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Microwave Packaging

US Industry Study with Forecasts for **2013 & 2018**

Study #2572 | December 2009 | \$4700 | 213 pages

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Improved heat-and-serve package structures coupled with innovations in microwave ovens that more evenly warm food will continue to drive new microwave packaging introductions.

US demand to climb 7% annually through 2013

Demand for microwave packaging is projected to climb 7.0 percent annually to \$2.4 billion in 2013, driven by consumer demand for convenient meal options, the ubiquitousness of microwave ovens and rapid growth for foods developed specifically for microwave preparation. Moreover, improvements in package structures that enable foods to be heated and served in their packaging and innovations that overcome limitations of microwave ovens in terms of even heating, browning and crisping will continue to drive a steady stream of new product introductions. Other trends that will foster growth for convenience-type foods include above-average growth in older age groups, which tend to have smaller households than younger age groups; and large numbers of households where all adults work outside the home, which limits the time available for home cooking on a daily basis.

Frozen foods to remain dominant application

Frozen foods are by far the largest application for microwave packaging, accounting for nearly 60 percent of total demand in 2008. Through 2013, microwave packaging demand in frozen food uses is forecast to rise 6.1 percent per year to \$1.3 billion. Beyond demographic and convenience factors, gains will be further assisted by heightened consumer interest in ethnic cuisines; the increased availability of organic frozen foods; and

US Microwave Packaging Demand (\$1.7 billion, 2008)

Frozen Foods
58%

Fresh Prepared Foods
16%

Shelf-Stable Meals
13%

Other Foods
13%



photo: Associated Packaging Technologies

robust demand for steam cooked vegetables. The last employ self-venting microwaveable pouches that result in improved taste and texture compared to conventional frozen vegetables. Demand for packaging for microwaveable frozen dinners will be aided by more moderate consumer spending, resulting in heightened demand for economical meals that can be easily prepared in workplaces and with minimal cleanup.

Fresh prepared foods to be fastest growing use

Fresh prepared foods will represent the fastest growing application for microwave packaging through 2013, with demand expected to climb 11.2 percent

annually to \$450 million. Robust gains will be based on the convenience of fresh prepared foods and the perception that they are of higher quality than frozen and canned alternatives, especially among time-pressed consumers desiring meals with components closer to home cooking but without the time involved. Above-average growth is also anticipated in shelf-stable applications, boosted by quality improvements and the increased presence of single-serving shelf-stable items designed to be heated in microwave ovens. The fact that shelf-stable foods do not require refrigeration is advantageous in environments where refrigerators may not be available but microwave ovens typically are.

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Sample Text, Table & Chart

PRODUCTS

Folding Cartons

Demand for folding cartons for microwave packaging is projected to increase 4.6 percent from 2008 to 2013. Advances will be fueled by that typically employ folding cartons for microwave packaging, especially frozen dinners, entrees, breakfast food and other frozen microwave packaging market due to pouches, both of which hold microwave packaging volume.

Frozen foods are by far the leading microwave packaging application for folding cartons, accounting for over 80 percent of demand in 2008. Folding cartons have a well-established presence with frozen foods due to their product protection, stackability and graphic qualities. The latter is important since most frozen foods lack visual appeal and graphically illustrated cartons are an important means of demonstrating the appearance of packaged items when heated. Though the majority of folding cartons are not used to heat foods, some types are designed for microwave heating, including combination tray and carton products, which are frequently used with value-priced and organic frozen entrees and some multiserving entrees.

Additionally, certain other frozen food applications use the carton for microwave cooking. Such foods include frozen pizza, hand-held entrees and french fries. Rapid advances are expected for these microwaveable folding cartons. Such cartons are a specialty niche in the broader folding carton market and contain susceptors, typically inner layers of metallized polyester film. Susceptors are used with certain types of microwaveable foods to aid browning and crisping and to prevent sogginess or drying of bread-based products. In these uses, the cartons often have perforations to enable the top or bottom panels to be opened

SAMPLE
TEXT

TABLE IV-1

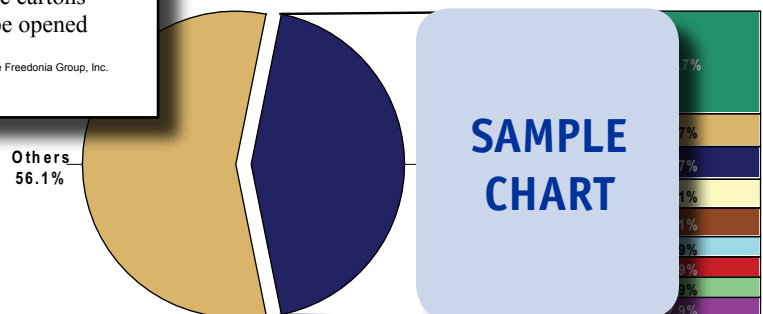
MICROWAVE PACKAGING DEMAND BY TYPE
(million dollars)

