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Converted Flexible Packaging

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

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Table of Contents

List of Tables/Charts

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List of Tables/Charts

(continued from previous page)

MATERIALS

PRODUCT & MARKET OVERVIEW

FOOD PACKAGING

NONFOOD PACKAGING

INDUSTRY STRUCTURE

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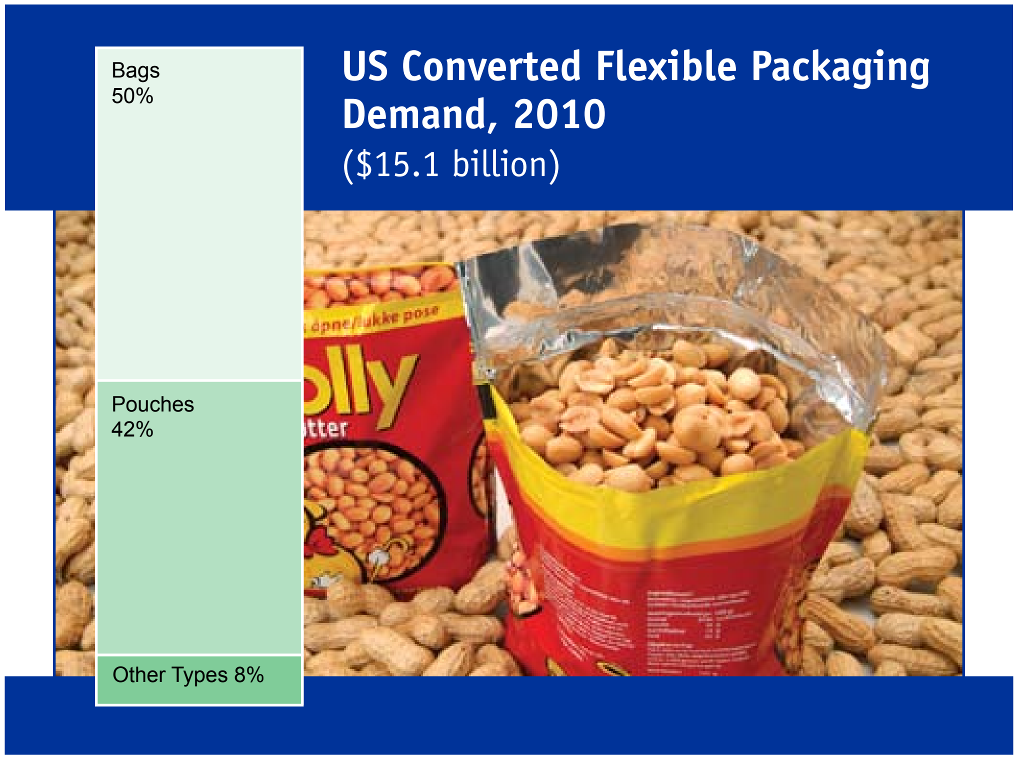
Converted Flexible Packaging

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

Flexible packaging demand will be driven by real growth in consumer nondurables, and by cost, performance and source reduction advantages over most rigid packaging formats.

US demand to rise 3.8% annually through 2015

Demand for converted flexible packaging is projected to increase 3.8 percent annually to $18.2 billion in 2015. Gains will be similar to the pace of the 2005-2010 period based on the now more well-established presence of pouches in a number of food and nonfood markets coupled with overall deceleration in raw material price growth. Volume increases, however, will accelerate from the previous five-year performance as a result of real growth in consumer nondurables as the US economy rebounds from the 2007-2009 recession. In addition, gains will be supported by cost, performance and source reduction advantages over most rigid packaging formats. Converted flexible packaging's source reduction capabilities will be increasingly advantageous in light of initiatives by major retailers and packaged goods firms to evaluate their packaging in terms of eco-friendliness and cost reduction.



US Converted Flexible Packaging Demand, 2010
($15.1 billion)

Pouches to be fastest growing major segment

Pouches will experience above-average advances, with demand expected to increase 4.6 percent yearly to $8 billion in 2015. Growth will be driven by continued conversions to stand-up pouches and healthy gains for flat pouches in a number of markets, along with a smaller environmental footprint due to light weight and reduced material use, which also holds down shipping costs. Additionally, the aging of rigid packaging equipment will create openings for replacements by pouch packaging equipment over the coming decade.

Bags to remain largest segment, with plastic bags outpacing paper

Gains for bags will be moderated by the maturity of many applications along with competition from pouches and rigid packaging. Still, advances will represent an improvement from the 2005-2010 performance based on the expected recovery in the US economy. Plastic bag demand will outpace that of paper bags due to cost and performance advantages, along with widespread usage in baked goods, produce, meat, frozen food and grain mill product applications. However, growing efforts by packaged goods firms to demonstrate their commitment to sustainability will lead to some degree of renewed interest in paper, which possesses such qualities as renewability, recyclability and compostability. While overall gains for other converted flexible packaging, primarily wrap products, will lag the market average, above-average prospects are anticipated for pharmaceutical strip packs and specialized film packaging with meat products.

