photo: Adams Foods

Frozen Food Packaging

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

Study #2594 | January 2010 | $4700 | 257 pages

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Frozen Food Packaging

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

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Growth factors include the popularity of convenience-type foods among consumers and foodservice establishments, the prevalence of microwave ovens and advances in packaging technology.

US demand to climb 3.7% annually through 2013

Demand for frozen food packaging is projected to climb 3.7 percent per year to $6.8 billion in 2013, driven by the popularity of convenience-type foods, both among consumers and foodservice establishments; the prevalence of microwave ovens; and technological advances in packaging. Demographic trends such as small household sizes, above-average growth in older age groups and high numbers of households where all adults work will stimulate demand for convenience foods, which tend to use more packaging relative to their volume. Revenue growth in the foodservice industry, which relies heavily on frozen foods, will also bode well for packaging. Additional factors supporting growth will include greater use of value-added components such as susceptors and the use of high-quality graphics for enhanced visual appeal and to convey a premium image.

US Frozen Food Packaging, 2013
($6.8 billion)

Frozen specialties, meat, poultry and seafood uses to post fastest gains

Packaging for frozen specialties and for meat, poultry and seafood are expected to post the fastest gains among major frozen food applications. Demand for frozen specialties packaging is projected to expand 4.4 percent annually to $2 billion in 2013, propelled by consumer demand for foods offering convenience and value along with quality improvements resulting from packaging innovations. In addition, solid prospects for frozen dinner packaging will reflect the growing presence of items incorporating premium ingredients and those positioned as being healthier through reduced calories or the presence of whole-grain ingredients. Meat, poultry and seafood applications are forecast to increase 4.2 percent annually to $2.3 billion in 2013, aided by increased production volume, the popularity of products that offer convenience in meal preparation, and the promotion of frozen meat, poultry and seafood as economical protein options. In addition, gains will be helped by continued high-volume requirements in the foodservice sector.

The ice cream, baked goods, and fruit and vegetable markets are expected to advance more slowly due to market maturity and/or limited production volume growth. Still, opportunities for packaging will be supported by shifting product mixes. For example, the growing popularity of single-serving and other small-sized baked goods and ice cream novelties targeted at smaller households or consumers desiring indulgent treats in portion control sizes will provide a growth niche for related packaging. Robust growth is anticipated for frozen vegetables using self-venting pouches, which enable steam cooking in their packaging and provide improved taste and texture.

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Sample Text, Table & Chart

TABLE III-17

FROZEN BAKED GOODS PACKAGING DEMAND BY TYPE (million dollars)

SAMPLE TABLE

Item	1998	2003	2008	2013	2018
Frozen Baked Goods Shipments (bil $)					
$ packaging/000$ baked goods					
Frozen Baked Goods Packaging					
Boxes:					
Folding Cartons & Sleeves					
Corrugated					
Bags					
Plastic Containers					
Trays					
Aluminum Foil Containers					
Pouches					
Other					
% baked goods					
Total Frozen Food Packaging	3[illegible]				[illegible]0

APPLICATIONS

Packaging Demand

SAMPLE TEXT

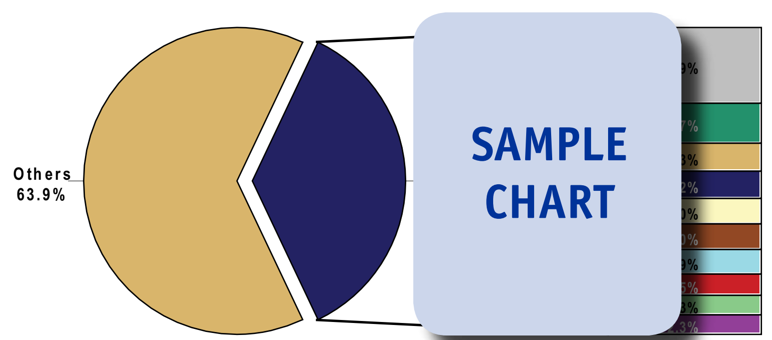
Demand for frozen meat, poultry and seafood packaging jected to climb [illegible] billion in 2013. [illegible] will decelerate [illegible] 1998-2008 perio[illegible] rial price increa[illegible] growth will be su[illegible] by expanded pr[illegible]arity of convenien[illegible] products and th[illegible] poultry and seaf[illegible] nomical protein[illegible]ent activity amon[illegible] sors will boost t[illegible] aimed at meeting [illegible] household and institutional demands. In addition, gains will [illegible] continued requirements in the foodservice sector. Favorable [illegible] for limited service restaurants will bode well for packaging s[illegible] establishments rely heavily on frozen meat, poultry and seaf[illegible] try, which accounted for 47 percent of frozen meat, poultry a[illegible] packaging demand in 2008, will remain the leading product [illegible] favorable production and consumption trends and the significance of shipments marketed in frozen form. Poultry applications will also outpace the overall frozen meat, poultry and seafood market through 2013.

