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# World Protective Packaging

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

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Study #2943 | September 2012 | \$6100 | 399 pages

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**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](mailto:info@freedoniagroup.com)

[www.freedoniagroup.com](http://www.freedoniagroup.com)

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*Protective packaging demand will benefit from accelerated global manufacturing output, as well as the increasing popularity of Internet shopping for relatively small items worldwide.*

## Worldwide demand to rise 6.3% yearly through 2016

World demand for protective packaging is forecast to increase 6.3 percent per year to \$24.5 billion in 2016. Factors contributing to rising demand include an acceleration in global manufacturing output, increased consumer spending on packaged goods worldwide, and demographic trends such as increasing urban populations, as urban residents tend to consume more packaged goods than their rural counterparts. The increasing popularity of Internet shopping in both developed and developing regions will fuel demand for protective packaging for the shipping of relatively small items. These trends will further boost demand for cost-effective packaging that protects goods from any damaging effects of shipping and handling throughout the supply chain.

## Foamed plastics to remain largest product segment

Foamed plastics will continue to account for the largest share of world protective packaging demand. Growth in this segment will be aided by foamed plastics' light weight and superior cushioning features, along with their versatility in conforming to virtually any shape to enhance protection. However, demand will be impacted by alternatives with more favorable environmental profiles, including bioplastic and nonplastic packaging products.

## Air pillows, insulated shipping containers, among fastest growing

Demand for protective mailers will be fueled by the rise in online shopping, which



will stimulate increased requirements for economical, lightweight, pre-constructed protective packaging for the shipping of a wide variety of relatively small objects. Insulated shipping containers will be one of the fastest growing protective packaging product types as a result of increasing cold chain requirements in the pharmaceutical and life science industries, as well as rising online sales of perishable foods. Pharmaceutical uses will be driven by rapidly expanding markets for biotechnology drugs and vaccines, which are often temperature-sensitive. Demand for air pillows will see rapid growth as well, as they are gaining market share over loose-fill due to their relatively low cost, versatility, and cleanliness during unpacking. Conversely, more moderate gains are anticipated for paperboard protectors, paper fill, and dunnage bags, due to intense competition and mature applications.

## Developing regions to see fastest gains in demand

The world's developing regions will exhibit the fastest advances in protective packaging demand. Population growth, greater urbanization, industrialization trends, and increases in international trade will support gains in these regions' generally underdeveloped packaging sectors. In particular, the Asia/Pacific region will post the fastest growth and remain the largest market due to its important manufacturing sector (by far the biggest in the world). Overall, some of the highest growth rates are expected in India, China, and Indonesia, with Brazil, Russia, Turkey, Mexico, and South Africa also expected to exhibit healthy growth. China alone will account for 31 percent of global value gains in protective packaging demand through 2016.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### China: Protective Packaging Demand

Demand for protective packaging in China totaled \$2.7 billion in 2011, representing 43 percent of the total market in the Asia/Pacific region (ten years earlier, China accounted for only 21 percent of the region's total). Over the past decade, China's market has experienced very strong growth, averaging 17 percent per annum between 2001 and 2011. Strong gains in manufacturing activity, personal income and consumer expenditures, combined with fast growth in opening and favorable urbanization trends, will continue to boost demand for packaged goods. In the coming years, these factors will continue to support protective packaging requirements in China, as will increased exports of Chinese goods to more advanced consumer economies (which will create the need for higher quality and more environmentally friendly packaging). Still, China's protective packaging industry will remain much less developed than that of countries like Japan (China will continue to have much lower per capita consumption), a reflection of the large share of rural and relatively less affluent Chinese citizens.

Through 2016, demand for protective packaging in China is forecast to see continued growth, reaching \$4.5 billion, faster than the overall market. Demand for all product types and applications will continue to grow at strong growth rates through the forecast period. This will be driven by continued economic growth and manufacturing expansion. The main end-use sectors for protective packaging will continue to be e-commerce and home shopping. Demand for protective mailers will be fueled by the increased popularity of home shopping. Demand for environmentally friendly products, such as molded bamboo packaging, will also see healthy growth, especially in export packaging applications.

