INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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Food Containers: Rigid & Flexible

US Industry Study with Forecasts for **2017 & 2022**

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INDUSTRY STRUCTURE

Food Containers: Rigid & Flexible

US Industry Study with Forecasts for ***2017 & 2022***

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Food container unit expansion will be aided by the growing popularity of single serving packaging, such as plastic cups and pouches, in an expanding range of applications.

US demand to climb 2.9% annually through 2017

US demand for food containers is projected to climb 2.9 percent per year to $27.6 billion in 2017, reaching 307 billion units. Growth will be fueled by an expanding population base; improved real growth in disposable personal income; smaller household sizes; heightened consumer demand for foods offering a combination of convenience, quality, and value; and the use of value added packaging that provides enhanced freshness protection and convenience of use. Unit expansion will be aided by the growing popularity of single serving packaging, such as plastic cups and pouches, in an expanding range of applications.

US Food Container Demand, 2017
($27.6 billion)

Bags, pouches to be fastest growing food containers

Among major food container segments, plastic containers, and bags and pouches will record the fastest growth, the result of further supplantation of paperboard, metal, and glass containers. Plastic container gains will be driven by advantages of light weight, clarity, and shatter resistance, along with the increased presence of containers with enhanced barrier and heat resistance properties. Competition from flexible packaging such as pouches, which provide greater source reduction capability as well as reduced shipping costs, will moderate advances somewhat.

Bags and pouches will make further inroads into rigid packaging applications due to cost and performance advantages. Moreover, the inherent environmentally friendly characteristics of bags and pouches -- such as reduced material requirements and shipping costs compared to rigid containers -- will be key advantages, especially in light of pressures by major retailers making purchasing decisions based on sustainability factors. The perception, especially among younger consumers, of stand-up pouches as a more contemporary packaging format than cans, bottles, and cartons will also propel gains. Bag demand will increase more slowly based on maturity of many applications as well as competition from pouches.

Among more mature segments, favorable graphics and sustainability qualities; enhancements such as higher wet strength and moisture resistance; and the capability to improve microwave oven performance in certain uses will support continued demand for paperboard food containers. Despite further unit declines, metal cans will remain an important segment of the food container mix due to their long shelf life and positioning as a means of controlling food expenditures. Prospects for glass containers will be aided by a premium image along with safety concerns surrounding the presence of bisphenol-A (BPA) in metal food containers, which will fuel opportunities for glass, a BPA-free alternative.

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Sample Text, Table & Chart

TABLE VI-12

PAPERBOARD FOOD CONTAINER DEMAND BY MARKET (million dollars)

Item	2002	2007	2012	2017	2022
Paperboard Food Container Demand					
Dairy Products					
Grain Mill Products:					
Pet Food					
Other Grain Mill Products					
Frozen Specialties					
Baked Goods					
Meat & Related Products:					
Meat, Poultry, & Seafood					
Eggs					
Candy & Confections					
Snack Foods					
Fruits & Vegetables					
Soups & Canned Specialties					
Other Foods					

SAMPLE TABLE

PLASTIC FOOD CONTAINERS

Cans

Demand for plastic cans, or canisters, in food packaging expected to increase … million units Advances will be fu… to applicatio… been typically domi… site cans, or f… packaging, such as c… d powdered … Opportunities will e… ackaging as … to flexible packaging… ich offers pr… from crushing) and a… cup holders. will be moderated by the maturity of applications such as fro… drink mixes.

SAMPLE TEXT

Food packaging applications for plastic cans include sna… coffee, frosting, sugar, salt, drink mixes, and shortening. Leading retail coffee brands such as JM Smucker's FOLGERS and Kraft Foods Group's MAXWELL HOUSE have shifted their ground coffee packaging from metal to plastic in the past several years. Both companies' plastic cans are molded with gripping areas and/or handles and offer differentiation from conventional coffee packaging formats. Further advantages of plastic coffee cans over metal coffee cans are that plastic cans do not require the use of can openers and they eliminate sharp edges.

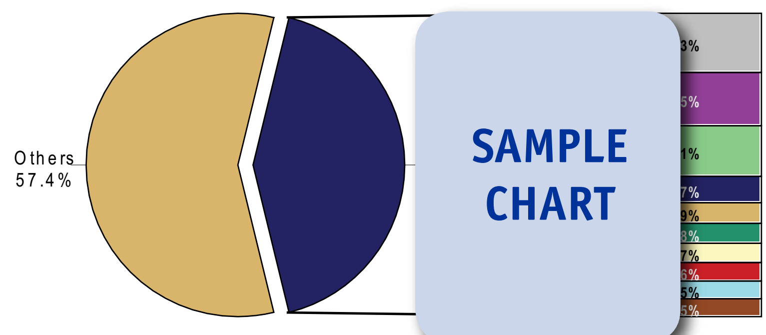
Snacks such as Frito-Lay's STAX potato crisps are packaged in multilayer HDPE canisters produced by Graham Packaging. Other snack foods in canisters include beef jerky sticks and dried fruits. While most plastic food cans are opaque, clear cans are also presen… Nuts, a subsidiary of John B. Sanfilippo & Son, uses clear P… its snack nut line. The plastic cans are 40 percent lighter tha… cans previously used and can also be reused by consumers.

