World Bulk Packaging

Industry Study with Forecasts for **2018 & 2023**

Study #3233 | January 2015 | $6300 | 430 pages

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Industry Study with Forecasts for *2018 & 2023*

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OVERVIEW

NORTH AMERICA

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INDUSTRY STRUCTURE

Accelerating growth in global manufacturing activity will be the primary driver of demand, with film wrap, FIBCs, RIBCs, and material handling containers among the best opportunities.

World demand to rise 5% annually through 2018

World demand for bulk packaging is projected to increase 5.0 percent annually to $59.2 billion in 2018. This will represent an improvement over the 2008-2013 period, when growth in demand was particularly sluggish in the world's most developed markets, especially Japan and Western Europe. Accelerating growth in global manufacturing activity will be the primary impetus for demand gains.

Developing regions to see fastest gains in demand

Although the improved performance for bulk packaging in developed markets is notable, the fastest gains will be in developing regions such as the Africa/Mideast region, the Asia/Pacific region, and Central and South America. India and Indonesia will be among the fastest growing national markets. Growth in China's manufacturing sector is beginning to decelerate after a few decades of world-leading growth -- but advances in bulk packaging demand in China will still be among the world's fastest.

In developed markets, advances will be more modest. In the US, gains will be driven by increased demand in food and chemical applications, as growth in both food and beverage processing and chemical and pharmaceutical production are expected to accelerate. These same developments are expected to drive demand in Western Europe and Japan, though gains will be somewhat muted as the manufacturing slump in these areas has been more enduring, and the recovery is also expected to be less explosive.

World Bulk Packaging Demand
($59.2 billion, 2018)

Flexible bulk packaging to slightly outpace rigid

Flexible bulk packaging will register slightly faster growth than rigid packaging. Gains in flexible bulk packaging will be led by film wrap and FIBCs. Film wrap will post healthy gains due to its increased use in securing pallets and other packaging formats during shipment, and the growing use of film to bundle bulk and multipack items in retail settings such as warehouse-style stores. FIBCs will register strong advances due to the advantages they offer in terms of loading and unloading products, their ability to handle greater quantities of product per container, and efficiency advantages in terms of their reuse in closed-loop distribution systems. In rigid bulk packaging, RIBCs and material handling containers are projected to register faster growth than the somewhat more established drums and pails. Drums will remain the largest rigid bulk packaging type, even as they surrender market share to FIBCs and competitive rigid formats. Within the drum segment, plastic will post the fastest gains. Healthy gains for steel drums are also expected, while demand for fibre drums will advance much more slowly.

World Bulk Packaging

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Sample Text, Table & Chart

TABLE VI-8

CHINA: BULK PACKAGING DEMAND BY TYPE
(million dollars)

Item	2003	2008	2013	2018	2023
Manufacturing Value Added (bil 2012$)					
$ bulk packaging/000$ MVA					
Bulk Packaging Demand					
Flexible Bulk Packaging:					
Shipping Sacks					
Film Wrap					
Other Flexible Bulk Packaging					
Rigid Bulk Packaging:					
Drums					
Pails					
Other Rigid Bulk Packaging					

SAMPLE TABLE

ASIA/PACIFIC

China: Bulk Packaging Types

Demand for bulk packaging in China totaled nearly $6.7
2013. Over the past decade, China's market has experienced
growth, averaging better than 14 percent per year between 20
2013. An illustration of this rapid growth is the fact that eve
market expansion has been considerable, China's share has g
less than one-quarter of regional bulk packaging demand in 2
percent in 2013.

Strong gains in manufacturing activity, personal income
consumer expenditures, combined with continued urbanization of the population, will continue to boost demand for packaged goods. In addition, increased exports of Chinese goods to more advanced consumer economies will create a need for more and higher-quality packaging.

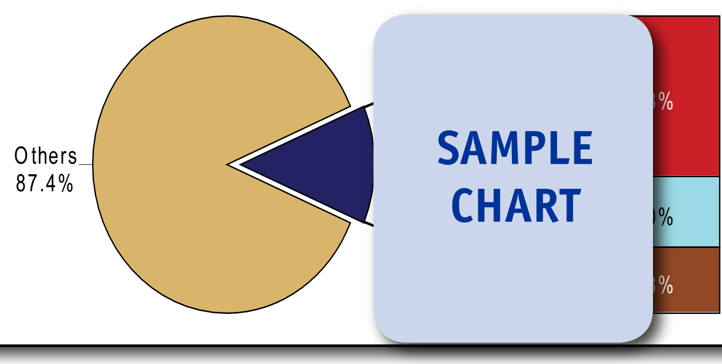
Through 2018, demand for bulk packaging in China is projected to
increase 8 ... billion, well above both
the regio... oduct types are expected
to experi... hinese manufacturing sec-
tor contir... than it has been in the past
two deca

SAMPLE TEXT

Whi... d in China will remain
relatively inexpensive (e.g., shipping sacks), they will continue to be
consumed in very large quantities. Growth for flexible bulk packaging
will be somewhat stronger than that for rigid packaging, but
product type will register strong growth by global standards.
major producer of FIBCs, but much of that output has been d
for export markets. However, the domestic market for FIBC
significantly in recent years, and is expected to continue to d
tionally, exports of Chinese goods to more advanced consum
mies will boost greater interest in and need for high-quality

