



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form & Corporate Use License 7](#)

[About Freedonia, Custom Research, Related Studies, 8](#)

Produce Packaging

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

Study #3097 | November 2013 | \$5100 | 324 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Environment.....	5
Demographic Trends	9
Consumer Income & Spending	12
Retail Trends	15
Food Industry Overview.....	19
Fresh Produce Industry Trends.....	22
Production Trends	24
Vegetables	26
Fruit	28
Shipping & Distribution Trends.....	30
Fresh-Cut Produce Trends.....	34
Salad	36
Vegetables	38
Fruit	39
Food Packaging Industry Overview	40
Rigid.....	42
Flexible	44
Raw Material Trends.....	45
Technology Overview	48
Pricing Trends	51
Environmental Issues.....	55
Regulatory Considerations	59

PACKAGING TYPES

General	62
Corrugated Boxes	66
Corrugated Common Footprint Boxes....	70
Producers	71
Bags & Liners	73
Plastic.....	76
Applications.....	81
Producers	82
Mesh.....	85
Paper & Textile	88
Plastic Containers	90
Clamshells	92
Tubs, Cups, & Bowls	96
Other Plastic Containers.....	99
Trays.....	102
Other Packaging.....	107
Plastic Film.....	108
Reusable Plastic Containers	111

Wood Crates	115
Foam Boxes.....	116
Molded Pulp Baskets.....	117
All Other	118

APPLICATIONS

General	123
Bulk.....	127
Ready To Eat	127
Vegetables	128
Potatoes.....	131
Tomatoes.....	136
Lettuce	140
Onions	143
Carrots	146
Mushrooms	149
Celery	151
Cabbage	153
Other Vegetables.....	155
Fruit	160
Berries	163
Apples	167
Citrus Fruit	171
Melons	174
Grapes.....	178
Other Fruit.....	181
Salads	185
Conventional.....	189
Specialty Mix.....	190

END USERS

General	192
Growers/Shippers.....	195
Repackers	199
Retail Stores & Other.....	203

INDUSTRY STRUCTURE

General	206
Industry Composition	208
Market Share	212
Acquisitions & Divestitures.....	219
Marketing & Distribution	223
Manufacturing	225
Research & Development.....	227
Competitive Strategies.....	229
Cooperative Agreements.....	232

COMPANY PROFILES

Acme Bag	237
AEP Industries.....	238
Amcor Limited.....	240
American Packaging	242
Ampac Holdings.....	243
Bemis Company	244
Berry Plastics	247
Brambles Limited	249
Cady Bag	250
Cascades Incorporated	251
CKF Incorporated	253
D&W Fine Pack.....	256
Deluxe Packages	259
Dow Chemical.....	260
DuPont (EI) de Nemours.....	262
Emerald Packaging	263
Exopack Holding	265
Highland Packaging Solutions	266
Honeywell International.....	267
Innovia Films	269
International Paper	270
IPL Incorporated.....	273
Keyes Packaging	275
Koch Industries	276
Landec Corporation	278
Leucadia National	281
Menasha Corporation	283
Pacific Agricultural Packaging	285
Packaging Corporation of America.....	286
Peninsula Packaging	289
Printpack Incorporated	290
Rehrig Pacific	292
Reynolds Group.....	294
Rock-Tenn Company	297
Sambriilo Packaging.....	300
Schoeller Allibert	302
Sealed Air.....	303
Sonoco Products	306
Taghleaf Industries.....	309
Tekni-Plex Incorporated	310
Volm Companies.....	312
Wihuri Oy	313
Additional Companies in Produce Packaging	315

List of Tables

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 Macroeconomic Indicators..... 8
2 Population & Households..... 12
3 Personal Consumption Expenditures..... 15
4 Retail Sales 19
5 Food Shipments 22
6 Fresh Produce Supply & Demand . 26
7 Fresh Vegetable Supply & Demand 28
8 Fresh Fruit Supply & Demand..... 30
9 Fresh-Cut Produce Sales..... 36
10 Food Packaging Demand 41
11 Selected Produce Packaging Prices..... 55

PACKAGING TYPES

1 Produce Packaging Demand by Type & Form 65
2 Corrugated Box Demand in Produce Packaging 70
3 Bag & Liner Demand in Produce Packaging 75
4 Plastic Bag & Liner Demand in Produce Packaging 81
5 Mesh Bag Demand in Produce Packaging 88
6 Paper & Textile Bag Demand in Produce Packaging 90
7 Plastic Container Demand in Produce Packaging 92
8 Clamshell Demand in Produce Packaging 96
9 Tub, Cup, & Bowl Demand in Produce Packaging 99
10 Other Plastic Container Demand in Produce Packaging 102
11 Tray Demand in Produce Packaging 106