In other food applications, plastic cans are the dominan… type for ready to spread frosting, including brands such as D…

276 Copyright 2013

CHART X-1

US FOOD CONTAINER MARKET SHARE, 2012 ($23.9 billion)



Sample Profile, Table & Forecast

TABLE V-2

PLASTIC BAG & POUCH DEMAND IN FOOD APPLICATIONS BY TYPE

Item	2002	2007	2012	2017	2022
Food Shipments (bil $)					
$ plastic bags & pouches/000$ food					
Plastic Bags & Pouches (mil $)					
Pouches					
Bags & Sacks					
cents/unit					
Plastic Bags & Pouches (bil units)					
% plastic					
Total Bags & Pouches (bil units)					

SAMPLE TABLE

COMPANY PROFILES

Constar International LLC
1100 Northbro
Trevose, PA 1
215-552-3700
http://www.co

Annual Sales:
Employment:

Key Products: vide mouths

SAMPLE PROFILE

Constar International LLC is primarily engaged in the manufacture of polyethylene terephthalate (PET) containers, preforms, and related closures for the beverage, food, personal care, and household chemical markets. The Company also produces high density polyethylene (HDPE) and polypropylene containers for the food market. Black Diamond Capital Management LLC (Greenwich, Connecticut) and Solus Asset Management LP (New York, New York) own majority stakes in Constar.

The Company competes in the US food containers industry via the production of PET, HDPE, and polypropylene containers used to package condiments, salad dressings, sauces, edible oils, and other foods. These containers are primarily used by major brand marketers, as well as private label food manufacturers. Among Constar's food containers are bottles and jars with narrow and wide mouths. These containers feature capacities of 10 to 48 ounces.

Constar makes its plastic containers using several proprietary technologies. For example, The Company utilizes OXBAR, MONOXBAR and DIAMONDCLEAR barrier technologies that improve product life

386

"Bag and pouch demand in snack food packaging is expected to advance 4.4 percent annually to $1.5 billion in 2017, outpacing the snack food container average. Gains will be helped by increased demand for single serving products; expanded availability of baked snacks; and continued growth for quick casual sandwich restaurants, which tend to sell small bags of chips as side items. Also stimulating growth will be the increased presence of ..."
--Section III, pg. 120

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Other Studies

World Food Containers

World demand for food containers is forecast to rise 4.5 percent annually to $139 billion in 2017. While the US remains by far the world's largest user of food containers, the most significant growth will occur in India and China. Bags and pouches will remain the largest category based on their light weight, portability and convenience. This study analyzes the $111.4 billion world food container industry, with forecasts for 2017 and 2022 by product, market, world region, and for 22 countries. The study also evaluates company market share and profiles industry players.

#3124 .... February 2014 .... $6100

Produce Packaging

US demand for produce packaging is forecast to increase 3.3 percent per year to $5.7 billion in 2017. Corrugated boxes will remain the most common type, while plastic containers will grow the fastest. Fruit applications will lead gains based on more fresh-cut fruit marketed for convenience and as a healthy snack option. This study analyzes the $4.8 billion US produce packaging industry, with forecasts for 2017 and 2022 by produce packaging type, application and end user. The study also evaluates company market share and profiles industry players.

#3097 .... November 2013 .... $5100

World Corrugated Boxes

World corrugated box demand will rise 4.2 percent yearly to 234 billion square meters in 2017. The fastest growth will occur in developing areas, especially in the Asia/Pacific and Africa/Mideast regions. Food and beverages will remain the leading market while the nonfood nondurables segment will grow the fastest. This study analyzes the 190.7 billion square meter world box industry, with forecasts for 2017 and 2022 by raw material, market, world region and for 27 major countries. The study also evaluates company market share and profiles industry players.

#3042 .... July 2013 .... $6100

World Cups & Lids

World cup and lid demand will rise 5.0 percent per year to $25.9 billion in 2017. The fastest gains will occur in developing regions, while demand in developed areas will be supported by the increasing use of costlier biodegradable and compostable products. Food and beverage packaging will be the fastest growing market. This study analyzes the $20.3 billion world cup and lid industry, with forecasts for 2017 and 2022 by product, material, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry competitors.

#3012 ....June 2013 .... $6100

Meat, Poultry & Seafood Packaging

Demand for meat, poultry, and seafood packaging is forecast to increase 3.2 percent annually to $9.7 billion in 2017. Flexible packaging will outpace rigid, based on solid prospects for pouches and high barrier film. Poultry will be the fastest growing packaging application based on poultry's low cost and good nutritional profile. This study analyzes the $8.2 billion US meat packaging industry, with forecasts for 2017 and 2022 by technology, product, application, and market. The study also evaluates company market share and profiles industry players.

#3028 .... May 2013 .... $5100

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