CHART VIII-1

WORLD BULK PACKAGING MARKET SHARE
($46 billion, 2013)



World Bulk Packaging

Industry Study with Forecasts for ***2018 & 2023***

Sample Profile, Table & Coverage

TABLE VI-9

CHINA: BULK PACKAGING DEMAND BY MARKET
(million dollars)

Item	2003	2008	2013	2018	2023
Bulk Packaging Demand					
Nondurable Goods:					
Chemicals & Pharmaceuticals					
Food & Beverages					
Other Nondurable Goods					
Durable Goods					
Other Markets					

SAMPLE TABLE

COMPANY PROFILES

SCHÄFER WERKE GmbH
Pfannenbergstraße 1
57290 Neunkirchen
Germany
49-2735-787-(
http://www.scl

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

SCHÄFER WERKE is a manufacturer of reusable stainless steel containers, steel cabinets and other furniture, server racks and other information technology enclosures and housings, and perforated metal plates. The Company operates in six divisions: SCHÄFER Perforated Metal, SCHÄFER Container Systems, SCHÄFER Industrial Solutions, SCHÄFER Interior Systems, SCHÄFER IT Systems, and EMW Steel Service Centre. SCHÄFER WERKE is privately held.

The Company participates in the world bulk packaging industry through the SCHÄFER Container Systems division, which is engaged in the production of reusable stainless steel containers for beverages and various industrial materials. For beverage applications, the division manufactures reusable stainless steel kegs under such brand names as PLUS KEG, ECO KEG, and PARTY-KEG. For example, PLUS KEG containers are made in sizes from 15 to 50 liters and feature a stainless steel liner with a polyurethane jacket. The division's ECO KEG containers are 100-percent recyclable and feature easily separated steel and polypropylene components. PARTY-KEG kegs from SCHÄFER Container Systems are self-service containers with an isolating polyurethane coating, and are available in 10-, 15-, and 20-liter

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STUDY COVERAGE

This Freedonia study, ***World Bulk Packaging***, presents historical data (2003, 2008, 2013) plus forecasts (2018, 2023) for demand for both rigid and flexible bulk packaging types, as well as demand by market in 6 regions and 18 countries. The study also assesses key market environment factors, examines the industry structure, evaluates company market share and profiles 42 major competitors in the world bulk packaging industry.

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Related Studies

Stretch & Shrink Film

This study analyzes the US stretch and shrink film industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by type (stretch film, shrink film), market (e.g., food packaging, beverage packaging, paper and textile product packaging, consumer product packaging, storage and distribution), application and resin. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry players.

#3262 .... March 2015................... $5100

Plastic Film

US demand for plastic film will grow 1.5 percent per year through 2018 to 15.4 billion pounds, valued at $24.9 billion. Linear low density polyethylene will remain the most common film resin and maintain solid growth, while polypropylene and other resins such as degradable types will outpace it from smaller bases. The food packaging market will exhibit the fastest gains. This study analyzes the 14.3 billion pound US plastic film industry, with forecasts for 2018 and 2023 by resin and market. The study also evaluates company market share and profiles industry players.

#3243 ....January 2015 .... $5300

Corrugated & Paperboard Boxes

US corrugated and paperboard box demand will rise 2.6 percent per year to $39.4 billion in 2018. Corrugated and solid fiber boxes will remain the largest and fastest growing product segment. The food and beverage market will remain dominant, based in part on more value-added boxes such as display ready and moisture-resistant types. This study analyzes the $34.7 billion US corrugated and paperboard box industry, with forecasts for 2018 and 2023 by material, product and market. The study also evaluates company market shares and profiles industry players.

#3235 ....December 2014 .... $5300

Rigid Bulk Packaging

US demand for rigid bulk packaging will rise 4.0 percent per year to $7.3 billion in 2018. Rigid intermediate bulk containers (RIBCs) and material handling containers will see the fastest growth, while pails will overtake drums as the largest product segment. Plastic will outpace steel and paperboard to be the fastest growing rigid bulk packaging material. This study analyzes the $6 billion US rigid bulk packaging industry, with forecasts for 2018 and 2023 by material, product and market. The study also evaluates company market share and profiles industry players.

#3213 ....October 2014 .... $5300

World Pallets

Global sales of pallets are projected to climb 5.0 percent annually through 2017 to 5.1 billion units. The Asia/Pacific region will be the fastest growing market and will surpass North America as the largest. Plastic pallets will grow the fastest based on their cleanability and recyclability, while wood pallets will remain dominant based on their low cost. This study analyzes the four billion unit global pallet industry, with forecasts for 2017 and 2022 by product, market, world region, and for 25 countries. The study also evaluates company market share and profiles industry players.

#3126 .... February 2014................. $6100

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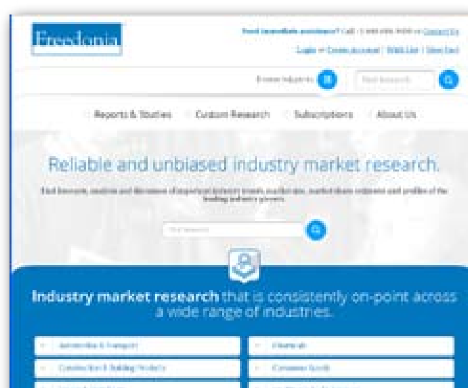

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