



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form & Corporate Use License 7](#)

[About Freedonia, Custom Research, Related Studies, 8](#)

World Aseptic Packaging

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

Study #2859 | March 2012 | \$5900 | 322 pages



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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Historical Trends	5
Macroeconomic Outlook	7
World Demographic Outlook	11
World Population Outlook	12
World Urban Population Outlook	13
World Per Capita Gross Domestic Product.....	15
World Personal Income & Expenditure Trends...	17
World Packaging Outlook	19
World Manufacturing Outlook	23
World Food & Beverage Manufacturing Outlook	25
World Pharmaceutical Outlook	28
Technology Overview	31
Competitive Technologies	33
Machinery Trends	35
Pricing Trends.....	37
Environmental & Regulatory Issues	39
World Production & Trade Overview	43

OVERVIEW

Regional Overview	45
Product Overview	47
Aseptic Cartons	50
Aseptic Bottles.....	54
Plastic	56
Glass	58
Aseptic Bags & Pouches	58
Other Aseptic Packaging	63
Vials & Ampuls.....	65
Prefillable Syringes	67
Cups & All Other	69
Market Overview	71
Beverages.....	74
Food.....	77
Pharmaceuticals	82

NORTH AMERICA

General	88
Aseptic Packaging Demand	90
United States	92
Canada	100
Mexico	104

WESTERN EUROPE

General	109
Aseptic Packaging Demand	111
France	113
Germany	118
Italy	124

Netherlands	129
Spain	133
United Kingdom.....	137
Other Western Europe	141

ASIA/PACIFIC

General	147
Aseptic Packaging Demand	149
Australia.....	152
China	156
India	162
Japan.....	167
South Korea	172
Other Asia/Pacific	177

OTHER REGIONS

Central & South America	183
Aseptic Packaging Demand	185
Brazil.....	187
Other Central & South America.....	192
Eastern Europe	196
Aseptic Packaging Demand	197
Russia.....	199
Other Eastern Europe.....	204
Africa/Mideast.....	209
Aseptic Packaging Demand	211
Turkey.....	213
Other Africa/Mideast	217

INDUSTRY STRUCTURE

General	222
Market Share	224
Acquisitions & Divestitures	227
Cooperative Agreements.....	229
Competitive Strategies.....	231
Marketing & Distribution	233

COMPANY PROFILES

Amcort Limited	236
Baxter International.....	239
Becton, Dickinson and Company	241
Bemis Company	242
Bosch (Robert) GmbH	244
Catalent Pharma Solutions.....	247
CFT SpA	248
Coesia SpA	250
DS Smith plc	252
DuPont (EI) de Nemours.....	254
Ferd AS	255
Fujimori Kogyo	258
GEA Group AG.....	259
Goglio SpA.....	262
Greatview Aseptic Packaging	265
Jpak Group	267
Krones AG.....	268
Nestlé SA.....	271

Nipro Corporation.....	273
OYSTAR Holding	275
Printpack Incorporated	277
Reynolds Group.....	279
rommelag ag	283
Salzgitter AG	285
Scholle Corporation	287
SCHOTT AG	290
Sealed Air.....	293
Serac Group.....	296
Shanghai Jielong Industry.....	297
Shanghai Skylong Packaging Machinery	298
Shibuya Kogyo.....	300
Shikoku Kakoki	301
Stork Food and Dairy Systems	303
Tetra Laval International.....	304
Thimonnier	308
Vetter Pharma-Fertigung	309
West Pharmaceutical Services.....	311
Wihuri Oy	314
Other Companies Mentioned in the Study	316

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	11
2 World Population by Region	13
3 World Urban Population by Region	15
4 World Per Capita Gross Domestic Product by Region.....	17
5 World Personal Consumption Expenditures by Region	19
6 World Packaging Demand by Region	23
7 World Manufacturing Value Added by Region.....	25
8 World Food & Beverage Manufacturing Value Added by Region	28
9 World Pharmaceutical Shipments by Region.....	31

