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Green Packaging

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

Study #2721 | January 2011 | \$5100 | 400 pages

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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Green packaging has grown in importance among packaging suppliers and their customers due to increased energy and transportation costs and growing interest in environmental issues.

US demand to increase 3.9% yearly through 2014

Demand for recycled content, reusable and degradable packaging is projected to increase 3.9 percent yearly to \$41.7 billion in 2014, consuming 58 billion pounds of material. Growth will outpace overall packaging demand but will remain relatively moderate due to the maturity of many products and the large existing presence of recycled content packaging in paperboard and metal packaging. Green packaging has grown in importance among packaging suppliers and their customers in recent years due to increased energy and transportation costs; growing interest in environmental issues; and initiatives by major retailers to make procurement decisions based on the eco-friendly properties of suppliers' packaging and cost reductions achievable through packaging improvements.

Degradable packaging to be fastest growing type

Degradable packaging is forecast to expand at a double-digit annual rate through 2014, driven by price competitiveness with conventional resins, capacity expansions and rising demand for environmentally friendly manufactured goods. Advances will also be based on enhanced performance properties resulting from blending and other modifications, initiatives by brand owners to improve the environmental footprint of their packaging, and legisla-



tive bans on polystyrene foam foodservice disposables in some parts of the country. Preventing faster advances will be the maturity of some product types (e.g., ring carriers, loose-fill), the lack of consumer composting networks in most areas of the US, and competition from emerging green packaging materials such as non-biodegradable bioplastics.

Recycled content packaging constitutes the vast majority of green packaging and demand is forecast to increase at an annual rate slightly below that of the industry as a whole through 2014. Gains will be supported by increased collection activity and processing capacity, coupled with greater use of recycled content packaging by firms seeking to demon-

strate environmental responsibility and differentiate their products. Robust growth is anticipated for plastic recycled content packaging based on more concerted collection efforts and expanded processing capacity, especially for food-contact approved resin grades.

Reusable packaging demand is expected to post above-average growth through 2014, improving from the 2004-2009 pace based on a rebound in manufacturing activity from a weak base in 2009. Demand for reusable plastic containers and intermediate bulk containers will benefit from an upswing in manufacturing activity and inroads into lower capacity packaging types such as drums, pails and shipping sacks.

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Sample Text, Table & Chart

REUSABLE PACKAGING

Plastic

SAMPLE TEXT

percent per from the 20 during sector Opportuni material impr and the ability of plastic drums to ship and store a wide array als, with the exception of substances (e.g., solvent-based liqu incompatible with plastic. Growth will outpace that of steel and more drums as a result of further supplantation of these drum types. Further gains will be restricted by competition from RIBCs as well as the entrenched position of steel and fibre drums in certain applications. RIBCs offer a number of advantages over plastic drums, such as cost and space efficiency benefits in packaging large volumes.

Plastic drums offer a number of advantages that have spurred their use in many applications. For example, plastic's corrosion resistance and barrier properties have made plastic drums particularly amenable to packaging chemicals and food products. In addition, the one-piece construction of tight-head plastic drums has made them suitable for the shipping and storage of hazardous wastes. Plastic drums are also lighter in weight than their steel counterparts, which substantially reduces freight costs. Moreover, plastic drums have greater impact resistance, durability and reusability than fibre alternatives.

Plastic drums are generally used for five to ten trips before need to be reconditioned and recertified for additional usage. of their impact and corrosion resistance, plastic drums can be longer periods of time without traditional reconditioning than counterparts. Cleaning is required between uses but is generally extensive if similar materials are carried during multiple trips. mately eight to ten million plastic drums are reconditioned a