12 Other Produce Packaging Demand 108

APPLICATIONS

1 Produce Packaging Demand by Application & Format 126
2 Fresh Vegetable Packaging Demand by Type & Format..... 130
3 Potato Packaging Demand..... 136
4 Tomato Packaging Demand..... 140
5 Lettuce Packaging Demand..... 143
6 Onion Packaging Demand..... 145
7 Carrot Packaging Demand..... 148
8 Mushroom Packaging Demand.... 151
9 Celery Packaging Demand..... 153
10 Cabbage Packaging Demand 155
11 Other Vegetable Packaging Demand 160
12 Fresh Fruit Packaging Demand by Type & Format..... 162
13 Berry Packaging Demand..... 167
14 Apple Packaging Demand 171
15 Citrus Fruit Packaging Demand... 174
16 Melon Packaging Demand..... 177
17 Grape Packaging Demand 181
18 Other Fresh Fruit Packaging Demand 185
19 Salad Packaging Demand 189

END USERS

1 Produce Packaging Demand by End User 194
2 Grower/Shipper Market for Produce Packaging 199
3 Repacker Market for Produce Packaging 203
4 Retail Store & Other Markets for Produce Packaging 205

INDUSTRY STRUCTURE

1 US Produce Packaging Sales by Company, 2012 211
2 Selected Acquisitions & Divestitures 222
3 Selected Cooperative Agreements 235

List of Charts

MARKET ENVIRONMENT

1 Produce Industry Flow Chart..... 33

PACKAGING TYPES

1 Produce Packaging Demand by Type, 2012 66
2 Bag & Liner Demand in Produce Packaging, 2012 76

APPLICATIONS

1 Produce Packaging Demand by Application, 2012..... 126
2 Fresh Vegetable Packaging Demand by Type, 2012..... 131
3 Fresh Fruit Packaging Demand by Type, 2012 163

END USERS

1 Produce Packaging Demand by End User, 2012..... 195

INDUSTRY STRUCTURE

1 US Produce Packaging Market Share, 2012 213

Growth will outpace expected expansion in fresh produce production, reflecting the important role of packaging in the protection, safety assurance, and marketing of fresh fruits and vegetables.

US demand to rise 3.3% annually through 2017

US demand for produce packaging is forecast to increase 3.3 percent per year to \$5.7 billion in 2017. Growth will outpace expected expansion in fresh produce production, reflecting the important role of packaging in the protection, safety assurance, and marketing of fresh fruits and vegetables. Also driving gains will be the increasing presence of fresh-cut, ready to eat produce, which offers convenience and tends to use more value added packaging than bulk produce.

Plastic containers to offer best growth opportunities

Corrugated boxes are the leading produce packaging type based on their relatively low cost, light weight, good protective performance, graphics capabilities, and well established recycling infrastructure. Box demand through 2017 is forecast to rise at a below average pace based on more moderate price increases, the maturity of many applications, and competition from reusable plastic containers (RPCs). At the same time, gains will be helped by the growth of more costly box structures such as modular boxes, white-top linerboard boxes, highly printed boxes, and moisture-resistant recyclable boxes.

Plastic containers will experience the fastest gains among major produce packaging types through 2017. Advanc-

US Produce Packaging Demand (\$5.7 billion, 2017)



es will be propelled by growth in berry applications and widening usage with other produce items. Factors that will limit gains include increasing saturation in strawberry uses and inroads by stand-up pouches. Although bag and liner demand is expected to increase at a similar pace to the overall produce packaging average, faster growth will occur for breathable bags in fresh-cut produce uses. Heightened demand is anticipated for pouches, which, in addition to being less expensive than rigid containers, are valued for being display-ready and offering good aesthetics, which can be helpful in produce merchandising. Smaller product segments such as RPCs will log well above average growth.

Fruit to be fastest growing application

Fruit applications are expected to outpace the overall produce packaging average through 2017, supported by population growth, trends toward healthier eating, and the increased availability of ready to eat fruit marketed for convenience and as a healthy snack option. These applications necessitate usage of modified atmosphere packaging for freshness protection. Though gains for vegetable applications are expected to slightly trail the average, advances will be assisted by improved output for most vegetable types and ongoing new product introductions of fresh-cut vegetables in nontraditional categories.

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Sample Text, Table & Chart

APPLICATIONS

Carrots

Demand for fresh carrot packaging is forecast to increase 1.5 percent annually to \$1.2 billion by 2022, up from \$1.1 billion in 2012. The fresh produce packaging average by material is 60 percent plastic, 30 percent paper and rising demand for waveable packaging. Demand for ready to eat, healthy snack options will be helped by in-home marketing efforts by positioning carrots as a healthy snack option. Competition from imported carrots in baby-cut

**SAMPLE
TEXT**

Carrots were one of the earliest applications for fresh-cut produce and have been available for over two decades. Still, packaging will be supported by the availability of additional varieties of carrots, such as petite carrots, and sliced and shredded products. Additionally, gains will benefit from further introductions of products that use more specialized packaging, such as snack-sized packs of baby-cut carrots. In 2012, Bolthouse Farms (Campbell Soup) introduced BABY CARROT SHAKEDOWNS, using 2.25-ounce pouches that also hold an inner dry seasoning pack that can be pinched and pulled and then shaken to disperse the seasoning onto the carrots. This custom application was developed and produced by Emerald Packaging.

