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Active & Intelligent Packaging

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

Study #2772 | June 2011 | \$4900 | 302 pages

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Advances will be driven in part by the availability of products with more reasonable price points and those offering enhanced shelf life and/or improved quality.

US demand to climb 8% annually through 2015

Demand for active and intelligent packaging is forecast to climb 8.0 percent annually to \$2.3 billion in 2015, significantly outpacing overall packaging demand. Advances will be driven by the availability of products with more reasonable price points and those offering enhanced shelf life and/or improved quality. Additionally, gains will be supported by new mandates aimed at improving food safety and by the leveraging of smartphone applications to bring interactivity to packaging. However, in spite of rapid increases, active and intelligent packaging will continue to represent less than two percent of overall packaging demand through 2015.

Intelligent packaging demand to grow nearly 20% annually

Demand for intelligent packaging is expected to expand at nearly 20 percent annually to \$370 million in 2015, propelled by rapid growth for Quick Response (QR) and other two-dimensional (2D) barcodes. Demand will also be fueled by greater use of time-temperature indicator (TTI) labels and tags due to the increased presence of temperature-sensitive drugs and new regulations calling for increased track and trace capabilities with perishable foods. Gains for pharmaceutical compliance monitor-



ing packaging will be supported by the development of more cost-competitive products and efforts to boost adherence levels. However, slow acceptance by the pharmaceutical industry will limit usage largely to clinical trials. Growth for intelligent packaging overall will also be restrained by competition from electronic data logging devices and systems used for monitoring of temperature-sensitive goods.

Gas scavengers among best active packaging prospects

Demand for active packaging is projected to increase 6.5 percent per year to

\$1.9 billion in 2015. Gains will be driven by above-average advances for gas scavengers, the result of expanded applications for oxygen scavengers in food, beverage and pharmaceutical packaging. Additionally, growth will be propelled by solid prospects for susceptor packaging in applications other than microwave popcorn and robust increases for self-venting packaging. Technology improvements will support further development of niche active packaging segments such as antimicrobial packaging. Moisture control and corrosion control packaging demand will post slower advances based on the presence of more mature product types and applications.

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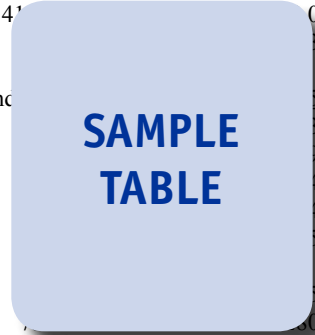
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Sample Profile, Table & Forecast

TABLE IV-3

FOOD MARKET FOR ACTIVE & INTELLIGENT PACKAGING
(million dollars)

Item	2000	2005	2010	2015	2020
Food Shipments (bil \$)	41	47	53	59	65
\$ pkg/000\$ food	1.2	1.3	1.4	1.5	1.6
Active & Intelligent Packaging Demand					
Processed Foods					
Meat, Poultry & Seafood					
Produce					
Dairy Products					
Other					
% food					
Total Active & Intelligent Packaging					



COMPANY PROFILES

Maxwell Chase Technologies LLC
 125 Westlake Parkway, Suite 100
 Atlanta, GA 30336
 404-344-0796
 http://www.mct.com

Annual Sales:
 Employment:

Key Products: superabsorbent pouches, pads

Maxwell Chase Technologies specializes in the development and manufacture of packaging designed to extend the shelf life of fresh foods and flowers. The privately held company conducts manufacturing operations at its headquarters site in Atlanta, Georgia and markets its products in North America, Western Europe, Japan and Australia.

The Company participates in the US active and intelligent packaging industry through the manufacture and sale of ICE WRAP pads and refrigerant blankets; and FRESH-R-PAX superabsorbent pouches, pads, tote inserts and trays. ICE WRAP refrigerant pads and blankets are intended to maintain cool temperatures during shipment of fresh-cut flowers, fresh fruits and vegetables, and other fresh food products. Prior to use, ICE WRAP pads and blankets are soaked in water and then frozen in order to produce refrigerant products that are more efficient than ice in keeping perishables cool during shipment. The superabsorbent material comprising ICE WRAP products functions to gel the frozen water in place, holding it in individual packs or cells within the blanket to create a quilted pattern. When the ICE WRAP structure thaws, the gel remains trapped inside the cells, thereby preventing water from being released back into the package or the environment.

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“Demand for active and intelligent packaging in the food market is projected to rise 9.1 percent per year to \$835 million in 2015, driven by heightened requirements for longer shelf life for processed foods and packaged fresh foods. Continued growth for organic foods, in-store prepared foods and other foods containing fewer or no preservatives will propel opportunities for oxygen scavengers in sachet, label or film forms for the protection of such foods from spoilage. Additional factors that will drive advances include ...”
 --Section IV, pg. 124

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

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

World Pharmaceutical Packaging

World demand for pharmaceutical packaging is forecast to rise 5.5 percent annually through 2015. The developed countries of Western Europe, the US and Japan will account for over 70 percent of the amount, although China will provide faster growth opportunities. India and Brazil will also evolve into fast-growing markets. This study analyzes the \$4.7 billion world drug packaging industry, with forecasts for 2015 and 2020 by raw material and resin, product, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2765 June 2011 \$6400

Frozen Food Packaging

US demand for frozen food packaging will climb 3.7 percent yearly through 2013. Gains will be driven by the popularity of convenience-type foods, the prevalence of microwave ovens, and technological advances in packaging. Frozen food specialties and meat, poultry and seafood will be the fastest growing applications. This study analyzes the \$5.7 billion US frozen food packaging industry, with forecasts for 2013 and 2018 by application and product. It also evaluates company market share and profiles industry players.

#2594 January 2010 \$4700

Microwave Packaging

US microwave packaging demand will climb 7 percent annually through 2013, driven in part by demand for more convenient meals coupled with the prevalence of microwave ovens. Frozen foods will remain the top use while fresh prepared foods will lead gains. Foodservice containers and tubs, cups and bowls will be the fastest growing types. This study analyzes the \$1.7 billion US microwave packaging industry, with forecasts for 2013 and 2018 by application and product. It also evaluates company market share and profiles industry players.

#2572 December 2009 \$4700

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:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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