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# Corrugated & Paperboard Boxes

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US Industry Study with Forecasts for **2014 & 2019**

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Study #2598 | March 2010 | \$4800 | 303 pages

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*Corrugated and paperboard box producers will look for ways to heighten the visual appeal of boxes in order to offset competition from alternative packaging formats and thus increase demand.*

## US demand to increase 2.4% yearly through 2014

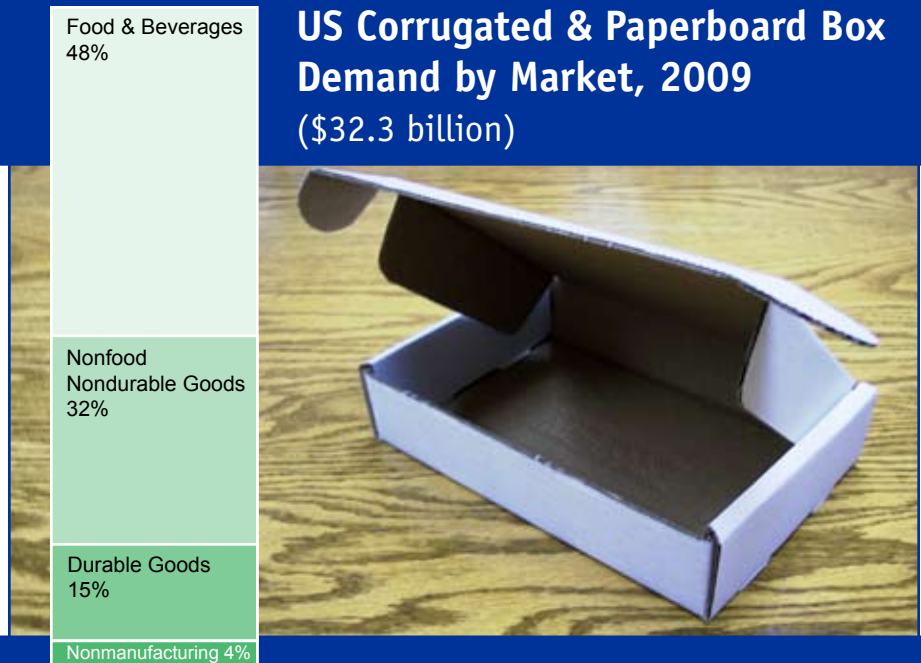
Demand for corrugated and paperboard boxes is projected to increase 2.4 percent annually through 2014 to \$36.4 billion, with gains driven by an expansion in manufacturing output after the real declines registered during the 2004-2009 period. In particular, an acceleration in shipments of nondurable goods such as food and beverages will support demand for related boxes. Box demand will also be supported by trends favoring Internet-based shopping.

Additionally, box demand will benefit from the increasing importance of higher-value boxes that can support improved printing and graphics as producers continue to look for ways to heighten the visual appeal of boxes in order to offset competition from alternative packaging formats. Although boxes with superior graphics capabilities are more prevalent in the folding carton segment, the continued popularity of mass retailers and warehouse club stores has compelled many boxmakers to develop corrugated boxes that can serve as appealing product billboards.

## Corrugated/solid fiber box segment to remain dominant, grow the fastest

Sales of corrugated and solid fiber boxes, which accounted for more than

## US Corrugated & Paperboard Box Demand by Market, 2009 (\$32.3 billion)



70 percent of demand in 2009, will increase 2.7 percent annually through 2014. Advances will be aided by their well-entrenched position as the shipping container of choice in nearly all manufacturing sectors. Demand will also benefit from the favorable environmental profile of corrugated boxes, which will become increasingly important as producers continue to seek ways to adopt sustainable packaging practices. Moreover, value gains will be bolstered by heightened demand for more costly linerboard grades that can support high-quality printing and graphics.

Demand for folding paperboard boxes will rise 1.8 percent per annum through

2014, slower than the corrugated box annual pace of growth as folding cartons face stiff competition from alternative packaging (e.g., pouches, blister packs and clamshells) in many markets. Source reduction efforts, many of which involve the elimination or downsizing of cartons, will also restrain demand. However, gains will be supported by advances in printing and graphics capabilities and a more favorable environmental profile than plastic packaging. Set-up box demand will be supported by their widespread use in high-end confectionery, silverware and jewelry applications.

