World Pallets

Industry Study with Forecasts for 2017 & 2022

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World Pallets
Industry Study with Forecasts for 2017 & 2022

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Demand growth will be spurred by a pickup in manufacturing activity -- especially in large, mature regional markets -- as well as by a shift in the product mix toward higher-priced plastic pallets.

World demand to rise 5% annually through 2017

Global sales of pallets are projected to climb 5.0 percent annually through 2017 to 5.1 billion units, an acceleration from the relatively sluggish pace of the 2007-2012 period. A pickup in manufacturing activity will spur across-the-board gains, especially in large, mature regional markets such as North America and Western Europe. Demand will advance 6.8 percent per annum in value terms to $51.6 billion in 2017, stimulated by increases in unit sales, as well as by a shift in the product mix toward higher-priced plastic pallets. The number of pallets in use will expand at a 4.6 percent annual rate through 2017 to 9.9 billion. Stock growth will be fueled by a larger global economy requiring more pallets to accommodate greater shipping requirements, as well as increased utilization of pallets in developing markets.

Plastic pallets to lead gains, wood to remain dominant

The vast majority of pallets are constructed using wood or plastic, but they can also be made from metal and corrugated paper. Demand for plastic pallets will grow the fastest of any product type in most national markets through 2017. Plastic pallets can be easily cleaned, lending themselves to use with food, beverages, and other products where contamination must be minimized. They also last for many years and are resistant to damage during normal use. Additionally, their recyclability and ability to be made from recycled materials will be attractive to users seeking to raise the perceived environmental friendliness of their operations. However, because of their low cost, wood pallets will continue to dominate product sales in most areas, representing more than nine-tenths of 2017 global unit demand.

Asia/Pacific region to post strongest gains

In industrializing countries, manufacturing output will not be the sole driver of market advances, however. In these nations, pallet utilization is typically low relative to the size of their manufacturing, warehousing, and construction sectors. Going forward, greater numbers of potential pallet users will strive to become more competitive on a global scale by improving operating efficiencies and reducing product damage in shipments through the use of pallets. The Asia/Pacific region, led by China, will post the strongest unit sales increases of any regional market, averaging 8.1 percent per year through 2017. This region will also overtake North America to become the largest regional market by 2017, when it will account for one-third of the global total. Sales advances across the region will be spurred by climbing manufacturing activity and increased adoption of pallets by new users.
United Kingdom: Supply & Demand

The 2012 market for pallets in the UK was 140 million units valued at $1.2 billion, with stocks totaling 340 million units. The country is the third largest pallet market in Western Europe, accounting for 14 percent of the region’s unit sales. Demand declined between 2007 and 2012, reflecting shrinking activity in most manufacturing industries. However, a rise in food and beverage manufacturing output and new pallet purchases made by users in that and the pharmaceutical industry because of cross-contamination concerns presented by used wood pallets prevented overall pallet sales from falling further.

Shipments of pallets from plants in the UK totaled 140 million units in 2012, representing 15 percent of West European production. Local output fell during the 2007-2012 period due to shrinking local demand. The country had balanced trade in 2012. Most UK pallet output is used domestically, although neighboring Ireland and nearby France and the Netherlands receive some exports. The Netherlands and France are also the UK’s chief external sources of supply.

Pallet shipments from facilities in the UK are forecast to increase 2.4 percent per annum to 158 million units in 2017, recovering from declines posted between 2007 and 2012 and roughly keeping pace with local demand growth. Local suppliers will benefit from rebounding domestic demand. On the other hand, timber supplies for lumber pallets will continue to be limited in the UK, inhibiting overall production increases through 2017.

One notable pallet manufacturer based in the nation is UK Industrial Pallets Southern. Like UK Industrial Pallets, most firms in the domestic pallet market are small businesses operating within a prescribed geographic area. Craemer and Schoeller Allibert are two major foreign-based producers that make pallets in the UK.

### TABLE VI-3

<table>
<thead>
<tr>
<th>Item</th>
<th>2002</th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2022</th>
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<td>Population (millions)</td>
<td>1281.0</td>
<td>1317.0</td>
<td>1349.0</td>
<td>1374.0</td>
<td>1389.0</td>
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<tr>
<td>per capita GDP</td>
<td>3530</td>
<td>5950</td>
<td>9040</td>
<td>12890</td>
<td>17570</td>
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<tr>
<td>Gross Domestic Product (bil 2011$)</td>
<td>4516</td>
<td>7834</td>
<td>12197</td>
<td>17710</td>
<td>24400</td>
</tr>
<tr>
<td>% MVA</td>
<td>23.5</td>
<td>28.8</td>
<td>32.4</td>
<td>33.6</td>
<td>35.0</td>
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<tr>
<td>Manufacturing Value Added (bil 2011$)</td>
<td>1063</td>
<td>2257</td>
<td>3952</td>
<td>5950</td>
<td>8550</td>
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<tr>
<td>Pallet Stock</td>
<td>100</td>
<td>250</td>
<td>700</td>
<td>1250</td>
<td>2000</td>
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<td>demand/capita</td>
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<td>0.76</td>
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<td>demand/000$ MVA</td>
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<td>0.12</td>
<td>0.16</td>
<td>0.18</td>
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<td>demand/stock</td>
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<td>1.08</td>
<td>0.93</td>
<td>0.84</td>
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<td>Pallet Demand</td>
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<td>6.0</td>
<td>3.0</td>
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<tr>
<td>Pallet Shipments</td>
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<td>276.0</td>
<td>653.0</td>
<td>1050.0</td>
<td>1555.0</td>
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<tr>
<td>% China</td>
<td>28.0</td>
<td>37.6</td>
<td>57.8</td>
<td>63.3</td>
<td>67.0</td>
</tr>
<tr>
<td>Asia/Pacific Pallet Shipments</td>
<td>460.0</td>
<td>735.0</td>
<td>1130.0</td>
<td>1660.0</td>
<td>2320.0</td>
</tr>
</tbody>
</table>

### CHART II-1

WORLD PALLET PRICES BY MATERIAL, 2002-2022
(annual rate of change)

---

Sample Text, Table & Chart
Craemer Holding manufactures plastic pallets and containers for storage, transport, and other applications. The privately held company also performs metal forming, tool making, and other services.

The Company is involved in the world pallets industry through the manufacture of plastic pallets, which include PALCONTROL, ECOMAX, H series, D series, and TC series products. ECOMAX plastic pallets are four-way half pallets that are made from 100 percent recyclable materials. Craemer Holding’s PALCONTROL pallets feature radio frequency identification chips that allow the pallets’ locations to be tracked. PALCONTROL pallets are available in half pallet, European, and industrial sizes. The Company’s H series plastic pallets are designed to meet hygiene requirements for use with meats and other foods. D series plastic pallets are made in 120-centimeter-(cm)-by-80-cm and 120-cm-by-100-cm sizes. These D series pallets feature dynamic static of 5 metric tons and dynamic capacities up to 1.5 metric tons. Craemer Holding’s TC series of pallets are closed pallets engineered to resist contamination, thereby making them suitable for use in pharmaceutical applications, among others.
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