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Rigid Bulk Packaging

US Industry Study with Forecasts for **2015 & 2020**

Study #2737 | February 2011 | \$4900 | 318 pages

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Advances will be supported in part by a shift toward larger, higher-value containers offering enhanced performance as well as greater cost-effectiveness than smaller containers.

US demand to rise 4.3% annually through 2015

Demand for rigid bulk packaging in the US is projected to advance 4.3 percent per year to \$6.7 billion in 2015. Gains will accelerate from the performance of the 2005-2010 period, reflecting improved manufacturing output and a rebounding economy. Additionally, advances will be supported by a shift in the product mix toward larger, higher-value containers offering enhanced performance as well as greater cost-effectiveness than smaller containers with shorter service lives. Moreover, value gains will reflect price increases in raw materials, especially plastics.

Material handling containers to grow the fastest

Material handling containers are expected to experience the fastest growth through 2015, advancing 5.9 percent annually to \$1.1 billion. Gains will be driven by a rebound in durable goods production, and efforts to boost manufacturing efficiency and achieve cost savings. Advances will also be supported by a continuing shift to reusable plastic totes and crates in food and agricultural applications. Rigid intermediate bulk container (RIBC) demand is expected to climb 5.5 percent yearly to \$825 million in 2015, stimulated by a rebound in chemical production as well as cost and performance advantages over smaller, single-use or shorter life packaging (e.g., bulk boxes, and steel and plastic drums).

US Rigid Bulk Packaging Demand (\$5.4 billion, 2010)



Drums	31%
Pails	26%
Bulk Boxes	16%
Material Handling Containers	15%
RIBCs	12%

photo: Wilhelmen - Ships Service

Demand for drums, the leading rigid bulk packaging format in 2010, is forecast to increase 3.4 percent annually to \$2.0 billion in 2015. Though trailing the overall average due to the maturity of steel and fibre drums, growth will accelerate from the 2005-2010 performance based on an expected rebound in chemical output. Pail demand will rise in line with the overall industry average, with prospects benefiting from a rebound in construction expenditures. Below-average advances for bulk boxes will result from heightened competition from more reusable packaging forms, such as drums, material handling containers, RIBCs and flexible intermediate bulk containers.

Chemicals to pace key nondurable goods market

Nondurable goods markets such as chemicals, food, plastics, rubber, fiber, petroleum, lubricants, and agricultural and horticultural products represented over 80 percent of demand in 2010. Among these markets, chemicals will experience the fastest gains as a result of an upswing in manufacturing activity, especially in key end markets such as motor vehicles and construction. Advances will also be supported by rising pharmaceutical production as a result of the aging of the US population and a heightened reliance on medications by seniors.

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MATERIALS

Steel

Steel consumption in the manufacture of rigid bulk containers is projected to increase to 895 million pounds in 2015, reversing the decline of 2009. This activity along with a rebound in manufacturing output will be helped by favorable prospects for plastic body RIBCs (which utilize steel cages) and modest gains for metal body RIBCs. Additionally, steel demand will be aided by industry efforts that emphasize the key performance characteristics of steel drums, including durability, fire resistance, reusability and recyclability, along with suitability for international shipping due to standardized sizes and configurations. Moreover, a moderation in steel pricing after sharp spikes in recent years (particularly for steel drums) will support demand.

Steel is employed in the manufacture of bulk drums, pails, metal body RIBCs, material handling containers and steel cages for plastic body RIBCs. Consumption of steel in drums is forecast to increase 1.5 percent per year to 895 million pounds in 2015, reversing the decline since 2000 as a result of a rebound in manufacturing output, particularly in key chemical markets such as construction and motor vehicles. Demand will be moderated by the maturity of most markets and competition from plastic drums and RIBCs. However, steel drums will still account for 64 percent of all steel utilized in rigid bulk packaging in 2015 and remain by far the leading application. In order to offset loss of market share to plastic bulk packaging, steel makers have introduced higher gauge steel for drums, thus boosting the price competitiveness of steel drums. Moreover, steel drum producers increasingly employ

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SAMPLE
TEXT

TABLE IV-4

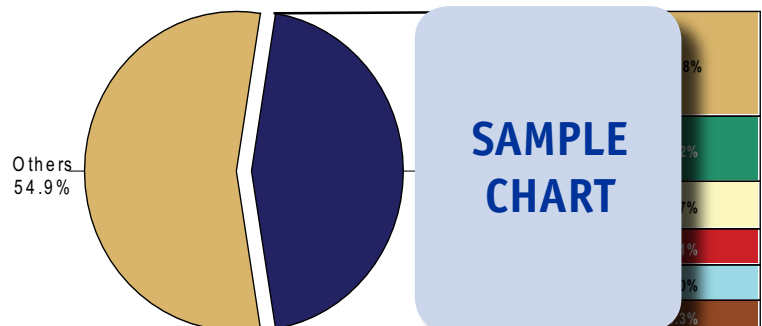
STEEL DRUM DEMAND BY MARKET
(million dollars)