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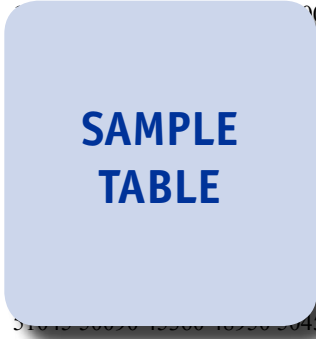




## Sample Profile, Table & Forecast

**TABLE III-1**  
**PAPERBOARD SUPPLY & DEMAND BY TYPE**  
(thousand tons)

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2005\$)					
tons/mil \$ GDP					
Paperboard Demand					
Unbleached Kraft Board					
Recycled Board					
Semichemical Board					
Bleached Kraft Board					
+ net exports					
Paperboard Production					



**COMPANY PROFILES**

**PaperWorks Industries Incorporated**  
 5000 Flat Rock Road  
 Philadelphia, PA 19127  
 215-984-7000  
 http://www.pap

Annual Sales: (10)  
 Employment:  
 Key Products: and folding cartons

**SAMPLE PROFILE**

PaperWorks Industries, which was formed in September 2008, is a leading North American manufacturer of coated recycled paperboard (CRB), uncoated recycled paperboard and paperboard packaging. The Company is an affiliate of Sun Capital Partners (Boca Raton, Florida), a private equity firm. In July 2009, PaperWorks Industries acquired Specialized Packaging Group Incorporated (Hamden, Connecticut), a paperboard packaging manufacturer. Sun Capital Partners is a majority stakeholder in the combined companies.

The Company is active in the US corrugated and paperboard box industry through its own operations as well as through Specialized Packaging. PaperWorks Industries' CRB range is produced under the MASTERPRINT brand name and includes the NEWS, PLUS, LITE, FREEZE and BEV grades. For example, MASTERPRINT NEWS CRB can be used in a variety of folding carton and other packaging end uses, and features a light gray backside. MASTERPRINT PLUS CRB has a high kraft fiber content and is intended for packaging applications requiring enhanced strength. The Company's MASTERPRINT LITE paperboard has the lightest gray shade of any MASTERPRINT CRB offering, while MASTERPRINT FREEZE CRB is designed for frozen

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"Net exports of paperboard, mostly unbleached kraft, are forecast to rise 2.3 percent annually through 2014, accelerating from the weak pace of the 2004-2009 period as the global economy strengthens and demand for a range of paperboard-based items grows in many parts of the world. However, net exports will be held back by heightened paperboard production in developing regions. Unbleached kraft will continue to lead US exports, benefiting from ..."  
 --Section III, pg. 47



**OTHER STUDIES**

**Cups & Lids**

US demand for cups and lids will increase 4.4% per year to 2014, driven by expanding foodservice revenues and favorable prospects for food packaging cups. Value gains will be bolstered by increasing demand for environmentally friendly cups, such as cups made from higher-value biodegradable resins or recycled content. This study analyzes the \$6.6 billion US cups and lids industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.

#2679 ..... August 2010 ..... \$4800

**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

**Protective Packaging**

US demand for protective packaging is forecast to climb 6.2% annually through 2014, driven in part by the continued proliferation of Internet shopping. Value gains will be helped by greater interest in recycled or biodegradable materials. The fastest growth is expected for air pillows, foamed plastics and bubble packaging. This study analyzes the \$3.8 billion US protective packaging industry, with forecasts for 2014 and 2019 by function, market and product. It also evaluates company market share and profiles industry players.

#2619 ..... March 2010 ..... \$4800

**Frozen Food Packaging**

US demand for frozen food packaging will climb 3.7% yearly through 2013. Gains will be driven by the popularity of convenience-type foods, the prevalence of microwave ovens, and technological advances in packaging. Frozen food specialties and meat, poultry and seafood will be the fastest growing applications. This study analyzes the \$5.7 billion US frozen food packaging industry, with forecasts for 2013 and 2018 by application and product. It also evaluates company market share and profiles industry players.

#2594 ..... January 2010 ..... \$4700

**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 ..... December 2009 ..... \$4700

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