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Plastic Containers

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

Study #2954 | October 2012 | \$5100 | 386 pages

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Growth in plastic container demand will be driven by performance advantages over alternative packaging formats as well as a recovery in the broader economy following the 2007-2009 recession.

US demand to rise 4.9% annually through 2016

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. Growth will be driven by performance advantages over alternative packaging formats as well as a recovery in the broader economy following the 2007-2009 recession.

Volume gains will lag value gains as the average weight per container unit continues to fall, reflecting preferences for small, single-serving containers in a number of food and beverage markets, and lightweighting of containers to reduce material use and enhance sustainability. In unit terms, demand is expected to climb 3.0 percent yearly to 304 billion units in 2016, slightly below the 2006-2011 pace and held back by sluggish consumption trends in some high-volume beverage markets. Though plastic containers will face increased competition from pouches and other types of flexible packaging, these will often augment rather than replace rigid containers.

Tubs, cups, bowls, pails & other types to lead gains

Bottles and jars, which represented 77 percent of plastic container poundage in 2011, are by far the leading plastic container type. Through 2016, plastic bottle and jar demand is expected to rise 2.8 percent per year to 165 billion units, moderated by the already-dominant position of plastic in many applications,

US Plastic Container Demand (14.2 billion pounds, 2016)



with few new areas existing for large-scale conversions. Additionally, bottle unit growth in the 2001-2006 period benefited significantly from skyrocketing sales of bottled water. Going forward, a substantial deceleration in bottled water growth is expected based on environmental considerations. Still, advances will be aided by healthy prospects for smaller single-serving beverage bottles. Among major bottle and jar markets, the fastest gains are anticipated for pharmaceutical and food applications. In pharmaceutical applications, growth will be supported by rising pharmaceutical production, attributable to an expansion among the older population segments, which comprise many of the most intensive consumers of pharmaceuticals and related containers. Demand in food

uses will be driven by improvements in processing and barrier properties that will create further opportunities for polyethylene terephthalate (PET) bottles in hot-fill and aseptic applications.

Faster volume gains are anticipated for other plastic container types, such as tubs, cups, and bowls. Demand will be supported by the convenience, portability, and portion control benefits of single-serving cup packaging as well as favorable outlooks for foods typically packaged in tubs and cups. A rebound is expected for plastic pails based on a recovery in construction activity from low levels in 2011, which will boost demand for paints, adhesives, driveway sealers, and other goods packaged in pails.

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Sample Text, Table & Chart

OTHER PLASTIC CONTAINERS

Squeeze Tubes

Demand for plastic squeeze tubes (excluding laminate tubes) is forecast to increase to 1.5 billion units in 2016. In value terms, resin consumption will advance to \$1.2 billion in 2016. Unconstrained growth represents a major opportunity for the industry. The 2009-2011 performance, which was impacted by the recession, is expected to be a recovery period during the 2009 recession. Demand for plastic squeeze tubes including performance in the home care and personal care segments, such as dispensing size, and good aesthetics. The decorative capabilities of plastic tubes increase their suitability for use with multiple closure or applicator types, which increase opportunities for product differentiation. Additional demand for extruded plastic tubes can be tailored to meet specific moisture and oxygen barrier requirements. Value gains will be restrained by competition from low-cost imported tubes from Asia.

Plastic squeeze tubes are formed via the extrusion process, which results in continuous sleeves that are then cut to various lengths and joined to a shoulder, which is then molded onto the sleeve. Unlike laminate tubes and aluminum tubes, extruded plastic tubes maintain their original shape during use. Tube structures may be a monolayer of polyethylene or coextrusions of multiple materials. Monolayer tubes consist of high, medium, or low density polyethylene, with medium density polyethylene often preferred due to its intermediate level of rigidity. Coextruded tubes are comprised of layers of polyethylene and other resins offering enhanced barrier properties, such as EVOH. Coextrusions are used to create unique textures and provide visual appeal. Polypropylene and DuPont's SURLYN (ionomer polyethylene copolymer) also find use in extruded plastic squeeze tubes.

Cosmetics and toiletries and pharmaceuticals account for 66.5% of plastic squeeze tube demand. Above average growth is a

248

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TABLE III-4

POLYPROPYLENE DEMAND IN PLASTIC CONTAINERS (million pounds)

| Item | 2001 | 2006 | 2011 | 2016 | 2021 |
|-------------------------------------|------|------|------|------|------|
| Total Polypropylene Demand | 15 | 18 | 20 | 22 | 25 |
| % containers | 10 | 12 | 15 | 18 | 20 |
| Polypropylene in Plastic Containers | 15 | 18 | 20 | 22 | 25 |
| Tubs, Cups, & Bowls | 5 | 6 | 7 | 8 | 9 |
| Bottles & Jars | 3 | 4 | 5 | 6 | 7 |
| Cans | 2 | 3 | 4 | 5 | 6 |
| Trays | 1 | 2 | 3 | 4 | 5 |
| Pails | 1 | 1 | 2 | 3 | 4 |
| Squeeze Tubes | 1 | 1 | 2 | 3 | 4 |
| Other | 1 | 1 | 2 | 3 | 4 |
| % polypropylene | 10 | 12 | 15 | 18 | 20 |
| Total Container Resin Demand | 15 | 18 | 20 | 22 | 25 |