Carrots are also frequently a component of fresh-cut vegetable blends, such as mixtures containing celery, peppers, broccoli, cauliflower, and snap peas. Blends include products packaged on trays or platters with dips. Blends for cooking are packaged in conventional containers as well as steamable bags or film-lidded trays that enable microwave cooking in their original packaging.

Baby-cut carrots are actually long carrots that are cut into 1/2-inch lengths and processed on machinery that grates off their outer skin, rounds the ends, resulting in uniform-sized pieces. About 60

146

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TABLE III-3

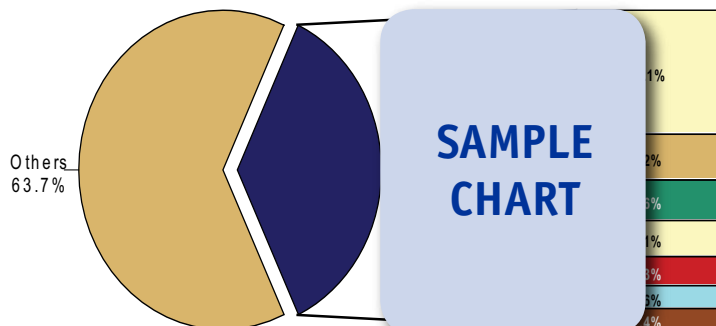
BAG & LINER DEMAND IN PRODUCE PACKAGING
(million dollars)

Item	2002	2007	2012	2017	2022
Fresh Produce Production (bil lb)					
\$ bag/000 lb produce					
Bag & Liner Demand					
By Material:					
Plastic					
Mesh					
Paper & Textile					
By Application:					
Vegetables					
Fruit					
Salad					
% bags & liners					
Total Produce Packaging Demand					

**SAMPLE
TABLE**

CHART VI-1

US PRODUCE PACKAGING MARKET SHARE, 2012
(\$4.8 billion)

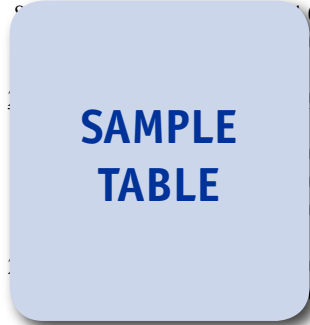


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-1
PRODUCE PACKAGING DEMAND BY APPLICATION & FORMAT
 (million dollars)

Item	2002	2007	2012	2017	2022
Fresh Produce Production (bil lb)					
\$ pkg/000 lb produce					
Produce Packaging Demand					
By Application:					
Vegetables					
Fruit					
Salad					
By Format:					
Bulk					
Ready to Eat					



COMPANY PROFILES

Sambrailo Packaging
 800 Walker Street
 Watsonville, CA 95076
 831-724-7581
<http://www.sambrailo.com>

Annual Sales \$
 Employment: c

Key Products: baskets, molded fiber and corrugated containers

SAMPLE PROFILE

Sambrailo Packaging is a manufacturer and distributor of produce packaging. The privately held company's products primarily serve growers and shippers in the agricultural industry.

The Company is active in the US produce packaging industry through the manufacture of modular plastic clamshells and other items for packaging strawberries, blueberries, raspberries, cucumbers, peppers, tomatoes, asparagus, spinach, artichokes, apples, and other fruits and vegetables. Sambrailo Packaging's plastic clamshells are sold mainly under the MIXIM brand name and feature a ventilating system designed to provide 20 percent faster product cooling and extended shelf life. MIXIM modular plastic clamshells also have smooth, contoured interior walls for increased visibility and reduced product damage, and reusable lids designed to provide secure closure. The Company's MIXIM product line also includes MIXIM CLASSIC modular clamshells, which are designed for packaging strawberries and are available in 6 ounce, 8.8 ounce, and 1 pound varieties; and MIXIM SNAP FLAP clamshells that are made with overlapping flap closures

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STUDY COVERAGE

This Freedonia industry study, **Produce Packaging**, presents historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 by product segment, application and market by value. The study also examines market environment factors, evaluates company market share and profiles 43 key competitors in the US industry.

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OTHER STUDIES

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

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

Food Containers: Rigid & Flexible

US food container demand will rise 2.9 percent per year to \$27.6 billion in 2017. The plastic container, and bag and pouch segments will grow the fastest based on further inroads into paperboard, metal, and glass containers. The best market prospects include snack foods, sauces and condiments, dairy products, and meat and related products. This study analyzes the \$24 billion US rigid and flexible food container industry, with forecasts for 2017 and 2022 by type and market. The study also evaluates company market share and profiles industry players.

#3013 April 2013 \$5300

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

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