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Protective Packaging

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

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Protective Packaging

US Industry Study with Forecasts for ***2014 & 2018***

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Protective Packaging

US Industry Study with Forecasts for ***2014 & 2018***

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Advances will be boosted in part by the continued proliferation of Internet shopping, which will benefit cost-effective packaging that protects goods from damage during shipping and handling.

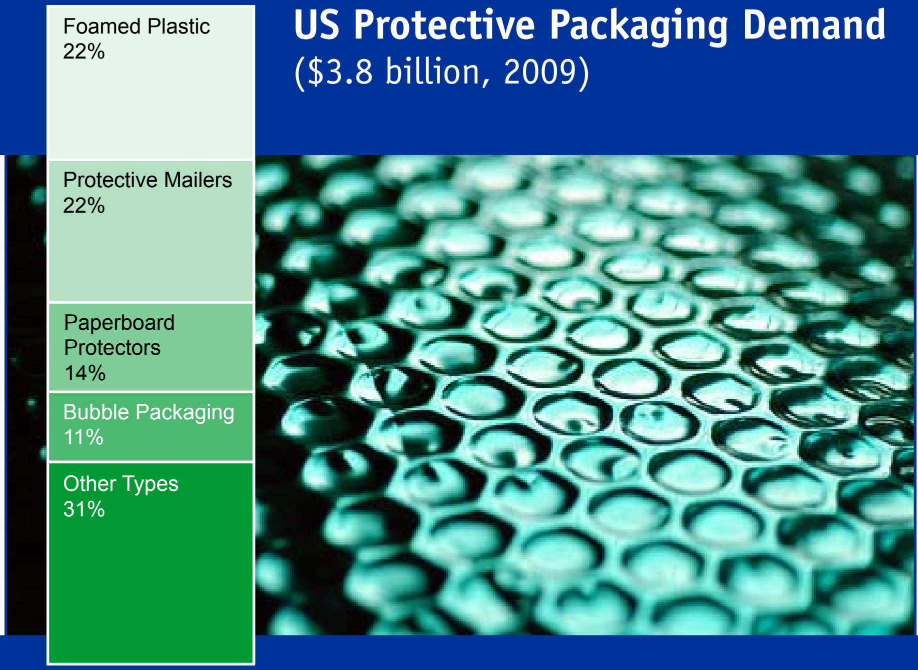
US demand to climb 6.2% annually through 2014

US demand for protective packaging is forecast to climb 6.2 percent per year to $5.2 billion in 2014, reflecting an upswing in manufacturing output as the US economy recovers from the recession that began in December 2007. Advances will also be boosted by the continued proliferation of Internet shopping. These factors will necessitate heightened requirements for cost-effective packaging used in the protection of goods from shock, vibration, abrasion and other damaging effects of shipping and handling. Value gains will also be helped by greater interest in environmentally friendly products -- typically those made from recycled or biodegradable materials -- and which tend to be more costly than their conventional counterparts.

Air pillows, foamed plastics, bubble packaging among fastest growing products

Through 2014, the fastest growth is expected for air pillows, foamed plastics and bubble packaging, with rapid advances also anticipated in the smaller molded pulp segment. Demand for air pillows will climb 8.7 percent per year through 2014, the result of strong growth in Internet shopping, advantages over other materials in terms of cost and material use, and consumer preference for the product over other materials such as loose-fill.

US Protective Packaging Demand
($3.8 billion, 2009)



Foamed plastic protective packaging is expected to rebound substantially from a depressed base in 2009, with combined demand forecast to expand 7.6 percent per annum through 2014. Gains will reflect a significantly improved outlook in the manufacturing sector, especially durable goods, which represent the majority of demand for molded foam, foam-in-place and polyolefin roll protective packaging. Nonetheless, longer-term prospects for foams will be moderated by further shifting of manufacturing to nations that offer lower-cost production. The growing emphasis on packaging sustainability will also constrain opportunities, as users increase their efforts in source reduction and shift to alternative materials, especially in applications with lower protective requirements.

