Plastic Containers

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

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MARKET ENVIRONMENT

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INDUSTRY STRUCTURE

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Growth will be driven by performance advantages over alternative packaging media, and consumer preferences for small, single-serving containers in food and beverage uses.

US value demand to rise 4.3% annually to 2014

US plastic container demand is projected to increase 4.3 percent annually to $30.4 billion in 2014, creating demand for 13.9 billion pounds of resin. Growth will be driven by performance advantages over alternative packaging media, which will stimulate ongoing opportunities in a broad range of applications. Additionally, consumer preferences for small, single-serving containers in food and beverage uses will support gains. Unit advances will outpace growth in the amount of resin consumed as a result of the preference for smaller, single-serving containers and the lightweighting of plastic bottles and other containers in order to lower material costs and achieve a reduced environmental footprint.

US Plastic Container Demand
(12.5 billion pounds, 2009)

Food, pharmaceutical markets to pace key bottle and jar segment

Plastic bottles and jars, which represented 78 percent of plastic container poundage in 2009, are by far the leading plastic container type. Through 2014, plastic bottle and jar demand is expected to increase 3.1 percent annually to 157 billion units, a marked deceleration from the pace of the 2004-2009 period due to the maturing of several large beverage applications and a significantly slower outlook for bottled water based on heightened environmental concerns. The food and pharmaceutical markets will experience faster unit growth. Gains in food uses will benefit from hot-fill processing improvements that will create further opportunities for polyethylene terephthalate (PET) bottles in uses such as sauces and condiments, and processed fruits. Prospects in pharmaceutical applications will be supported by growth in pharmaceutical production, as well as by expansion in older population segments, which comprise many of the most intensive consumers of pharmaceuticals. Resin demand in bottles and jars is projected to increase 1.7 percent per year to 10.7 billion pounds in 2014, constrained by beverage market maturity, container lightweighting and the shift to more concentrated laundry detergent formulations, which use smaller bottles.

Paint pails, single-serving cups among other drivers

Among plastic containers other than bottles and jars, demand in some segments will be helped by an upswing in construction activity as the US economy recovers from the recession that began in December 2007. This will result in heightened requirements for items packaged in plastic pails, such as paints, adhesives and driveway sealers, as well as boosting demand for plastic paint cans. Tub, cup and bowl demand will be supported by the convenience, portability and portion control benefits of single-serving cup packaging as well as the popularity of various foods packaged in tubs and cups.

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Sample Text, Table & Chart

TABLE V-37

PHARMACEUTICAL MARKET FOR PLASTIC BOTTLES & JARS

Item	1999	2004	2009	2014	2019
Pharmaceutical Shipments (bil 2005$)					0
units/000$ pharmaceuticals					0
Plastic Pharma Bottles/Jars (mil units)					0
Liquid					0
Powders, Tablets & Capsules					0
ounces resin/unit					7
Resin Demand (mil lbs)					5
HDPE					8
PET					4
Polypropylene					9
Other Resins					4

SAMPLE TABLE

BOTTLES & JARS

Plastic Pharmaceutical Bottles & Jars

Demand for plastic pharmaceutical bottles and jars is fo expand ... billion units in 2014, co million ... th will be aided by favora the deve ... pharmaceuticals, as well average ... pulation segments, which many o ... ers of pharmaceuticals an contain ... in barrier properties and systems ... plastic bottles as containers and spray pharmaceuticals.

SAMPLE TEXT

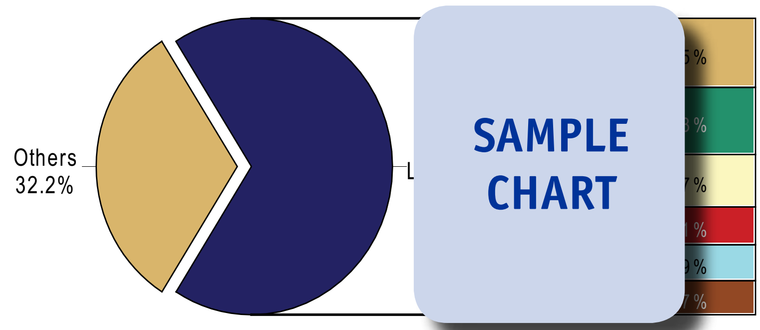
Limited adaptability to unit dose and compliance forma a moderating effect on long-term growth opportunities for plastic pharmaceutical bottles. Plastic bottles do not provide a viable cost-effective option for meeting FDA regulations requiring the unit dose packaging and bar coding of institutional drugs. These regulations aim to reduce the widespread problem of medication dispensing errors, which result in over 25,000 adverse events in the US annually. Moreover, plastic bottles do not provide the compliance features needed to ensure the integrity of clinical trials or to allow for the accurate self-administration of critical care medicine. Lastly, the bottles are not well-suited to the packaging of physicians' samples due to cost disadvantages versus small blister packs.

