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World Green Packaging

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

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Industry Study with Forecasts for *2015 & 2020*

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World Green Packaging

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

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.

World Green Packaging

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

Sample Text, Table & Chart

TABLE VI-8

INDIA -- GREEN PACKAGING DEMAND BY TYPE (million dollars)

Item	2000	2005	2010	2015	2020
Packaging Demand (bil $)					
% green packaging					
Green Packaging Demand					
Recycled Content Packaging:					
Paper					
Metal					
Plastic					
Glass					
Reusable Packaging:					
Drums					
Plastic Containers					
Intermediate Bulk Containers					
Other Reusable Packaging					
Degradable Packaging					

SAMPLE TABLE

ASIA/PACIFIC

India: Green Packaging Products

Recycled content packaging is by far the largest green p
product segment, accounting for 87 percent of India's total d
2010. Despite facing tough competition from plastic materia
content paper and metal packaging demand will continue to a
for the biggest shares of the recycled content packaging segn
wide margin. The fastest gains are expected for recycled cor
packaging, which will continue to take market share from me
glass containers due to plastic's lower cost, lighter weight an
performance properties. Packaging requirements largely con
pensive containers, which holds down market value. The use
and/or reusable packaging alternatives -- such as newspaper,
and wood crates in lieu of paper, metal, plastic or glass conta
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 bever
tions, as it is cturers to collect, san
refill bottles ass containers. Desp
growth, dem ng will remain limite
prohibitively s.

SAMPLE TEXT

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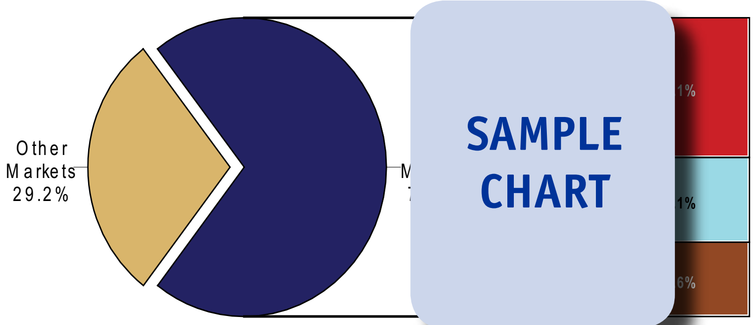
CHART III-6

WORLD GREEN PACKAGING DEMAND BY MARKET ($160.8 billion, 2010)



SAMPLE CHART

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World Green Packaging

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

Sample Profile, Table & Forecast

TABLE VI-7

INDIA --
GREEN PACKAGING DEMAND BY MARKET

Item	2000	2005	2010	2015	2020
Population (mil persons)					
$ GDP/capita					
Gross Domestic Product (bil 2009$)					
Personal Consumption Expend (bil 2[illegible]					
Manufacturing Value Added (bil 200[illegible]					
Food & Beverage MVA (bil 2009$)					
$ green packaging/000$ GDP					
Green Packaging Demand (mil $)					
Food					
Beverages					
Consumer Products					
Other Markets					
% India					
Asia/Pacific Green Packaging (mil $)					

SAMPLE TABLE

COMPANY PROFILES

Earthcycle Packaging Limited
210-1200 West 73rd Avenue
Vancouver, British Columbia V6P 6G5
Canada
604-899-0928
http://www.ear

Annual Sales:
Employment:

Key Products: aging based on palm fiber

SAMPLE PROFILE

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 NATUREFLEX film made by Innovia Films Limited (United Kingdom).

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"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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Other Studies

Foodservice Disposables

US demand for foodservice disposables is expected to increase 4.1 percent annually through 2015. Packaging products will achieve the fastest gains, followed by serviceware, napkins and other products. Retail and vending will be the fastest growing market, while the eating and drinking places segment remains dominant. This study analyzes the $15.3 billion US foodservice disposables industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.

#2787 .... August 2011 .... $5100

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

Green Packaging

US demand for green packaging will rise 3.9 percent annually through 2014, outpacing growth in overall packaging demand. The fastest gains are anticipated for degradable packaging -- from a relatively small base -- and for plastic recycled content packaging. This study analyzes the $34 billion US market for recycled content, reusable and degradable packaging, with forecasts for 2014 and 2019 by material, product and market. It also discusses source reduction and recycling activity, details industry structure and profiles industry competitors.

#2721 ....January 2011 .... $5100

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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