
photo: LINPAC

Meat, Poultry & Seafood Packaging

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

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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

www.freedoniagroup.com

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TECHNOLOGY & RAW MATERIALS

PRODUCTS

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INDUSTRY STRUCTURE

Value gains will be bolstered in part by the ongoing shift by many retailers to case-ready packaging, which generally use more expensive trays and high barrier films.

US demand to rise 3% annually through 2015

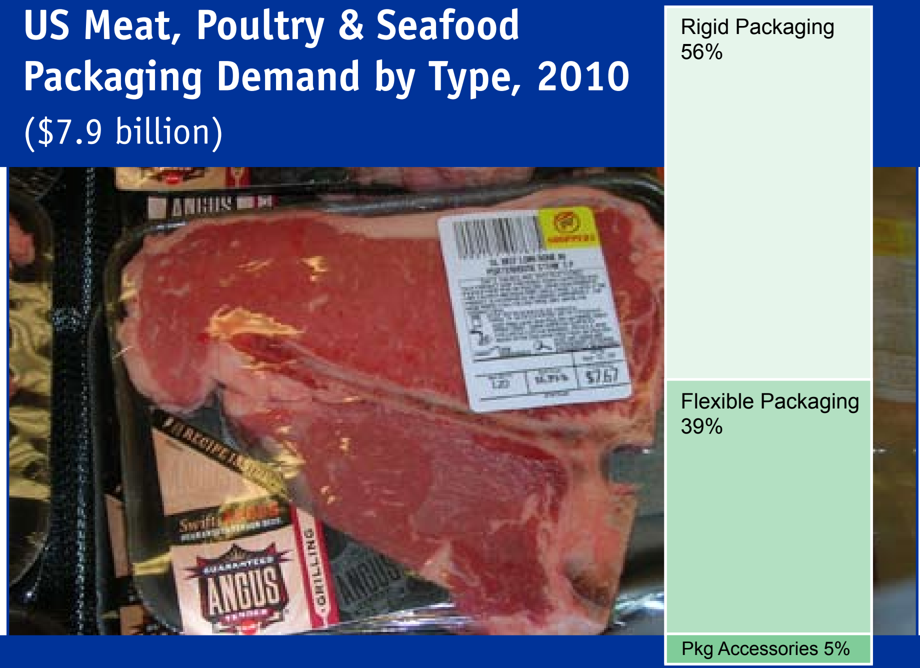
Demand for meat, poultry and seafood packaging will increase 3.0 percent per annum to $9.2 billion in 2015. Gains will be fueled by expanding meat, poultry and seafood production for the domestic market, as well as rising export opportunities to countries such as Japan and Chile. Packaging demand will also be stimulated by the ongoing shift to case-ready packaging by many retailers as a means of reducing in-store labor costs. Case-ready packaging generally uses more expensive trays and high barrier films, thus bolstering value gains. Packaging demand will also be aided by the increasing use of value-added features such as zipper closures; the expanding number of meat and poultry items in smaller, more convenient sizes; and the growing range of products that are further processed. Many such products, which are favored by consumers for their easy preparation and storage capabilities, tend to use more packaging relative to their volume than larger unprocessed items. Value gains will be limited by moderating prices of such raw materials as paper and metal.

Flexible packaging to continue outpacing rigid

Flexible packaging demand growth will continue to outpace that of rigid packaging, increasing at a 3.7 percent annual rate to $3.7 billion in 2015. Gains will be bolstered by good opportunities for high barrier film and pouches. Demand for high barrier film will benefit from a favorable outlook for case-ready packaging, which requires value-added materials to prolong shelf life and protect contents during shipping and handling. Pouch demand will be driven by further inroads by retort pouches into traditional can applications and healthy gains for stand-up pouches in frozen meat, poultry and seafood applications, stemming from pouches' enhanced visual appeal, resealability and ability to be stored vertically in freezer cases.

Gains for rigid packaging will lag those for flexible packaging, reflecting maturity in the large corrugated box segment and minimal advances for metal cans.

US Meat, Poultry & Seafood Packaging Demand by Type, 2010
($7.9 billion)



However, plastic containers and trays will post robust gains. Demand for plastic containers will be driven by heightened demand for prepared meat and poultry items in supermarkets and other retail locations as a result of consumer preference for convenience foods that require little or no preparation. Tray demand will be aided by the growing use of case-ready packaging, which often employs larger foam or more costly rigid barrier trays. Increasing use of more expensive biodegradable trays will also stimulate value gains. Demand for packaging accessories will benefit from regulations requiring nutrition information and country-of-origin labels on a variety of meat and poultry items.

Sample Text, Table & Chart

TABLE V-6

FRESH & FROZEN MEAT, POULTRY
& SEAFOOD PACKAGING DEMAND
(million dollars)

SAMPLE TABLE

Item	2000	2005	2010	2015	2020
F/F Meat, Poultry & Seafood Shpts (bi					5
$ pkg/000$ fresh & frozen meat					6
Packaging Demand					0
By Type:					
Rigid					3
Boxes					0
Trays					3
Other					0
Flexible					5
Plastic Film					5
Bags					6
Paper & Foil					5
Pouches					9
Accessories					2
By Application:					
Meat					6
Poultry					6
Seafood					8
% fresh & frozen					7.4
Total Meat/Poultry/Seafood Packaging	5000	6300	7920	9180	10800

APPLICATIONS & MARKETS

SAMPLE TEXT

Flexible Packaging -- Flexible packaging de
applications will increase 3.8 percent per annum to $
with advances driven by expanding poultry consump
requirements for barrier and other specialty films des
shelf life and reduce leakage. Additionally, flexible p
will be supported by increased demand for individua
poultry pieces, which offer better convenience and st
than whole bird offerings. While film and bags will
for the m packaging, pouch
faster pa ads by retort pou
can appl stand-up pouches
packagi