OVERVIEW

1 World Aseptic Packaging Demand by Region	46
Cht World Aseptic Packaging Demand by Region, 2010	47
2 World Aseptic Packaging Demand by Product	49
Cht World Aseptic Packaging Demand by Product, 2010	50
3 World Aseptic Carton Demand by Region ..	53
(continued on following page)	

List of Tables/Charts

(continued from previous page)

Cht World Aseptic Carton Demand by Region, 2010	54
4 World Aseptic Bottle Demand by Region & Type	55
Cht World Aseptic Bottle Demand by Region, 2010	56
5 World Aseptic Bag & Pouch Demand by Region	62
Cht World Aseptic Bag & Pouch Demand by Region, 2010	63
6 World Other Aseptic Packaging Demand by Region & Product	64
Cht World Other Aseptic Packaging Demand by Region, 2010	65
7 World Aseptic Packaging Demand by Market	73
Cht World Aseptic Packaging Demand by Market, 2010	73
8 World Beverage Market for Aseptic Packaging by Region & Type	76
Cht World Beverage Market for Aseptic Packaging by Region, 2010	77
9 World Food Market for Aseptic Packaging by Region	81
Cht World Food Market for Aseptic Packaging by Region, 2010	82
10 World Pharmaceutical Market for Aseptic Packaging by Region	86
Cht World Pharmaceutical Market for Aseptic Packaging by Region, 2010	87

NORTH AMERICA

1 North America: Aseptic Packaging Market Environment	89
2 North America: Aseptic Packaging Demand by Product & Market	91
Cht North America: Aseptic Packaging Demand by Country, 2010	92
3 United States: Aseptic Packaging Market Environment	94
4 United States: Aseptic Packaging Demand by Product & Market	97
5 Canada: Aseptic Packaging Market Environment	101
6 Canada: Aseptic Packaging Demand by Product & Market	103
7 Mexico: Aseptic Packaging Market Environment	106
8 Mexico: Aseptic Packaging Demand by Product & Market	108

WESTERN EUROPE

1 Western Europe: Aseptic Packaging Market Environment	110
---	-----

2 Western Europe: Aseptic Packaging Demand by Product & Market	112
Cht Western Europe: Aseptic Packaging Demand by Country, 2010	113
3 France: Aseptic Packaging Market Environment	115
4 France: Aseptic Packaging Demand by Product & Market	117
5 Germany: Aseptic Packaging Market Environment	120
6 Germany: Aseptic Packaging Demand by Product & Market	122
7 Italy: Aseptic Packaging Market Environment	125
8 Italy: Aseptic Packaging Demand by Product & Market	127
9 Netherlands: Aseptic Packaging Market Environment	130
10 Netherlands: Aseptic Packaging Demand by Product & Market	132
11 Spain: Aseptic Packaging Market Environment	134
12 Spain: Aseptic Packaging Demand by Product & Market	136
13 United Kingdom: Aseptic Packaging Market Environment	138
14 United Kingdom: Aseptic Packaging Demand by Product & Market	140
15 Other Western Europe: Aseptic Packaging Market Environment	142
16 Other Western Europe: Aseptic Packaging Demand by Product & Market	144

ASIA/PACIFIC

1 Asia/Pacific: Aseptic Packaging Market Environment	149
2 Asia/Pacific: Aseptic Packaging Demand by Product & Market	151
Cht Asia/Pacific: Aseptic Packaging Demand by Country, 2010	152
3 Australia: Aseptic Packaging Market Environment	153
4 Australia: Aseptic Packaging Demand by Product & Market	155
5 China: Aseptic Packaging Market Environment	158
6 China: Aseptic Packaging Demand by Product & Market	160
7 India: Aseptic Packaging Market Environment	164
8 India: Aseptic Packaging Demand by Product & Market	166
9 Japan: Aseptic Packaging Market Environment	169
10 Japan: Aseptic Packaging Demand by Product & Market	171

11 South Korea: Aseptic Packaging Market Environment	174
12 South Korea: Aseptic Packaging Demand by Product & Market	176
13 Other Asia/Pacific: Aseptic Packaging Market Environment	178
14 Other Asia/Pacific: Aseptic Packaging Demand by Product, Market & Country	181