Demand for bubble packaging is projected to increase 6.9 percent annually through 2014, aided by favorable outlooks for manufacturing activity and electronic shopping. Advances will also be supported by a competitive cost structure, flexibility of use and less messiness than alternatives such as foam-in-place polyurethane and loose-fill. Moreover, onsite bubble packaging systems will gain ground as they offer greater cost-effectiveness and reduced warehouse space compared to traditional bubble packaging. Molded pulp will experience some of the fastest gains as a result of heightened interest in environmentally friendly packaging coupled with more stable pricing than petroleum-based plastics.

Sample Text, Table & Chart

FOAMED PLASTIC

Expanded Polystyrene

Demand for molded expanded polystyrene foam in prote packaging uses is projec annually t million in 2014. Thougl und from decline seen in the 2004 nomy rec the recession that began demand remain below the 2004 be suppor material's good shock a er protecti combined with its relativ ability an processing. These attributes make EPS a popular protective p material. Other growth stimulants include rising disposable personal in-come levels and resultant increased spending for durable and nondurable goods. Further gains will be hampered by slow growth in significant EPS markets such as appliances, electronic equipment and computers due to outsourcing of production to low-cost nations. Additionally, molded EPS faces growing competition from molded pulp protective packag-ing, which is less costly and becoming more popular due to growing emphasis among retailers and brand owners on sustainability. EPS also experiences competition from molded polyurethane in more demanding applications.

Molded EPS is used in the packaging of lightweight delicate items such as electronic components, as well as of heavier items like appliances. It is also widely used for packaging fragile items such as electronic goods (e.g., consumer electronics, computers and DVDs), office furniture and a plethora of other products. Many electrical and electronic products are produced offshore and assembled and in the US. However, other items such as small household ap DVDs are both produced and packaged offshore, and subseq ported, thereby limiting packaging opportunities. As original manufacturers move their production facilities to offshore co lower labor costs, firms will concomitantly establish local pa

SAMPLE TEXT

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TABLE IV-6

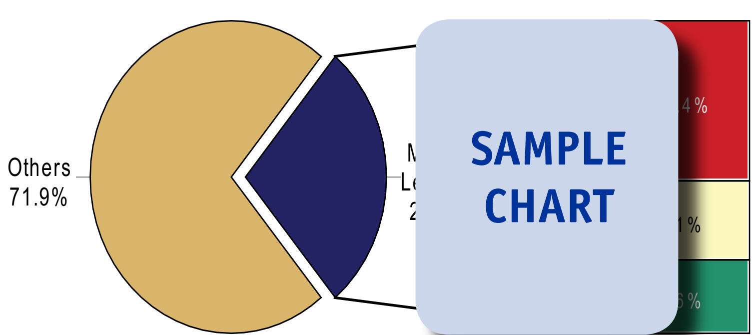
FOAM-IN-PLACE POLYURETHANE PROTECTIVE PACKAGING DEMAND BY MARKET

Item	1999	2004	2009	2014	2019
Durable Goods Shipments (bil $)	2				90
$ foam-in-place PUR/mil $ durables					12
Foam-in-Place Polyurethane (mil $)					25
Durable Goods					61
All Other					64
$/lb					30
Foam-in-Place Polyurethane (mil lbs)					41
% foam-in-place polyurethane					.7
Plastic Foam Protective Packaging (mil $)					430

SAMPLE TABLE

CHART VI-1

US PROTECTIVE PACKAGING MARKET SHARE ($3.8 billion, 2009)



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Sample Profile, Table & Forecast

TABLE V-5

INSULATED SHIPPING CONTAINER DEMAND BY APPLICATION & MARKET

Item	1999	2004	2009	2014	2019
Nondurable Goods Shipments (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ insulated/mil $ nondurables	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Insulated Shipping Containers (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Application:					
Pharmaceutical & Medical	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Nondurable Goods	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
All Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$/lb	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Insulated Shipping Containers (mil lbs)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% insulated shipping containers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Protective Packaging Demand (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	6450

