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World Rigid Packaging

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

Study #2909 | July 2012 | \$6100 | 409 pages



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

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Growth in global manufacturing output and greater spending on packaged goods worldwide (particularly food and beverages in the Asia/Pacific region) will aid rigid packaging demand.

World demand to increase 6.4% yearly through 2016

World demand for rigid packaging is forecast to increase 6.4 percent per year to \$472 billion in 2016. Factors contributing to rising demand include growth in global manufacturing output, increased consumer spending on packaged goods worldwide, and demographic trends such as increasing urban populations, as urban consumers tend to use more packaged foods than their rural counterparts. Rigid packaging consumption will also be supported by the extensive and expanding recycling infrastructure for metal, glass, and plastic.

The largest markets for rigid packaging are food and beverages, which together represented 64 percent of total rigid packaging demand in 2011. Strong gains are expected for plastic bottles and containers due to cost and performance advantages, as well as further development of food-grade materials. Beverage applications for rigid packaging will benefit from expanded processing capacity. Rigid packaging demand in pharmaceutical applications is forecast to see above average growth, boosted by fast growing pharmaceutical manufacturing capabilities, especially in Asia.

Food & beverage market to benefit Asia/Pacific region

The most rapid gains in demand for rigid packaging will be seen in the world's developing regions. In particular, the Asia/Pacific region will post the fastest growth and remain the largest market due to its large food and beverage industries. In contrast, market maturity in developed countries (as well as market saturation

World Rigid Packaging Demand (\$472 billion, 2011)

Asia/Pacific
46%

Western Europe
18%

North America
20%

Other Regions
16%



photo: The Financial Times, Ltd.

in bedrock applications such as bottled and canned beers and carbonated soft drinks) will serve to limit faster gains in rigid packaging demand. Overall, some of the best growth rates are expected in Indonesia, China, and India, with Brazil, Turkey, Russia, and Mexico also forecast to see strong gains.

Plastic to remain dominant, fastest-growing material

In terms of materials, plastic will continue to account for the largest share of demand and will also see the fastest gains, as plastic containers grab market share at the expense of paperboard, metal, and glass packaging in many applications. Gains for plastic containers will be attributable to their cost advantages over some alternatives,

shatter resistance, resealability, graphics capabilities, ease of opening and dispensing, and improved resin and processing technologies.

Still, metal cans will remain an important segment of the rigid packaging mix due to their durability, long shelf life, tamper resistance, ease of storage, recyclability, and the economic advantages of canned items in controlling food expenditures, as metal cans are often used to package low-price food items. Opportunities for paperboard rigid packaging will reflect a competitive price structure, suitability for high quality graphics, and a favorable environmental profile. On the other hand, the heavier weight of glass containers and their risk of breakage will continue to limit applications -- especially in export markets -- due to high shipping costs.

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**Sample Text,
 Table & Chart**

ASIA/PACIFIC

China: Rigid Packaging Markets

Demand for rigid packaging in China totaled \$71.3 billion representing more than one-half of total demand in the Asia/Pacific region. Over the past decade, China's market has experienced strong growth, averaging 17 percent per annum between 2001 and 2011. Strong gains in manufacturing activity, personal income levels, consumer expenditures, combined with favorable urbanization trends will continue to boost demand for packaged goods. In the coming years, these factors will continue to support rigid packaging requirements in China, as will increased exports of Chinese goods to more advanced consumer economies (which will create the need for higher-quality, more environmentally friendly packaging). Still, China's rigid packaging industry will remain much less developed than that of countries like Japan (with much lower per capita consumption), a reflection of the large share of rural and relatively less affluent Chinese citizens.

Through 2016, demand for rigid packaging in China is forecast to increase to \$100 billion, well above both the United States and Europe -- the region's other major markets -- including food, beverage and pharmaceutical products -- are expected to experience slower growth rates as they will decelerate from the pace seen in the past decade. Other sectors will follow similar decelerations as manufacturing activity. Still, continued growth in end-use sectors (i.e., food and beverages) will support rigid packaging demand through the forecast period and beyond.

The pharmaceutical market will continue to see above average growth, providing good opportunities for rigid packaging development. The impact of regulatory reforms, coupled with the expansion of distribution and development activities, will underlie gains. Most pharmaceutical packaging products will record fast-paced sales growth.