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Sample Text, Table & Chart

TABLE III-5

POLYETHYLENE FILM DEMAND IN CONVERTED FLEXIBLE NONFOOD PACKAGING BY TYPE & MARKET
(million pounds)

Item	2000	2005	2010	2015	2020
Consumer Nondurables (bil 2005$)					
lbs film/000$ nondurables					
Polyethylene Film in Nonfood Packagi					
By Type:					
Low Density Polyethylene					
High Density Polyethylene					
By Market:					
Rack & Counter					
Paper & Textile					
Agricultural & Horticultural					
Pharmaceuticals					
Chemicals					
Medical Products					
Other Nonfood Products					
% nonfood					
Polyethylene Flexible Pkg Demand					

SAMPLE TABLE

NONFOOD PACKAGING

Converted Flexible Packaging Demand

Demand for converted flexible packaging in pharmaceutica plications is projected to increase 2015. The pharmaceutical marke growing nonfood markets for con other being medical products. Ga use in unit dose packaging of tabl dermal and selected other oral me more moderately, although the incr viders for ready-to-mix intravenous (IV) systems will support c growth. Other converted flexible packaging demand for pharm is generated by strip packs, a low-cost but low-barrier unit dose

SAMPLE TEXT

Demand for pharmaceutical pouches is expected to advanc percent annually to $640 million in 2015, supported by adaptab cost-effective unit dose formats. Pouches will benefit from usa primary and secondary containers. All transdermal drugs are packaged in either foil or film pouches. Moreover, prefillable inhalers and syringes generally use pouches as secondary packaging to assure the sterility of contents prior to use.

Pharmaceutical pouches primarily serve unit dose applications and incorporate rectangular- or square-shaped designs. Length and width dimensions of common varieties range from one to six inche costs of pharmaceutical pouches vary according to size and composition. These containers are the leading packages for powder-based drugs dispensed in hospitals and nursing hom cations involving institutional medication, pouches offer bot and infection prevention advantages. The containers are also package a number of ethical and OTC drugs distributed dire sumers. Analgesic tablets, transdermal patches, effervescent powdered laxatives, wound care products and medicated ski

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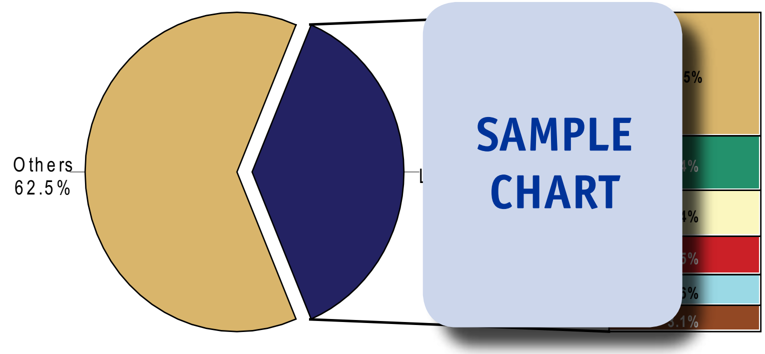
CHART VII-1

US CONVERTED FLEXIBLE PACKAGING MARKET SHARE BY COMPANY
($15.1 billion, 2010)



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Sample Profile, Table & Forecast

TABLE V-7

BAKED GOODS: CONVERTED FLEXIBLE PACKAGING DEMAND BY MATERIAL (million pounds)

Item	2000	2005	2010	2015	2020
Baked Goods Shipments (bil 2005$)					7
lbs pkg/000$ baked goods					9
Baked Goods Flexible Pkg Demand					6
Plastic Film:					4
Polyethylene					5
Polypropylene					4
Other Films					5
Paper:					1
Kraft & Sulfite					5
Oiled & Waxed/Glassine					6
Aluminum Foil					41

SAMPLE TABLE

COMPANY PROFILES

Honeywell International Incorporated
101 Columbia Road
Morris Township, NJ 07962
973-455-
http://wv

Sales: $
US Sale
Employ

Key Pro films

SAMPLE PROFILE

Honeywell International is a diversified manufacturer that offers a variety of products, technologies and services. The Company operates in four segments: Aerospace, Automation and Control Solutions, Specialty Materials and Transportation Systems.

The Company participates in the US converted flexible packaging industry through its Specialty Materials segment, which had sales of $4.7 billion in 2010. The segment produces a range of materials, including specialty films, resins and chemicals, advanced fibers and composites. The Specialty Materials segment operates through numerous divisions, of which the Specialty Films division participates in the manufacture of flexible packaging for food, pharmaceutical and industrial uses. The Company markets these products under such brand names as ACLAR, CAPRAN and OXYSHIELD.

Via the Specialty Films division, Honeywell makes ACLAR films with plasticizer- and stabilizer-free polycholorotriflouroethylene. These films have high moisture barrier and nonflammable capabilities, are resistant to cracking and deterioration, and are chemically inert, making

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"Converted flexible packaging material demand in the baked goods market is forecast to advance 1.0 percent per year to over 930 million pounds in 2015. Plastic film demand will increase more rapidly based on cost and performance advantages over paper and foil, and continued favorable prospects for flexible packaging at the expense of rigid containers based on source reduction advantages. Paper demand in baked goods converted flexible packaging uses is expected to ..."
--Section V, pg. 164

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Other Studies

World Labels

World demand for labels will rise 5.2 percent annually through 2015. Pressure sensitive labels will remain the largest type and continue to supplant glue-applied labels. The Asia/Pacific region will grow the fastest and remain the largest market, due to its large manufacturing industries. This study analyzes the 40.1 billion square meter world label industry, with forecasts for 2015 and 2020 by application method, material, printing technology, market, world region and for 19 countries. The study also evaluates company market share and profiles industry participants.

#2808 .... October 2011 .... $6100

Labels

US label shipments will rise 4.8 percent annually through 2015. Pressure sensitive labels will remain dominant, but will continue to face growing competition from stretch sleeve, heat-shrink, in-mold and other labeling methods. Paper will remain by far the leading stock material, but will continue to lose market share to plastic. This study analyzes the $15.7 billion US label industry, with forecasts for 2015 and 2020 by raw and stock material, application method, printing technology and function. The study also evaluates company market share and profiles industry players.

#2784 .... 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

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

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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