OTHER REGIONS

1 Central & South America: Aseptic Packaging Market Environment	185
2 Central & South America: Aseptic Packaging Demand by Product & Market	187
3 Brazil: Aseptic Packaging Market Environment	189
4 Brazil: Aseptic Packaging Demand by Product & Market	191
5 Other Central & South America: Aseptic Packaging Market Environment	193
6 Other Central & South America: Aseptic Packaging Demand by Product & Market	195
7 Eastern Europe: Aseptic Packaging Market Environment	197
8 Eastern Europe: Aseptic Packaging Demand by Product & Market	199
9 Russia: Aseptic Packaging Market Environment	201
10 Russia: Aseptic Packaging Demand by Product & Market	203
11 Other Eastern Europe: Aseptic Packaging Market Environment	206
12 Other Eastern Europe: Aseptic Packaging Demand by Product & Market	208
13 Africa/Mideast: Aseptic Packaging Market Environment	210
14 Africa/Mideast: Aseptic Packaging Demand by Product & Market	212
15 Turkey: Aseptic Packaging Market Environment	214
16 Turkey: Aseptic Packaging Demand by Product & Market	216
17 Other Africa/Mideast: Aseptic Packaging Market Environment	218
18 Other Africa/Mideast: Aseptic Packaging Demand by Product & Market	220

INDUSTRY STRUCTURE

1 World Aseptic Packaging Sales by Company, 2010	223
Cht World Aseptic Packaging Market Share, 2010	224
2 Selected Acquisitions & Divestitures	229
3 Selected Cooperative Agreements	231

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Aseptic packaging will benefit from a rising number of applications, its cost and convenience attributes, and strong growth in developing regions, particularly in China, India and Brazil.

World demand to increase 9.1% yearly through 2015

Global demand for aseptic packaging is projected to grow 9.1 percent per year to \$35.8 billion in 2015. Gains will be driven by the rising number of applications and the cost and convenience benefits associated with aseptic packaging (especially in terms of ambient storage and transportation). Strong growth is expected in developing countries, where the lack of a cold supply chain infrastructure will continue to fuel demand for shelf-stable products packaged aseptically. These packaged products generally have a shelf life of six to twelve months or more without refrigeration.

Cartons to continue aseptic packaging dominance

In 2010, aseptic cartons accounted for 44 percent of the aseptic packaging market worldwide. Gains will be aided by their widespread use in milk packaging applications. Additional factors providing momentum include favorable consumption trends in other beverages, such as teas and nondairy milk alternatives, and in liquid food applications.

Growth opportunities will exist in other product segments, especially for high-value pharmaceutical packaging products. For instance, prefillable syringes will exhibit rapid gains due to growing applications in the delivery of critical care, emergency and patient-administered parenteral medication.



Beverages will continue to represent over half of the global aseptic packaging market. Demand for aseptic packaging in beverage applications will benefit from output growth coupled with expanding applications resulting from cost and sustainability benefits of aseptic packaging. Gains in the food market will be driven by expanding applications with liquid, low-particulate and pumpable foods, often through the replacement of metal cans and glass jars. Demand for aseptic packaging in pharmaceutical applications will be fueled by preferences for unit-dose and other convenient drug delivery formats combined with the rising availability and consumption of biotechnology-based drugs, which require the use of aseptic packaging to prevent contamination and assure product sterility.

Asia, Central/South America to lead regional growth

While the US accounted for only 15 percent of the world aseptic packaging market in 2010, the country represented one-third of the aseptic pharmaceutical packaging market. Gains in the US will reflect the broadening aseptic filling requirements with liquid pharmaceuticals. Overall, the fastest growth in the aseptic packaging market will be posted in Asia, with India and China expected to see the fastest advances worldwide. Between 2015 and 2020, China alone will account for 28 percent of global market value gains. Central and South America will also post above-average advances, with Brazil in particular continuing to exhibit double-digit annual growth through 2020.