SAMPLE
TABLE

CHART VII-1

US PLASTIC CONTAINER MARKET SHARE (\$25.5 billion, 2011)

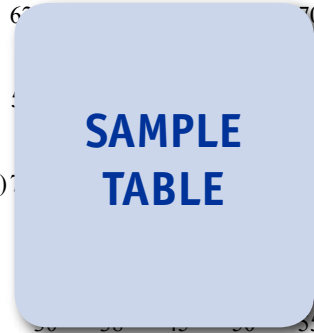


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE V-9
MILK MARKET FOR PLASTIC BOTTLES

| Item | 2001 | 2006 | 2011 | 2016 | 2021 |
|--|------|------|------|------|------|
| Fluid Milk Production (mil gal) | 67 | 67 | 67 | 67 | 70 |
| % in plastic | 10 | 10 | 10 | 10 | 13 |
| Milk Production in Plastic (mil gal) | 6.7 | 6.7 | 6.7 | 6.7 | 9.1 |
| ounces milk/unit | 12.8 | 12.8 | 12.8 | 12.8 | 14.2 |
| Plastic Milk Bottle Demand (mil units) | 0.52 | 0.52 | 0.52 | 0.52 | 0.64 |
| ounces resin/unit | 1.5 | 1.5 | 1.5 | 1.5 | 1.6 |
| Resin Demand (mil lbs) | 0.78 | 0.78 | 0.78 | 0.78 | 1.02 |
| HDPE | 0.78 | 0.78 | 0.78 | 0.78 | 1.02 |
| Other Resins | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |



COMPANY PROFILES

Ring Companies

1 Industrial Park
 Oakland, TN 38060
 901-465-6333
<http://www.rin>



Annual Sales:
 Employment:

Key Products: polyethylene containers for applications

Ring Companies is a privately held manufacturer of plastic containers and a recycler of polystyrene. The Company operates primarily through two subsidiaries: Ring Container Technologies Incorporated and RAPAC.

Ring is active in the US plastic container industry through the Ring Container Technologies subsidiary (Oakland, Tennessee), which produces polyethylene terephthalate (PET) and high density polyethylene (HDPE) containers for the food, pet care, agrochemical, and other industries. The company manufactures these products under such brand names as ULTRA 35 and TRIM-LITE. Customers include ConAgra Foods Incorporated; Del Monte Foods; Cargill Incorporated; Archer-Daniels-Midland Company; UTZ Quality Foods Incorporated; ACH Food Companies Incorporated, a subsidiary of Associated British Foods plc (United Kingdom -- UK); and Unilever plc (UK).

Ring Container Technologies' ULTRA 35 line of products encompasses 35-pound edible oil containers, which the company engineers to reduce material usage by up to 10 percent. More specifically, the reduction in materials eliminates the need for over 11.4 million tons of

“Demand for plastic milk bottles is expected to climb 1.6 percent yearly to 10.2 billion units in 2016, consuming 995 million pounds of resin. Plastic is the dominant form of packaging for milk by volume due to the significance of plastic in gallon containers and the increasing penetration of plastics into the half-gallon and smaller sizes. Unit gains will benefit from heightened demand for single-serving milk bottles in quick service restaurants, schools, and convenience stores. Vending machines offer a further avenue of growth for milk in single-serving plastic bottles.”
 --Section V, pg. 113

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OTHER STUDIES

Caps & Closures

US demand for caps and closures will rise 4.4 percent annually to \$10.4 billion in 2016. The dominant plastic cap and closure segment will post above average increases. Beverages will remain the largest market, while pharmaceuticals will be the fastest growing. Among other closure types, elastomer and rubber stopper demand will register healthy gains. This study analyzes the \$8.4 billion US cap and closure industry, with forecasts for 2016 and 2021 by raw material, product and market. The study also evaluates company market share and profiles industry players.

#2975December 2012 \$5200

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 cup and lid 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 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

Pouches

Demand for pouches in the US is projected to increase 5.1 percent per year to \$8.8 billion in 2016. Gains will be driven by faster growth for stand-up pouches stemming from sustainability, functional, and marketing advantages over alternative packaging media. The nonfood market will slightly outpace the dominant food market. This study analyzes the \$6.9 billion US market for pouches, with forecasts for 2016 and 2021 by type, market, feature and production method. The study also evaluates company market share and profiles industry players.

#2899 July 2012 \$4900

World Aseptic Packaging

World demand for aseptic packaging is projected to grow 9.1 percent annually to \$35.8 billion in 2015. India and China will experience the fastest increases in demand. Gains in the US will reflect the broadening aseptic filling requirements for liquid pharmaceuticals. Beverages will remain the dominant market worldwide. This study analyzes the \$23.2 billion world aseptic packaging industry, with forecasts for 2015 and 2020 by product, market, world region and for 17 countries. The study also evaluates company market share and profiles industry competitors.

#2859 March 2012 \$5900

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