World Green Packaging

Industry Study with Forecasts for 2015 & 2020

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Advances in world green packaging demand will be driven by growth in the broader “green” movement and trends toward environmentally friendly packaging.

**World demand to rise 5.7% annually through 2015**

World demand for green packaging (which encompasses recycled content, reusable and degradable packaging) is projected to rise 5.7 percent per year to $212 billion in 2015. Advances will be driven by growth in the broader “green” movement and trends toward environmentally friendly packaging. While recycled content packaging will remain by far the largest product type through the forecast period and beyond, this segment will see the slowest increases due to the maturity of products such as metal cans and glass containers. On the other hand, above-average demand growth is expected in reusable and degradable packaging. In particular, demand for degradable packaging will continue to see double-digit annual growth rates.

**Recycled content packaging to remain dominant**

Gains in recycled content packaging will be supported by increased collection activity and processing capacity, coupled with greater use of recycled content packaging by firms seeking to demonstrate environmental responsibility and differentiate their products. Also supporting advances will be efforts by industry associations, brand owners, packaging firms and others to promote recycling initiatives in order to raise the recycling rates of different types of packaging materials. However, increases in recycled content packaging demand will be limited by the general maturity of products such as corrugated boxes and metal cans, and the existing high levels of recycled content in them.

**Reusable, degradable packaging to grow fastest**

Demand for reusable packaging will be boosted by an acceleration in global manufacturing activity. In particular, demand for reusable drums will benefit from an upswing in global chemical output, as chemicals comprise the leading application for these products. However, competition from larger reusable formats such as intermediate bulk containers (IBCs) will prevent faster growth in drum demand. Additionally, the relatively long service life of most reusable packaging will limit the need for purchasing replacement units, a factor that will offer source reduction and cost advantages, but will continue to hamper growth in sales of new units. Degradable packaging will continue to see the fastest advances in demand, but will only account for approximately one percent of the overall green packaging market through 2015. Gains will be driven by greater price competitiveness with conventional packaging options, capacity expansions, increased importance of sustainability in packaging, and enhanced performance properties brought about by the use of additives, improved polymerization and new blending techniques.
Asia/Pacific

India: Green Packaging Products

Recycled content packaging is by far the largest green packaging product segment, accounting for 87 percent of India’s total demand in 2010. Despite facing tough competition from plastic materials, recycled content paper and metal packaging demand will continue to account for the biggest shares of the recycled content packaging segment by a wide margin. The fastest gains are expected for recycled content plastic packaging, which will continue to take market share from metal and glass containers due to plastic’s lower cost, lighter weight and good performance properties. Packaging requirements largely consist of inexpensive containers, which holds down market value. The use of cheap and/or reusable packaging alternatives -- such as newspaper, jute bags and wood crates in lieu of paper, metal, plastic or glass containers -- also limit demand for recycled content packaging.

Reusable drum demand will be supported by India’s very large and fast-growing chemical and pharmaceutical industry, which is the largest market for drums (India’s chemical and pharmaceutical output level is the third highest in the world, behind the US and China). Demand for reusable plastic containers and IBCs will benefit from increasing requirements for good barrier properties, as well as value-added features, such as durability and corrosion resistance. Unlike in many other countries, polyethylene terephthalate (PET) is among the most broadly used packaging materials in India, as the country’s abundant domestic PET supplies render the high-performance resin more affordable than in other markets. Reusable glass bottles will remain popular in beverages, as it is cheaper for manufacturers to collect, sanitize and refill bottles than purchase new glass containers. Despite strong growth, demand for degradable packaging will remain limited due to the prohibitively high cost of these products.
Earthcycle Packaging Limited
210-1200 West 73rd Avenue
Vancouver, British Columbia V6P 6G5
Canada
604-899-0928
http://www.earthcycle.com

Annual Sales: $5 million (estimated)
Employment: 15 (estimated)
Key Products: biodegradable and compostable packaging based on palm fiber

Earthcycle Packaging produces biodegradable and compostable packaging based on palm fiber for the produce, foodservice, poultry, seafood and garden markets, among others. The Company is privately held.

The Company is active in the world green packaging industry through the manufacture of EARTHCYCLE packaging, which is made from renewable palm fiber and engineered to decompose within 90 days in home compost areas. This recyclable packaging includes fresh produce packs for blueberries, strawberries, raspberries, kiwi fruit, mangoes, tomatoes, bell peppers, zucchini, and other fruits and vegetables; and foodservice takeout containers, which can be used for packaging sandwiches, salads, French fries, hamburgers and other foods. Earthcycle Packaging also manufactures customized packaging products designed to meet specific customer requirements. The Company’s EARTHCYCLE packaging is available with several lid options, including rigid polyethylene terephthalate (PET) and recycled PET types and low density polyethylene stretch wrap, as well as NA-TUREFLEX film made by Innovia Films Limited (United Kingdom).

“Through 2015, green packaging demand in India is forecast to increase 12.4 percent per year to $5.1 billion. This represents one of the fastest growth rates in the world, but advances will stem from a small base. Despite these rapid gains, usage intensity (as measured against gross domestic output) of green packaging in India will remain among the lowest in the world. As a result, long-term growth potential exists in this country for all major product types, and in virtually all major markets. Furthermore, ...”

--Section VI, pg. 191
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