INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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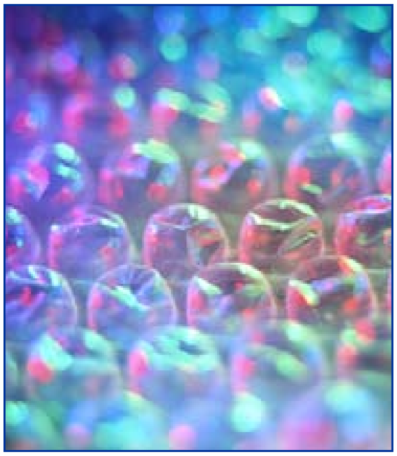

Protective Packaging

US Industry Study with Forecasts for **2016 & 2021**

Study #2839 | January 2012 | $5100 | 276 pages

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Protective Packaging

US Industry Study with Forecasts for ***2016 & 2021***

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INDUSTRY STRUCTURE

Advances will be driven in part by the growing presence of value-added product types, such as higher performing insulated shipping containers and environmentally friendly products.

US demand to rise 5% annually through 2016

Protective packaging demand in the US is projected to increase 5.0 percent per year to $5.9 billion in 2016, fueled by a rebound in manufacturing output, especially for durable goods, along with continued solid growth for Internet shopping. These factors will necessitate heightened requirements for cost-effective packaging used in the protection of goods from shock, vibration, abrasion and other damaging effects of shipping and handling. Advances will also be driven by the growing presence of value-added product types, such as higher performing insulated shipping containers and environmentally friendly products. Green products such as those made from recycled or biodegradable materials tend to be more costly than their conventional counterparts. While interest in green products will increase, pressures to control packaging costs will limit gains to some extent.

Recovery in durable goods manufacturing to benefit foam products, molded pulp

Recovery in the manufacturing sector, particularly a substantial improvement in durable goods output, will fuel accelerated gains for protective packaging, especially foam products and molded pulp. Advantages of molded foams include light weight, excellent cushioning and blocking and bracing capabilities, along with the ability to be customized to conform to the shape of sensitive electronics and appliances. Opportunities for paperboard protectors will be assisted by healthy growth for warehouse clubs and home center stores, boosting demand for edge protection products, which are used by these establishments to unitize and stack pallets.

Internet shopping to favor protective mailers, air pillows, bubble packaging

The increasing popularity of Internet shopping will be one of the most important trends influencing protective packaging demand. Products expected to benefit include protective mailers, air pillows and bubble packaging. Mailers are valued as an alternative to boxes, providing reduced material and postage costs, source reduction and space savings. Solid gains for air pillows will be the result of advantages over other void-fill materials in terms of cost and material use, and consumer preference for the product over traditional materials such as loose-fill. Growing requirements for cost-effective, lightweight cushioning will propel gains for bubble packaging, which also offers greater ease of use than alternatives such as foam-in-place polyurethane.

Protective Packaging

US Industry Study with Forecasts for ***2016 & 2021***

Sample Text, Table & Chart

TABLE VI-1

FOAMED PLASTIC PROTECTIVE PACKAGING DEMAND (million dollars)

SAMPLE TABLE

Item	2001	2006	2011	2016	2021
Durable Goods Shipments (bil $)					
$ foamed plastic/mil $ durables					
Foamed Plastic Protective Packaging					
Molded					
Foam-in-Place					
Polyolefin Rolled Foam					
Loose-Fill					
Other					
% foamed plastic					
Protective Packaging Demand					

FLEXIBLE PROTECTIVE PACKAGING

Protective Mailers

SAMPLE TEXT

Pr... per... ally to ... tiv... averag... ctu... along ... g, w... drive i... , pr... ed prote... of small objects. Moderating advances somewhat will be the gr... prevalence of digital downloading in books and music rather... chasing physical formats of these products.

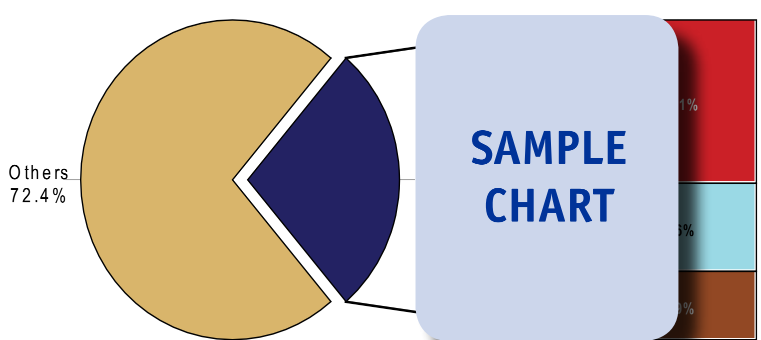
Demand for bubble mailers is expected to climb at a slightly faster pace than demand for other mailers, such as macerated paper, foam-lined and rigid paperboard types. Opportunities will be driven by advantages of light weight and good cushioning performance. Advances for paper mailers will be helped by their environmentally friendly qualities -- being constructed from recycled paper and greater amenability for recycling since they are all-paper rather than a mix of paper and film or paper and foam. However, a key drawback of macerated paper mailers is their heavier weight than bubble mailers, which increases postal and courier charges.