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**Sample Text,
 Table & Chart**

MARKETS

China: Aseptic Packaging Demand

Demand for aseptic packaging in China totaled \$4.5 billion representing 56 of total demand in the Asia/Pacific region. Over the decade, China's market has experienced very strong growth, averaging more than 19 percent per annum between 2000 and 2010. This is due to gains in manufacturing activity, personal income levels and consumer expenditures, combined with favorable urbanization trends, which tend to boost demand for packaged goods. In the coming years, the market will continue to support aseptic packaging requirements in China as a result of increased exports of Chinese goods to more advanced consumer economies (which will create the need for higher-quality packaging).

Through 2015, demand for aseptic packaging in China is forecast to increase to \$10 billion, faster than the overall market -- beverages, food and pharmaceuticals -- which will see robust gains, although growth has been over the 2000-2010 period. Continued overall economic growth and manufacturing activity, plus continued healthy expansion in the main end-use sectors (e.g., milk packaging) will support aseptic packaging demand through the forecast period and beyond.

Aseptic cartons will continue to dominate China's aseptic packaging market, due to their widespread use in ultra high temperature milk packaging. Demand for aseptically-packaged milk will continue to increase with increasing personal incomes, which make milk more affordable to a broader range of consumers. Demand for aseptic cartons will also be supported by its lengthy unrefrigerated shelf life, which will support milk consumption in rural areas without refrigerators. Other aseptic packaging markets, such as ready-to-drink teas and wine, will continue to use aseptic cartons for product differentiation and cost control. On the

158

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TABLE VI-5

**CHINA:
 ASEPTIC PACKAGING MARKET ENVIRONMENT**

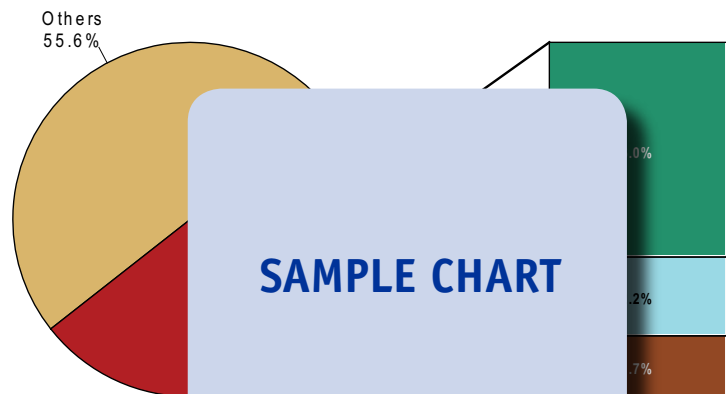
Item	2000	2005	2010	2015	2020
Population (mil persons)					1.37
\$ GDP/capita					1,000
Gross Domestic Product (bil 2009\$)					10,000
\$ packaging/capita					100
Packaging Demand (bil \$)					100
\$ aseptic packaging/capita					7
\$ aseptic packaging/000\$ GDP					3
\$ aseptic packaging/000\$ packaging					6
Aseptic Packaging Demand (mil \$)					100

**SAMPLE
 TABLE**

SAMPLE TEXT

CHART VIII-1

**WORLD ASEPTIC PACKAGING MARKET SHARE
 (\$23.2 billion, 2010)**

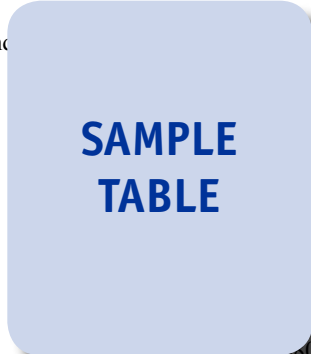


SAMPLE CHART

**Sample Profile,
 Table & Forecast**

TABLE VI-6
CHINA:
ASEPTIC PACKAGING DEMAND BY PRODUCT & MARKET
 (million dollars)

Item	2000	2005	2010	2015	2020
Asia/Pacific Aseptic Packaging Demand % China					
Aseptic Packaging Demand By Product:					
Cartons					
Bottles					
Bags & Pouches					
Other Aseptic Packaging					
By Market:					
Beverages					
Food					
Pharmaceuticals	110	250	530	950	1550



COMPANY PROFILES

CFT SpA
 Via Paradigna 94/a
 Parma 43100
 Italy
 39-0521-2771
 http://www.cft.it

Annual Sales:
 Employment:
 Key Products:

SAMPLE PROFILE

CFT specializes in the development, manufacture and sale of systems and technologies for processing and packaging food and beverage products. The privately held Company conducts research, manufacturing and sales operations at its headquarters in Parma, Italy. CFT serves customers mainly in Europe.