TABLE VII-1

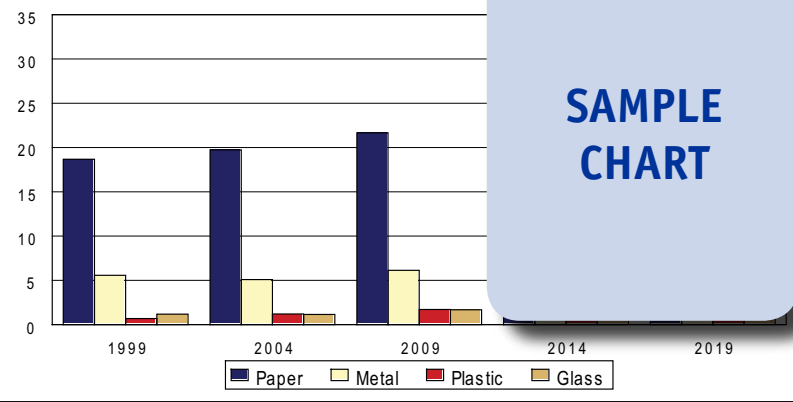
GREEN PACKAGING DEMAND BY MARKET
(million dollars)

Item	1999	2004	2009	2014	2019
Packaging Demand (bil \$)					10.0
% green packaging					1.9
Green Packaging Demand					0.20
Food					0.35
Beverages					0.30
Consumer Products					0.65
Shipping					0.60
Chemicals					0.65
Foodservice					0.05
Other					0.40

SAMPLE TABLE

CHART IV-1

RECYCLED CONTENT PACKAGING DEMAND BY MATERIAL, 1999-2004
(billion dollars)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-8
DEGRADABLE PACKAGING DEMAND BY MATERIAL
 (million pounds)

Item	1999	2004	2009	2014	2019
Total Packaging Demand (bil 2005\$)	117	175	202	200	129.6
lbs degradable/000\$ pkg					15.0
Degradable Packaging Demand					15
Photodegradable					58
Polylactic Acid					10
Starch-Based Plastics					40
Other Plastic					56
Other Materials					51
\$/lb					80
Degradable Plastic Packaging (mil \$)	117	175	202	200	129.0

**SAMPLE
TABLE**

COMPANY PROFILES

D&W Fine Pack

1372 North Old Laurens Road
 Fountain Inn, SC 29644
 864-862-6488
<http://www.dv.com>

Annual Sales:
 Employment:

Key Products:
 recycled polyeth

**SAMPLE
PROFILE**

D&W Fine Pack is a packaging firm that was formed in February 2010 as a result of acquisitions made by Mid Oaks Investments LLC (Buffalo Grove, Illinois), a private investment group, in 2009. Mid Oaks Investments acquired Dispoz-o Products LLC (Fountain Inn, South Carolina) in May 2009 and purchased C&M Fine Pack Incorporated (San Bernardino, California) in November 2009. In February 2010, Dispoz-o Products, C&M Fine Pack and Wilkinson Industries Incorporated (Fort Calhoun, Nebraska), which has been owned by Mid Oaks Investments since 2004, were combined as subsidiaries of the newly formed D&W Fine Pack.

The Company participates in the US green packaging industry through the Wilkinson Industries and Dispoz-o Products subsidiaries. Wilkinson Industries makes foodservice, grocery and food processor packaging at a 400,000-square-foot manufacturing and warehouse facility in Fort Calhoun, Nebraska. Among the company's products are NATURESPASTIC thermoformed and extruded plastic packaging, which is made using INGENO polylactic acid (PLA) resins from NatureWorks LLC (Minnetonka, Minnesota), a subsidiary of Cargill Incorporated (Wayzata, Minnesota). INGENO resins are derived entirely

“Polylactic acid demand in packaging applications is projected to increase 19 percent annually to nearly 95 million pounds in 2014. Advances will reflect increased capacity, improved product performance via blending and compounds, and greater processor familiarity, which will support good growth in areas such as film, containers, and cups, plates and bowls. PLA film will be increasingly used in the overwrapping of produce and other food products, as well as ...”
 --Section VI, pg. 160

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

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

Plastic Containers

US plastic container demand will rise 4.3% yearly to 2014, driven by performance advantages over alternative packaging media. Bottles and jars will remain the dominant type, while pails and other containers grow the fastest. PET and HDPE will remain the most common resins while polypropylene leads gains. This study analyzes the 12.5 billion pound US plastic container industry, with forecasts for 2014 and 2019 by type and resin. It also evaluates company market share and profiles industry players.
 #2672 August 2010 \$4900

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

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

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