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World Bulk Packaging

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

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World Bulk Packaging

Industry Study with Forecasts for *2015 & 2020*

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Advances will be driven by growth in manufacturing activity, especially in key end-use industries such as chemicals and pharmaceuticals, and food and beverages.

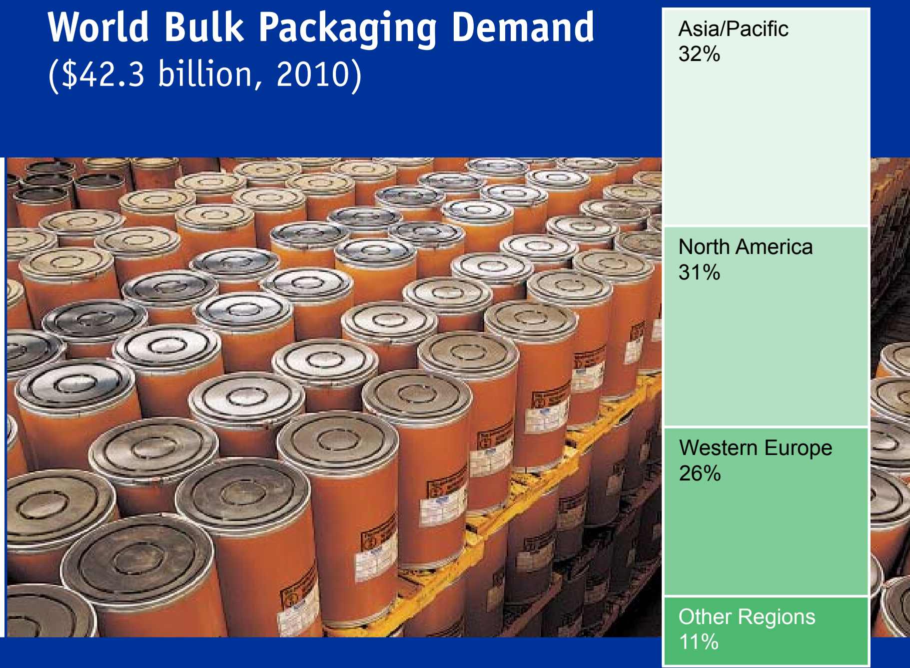
World demand to rise 5.8% annually through 2015

World demand for bulk packaging is projected to rise 5.8 percent per year to $56.0 billion in 2015. Advances will be driven by growth in manufacturing activity, especially in key end-use industries such as chemicals and pharmaceuticals, and food and beverages. China and the US -- the two largest markets -- will account for close to one-half of value gains in bulk packaging demand between 2010 and 2015.

Film wrap to lead gains

Film wrap will see the fastest gains, benefiting from growing requirements for the bundling and protection of goods during warehousing and distribution. Demand for film wrap will also be bolstered by retail trends, as an increasing number of retailers offer a broad range of goods packaged in bulk and utilize secondary packaging for product warehousing and multipack bundling. Although shipping sacks will continue to represent the largest product type, shipping sack demand will experience below-average growth through the forecast period and beyond. Strong price competition and increasing use of alternative products will serve to limit gains in shipping sack demand. Demand for drums will benefit from an upswing in global chemical and pharmaceutical production, as chemicals comprise by far the leading application for drums. Growth in pail demand will be slightly below average, due to competition from other packaging formats, including drums, bulk boxes and shipping sacks. Plastic pails will experience faster advances than their steel counterparts as a result of their lighter weight, which substantially reduces shipping expenses.

World Bulk Packaging Demand
($42.3 billion, 2010)



Asia/Pacific region to post fastest increases

The Asia/Pacific region will post the most rapid increases and remain the biggest regional market in the world, due to its large food and beverage, and chemical and pharmaceutical industries. Central and South America, Eastern Europe, and the Africa/Mideast region will also experience above-average growth, though advances in these areas will stem from relatively small bases (collectively, these three regions will only account for twelve percent of global bulk packaging demand in 2015). Overall, the fastest growth will be seen in Asia, specifically in India, China and Indonesia. Other developing countries such as Russia, Mexico and Brazil are also expected to see healthy gains.

Advances will generally be below average in North America, Western Europe and Japan, where markets are more established. Nonetheless, good opportunities will still be found in developed countries, especially for flexible bulk packaging products such as film wrap.

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Sample Text, Table & Chart

TABLE VI-8

CHINA -- BULK PACKAGING DEMAND
(million dollars)

Item	2000	2005	2010	2015	2020
Manufacturing Value Added (bil 2009$)					
$ bulk packaging/000$ MVA					
Bulk Packaging Demand					
Flexible Bulk Packaging:					
Shipping Sacks					
Film Wrap					
Other Flexible Bulk Packaging					
Rigid Bulk Packaging:					
Drums					
Pails					
Other Rigid Bulk Packaging					

SAMPLE TABLE

ASIA/PACIFIC

China: Bulk Packaging Demand

Demand for bulk packaging in China totaled $5.6 billio representing more than two-fifths (42 percent) of total demar Asia/Pacific region (and the largest national market in the reg the past decade, China's market experienced very strong grov ing 15.1 percent per annum between 2000 and 2010 (in 2000 accounted for only one-fifth of the region's total). Strong ga facturing activity, personal income levels and consumer expe combined with favorable urbanization trends, will continue t demand for packaged goods. In the coming years, these fact tinue to support bulk packaging requirements in China, as wi exports of Chinese goods to more advanced consumer economies (which will create the need for higher-quality packaging).

