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Converted Flexible Packaging

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

Study #3094 | November 2013 | $5300 | 477 pages

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PRODUCT & MARKET OVERVIEW

FOOD PACKAGING

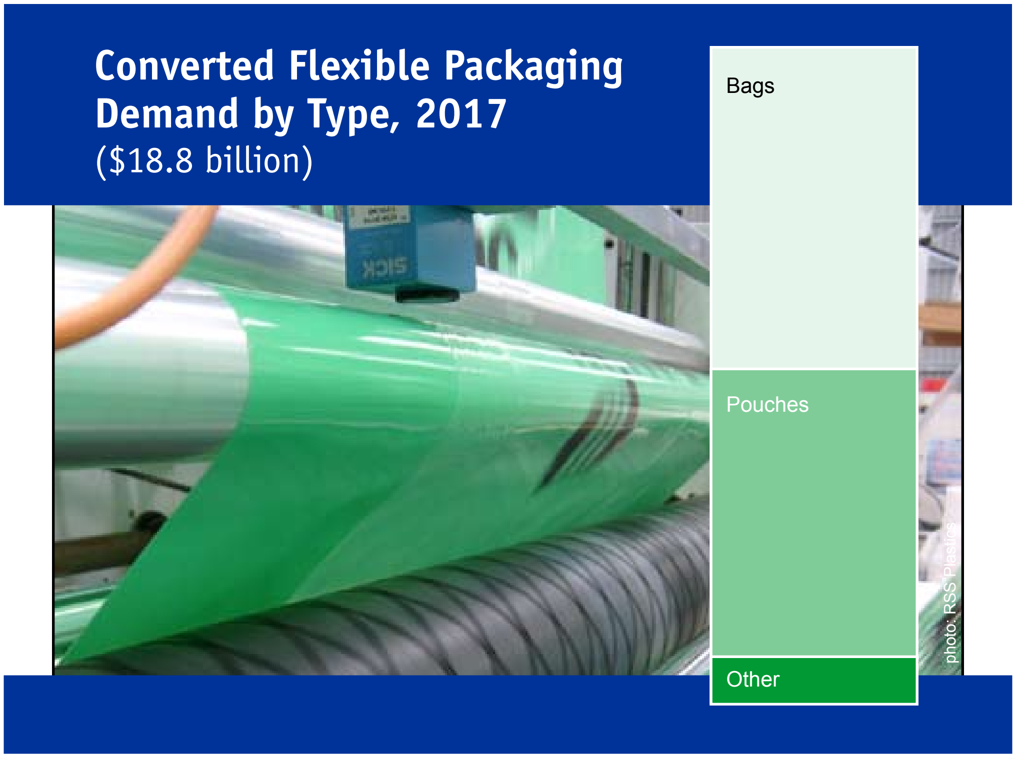
NONFOOD PACKAGING

INDUSTRY STRUCTURE

Demand will benefit from the inherent advantages of light weight bags and pouches, while technology advances to enhance shelf life and protect from bacteria will boost future growth.

US demand to grow 3% annually through 2017

US demand for converted flexible packaging is projected to increase 3.0 percent annually to $18.8 billion in 2017. The market for converted flexible packaging will benefit from the inherent advantages of light weight bags and pouches. Further market penetration will be influenced by features dedicated to enhancing the consumer experience, leading to higher retail volumes. Long term prospects for converted flexible packaging will be heightened by technology advances to enhance shelf life and protect the package from bacteria and other potential contaminants, with material advances in thinner multiwall bags also generating growth.



Converted Flexible Packaging Demand by Type, 2017
($18.8 billion)

Pouches, bags to hold best growth prospects

Pouches, primarily of a standup construction, will offer significant growth opportunities. Recent product launches in such areas as pet food, soups and stews, sauces, baby food, snack food, fresh-cut produce, ready-to-eat meals, noncarbonated beverages, lawn and garden products, and household goods will contribute to further growth. Growth in demand for pouches is also a function of economics, as the lighter weight packages can vastly reduce both production and transport costs.

The usage of bags in converted flexible packaging will also increase, albeit slower than in previous years. The bag market is especially strong for nonfood items such as pharmaceuticals and medical products, where advancements in sealing and protection and strong handling capabilities are driving gains. The continuing conversion to plastic bags in the pet food market and the popularity of ready-to-eat and case-ready meats will trigger added growth

Food applications to offer better gains than nonfood

Converted flexible packaging will provide strong competition to rigid packaging in food applications, where there are opportunities for further market penetration. Growth will be led by product introductions in packaged meat and poultry, snack foods, ready-to-eat produce, and specialty beverages. The addition of convenience features, such as easy-opening and resealing, will also fuel continued conversions from rigid containers to converted flexible packaging.

Demand for converted flexible packaging in nonfood applications will depend on growth in medical products and chemicals. The health care market is especially vital due to the growth of the aging US population and a focus on product protection and clean room environments. The growing popularity of pouches for single-use laundry and dishwasher detergent and the conversion to reclosable, large-format plastic bags for lawn and garden and other household items showcase the potential for pouch and bag formats.

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Sample Text, Table & Chart

TABLE V-10

**SNACK FOOD:
CONVERTED FLEXIBLE PACKAGING DEMAND BY MATERIAL
(million pounds)**

Item	2002	2007	2012	2017	2022
Snack Food Shipments (bil 2005$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
lbs pkg/000$ snack food	[illegible]				
Snack Food Flexible Packaging Demand					
Plastic Film:					
Polypropylene					
Polyethylene					
Polyester					
Other Films					
Paper:					
Glassine & Greaseproof					
Oiled & Waxed					
Aluminum Foil					

SAMPLE TABLE

NONFOOD PACKAGING

Converted Flexible Packaging Demand

Demand for converted flexible packaging in rack and co... plications is forecast to increase ... in 2017. Growth will be buffere... household goods and for retail it... shift to offshore production for r... and office supplies and the relati... items will continue to restrain gr... dampened by competition from a... enhanced theft protection or storage capabilities for small siz... such as blister packaging and clear cartons or round lidded c...