The Company is active in the world aseptic packaging industry through the production of aseptic filling machines sold through the MACROPAK, FLAVOUR MARK ANTARES and LABOPAK product lines. All of CFT's aseptic fillers operate exclusively with steam as the machine and cap sterilizing agent, thus eliminating any possibility of product contamination. A representative product in the MACROPAK range is MACROPAK AF/2 unit, which is a two-head filling machine used to aseptically package semifinished or finished food products, including liquid, semiliquid and highly viscous products, in pre-sterilized bags.

CFT's FLAVOUR MARK ANTARES aseptic vertical form-fill-seal machine is designed for packaging various pumpable foods and liquids with pH level greater than 4.5. This unit provides high speed

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"The fastest gains in aseptic packaging demand are expected in the food market, driven by expanding applications with liquid foods, often via the replacement of metal cans and glass jars. Good opportunities will also be found in the pharmaceutical market. The impact of regulatory reforms, coupled with the country's pursuit of new proprietary medicines and the expansion of drug distribution activities, will underlie gains. Prefillable inhalers, prefillable syringes, parenteral vials and intravenous (IV) containers are among the products expected to ..."
 --Section VI, pg. 159-60

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OTHER STUDIES

Plastic Containers

US demand for plastic containers is forecast to increase 4.9 percent annually to \$32.4 billion in 2016, consuming 14.2 billion pounds of resin. Plastic bottles and jars will remain the dominant segment but will be outpaced by other plastic container types, including tubs, cups, bowls and pails. Among the leading resins, PET will continue outpacing HDPE. This study analyzes the 13 billion pound US plastic container industry, with forecasts for 2016 and 2021 by type and resin. The study also evaluates company market share and profiles industry players.

#2954 October 2012 \$5100

Cups & Lids

US demand for cups and lids is forecast to increase 4.1 percent per year to \$8.9 billion in 2016. Although drinking cups will continue to dominate, the fastest gains are anticipated in the packaging cup segment due to solid outlooks for demand in key packaging cup-using markets such as yogurt, coffee and tea, and fresh fruits and vegetables. This study analyzes the \$7.2 billion US cups and lids industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2935 August 2012 \$5100

World Foodservice Disposables

World demand for foodservice disposables will rise 5.4 percent per year to \$53.3 billion in 2015. Disposable serviceware will remain the largest segment, while disposable packaging grows the fastest. The fastest growth will be seen in Asia, with China and India expected to experience the most rapid increases in the world. This study analyzes the \$41 billion world foodservice disposables industry, with forecasts for 2015 and 2020 by product, market, world region and for 18 major countries. The study also evaluates company market share and profiles industry competitors.

#2831 December 2011 \$5900

Aseptic Packaging

US demand for aseptic packaging is projected to expand 8.0 percent per year to \$5.1 billion in 2015. Gains will be driven by drug sterility requirements and ambient distribution and storage advantages for food and beverages. Prefillable syringes and plastic bottles will be among the fastest growing types, with pharmaceuticals the fastest growing market. This study analyzes the \$3.5 billion US aseptic packaging industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry competitors.

#2827 December 2011 \$4900

Beverage Containers in China

Demand for beverage containers in China will rise 9.6 percent per year through 2015. Plastic beverage containers will remain the largest material segment, while paperboard containers grow the fastest, led by aseptic cartons. Milk containers will be the largest nonalcoholic beverage market, while beer remains the largest alcoholic beverage market. This study analyzes the 297 billion unit beverage container industry in China, with forecasts for 2015 and 2020 by market and material. The study also evaluates company market share and profiles industry participants.

#2815 November 2011 \$5400

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