SAMPLE TABLE

COMPANY PROFILES

Pak-Lite Incorporated
550 Old Peachtree Road
Suwanee, GA [illegible]
770-447-5123
http://www.pl[illegible]

Annual Sales: [illegible]
Employment: [illegible]

Key Products: [illegible] ducts

SAMPLE PROFILE

Pak-Lite In[illegible] verts foam components, pressure sensitive industrial foam tapes, insulation, flooring underlayment, and loose-fill and other packaging materials. The privately held company serves customers in the automotive, aerospace, marine, appliance, heating and cooling, sporting goods, medical, electronics, and window and door industries.

The Company is active in the US protective packaging industry through the manufacture of loose-fill and custom foam packaging. In general, PLI's loose-fill is designed to interlock to provide cushioning and protect against shock, compression, vibration, and shifting and settling during shipping. Specific loose-fill products from the Company comprise EASY PAK and BIO STARCH types. EASY PAK loose-fill is sold in 14- or 20-cubic-foot bags, while the Company's BIO STARCH loose-fill is static-free, humidity-resistant and 100-percent biodegradable. In addition, PLI develops and installs loose-fill storage and dispensing systems for high-volume packing lines. These systems are suitable for manual or automated operation.

Custom foam packaging from Pak-Lite is engineered to provide protection against electrostatic discharge, shock, abrasion and vibration

221

"Insulated shipping container demand is projected to increase 6.2 percent per annum to $540 million in 2014. Stimulants include expanding specialized delivery requirements for temperature-sensitive pharmaceuticals and increased online sales of perishable foods. The growing presence of biotechnology drugs that are temperature-sensitive will benefit demand for insulated shipping containers as temperature control throughout the supply chain is critical to the efficacy of these drugs."
--Section V, pg. 119

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Other Studies

Green Packaging

US demand for green packaging will rise 3.9% annually through 2014, outpacing growth in overall packaging demand. The fastest gains are anticipated for degradable packaging -- from a relatively small base -- and for plastic recycled content packaging. This study analyzes the $34 billion US market for recycled content, reusable and degradable packaging, with forecasts for 2014 and 2019 by material, product and market. It also discusses source reduction and recycling activity, details industry structure and profiles industry competitors.

#2721 ....January 2011 .... $5100

Tube & Stick Packaging

US tube and stick packaging demand will rise 5.1% annually through 2014. The fastest gains are expected for stick packs, driven by advantages of product differentiation, portability and material savings compared to conventional single-portion pouches. The dominant squeeze tube segment will slightly lag the overall industry. This study analyzes the $1.4 billion tube and stick packaging industry, with forecasts for 2014 and 2019 by product type and market. It also evaluates company market share and profiles industry players.

#2631 .... May 2010.................... $4800

Corrugated & Paperboard Boxes

US corrugated and paperboard box demand will rise 2.4% yearly through 2014. Gains will be driven in part by higher-value types with better graphics capabilities, including folding cartons and corrugated boxes. Internet-based shopping will also support box demand. Durable goods will be the fastest growing market. This study analyzes the $32.3 billion US corrugated and paperboard box industry, with forecasts for 2014 and 2019 by material, product and market. It also evaluates company market share and profiles industry players.

#2598 .... March 2010................... $4800

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 .... October 2009 .... $4900

Labels

US label shipments are projected to advance 4.5% annually through 2013. The pressure sensitive segment will claim most gains, while more rapid growth will be achieved by heat-shrink and stretch-sleeve, and in-mold labels. Paper will remain the most widely used stock material, but will be outpaced by plastic. This study analyzes the $15.4 billion US label industry, with forecasts for 2013 and 2018 by material, application method, printing technology and function. It also evaluates market share and profiles industry players.

#2536 .... August 2009.................. $4800

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