Meat, Poultry, & Seafood Packaging

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

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PRODUCTS

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INDUSTRY STRUCTURE

Meat, Poultry & Seafood Packaging

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

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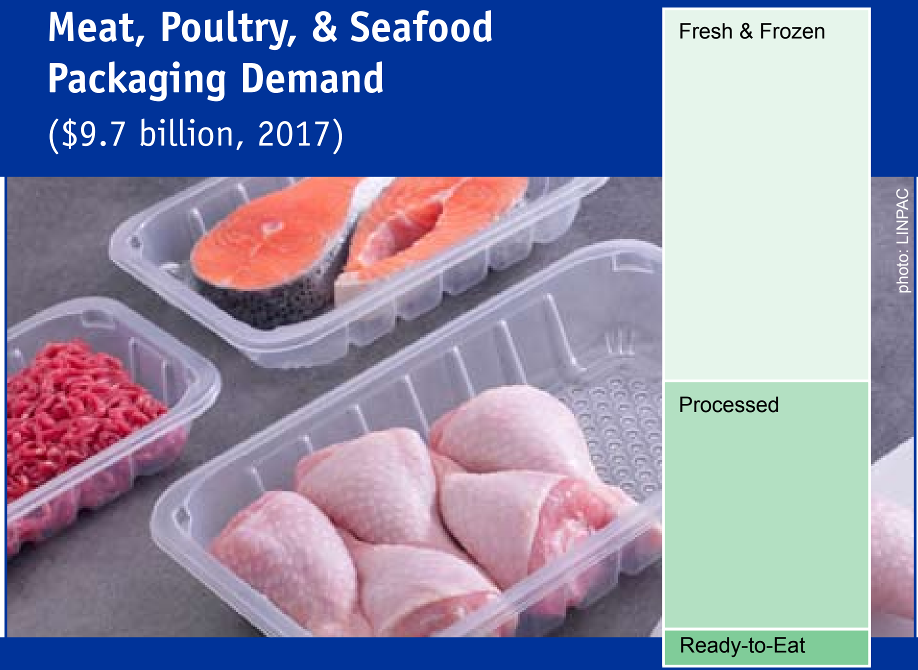
Demand will benefit from a significant shift to case-ready packaging, as well as the growing share of smaller sized items and items that are further processed for convenience of preparation.

US demand to rise 3.2% annually through 2017

Demand for meat, poultry, and seafood packaging is forecast to increase 3.2 percent annually to $9.7 billion in 2017. Gains will be driven by increased meat, poultry, and seafood production along with accelerated foodservice revenue increases.

Prospects for packaging will further benefit from the significant shift to case-ready packaging among grocery retailers as well as the growing share of smaller sized items and items that are further processed for convenience of preparation. Heightened demand for single portion and other smaller sized products will reflect the significant level of one and two person households in the US, as well as efforts among processors and retailers to hold down selling prices, especially in beef. Smaller sized and further processed products generally employ more packaging relative to their volume than larger unprocessed items. Additional underlying growth factors will be packaging's role in the merchandising of protein products, and the need for packaging designed to protect against contamination, to provide longer shelf life, and to offer user friendliness in terms of resealability and storage. Overall value gains will be held back by an expected moderation in prices of raw materials such as plastic, metal, and paper following the highs of recent years caused by spikes in energy costs and rising global demand.

Meat, Poultry, & Seafood Packaging Demand
($9.7 billion, 2017)



Flexible packaging to outpace rigid types

Flexible packaging demand growth will outpace that of rigid packaging as a result of solid prospects for pouches and high barrier film, along with inroads into rigid packaging due to sustainability benefits via reduced material use and significantly lower shipping costs. Opportunities are anticipated for vacuum pouches in single portion fresh, frozen, and processed uses, while stand-up pouches will make further inroads into bags in frozen applications due to their good aesthetics, ability to stand upright, and large front panels, all of which provide merchandising advantages. High barrier film gains will be based on increasing use of vacuum packaging and modified atmosphere packaging (MAP), since the efficacy of these technologies requires barrier films.

Rigid packaging growth will be limited by maturity and/or competitive drawbacks in corrugated boxes, metal cans, folding cartons, and paperboard sleeves. Plastic containers will experience faster gains based on expanded prepared food offerings in supermarkets. Tray demand will be helped by the need for value added trays for case-ready meats and precooked, ready-to-heat processed meat and poultry products. Despite favorable outlooks, plastic containers and trays will face growing competition from flexible packaging.

