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Food Containers: Rigid & Flexible

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

Study #2754 | April 2011 | \$5100 | 445 pages

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Gains will be driven in part by consumer demand for foods offering convenience and value, and heightened usage of value-added packaging providing enhanced freshness protection.

US demand to rise 3% annually through 2015

US demand for food containers is forecast to increase 3.0 percent per year through 2015 to \$26.7 billion, or nearly 300 billion units. Advances will be based on an expanding population base, improved real growth in disposable personal income, smaller household sizes, consumer demand for foods offering a combination of convenience and value, and heightened usage of value-added packaging providing enhanced freshness protection and convenience of use. Unit expansion will be aided by the growing popularity of single-serving packaging, such as plastic cups and pouches, in an increasing range of applications, with such formats increasingly chosen to meet consumer demand for food products offering convenience and portability.

Plastic containers, bags & pouches to grow fastest

Plastic containers, and bags and pouches will experience the fastest growth among food container types, continuing to supplant paperboard, metal and glass containers. Plastic container advances will be driven by advantages over glass, metal and paperboard alternatives, including light weight, strength, heat resistance and barrier properties. Also contributing to value gains will be expected increases in oil pricing, which will lead to faster price increases for plastic containers than other container

US Food Container Demand (\$23 billion, 2010)



types. Though rising resin prices in recent years have reduced plastic's cost advantage over other materials, plastic containers have a well-established presence in many markets and their combination of light weight and good barrier performance will propel continued growth. Above-average growth for bags and pouches will be the result of cost and performance advantages that will enable continued inroads into rigid packaging applications. Moreover, inherent sustainability qualities of bags and pouches, such as reduced material requirements and shipping costs compared to rigid containers, will drive gains as brand owners seek to reduce the environmental footprint of their packaging.

Slower growth is anticipated in the more mature paperboard, metal and glass food container segments, though each segment will present areas of opportunity. Paperboard container demand will benefit from further introductions of microwaveable foods. Aseptic cartons will gain ground against metal cans in uses such as soups and canned specialties, and sauces and condiments. Metal can demand will be supported by advantages of long shelf life, improved convenience via easy-opening tops and the positioning of canned foods as a means of controlling food expenditures. Glass food container demand will be helped by a premium image, which will promote opportunities in the growing organic and/or natural foods segments.

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Sample Text, Table & Chart

PAPERBOARD FOOD CONTAINERS

Molded Pulp Egg Cartons

Demand for molded pulp egg cartons is forecast to increase by more than one percent per year to 1.4 billion units by 2015, declining slightly to 1.4 billion units by 2020. Demand is expected to be further inroads by plastic egg cartons, which are expected to fall below 90 percent of total demand by 2015. Demand for molded pulp egg cartons and other food retailers tend to be more price sensitive, and many of firms that switched to molded pulp egg cartons to environmental considerations have shifted back to plastic. Non-plastic egg carton demand for molded pulp egg cartons is anticipated to increase due to cost competitiveness, degradability, compostability, durability, and ability to absorb leakage from broken eggs. Rising demand for organic specialty eggs, which frequently use molded pulp cartons, and a more natural image, will also stimulate demand. Despite competition for share to plastic, molded pulp egg cartons will still account for over 40 percent of egg carton unit demand in 2015.

Molded pulp's environmental friendliness is expected to raise interest in its use among retailers seeking to convey a positive image to their customers. For example, in 2010 Wegmans Food Markets switched from foam to molded pulp cartons for its WEGMANS brand eggs. A Life Cycle Assessment by the company of foam, polyethylene terephthalate (PET) and molded pulp egg cartons found the materials to be comparable in terms of environmental factors. The shift was made based on the 100 percent recycled content of molded pulp and customer feedback.

The production of molded pulp egg cartons is highly concentrated with only a handful of producers active in the market. Pacific Packaging, acquired by Reynolds Group in November 2010, is the leading producer of molded pulp egg cartons. The firm's molded pulp egg cartons are available in a wide range of sizes. Egg carton configurations include 2-egg-by-6-egg; 3-egg-by-6-egg; jumbo; and TWIN-SIX type.