SAMPLE TEXT

Also moderating growth will be competition from formats that reduce packaging even more than bags and pouches, such as paperboard cards with holes that use twist ties to hold items in place. Peggable header bags and pillow pouches are frequently employed in the packaging of smaller rack and counter items like pens and shower caps and offer a low cost means of packaging multiple items in a single package. Opportunities in the rack and counter market will result from the continued popularity of mass merchandisers like Wal-Mart, which typically offer a large, varied selection of inexpensive rack and counter products, and from the growth of dollar stores and other low-end, high-volume retailers.

The primary functions of packaging in rack and counter... cations are to display the product, bundle it, protect it from d... contamination, and lessen the chance of pilferage. Rack and... products encompass thousands of items found on retail shelv... counters such as fasteners, batteries, pins, golf tees, toys, pet... housewares (e.g., funnels, peelers and measuring spoons), ru... paint brushes, vacuum cleaner bags, video tapes, bows, writi... dex cards, photographic film and sponges. Bags, primarily p...

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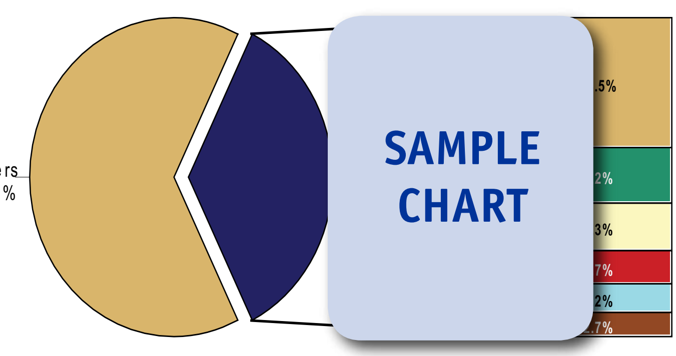
CHART VII-1

**US CONVERTED FLEXIBLE PACKAGING
MARKET SHARE BY COMPANY, 2012
($16.2 billion)**



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Sample Profile, Table & Forecast

TABLE III-3

POLYETHYLENE FILM DEMAND IN CONVERTED FLEXIBLE PACKAGING BY TYPE & MARKET (million pounds)

Item	2002	2007	2012	2017	2022
Consumer Nondurables (bil 2005$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
lbs film/000$ nondurables	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
PE Film Demand in Flexible Packaging	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Low Density Polyethylene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Linear Low Density PE	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Conventional LDPE	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
High Density Polyethylene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nonfood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% polyethylene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Plastic Film in Converted Flexible Pkg	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

Expera Specialty Solutions LLC
600 Thilmany Road
Kaukauna, WI 541[illegible]
920-766-4611
http://www.expe[illegible]

Annual Sales: $[illegible]
Employment: 1,[illegible]

Key Products: p[illegible]

SAMPLE PROFILE

Expera Specialty Solutions is a major North American producer of specialty paper products for use in the food packaging, tape, pressure-sensitive release liner, and industrial markets. The Company is held by KPS Capital Partners LP (New York, New York), a private investment firm. Expera Specialty Solutions was formed by KPS Capital in June 2013 to acquire Wausau Specialty Papers, a specialty paper business, from Wausau Paper Corporation (Mosinee, Wisconsin); and Thilmany LLC from Packaging Dynamics Corporation (Chicago, Illinois).

The Company is active in the US converted flexible packaging industry through the manufacture and sale of packaging papers. These products are made by the Wausau Specialty Papers and Thilmany subsidiaries. Wausau Specialty Papers (Mosinee, Wisconsin) is a leading producer of specialty paper products for use in the food packaging, industrial, tape, pressure sensitive release liner, and coated products markets. The company's packaging papers are sold for converting into laminates, premade bags, wraps, and other items for microwave popcorn, frozen food, cookie dough, charcoal, retail products, and other consumer goods, as well as industrial and protective packaging. These products are sold under such brand names as INVENTEC, PROGARD, PROTEC, and PROPLY. INVENTEC technical papers are designed

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STUDY COVERAGE

This Freedonia study, ***Converted Flexible Packaging***, presents US historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 by material, product and market. The study also details key market environment factors, analyzes the US industry structure, evaluates company market share data and profiles 38 players in the US converted flexible packaging industry.

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Other Studies

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 Medical Device Packaging

World demand for medical device packaging is projected to increase 5.9 percent annually to $25.7 billion in 2017. The US will remain the largest market while China will provide the largest and broadest sales opportunities. Pouches, trays and clamshell packs will continue to lead sales among container types. This study analyzes the $19.3 billion world market for medical device packaging, with forecasts for 2017 and 2022 by product, raw material, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#3056 .... August 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

Plastic Film

Demand for plastic film in the US is forecast to grow 1.8 percent annually to 15.9 billion pounds in 2016. LLDPE will remain the leading film. Among the low volume plastic resins used in film, degradable plastics will lead gains, followed by cellophane and ethylene vinyl alcohol. Packaging will remain the dominant market, but will be outpaced by nonpackaging applications. This study analyzes the 14.5 billion pound US plastic film industry, with forecasts for 2016 and 2021 by type and market. The study also evaluates company market share and profiles industry players.

#2955 ....December 2012 .... $5100

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