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**SAMPLE TEXT**

TABLE VI-5

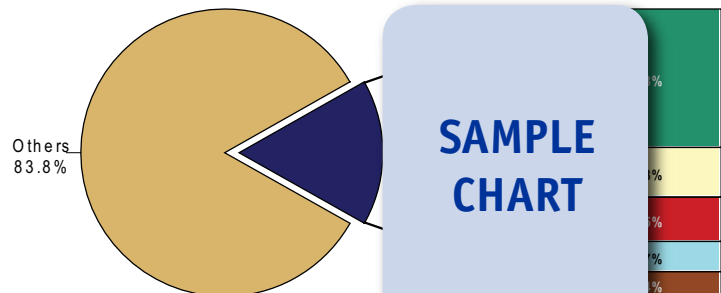
### CHINA: PROTECTIVE PACKAGING MARKET ENVIRONMENT

Item	2001	2006	2011	2016	2021
Population (million persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2010\$)					
% manufacturing					
Manufacturing Value Added (bil 2010\$)					
\$ protective packaging/000\$ MVA					
Protective Packaging Demand (mil \$)					
% China					
Asia/Pacific Protective Packaging (mil \$)					

**SAMPLE TABLE**

CHART VIII-1

### WORLD PROTECTIVE PACKAGING MARKET SHARE (\$18.0 billion, 2011)

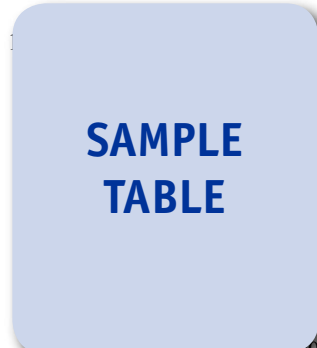


**SAMPLE CHART**

## Sample Profile, Table & Forecast

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

Item	2001	2006	2011	2016	2021
Population (million persons)					
\$ protective packaging/capita					
Protective Packaging Demand					
By Product:					
Foamed Plastics					
Paperboard Protectors					
Protective Mailers					
Other Protective Packaging					
By Market:					
Manufacturing					
Internet & Catalogs					
Retail & Other Markets	30	70	180	360	630



**COMPANY PROFILES**

**Polyair InterPack Incorporated**  
 330 Humberline Drive  
 Toronto, Ontario M9W 1R5  
 Canada  
 416-679-6600  
 http://www.polyair.com

Annual Sales:  
 Employment:

Key Products: bubble material, foam products, mailers, and packaging systems.

Polyair Inter Pack is a manufacturer of packaging, insulation products, and pool covers. According to the Company, the majority of its sales are generated in the US. The Company is owned by Glencoe Skydome Holdings LP (Chicago, Illinois), an operating unit of private equity firm Glencoe Capital LLC (Chicago, Illinois).

The Company is active in the world protective packaging industry through the manufacture of various packaging products. Specific items include bubble material, foam products, mailers, and packaging systems.

**Products** -- Bubble material from Polyair is marketed under the DURABUBBLE brand name. DURABUBBLE material, which is offered in standard and antistatic types, features 1/2-, 4/5-, and 1-1/4-centimeter (cm) bubble heights. Polyair makes such DURABUBBLE dispensers as BOX-A-BUBBLE, which is an octagonal shaped carton containing a 1-1/5-meter-wide roll of DURABUBBLE perforated at 30-1/2 cm for convenient tear-off sheets; and HANDI-PAK products that dispense DURABUBBLE in 30-1/2- or 61-cm widths for use in retail stores, mail rooms, warehouses, and other applications.

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“As is the case in other emerging economies, demographic and lifestyle patterns already in evidence in the developed world will be increasingly apparent in China as well, resulting in greater demand for highly packaged consumer products. For instance, China’s urban populace, who consume more packaged products than their rural counterparts, will continue to increase (from 51 percent of China’s total population in 2011 to 56 percent in 2016). Urban areas are also rapidly developing their Internet infrastructure, boosting online shopping trends and the corresponding protective packaging requirements.”  
 --Section VI, pg. 171

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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

**World Rigid Packaging**

World demand for rigid packaging is forecast to increase 6.4% per year to \$472 billion in 2016. The most rapid increases in demand will be seen in developing areas, especially in the Asia/Pacific region. Plastic will be the fastest growing container material, while beverages will remain the largest market. This study analyzes the \$345 billion world rigid container industry, with forecasts for 2016 and 2021 by container material, market, world region and for 19 major countries. The study also evaluates company market share and profiles industry competitors.

#2909 ..... July 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

**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

**Active & Intelligent Packaging**

US demand for active and intelligent packaging will climb eight percent annually through 2015. Intelligent packaging will be the fastest growing segment, propelled by Quick Response (QR) and other two-dimensional (2D) barcodes. The dominant active packaging segment will be driven by above-average advances for gas scavengers and suscepter packaging. This study analyzes the \$1.5 billion US active and intelligent packaging industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.

#2772 ..... June 2011 ..... \$4900

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