De try packaging is
increase 0 million in 2015
driven by expanding poultry production and consump
continuing requirements for barrier and other films th
life and provide resistance to leaks and punctures. B
is packaged in case-ready form at central processing
in stores, shrink or lidding films used must be durabl
offer higher barrier properties than conventional in-store polyvinyl chlo-
ride overwrapping films. For example, Cryovac's poultry films include
CRYOVAC SSD and CRYOVAC SES stretch-shrink films, which are en-
gineered to provide leakproof sealing for trays. Among Curwood's poul-
try films are ICE breathable coextruded types, which offer high clarity,
barrier and puncture resistance characteristics, allowing froz
products to maintain their fresh appearance until thawing. T
popularity of heat-and-serve poultry entrees packaged in mic
trays will bolster sales of shrink and lidding films used with
ucts. Demand for nonbarrier films such as low density polye
benefit from growing use of products such as saddle packs th
poultry parts to be packaged individually. Saddle packs, wh

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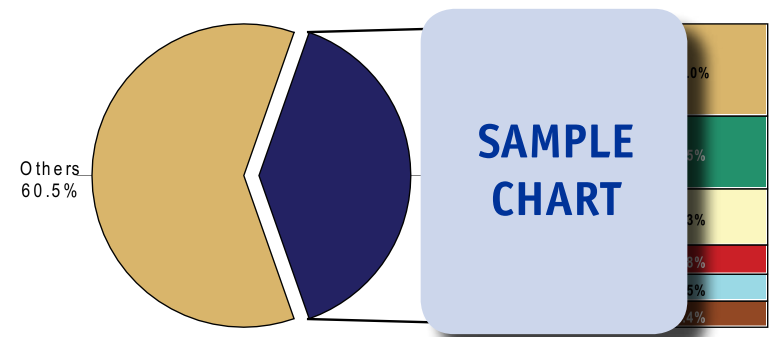
CHART VI-1

US MEAT, POULTRY & SEAFOOD PACKAGING MARKET SHARE
($7.9 billion, 2010)



Meat, Poultry & Seafood Packaging

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

Freedonia®

Sample Profile, Table & Forecast

TABLE IV-3

BOX DEMAND IN MEAT, POULTRY & SEAFOOD PACKAGING (million dollars)

Item	2000	2005	2010	2015	2020
Total Meat/Poultry/Seafood Packaging					
% boxes					
Box Demand					
By Type:					
Corrugated					
Folding Cartons					
By Application:					
Meat					
Poultry					
Seafood					
By Market:					
Fresh & Frozen					
Processed					
Ready-to-Eat					
% boxes					
Rigid Meat/Poultry/Seafood Packaging					

SAMPLE TABLE

COMPANY PROFILES

AEP Industries Incorporated
125 Phillips Avenue
South Hackensack, NJ 07606
201-641-6600
http://www.aepinc.com

Sales: $
US Sales
Employ

Key Pro k films

SAMPLE PROFILE

AE commodity and specialty portation, food and beverage, electronic, construction, textile, and agricultural markets. The Company operates through six product divisions: Custom Films, PROFORMANCE Films, Stretch Wrap, Polyvinyl Chloride Wrap, Printed and Converted Films, and Other Products and Specialty Films.

The Company is active in the US meat, poultry and seafood packaging industry through the Polyvinyl Chloride Wrap division, which had sales of $80 million in FY 2010. The division's products encompass RESINITE polyvinyl chloride (PVC) stretch and shrink films, which can be used for packaging fresh meat, poultry, fish, fruits, vegetables and bakery products.

RESINITE PVC films include MAPAC, general-purpose stretch and shrink, and specialty poultry types. For example, MAPAC films, which are used in case-ready meat packaging, are formulated to provide moisture-resistant seals and high oxygen permeability. These films offer heightened clarity and anti-fog properties, and can be used with

231

"Corrugated box demand in meat, poultry and seafood packaging will advance 2.0 percent per year through 2015 to $3 billion. Box demand will be driven by an increase in product shipments along with the ongoing need for boxes that are adequately strong and moisture-resistant to safeguard products and withstand handling throughout the supply chain."

--Section IV, pg. 90

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Other Studies

Active & Intelligent Packaging

This study analyzes the US active and intelligent packaging industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., gas scavengers, corrosion controls, moisture controls, time-temperature indicators, compliance monitors) and market (e.g., food, beverages, primary metals, pharmaceuticals, motor vehicles, electronics). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2772 .... June 2011 .... $4900

Foodservice Packaging: Bulk & Portion Control

US foodservice packaging demand will climb 2.5 percent 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

Food Containers: Rigid & Flexible

US demand for food containers is forecast to increase three percent annually through 2015. Plastic containers and bags and pouches will be the fastest growing segments, continuing to supplant paperboard, metal and glass containers. Best market prospects include frozen specialties, snack foods, dairy products, and sauces and condiments. This study analyzes the $23 billion US rigid and flexible food container industry, with forecasts for 2015 and 2020 by type and market. The study also evaluates company market share and profiles industry competitors.

#2754 .... April 2011 .... $5100

World Cups & Lids

World demand for cups and lids will rise five percent per year through 2014, fueled in part by advances in the quick service restaurant industry. Products made from biodegradable, recyclable or recycled materials will post robust advances. The US will remain by far the largest market, while developing regions grow the fastest. This study analyzes the $18.3 billion world cup and lid industry, with forecasts for 2014 and 2019 by product, market, world region and for 18 countries. It also evaluates company market share and profiles industry players.

#2741 .... March 2011................... $5800

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

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