Through 2015, demand for bulk packaging in China is forecast to increase 2 billion, well above both the regional an r product types are expected to experience th rates will decelerate from the pace seen This will follow similar decel- erations in d manufacturing activity. Still, continued end-use sectors (e.g., chemicals and pharmac ges) will support bulk packaging demand through the forecast period and beyond.

SAMPLE TEXT

While most bulk packaging products used in China will relatively inexpensive (e.g., shipping sacks), they will contin consumed in very large quantities. In addition, exports of C to more advanced consumer economies will boost greater in need for high-quality bulk packaging, which is often less of when shipping and marketing goods to China's domestic co

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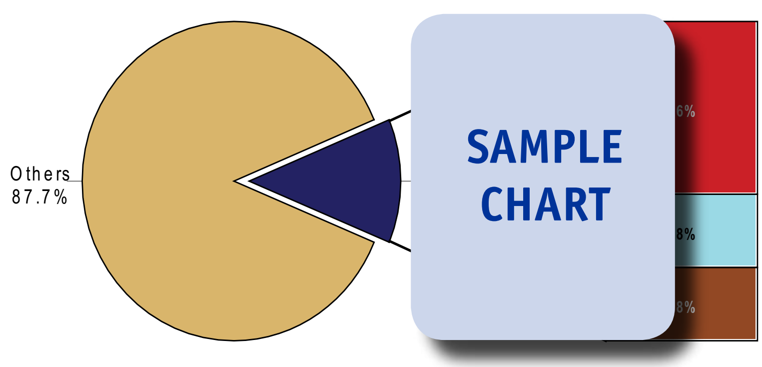
CHART VIII-1

WORLD BULK PACKAGING MARKET SHARE BY COMPANY
($42.3 billion, 2010)



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Sample Profile, Table & Forecast

TABLE VI-9

CHINA -- BULK PACKAGING DEMAND BY MARKET
(million dollars)

Item	2000	2005	2010	2015	2020
Bulk Packaging Demand					
Nondurable Goods:					
Chemicals & Pharmaceuticals					
Food & Beverages					
Other Nondurable Goods					
Durable Goods					
Other Markets					

SAMPLE TABLE

COMPANY PROFILES

Schäfer Werke GmbH
Pfannenbergstraße 1
57290 Neunkirchen
Germany
49-2735-787-
http://www.sc

Annual Sales:
Employment:

Key Products

SAMPLE PROFILE

Schäfer Werke is a manufacturer of reusable stainless steel containers, steel cabinets and other furniture, server racks and other information technology enclosures and housings, and perforated metal plates. The Company is privately held.

The Company participates in the world bulk packaging industry through the production of reusable stainless steel containers for beverages, other liquid products and various industrial materials. These containers are manufactured at sites in Neunkirchen, Germany and Ledec nad Sazavou, the Czech Republic.

For beverage applications, Schäfer Werke manufactures stainless steel kegs under such brand names as PLUS KEG, JUNIOR PLUS KEG, ECO KEG, FRESHKEG and SUDEX KEG. For example, PLUS KEG containers are made in sizes up to 50 liters (L) and feature a stainless steel liner with a polyurethane jacket. JUNIOR PLUS KEG containers, which are produced in sizes from 10.4 to 20.5 L, are available partially or completely coated with polyurethane. ECO KEG containers are 100-percent recyclable and feature easily separated steel and polypropylene components.

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"China's food and beverage industry, which is the largest in the world, will see robust gains in bulk packaging demand as well. Demand will benefit from trends toward convenience-oriented, highly packaged food and beverages. In addition, rapid growth in spending on food eaten or prepared away from home will stimulate demand for bulk packaging containers (e.g., drums and pails) for food distributed to restaurants and other foodservice venues. Still, ..."
--Section VI, pg. 179

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Other Studies

Labels

This study analyzes the US label industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by raw and stock material, application method (e.g., pressure sensitive, glue-applied, stretch sleeve and heat shrink, thermal transfer, in-mold), printing technology and function (e.g., primary, secondary, industrial, decorative, mailing and shipping). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2784 .... July 2011 .... $5100

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

Pallets

US demand for pallets is forecast to rise 6.1 percent annually through 2015. Pallets made from wood -- primarily lumber -- will continue to account for nearly 95 percent of demand, while plastic and metal pallets grow at double-digit rates. New pallet demand will outpace the dominant refurbished pallet segment. This study analyzes the 967 million unit US pallet industry, with forecasts for 2015 and 2020 by material, product, market and region. The study also evaluates company market share and profiles industry competitors.

#2766 .... May 2011 .... $4800

Rigid Bulk Packaging

Demand for rigid bulk packaging in the US is projected to advance 4.3 percent annually through 2015. Material handling containers and RIBCs will be the fastest growing types. Drums will remain the largest segment, with growth accelerating based on a rebound in chemical output. Durable goods markets will outpace the dominant nondurables segment. This study analyzes the $5.4 billion US rigid bulk packaging industry, with forecasts for 2015 and 2020 by material, product and market. It also evaluates company market share and profiles industry players.

#2737 .... February 2011 .... $4900

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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