Boxes, wrap and bags are the leading packaging products for frozen meat, poultry and seafood, accounting for a combined 82 percent of demand in 2008. The remainder of demand is generated by pouches, trays and other products such as paper interleaving and plastic containers. Through 2013, pouches will experience the fastest growth among frozen meat, poultry and seafood packaging types, reflecting rising use of stand-up pouches at the expense of folding cartons. Additionally, [illegible] will be helped by the growing popularity of larger-sized pou[illegible] stores and supermarkets. Growth for bags will be based on [illegible] demand for value-added frozen products that typically are pa[illegible] bags, such as poultry parts, meatballs, fish fillets and shrimp[illegible] ability of frozen products designed to be cooked in their pac[illegible] also support gains for specialty bags that can go from freeze[illegible]

43 Copyright 2009 [illegible]

CHART V-1

US FROZEN FOOD PACKAGING MARKET SHARE, 2008 ($5.7 billion)



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

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Sample Profile, Table & Forecast

TABLE IV-1

FROZEN FOOD PACKAGING DEMAND BY TYPE
(million dollars)

Item	1998	2003	2008	2013	2018
Packaging Demand (bil $)					
% frozen food					
Frozen Food Packaging Demand					
Boxes					
Bags					
Tubs & Cups					
Trays					
Wrap					
Pouches					
Other					

SAMPLE TABLE

COMPANY PROFILES

MeadWestvaco Corporation
11013 West Broad Street
Glen Allen, VA 23060
804-327-5200
http://www.meadwestvaco.com

Sales: $
US Sales
Employ

Key Pro ... ral kraft paperboard

SAMPLE PROFILE

Me ... ckaging, coated and specialty ... ts, and a variety of specialty ... ugh six segments: Packaging Resources, Consumer Solutions, Consumer and Office Products, Specialty Chemicals, Community Development and Land Management, and Corporate and Other.

The Company is involved in the US frozen food packaging industry via the Packaging Resources segment, which had 2008 sales of $2.3 billion. Through this segment, MeadWestvaco makes bleached paperboard, coated natural kraft (CNK) paperboard, linerboard, and converted packaging materials for beverage, dairy, produce, cosmetics, tobacco, pharmaceutical and health care products.

For frozen food packaging applications, the Company makes PRINTKOTE paperboard and CUSTOM KOTE CNK paperboard, both of which can be converted into cartons and other materials for packaging frozen entrees, pizza, seafood, novelty ice cream and other food products. PRINTKOTE paperboard products include standard varieties

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"Demand for trays in frozen food packaging is forecast to expand 4.5 percent annually to $685 million in 2013, outpacing the overall frozen food packaging average. Gains will be helped by the ongoing popularity of frozen dinners, entrees and side dishes, sandwiches, and other frozen foods commonly packaged in trays. Heightened demand for such foods will be based on convenience for consumers with limited time for meal preparation, and demographic trends such as above-average growth of older age groups and increasing numbers of one- and two-person households. Preventing faster growth will be ..."
--Section IV, pg. 135

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Other Studies

Foodservice Packaging: Bulk & Portion Control

US foodservice packaging demand will climb 2.5% annually through 2014. Flexible packaging will outpace rigid based on cost, convenience and performance advantages. Restaurants other than quick service types will post the fastest growth within the dominant eating and drinking places market. This study analyzes the $7 billion US foodservice packaging industry, with forecasts for 2014 and 2019 by product, application and end user. It also evaluates company market share and profiles industry players.

#2642 .... May 2010.................... $4800

Microwave Packaging

US microwave packaging demand will climb 7% annually through 2013, driven in part by demand for more convenient meals coupled with the prevalence of microwave ovens. Frozen foods will remain the top use while fresh prepared foods will lead gains. Foodservice containers and tubs, cups and bowls will be the fastest growing types. This study analyzes the $1.7 billion US microwave packaging industry, with forecasts for 2013 and 2018 by application and product. It also evaluates company market share and profiles industry players.

#2572 .... 12/2009..................... $4700

Converted Flexible Packaging

US converted flexible packaging demand will grow 3.4% yearly through 2013, supported by cost, performance and source-reduction advantages over most rigid packaging. Pouches will lead gains, including stand-up types as well as relatively newer products such as flat-bottomed, side-gusseted and stick types. This study analyzes the $15.2 billion US converted flexible packaging industry, with forecasts for 2013 and 2018 by material, product and market. It also evaluates market share and profiles industry players.

#2558 .... 10/2009..................... $4900

Meat, Poultry & Seafood Packaging

US demand for meat, poultry and seafood packaging is forecast to grow 3.5% yearly through 2013. Gains will be driven in part by the continuing shift to higher cost case-ready packaging by many retailers as a means to reduce in-store labor costs. Flexible packaging will outpace the larger rigid packaging segment. This study analyzes the $7.7 billion US meat packaging industry, with forecasts for 2013 and 2018 by technology and raw material, product, application and market. It also evaluates market share and profiles industry players.

#2522 .... 06/2009..................... $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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