HDPE and PET are the principal resins employed in the production of standard plastic pharmaceutical bottles and jars. Efforts b ers to upgrade the appearance and barrier properties of drug are promoting the increasing use of higher value materials. Alcan Packaging Global Pharmaceutical division introduced STABILITYSOLUTIONS line of high-barrier plastic bottles 2008. These bottles are bi-layer HDPE bottles that incorpora cant into the inner layer, which eliminates the need for a sepa cant sachet or canister. The line also includes tri-layer bottles

106 Copyright 2010

CHART VII-1

US PLASTIC CONTAINER MARKET SHARE BY COMPANY
($24.6 billion, 2009)



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Sample Profile, Table & Forecast

TABLE V-17

FOOD MARKET FOR PLASTIC BOTTLES & JARS

Item	1999	2004	2009	2014	2019
Food Shipments (bil 2005$)	4	[illegible]	[illegible]	[illegible]	6.5
units/000$ food	[illegible]	[illegible]	[illegible]	[illegible]	30
Plastic Food Bottles & Jars (mil units)	[illegible]	[illegible]	[illegible]	[illegible]	60
Sauces & Condiments	[illegible]	[illegible]	[illegible]	[illegible]	40
Dairy Products	[illegible]	[illegible]	[illegible]	[illegible]	60
Edible Oils	[illegible]	[illegible]	[illegible]	[illegible]	50
Other	[illegible]	[illegible]	[illegible]	[illegible]	10
ounces resin/unit	[illegible]	[illegible]	[illegible]	[illegible]	.4
Resin Demand (mil lbs)	[illegible]	[illegible]	[illegible]	[illegible]	90
PET	[illegible]	[illegible]	[illegible]	[illegible]	00
HDPE	[illegible]	[illegible]	[illegible]	[illegible]	30
Polyvinyl Chloride	[illegible]	[illegible]	[illegible]	[illegible]	12
Other Resins	[illegible]	[illegible]	[illegible]	[illegible]	48

SAMPLE TABLE

COMPANY PROFILES

Anchor Packaging Company
13515 Barrett Parkway Drive
St. Louis, MO 63021
314-822-7800
http://www.anchorpackaging.com

Annual Sales [illegible])
Employment [illegible]

Key Products [illegible] ther plastic containers

SAMPLE PROFILE

Anchor [illegible] c thermoformed containers an [illegible] food processing industries. The [illegible] subsidiary of Hermann Companies Inc., (St. Louis, Missouri), a holding firm.

The Company participates in the US plastic container industry through the production and sale of bowls, and two-piece, hinged-lid and other plastic containers under such brand names as MICRORAVES, THE ROASTER, CULINARY CLASSICS, CULINARY BASICS, MICROLITE, GOURMET CLASSICS, BONFAIRE, CRYSTAL CLEAR, FRESHVIEW and ONE2FOUR. MICRORAVES polypropylene containers are microwaveable and can withstand temperatures up to 230 degrees Fahrenheit. Among the products in the MICRORAVES range are INCREDI-BOWL bowls, which range in size from 5 to 48 ounces. THE ROASTER containers, which are suitable for use in hot and cold supermarket cases, are designed for whole-breasted chicken, bone-in turkey breasts, large casseroles, side dishes and other foods.

CULINARY CLASSICS and CULINARY BASICS containers from Anchor Packaging are made from polypropylene and feature

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"Demand for plastic bottles and jars employed in the packaging of sauces and condiments is forecast to advance 3.9 percent per year through 2014 to 5.8 billion units, consuming 440 million pounds of resin. Opportunities will be aided by the popularity of sauces and condiments in food preparation and to enhance flavors of various other foods, such as salads and snack foods. Growing consumer interest in ethnic dishes will fuel demand for sauces designed to increase the convenience of creating such dishes."
--Section V, pg. 133

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Other Studies

Paper versus Plastic in Packaging

In selected packaging markets where paper and plastic compete, plastic will make further inroads into paper. Rigid packaging demand will slightly outpace flexible packaging based on above-average growth for tubs and cups, trays, clamshells and two-piece high visibility plastic containers. This study analyzes the 23.2 billion pound competitive plastic and paper packaging industry in the US, with forecasts for 2014 and 2019 by product and market. It also discusses market leaders and profiles selected industry players.

#2698 .... November 2010 .... $4900

Degradable Plastics

US demand for degradable plastics is forecast to rise 16.6% annually to 2014, driven by interest in environmentally friendly products. Polylactic acid (PLA) and starch-based plastics will remain the dominant types and see strong growth. Polyhydroxyalkanoate (PHA) will be the fastest growing type from a small base. This study analyzes the 151 million pound US degradable plastic industry, with forecasts for 2014 and 2019 by type, product and market. It also evaluates company market share and profiles industry players.

#2648 .... August 2010 .... $4800

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

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

World Food Containers

Global demand for food containers is forecast to increase 3.9% annually through 2013. Bags and pouches will remain the largest product type while plastic containers will grow the fastest. Some of the best gains are expected in the BRIC countries of Brazil, Russia, India and China. This study analyzes the $103 billion world food container industry, with forecasts for 2013 and 2018 by product, market, world region and for 22 countries. It also evaluates company market share and profiles industry players.

#2601 .... February 2010 .... $5800

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