Item	2000	2005	2010	2015	2020
Steel Drum Shipments	4,067	5,070	5,400	6,070	7,850
- net exports					
Steel Drum Demand					
Chemical & Pharmaceutical Products					
Industrial Chemicals					
Pharmaceuticals					
Paints & Coatings					
Other Chemicals					
Petroleum & Lubricants					
Food & Beverages					
Hazardous Waste					
Other Markets					
% steel drums					
Rigid Bulk Packaging Demand	4,067	5,070	5,400	6,070	7,850

SAMPLE
TABLE

CHART VI-1

US RIGID BULK PACKAGING MARKET SHARE BY COMPANY
(\$5.4 billion, 2010)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE V-4
CHEMICAL & PHARMACEUTICAL PRODUCTS
MARKET FOR RIGID BULK PACKAGING BY TYPE
 (million dollars)

Item	2000	2005	2010	2015	2020
Chemical & Pharmaceutical Shpts (bil \$ pkg/000\$ chemicals					590
Chemical & Pharm Rigid Bulk Pkg					20
Drums:					46
Steel Drums					38
Plastic Drums					32
Fibre Drums					76
Pails:					53
Plastic Pails					51
Steel Pails					02
RIBCs					70
Bulk Boxes					71
Material Handling Containers					80
% chemical					6
Rigid Bulk Packaging Demand	4				50



COMPANY PROFILES

Bonar Plastics Incorporated
 3300 North Kenmore Drive
 South Bend, IN 46628
 574-232-8066
<http://www.bonarplastics.com>

Annual Sales:
 Employment:

Key Products: containers, drums, bag-in-box products

Bonar Plastics is a molder of plastic material handling equipment, dry materials, and industrial products. In 2010, Bonar Plastics operated as the Promens North America subsidiary of Promens hf (Iceland), itself a subsidiary of Atorka Group hf (Iceland). In October 2010, however, Olympus Partners (Stamford, Connecticut), purchased most of Promens North America assets, except for a plant in Saint John, New Brunswick, Canada, and renamed the company Bonar Plastics.

The Company is involved in the US rigid bulk packaging industry through the manufacture of bulk bins, totes, rigid intermediate bulk containers (RIBCs), drums, bag-in-box containers and other bulk packaging products. These items are made at plants in South Bend, Elkhart and Middlebury, Indiana; West Chicago, Illinois; Littleton, Colorado; and Ridgefield, Washington.

Bonar Plastics' bulk bins encompass MONSTER, POLY COMBO and ROTOMAX types. MONSTER bulk bins, which have capacities ranging from 222 to 377 gallons, are nestable, stackable containers with

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“Demand for rigid bulk packaging in chemical and pharmaceutical applications is projected to increase 4.6 percent per year to \$2.9 billion in 2015. Gains will slightly outpace the overall rigid bulk packaging average and will represent an improvement from the 2005-2010 performance based on a rebound in the overall economy, especially in major chemical end markets such as residential construction and motor vehicles. Advances will trail chemical product shipment growth due to ...”
 --Section V, pg. 158

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OTHER STUDIES

Food Containers: Rigid & Flexible

This study analyzes the US rigid and flexible food container industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by type (e.g., bags and pouches, rigid containers by material) and market (e.g., fruits and vegetables, grain mill products, baked goods, meat products, sauces and condiments, snack foods, candy and confections). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2754 April 2011 \$5100

Green Packaging

US demand for green packaging will rise 3.9 percent 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

Plastic Containers

US plastic container demand will rise 4.3 percent yearly through 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

World Protective Packaging

World demand for protective packaging will rise 7.8 percent per year through 2014. Advances will be stimulated by an upswing in manufacturing activity and the continued proliferation of Internet shopping. The US will remain the largest national market while China grows the fastest. This study analyzes the \$15.3 billion world protective packaging industry, with forecasts for 2014 and 2019 by product, material, function, market, world region and for 24 countries. It also evaluates company market share and profiles industry participants.

#2651 June 2010 \$5800

Corrugated & Paperboard Boxes

US corrugated and paperboard box demand will rise 2.4 percent 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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