Sample Text, Table & Chart

TABLE V-3

POULTRY PACKAGING DEMAND BY TYPE & MARKET
(million dollars)

Item	2002	2007	2012	2017	2022
Poultry Shipments (bil $)					
$ pkg/000$ poultry					
Packaging Demand					
By Type:					
Rigid					
Corrugated Boxes					
Trays					
Plastic Containers					
Folding Cartons					
Other					
Flexible					
Plastic Film					
Bags					
Other					
Accessories					
By Market:					
Fresh & Frozen					
Processed					
Ready-to-Eat					
% poultry					
Total/Meat/Poultry/Seafood Pkg					

SAMPLE TABLE

APPLICATIONS & MARKETS

Poultry

Demand for poultry packaging is projected to expand
in 2017, above the overall meat, po
age. Gains will be driven by an ac
rowth following declines in some y
esult of the effect of high feed cost
period of tightened food expenditu
will be helped by rising poultry c
cost and more favorable nutritional
beef and pork in terms of fat and cholesterol content. Con
prices for beef will drive increased promotion of poultry b
foodservice establishments. Poultry's popularity will also
in further new product introductions of convenience orient
which will boost packaging demand since such items emp
packaging formats.

SAMPLE TEXT

Rigid packaging demand growth will lag that for flex
due to an expected moderation in raw material price increa
market maturity for boxes, the leading rigid packaging typ
On the other hand, solid gains are expected for plastic con
processed and ready-to-eat poultry items (e.g., thin sliced
rotisserie chicken, fried chicken). Above average growth for flexible packaging will be aided by rising demand for high barrier films and favorable prospects for pouches.

Though much smaller than the fresh and frozen and p
markets, the ready-to-eat market will expand more rapidly
consumer preference for convenience foods such as rotiss
that require little or no preparation time. The popularity o
will continue to drive expanded offerings of prepared poul
stores, club stores, and other retail sites. Packaging gains
cessed poultry market will benefit from greater demand fo

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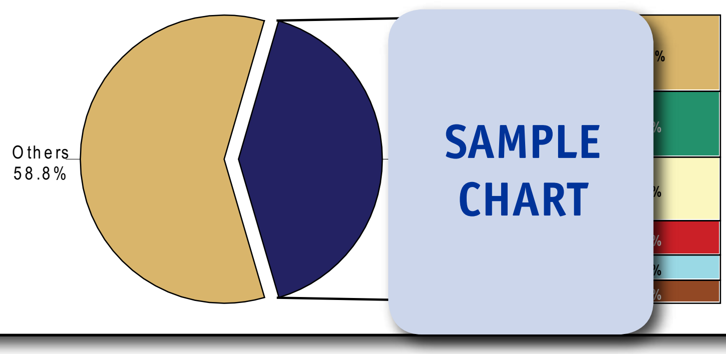
CHART VI-1

US MEAT, POULTRY, & SEAFOOD PACKAGING MARKET SHARE
($8.2 billion, 2012)



Sample Profile, Table & Forecast

TABLE IV-3

CORRUGATED BOX DEMAND IN MEAT, POULTRY & SEAFOOD PACKAGING (million dollars)

Item	2002	2007	2012	2017	2022
Total Meat/Poultry/Seafood Packaging	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% corrugated boxes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Corrugated Box Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Application:					
Meat	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Poultry	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Seafood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Fresh & Frozen	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Processed	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Ready-to-Eat	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% corrugated boxes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Rigid Meat/Poultry/Seafood Pkg	3185	3915	4425	5060	5780

SAMPLE TABLE

COMPANY PROFILES

MeadWestvaco Corporation
501 South 5th Street
Richmond, VA 23219
804-444-1000
http://w

Sales: $ ... 12)
US Sale ... (2012)
Employ ... 12)

Key Pro ... bleached paper-board

SAMPLE PROFILE

MeadWestvaco is a global manufacturer of packaging, coated and specialty papers, school supplies and office products, and a variety of specialty chemicals. The Company operates through five continuing segments: Food and Beverage; Home, Health, and Beauty; Industrial; Specialty Chemicals; and Community Development and Land Management. In May 2012, MeadWestvaco sold the operations of a former sixth segment, Consumer and Office Products, to ACCO Brands Corporation (US), a manufacturer of office supplies and products.

The Company participates in the US meat, poultry, and seafood packaging industry through the Food and Beverage segment, which had 2012 sales of $3.1 billion. Among the segment's products are coated natural kraft (CNK) paperboard, bleached paperboard, and linerboard. Specific products include CNK paperboard sold under the CUSTOM KOTE brand name, and bleached paperboard marketed under the PRINTKOTE brand name. CUSTOM KOTE CNK paperboard comprises a two ply, coated board that is produced from a combination of hardwood and softwood fibers engineered to exhibit high wet strength. This paperboard is suitable for conversion into packaging for such food

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". . . with gains driven by increased meat, poultry, and seafood output. In addition, advances will be assisted by the need for value added box types, such as modular boxes, display-ready boxes, and wax alternative boxes, which, unlike wax coated boxes, can be recycled, thereby contributing to a more sustainable packaging profile."
--Section IV, pg. 94

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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

Foodservice Disposables

US demand for foodservice disposables is forecast to climb 3.6 percent per year to $19.7 billion in 2017. Packaging products such as containers and lids and domes will achieve the fastest gains and will remain the largest category. Eating and drinking places will remain the dominant market while the retail and vending segment will grow the fastest. This study analyzes the $16.5 billion US foodservice disposables industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3081 .... September 2013................ $5300

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

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