Advantages of protective mailers over larger shipping containers such as boxes include reduced material and postage costs, labor savings, source reduction, inventory space savings, reduced solid was... tion, and increased customer satisfaction. Most protective m... sold via distributors due to their tendency to not be customiz... widespread use by a multitude of small businesses and other... However, direct sales are common among large-volume user... sellers such as the US Postal Service, OfficeMax, Staples, W... Costco. Direct sales are also significant to broadline Interne... such as Amazon.com and Overstock.com. Firms that condu...

73 Copyright 2012

CHART VII-1

US PROTECTIVE PACKAGING MARKET SHARE ($4.6 billion, 2011)



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Sample Profile, Table & Forecast

TABLE V-2

INSULATED SHIPPING CONTAINER DEMAND BY APPLICATION & MARKET

Item	2001	2006	2011	2016	2021
Nondurable Goods Shipments (bil $)					
$ insulated/mil $ nondurables					
Insulated Shipping Containers (mil $)					
By Application:					
Pharmaceutical & Medical					
Food					
Other					
By Market:					
Nondurable Goods					
All Other					
$/lb					
Insulated Shipping Containers (mil lbs)					
% insulated shipping containers					
Rigid Protective Pkg Demand (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	2240

SAMPLE TABLE

COMPANY PROFILES

ACH Foam Technologies LLC
5250 North Sherman Street
Denver, CO 80216
303-297-3844
http://www.a

Annual Sales
Employment

Key Products ...cts, flexible foams, loose- ...ks, and wine shippers

SAMPLE PROFILE

ACH Foam Technologies is a manufacturer of expanded polystyrene (EPS) products for construction, geotechnical, packaging and industrial applications. The Company is privately held.

The Company is involved in the US protective packaging industry via the production of EPS packaging, flexible foams, loose-fill materials, insulated shipping containers and gel packs. ACH also produces wine shippers via its WineLoc Packaging Products subsidiary.

ACH Foam Technologies' EPS packaging comprises fabricated and custom-molded products for low-volume shipping applications, as well as for use as end caps, corners and other protective shapes. Among the Company's EPS packaging items are POLAR-R foil- and film-laminated box liners. POLAR-R liners are engineered to offer thermal protection in packaging mail order products, food, pharmaceuticals and other goods. ACH Foam Technologies makes POLAR-R liners in thicknesses of 1/2 to 4 inches. Flexible foams produced by the Company include polyurethane, beaded and extruded polyethylene, polyester, polyether, and polypropylene varieties. These foams can be

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"Pharmaceutical and medical uses, which accounted for over 75 percent of demand in 2011, are by far the largest application. Insulated shipping container demand in pharmaceutical and medical applications is forecast to expand 6.5 percent annually to $725 million in 2016. Biotechnology-based drugs and vaccines are the most common temperature-sensitive pharmaceutical products transported. A wide variety of other pharmaceutical and medical items also require temperature control to maintain their efficacy."
--Section V, pg. 106

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Other Studies

Plastic Film

Demand for plastic film in the US is forecast to grow 1.8 percent annually to 15.9 billion pounds in 2016. LLDPE will remain the leading film. Among the low volume plastic resins used in film, degradable plastics will lead gains, followed by cellophane and ethylene vinyl alcohol. Packaging will remain the dominant market, but will be outpaced by nonpackaging applications. This study analyzes the 14.5 billion pound US plastic film industry, with forecasts for 2016 and 2021 by type and market. The study also evaluates company market share and profiles industry players.

#2955 .... December 2012 .... $5100

World Protective Packaging

World demand for protective packaging will rise 6.3 percent annually to $24.5 billion in 2016. Foamed plastics will remain the largest segment but will lose market share to bioplastic and nonplastic products such as molded pulp and bamboo. Developing regions will see the fastest advances in demand. This study analyzes the $18 billion world protective packaging industry, with forecasts for 2016 and 2021 by product, material, function, market, world region and for 24 major countries. The study also evaluates company market share and profiles industry participants.

#2943 .... September 2012 .... $6100

Corrugated & Paperboard Boxes

US demand for corrugated and paperboard boxes is forecast to increase 2.3 percent annually to $36.5 billion in 2016. Corrugated and solid fiber boxes will remain the dominant segments and grow the fastest. Food and beverages will remain the largest market, while nonmanufacturing and durable goods markets lead gains. This study analyzes the $32.5 billion US corrugated and paperboard box industry, with forecasts for 2016 and 2021 by material, product and market. The study also evaluates company market shares and profiles industry players.

#2868 .... March 2012 .... $5100

Stretch & Shrink Film

US demand for stretch and shrink film is forecast to rise 3.3 percent annually to $2.4 billion in 2015. Stretch film will remain the dominant segment, with stretch hoods growing the fastest. Shrink film demand growth will outpace gains in stretch film based on its high clarity and excellent print capabilities, greatly enhancing product marketability. This study analyzes the $2.0 billion US stretch and shrink film industry, with forecasts for 2015 and 2020 by type, market, application and resin. The study also evaluates company market share and profiles industry players.

#2830 .... December 2011 .... $4800

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

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