Item	1998	2003	2008	2013	2018
Packaging Demand (bil \$) % microwave					
Microwave Packaging Demand					
Folding Cartons					
Trays					
Bags & Pouches					
Tubs, Cups & Bowls					
Sleeves					
Foodservice Containers					
Other					

SAMPLE
TABLE

CHART V-1

MICROWAVE PACKAGING MARKET SHARE
(\$1.7 billion, 2008)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE III-4
FROZEN DINNERS: MICROWAVE PACKAGING DEMAND
 (million dollars)

Item	1998	2003	2008	2013	2018
Frozen Dinner Shipments (bil \$)					7.6
\$ pkg/000\$ dinner					01
Frozen Dinner Microwave Packaging					55
Trays					90
Folding Cartons					55
Tubs, Cups & Bowls					92
Sleeves					46
Bags & Pouches					38
Other					44
% dinners	49.3	47.1	47.7	48.3	43.0
Frozen Food Microwave Packaging	433	665	995	1340	1780

**SAMPLE
TABLE**

COMPANY PROFILES

Robbie Manufacturing Incorporated

10810 Mid-America Avenue
 Lenexa, KS 66219
 913-492-3400
<http://www.robieflexibles.com>

Annual Sales:
 Employment:

Key Products:

**SAMPLE
PROFILE**

Robbie Manufacturing is a privately held company that produces polyvinyl chloride (PVC) films. The company is a leading manufacturer of food processing and shrink packaging materials.

The Company is active in the US microwave packaging industry through the manufacture of microwaveable pouches, which are sold under the HOT N HANDY brand name. HOT N HANDY leakproof pouches are made with built-in handles, resealable zippers and antifog windows that allow consumers to see the packaged product, and are marketed as alternatives to conventional deli packaging for use in supermarkets, convenience stores and foodservice applications. These pouches are utilized to package chicken, turkey, pork, seafood, egg rolls and other products. Specific items in the Company's HOT N HANDY line include FRESH TO GO and GRAB N' GO pouches. FRESH TO GO pouches are offered in two sizes for service counter end uses. GRAB N' GO pouches can hold either hot or cold foods and are designed to fit into car cup holders.

Robbie Manufacturing makes HOT N HANDY pouches and other items at a 125,000-square-foot plant in Lenexa, Kansas. The Company

“Demand for packaging for microwaveable frozen entrees and side dishes is projected to increase 5.1 percent per year to over \$140 million in 2013. Growth will be fueled by the convenience advantages of microwaveable entrees and side dishes coupled with new product introductions using premium ingredients or that provide restaurant-type entrees in an easy-to-prepare form. Advances will also be boosted by quality improvements resulting from packaging enhancements such as susceptors and self-venting films.”
 --Section III, pg. 47

OTHER STUDIES

Frozen Food Packaging

This study analyzes the US frozen food packaging industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by application (e.g., meat, poultry and seafood; frozen specialties; fruit and vegetables; ice cream; baked goods) and product (e.g., folding cartons, corrugated boxes, sleeves, bags, tubs and cups, trays, wrap, pouches). The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#2594 01/2010..... \$4700

World Foodservice Disposables

Global demand for foodservice disposables is forecast to increase 4.8% annually through 2013. The US will remain the largest market by a wide margin, while more rapid growth is expected in China and other developing regions. Disposable foodservice packaging will be the fastest growing product segment. This study analyzes the \$38.5 billion world foodservice disposables industry, with forecasts for 2013 and 2018 by product, market, world region and for 18 countries. It also evaluates market share and profiles industry players.

#2573 11/2009..... \$5600

Foodservice Disposables

US foodservice disposables demand will rise 3.5% yearly through 2013, based on the ongoing popularity of away-from-home eating and ready prepared foods. Packaging products will grow the fastest and overtake serviceware as the largest segment. Eating and drinking places will remain the top market while retail and vending lead gains. This study analyzes the \$14.8 billion US foodservice disposables industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2545 08/2009..... \$4700

Active & Intelligent Packaging

US demand for active and intelligent packaging will climb 8.3% yearly through 2013, driven in part by food safety concerns and losses in perishables. Intelligent packaging will grow the fastest, propelled by time-temperature indicators and other products that offer product differentiation, traceability and interactive features. This study analyzes the \$1.3 billion US active and intelligent packaging industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2515 07/2009..... \$4700

Food Containers: Rigid & Flexible

US food container demand will reach \$25 billion in 2013. Unit expansion will be aided by the growing popularity of single-serving packaging in a widening range of applications. Plastic containers, and bags and pouches will see the fastest growth, often supplanting paperboard, metal and glass containers. This study analyzes the \$22 billion US rigid and flexible food container industry, with forecasts for 2013 and 2018 by type and market. It also evaluates company market share and profiles industry competitors.

#2492 05/2009..... \$4800

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