225

Copyright 2011

SAMPLE TEXT

TABLE V-1

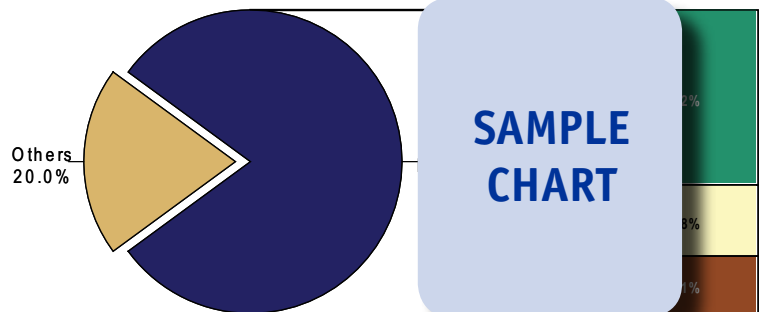
BAG & POUCH DEMAND IN FOOD APPLICATIONS BY MATERIAL & TYPE (million dollars)

| Item | 2000 | 2005 | 2010 | 2015 | 2020 |
|--|------|------|------|------|------|
| Food Shipments (bil 2005\$) units/000\$ food | | | | | |
| Bag & Pouch Demand (bil units) cents/unit | | | | | |
| Bag & Pouch Demand By Material: | | | | | |
| Plastic | | | | | |
| Paper | | | | | |
| By Type: | | | | | |
| Bags & Sacks | | | | | |
| Pouches | | | | | |
| % bags & pouches | | | | | |
| Total Food Container Demand | | | | | |

SAMPLE TABLE

CHART X-4

METAL FOOD CONTAINER MARKET SHARE BY COMPANY (\$3.9 billion, 2010)

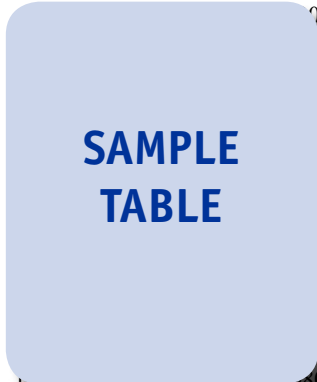


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VIII-1
PLASTIC FOOD CONTAINER DEMAND BY TYPE
 (million dollars)

| Item | 2000 | 2005 | 2010 | 2015 | 2020 |
|--|------|------|------|------|------|
| Food Shipments (bil 2005\$) containers/000\$ food | | | | | 2.0 |
| Plastic Food Containers (bil units) cents/unit | | | | | 2.9 |
| Plastic Food Containers Bottles & Jars | | | | | 50 |
| Tubs & Cups | | | | | 40 |
| Egg Cartons | | | | | 70 |
| Other | | | | | 40 |
| % plastic | | | | | 9 |
| Total Food Container Demand | | | | | 800 |



COMPANY PROFILES

Caraustar Industries Incorporated
 5000 Austell Powder Springs Road, Suite 300
 Austell, GA 30106
 770-948-3101
<http://www.caraustar.com>

Annual Sales
 Employment

Key Products: paperboard, folding cartons, etc.

SAMPLE PROFILE

Caraustar Industries manufactures recycled paperboard and converted products in three groups: Recovered, Mill, and Composite. Caraustar Industries is controlled by Wayzata Investment Partners LLC (Wayzata, Minnesota), a private equity firm.

The Company participates in the US food containers industry through the Mill and Converted Products groups. Via these groups, Caraustar Industries manufactures uncoated and clay-coated recycled paperboard, folding cartons, and rigid set-up boxes.

The Mill group makes uncoated recycled paperboard primarily for conversion into folding cartons, tubes and cores, gypsum board, composite containers, and other specialty paperboard products. Among the Company's paperboard products are ES NATURAL and ES CREAM types, both of which comply with US Food and Drug Administration guidelines for direct food contact. In addition, both ES NATURAL and ES CREAM paperboard utilize less fiber, less energy and less freight than typical recycled paperboard grades. Caraustar Industries makes

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"Demand for plastic food bottles and jars is forecast to increase 5.4 percent annually to \$2.3 billion in 2015, with unit demand rising to 13.7 billion over this period. Value gains will reflect faster price increases for plastic bottles and jars than containers from other materials based on expected increases in oil prices, which will drive up resin prices. Unit demand, while still outpacing the overall food container average, will decelerate from the performance of the past decade due to ..."
 --Section VIII, pg. 256

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

Meat, Poultry & Seafood Packaging

US demand for meat, poultry and seafood packaging will increase three percent annually through 2015. Flexible packaging will continue to outpace rigid types, bolstered by good opportunities for high barrier film and pouches. The ready-to-eat market will grow the fastest, driven by the growing range of prepared foods in the retail sector. This study analyzes the \$7.9 billion US meat packaging industry, with forecasts for 2015 and 2020 by technology, raw material, product, application and market. The study also evaluates company market share and profiles industry players.

#2753 April 2011 \$4900

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

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

Tube & Stick Packaging

US tube and stick packaging demand will rise 5.1 percent 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

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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