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**SAMPLE
 TEXT**

TABLE VI-5

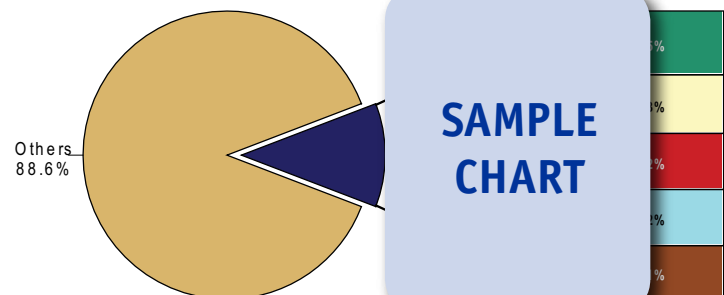
**CHINA:
 RIGID PACKAGING DEMAND BY MARKET**

Item	2001	2006	2011	2016	2021
Population (mil persons)	1.2	1.4	1.4	1.4	1.4
\$ GDP/capita	1,000	2,000	4,000	6,000	8,000
Gross Domestic Product (bil 2010\$)	100	200	400	600	800
Manufacturing Value Added (bil 2010\$)	100	200	400	600	800
Food & Beverage MVA (bil 2010\$)	10	20	40	60	80
\$ rigid packaging/capita	0.1	0.2	0.4	0.6	0.8
\$ rigid packaging/000\$ GDP	0.1	0.2	0.4	0.6	0.8
Rigid Packaging Demand (mil \$)	100	200	400	600	800
Food	50	100	200	300	400
Beverages	10	20	40	60	80
Pharmaceuticals	5	10	20	30	40
Other Nondurable Goods	5	10	20	30	40
Durable Goods	5	10	20	30	40

**SAMPLE
 TABLE**

CHART VIII-1

**WORLD RIGID PACKAGING MARKET SHARE, 2011
 (\$345 billion)**



**SAMPLE
 CHART**

Sample Profile, Table & Forecast

TABLE VI-6

CHINA: RIGID PACKAGING DEMAND BY MATERIAL
(million dollars)

Item	2001	2006	2011	2016	2021
Asia/Pacific Rigid Packaging Demand % China					
Rigid Packaging Demand					
Plastic					
Metal					
Paperboard					
Glass					

SAMPLE
TABLE

COMPANY PROFILES

Albéa Group

Immeuble Le Signac
 ZAC des Barbanniers
 1, avenue
 92635 C
 France
 33-1-819
 http://w

SAMPLE
PROFILE

Sales: \$
 Employ
 Key Pro...ars; and bottles

Albéa Group is a manufacturer of packaging products for the cosmetics, fragrance, skin care, personal care, and oral care markets. The Company is a subsidiary of Sun Capital Partners Incorporated (Boca Raton, Florida), a private equity firm.

The Company is active in the world rigid packaging industry through the manufacture of plastic, laminate, and other tubes, as well as jars and bottles. Plastic tubes are cylindrical types with 13.5- to 60-millimeter diameters made in monolayer or multilayer structures. These plastic tubes, which have capacities of up to 500 milliliters, are suitable for packaging shampoos, lotions, and other items. Albéa Group's plastic tubes are available with a range of closures, including flip-top and screw-on caps. The Company also makes PRECITUBE pumps for use with its plastic tubes, which allow for airless dispensing. Furthermore, Albéa Group makes ENCORE plastic tubes, which are produced from over 50-percent recycled high density polyethylene.

Laminate tubes from Albéa are constructed using either an aluminum foil or ethylene vinyl alcohol (EVOH) layer inside a multilayer

“Rigid plastic packaging -- the largest material type -- accounted for 37 percent of total rigid packaging demand in China in 2011. Plastic packaging will continue to gain market share over metal, paperboard, and glass packaging. Improvements in barrier properties of plastic containers, coupled with their attractive price points, will boost demand for plastic rigid packaging, often at the expense of metal and glass containers, which are more expensive, less convenient, and, in the case of metal containers, suffer from a ...”
 --Section VI, pg. 156

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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

Rigid Bulk Packaging

US demand for rigid bulk packaging will rise 3.9 percent yearly to \$7.0 billion in 2017, led by RIBC and material handling containers. Chemicals and pharmaceuticals, and plastic, rubber and fiber markets will drive gains in the dominant nondurables segment. Among container materials, plastic will grow the fastest. This study analyzes the \$5.7 billion US rigid bulk packaging industry, with forecasts for 2017 and 2022 by material, product and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2993 February 2013 \$5100

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

Protective Packaging

Protective packaging demand in the US is projected to increase 5.0 percent annually to \$5.9 billion in 2016. The increasing popularity of Internet shopping will benefit protective mailers, air pillows and bubble packaging. A recovery in manufacturing will spur gains for foam and molded pulp protective packaging. This study analyzes the \$4.6 billion US protective packaging industry, with forecasts for 2016 and 2021 by function, market and product. The study also evaluates company market share and profiles industry players.

#2839 January 2012 \$5100

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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