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Meat, Poultry & Seafood Packaging

Industry Study with Forecasts for **2019 & 2024**

Study #3263 | April 2015 | \$5300 | 347 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or
+1 440.684.9600
Fax: +1 440.646.0484
Email: info@freedoniagroup.com

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INDUSTRY STRUCTURE

1 US Meat, Poultry, & Seafood Packaging Market Share, 2014 231

Advances will be driven in part by increased meat, poultry, and seafood production, growth in the foodservice sector, export opportunities, and continued solid prospects for prepared and convenience-sized foods.

US demand to rise 3.8% annually through 2019

Demand for meat, poultry, and seafood packaging is projected to increase 3.8 percent annually to \$10.9 billion in 2019. Advances will be driven by population gains, increased meat, poultry, and seafood production, growth in the foodservice sector, and export opportunities. In addition, demand will be supported by continued solid prospects for prepared foods, items in smaller and more convenient sizes, and packaging formats that make food preparation easier and faster. Demographic trends such as smaller household sizes, an expanding elderly population, and high numbers of households where all adults work will strengthen demand for single portion and other smaller-sized products, as well as various convenience-oriented products. The expanded presence of smaller-sized items, especially in meat, will reflect efforts by processors and retailers to hold down selling prices amid record high beef and pork prices.

Shift toward case-ready packaging to drive gains

The significant shift to case-ready packaging by grocery retailers as a means to reduce labor costs and food waste will also drive gains, as case-ready meats are packaged in central processing facilities and require value added packaging for extended freshness. Overall advances will be held back by an expected moderation in prices of paper and plastic materials following

US Meat, Poultry & Seafood Packaging Demand, 2019

(\$10.9 billion)



Rigid Packaging

Flexible Packaging

Packaging Accessories

spikes in recent years caused by surges in energy costs and rising global demand.

Flexible packaging to outpace rigid types

Flexible packaging demand growth will outpace that of rigid packaging, reflecting performance and sustainability advantages, which will promote above average increases for pouches and high barrier films. Vacuum pouches will see expanded usage with fresh, frozen, and processed items, while stand-up pouches will make further inroads into folding carton applications based on advantages including large billboard space, light weight, and reduced material use. The prevalence of case-ready meats, which

use modified atmosphere packaging (MAP) and vacuum packaging, will drive gains for barrier films.

Rigid packaging demand growth will be held back by the maturity of folding cartons and metal cans, along with competitive drawbacks versus flexible packaging. Plastic containers will see the fastest growth among rigid packaging types, benefiting from the widening range of prepared meat and poultry items in supermarkets, warehouse club stores, and other retail locations. Despite healthy growth, plastic containers will face increased competition from lower cost packaging formats such as windowed bags and handled pouches with prepared foods.

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Sample Text, Table & Chart

TECHNOLOGY & RAW MATERIALS

Retort Packaging

Demand for retort packaging in the meat, poultry, and seafood market is expected to increase in 2019, faster than the overall market, driven by expanding applications in consumer and foodservice markets. Demand can be replaced by other packaging options such as cans. Among factors driving demand are a significant level of tuna and other products that are packaged offshore and changing demand away from some types of processed foods. In addition, demand for retort pouches (the most commonly used type of retort packaging for meat, poultry, and seafood applications; cups, trays, and bowls can also be employed) will be limited by several key disadvantages, such as slower processing speeds compared to cans and the reluctance of meat processors to invest in pouch machinery. The high efficiency of retort filling lines have enabled cans to remain an appealing packaging option for food processors that even the many benefits of retort pouches are not enough to justify a wholesale transition to pouch packaging. However, producers of processed meats often use contract manufacturers to fill retort pouches in order to augment their canned offerings without major capital investment.

Retort pouches offer a means for manufacturers of canned meat products to refresh the image of these goods to increase sales in a mature category. Additionally, the larger printing surface of retort pouches compared to cans provides product marketing advantages. Because canned goods are often perceived as being inferior in quality and nutritional content to fresh and frozen alternatives, the retort pouch provides an alternative to counter that perception and impart a somewhat fresher image. Retort pouches offer a number of other advantages including greater portability, lighter weight, and convenience in opening, as well as reduced storage space requirements.

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**SAMPLE
TEXT**

TABLE V-8

READY-TO-EAT MEAT, POULTRY, & SEAFOOD PACKAGING DEMAND (million dollars)

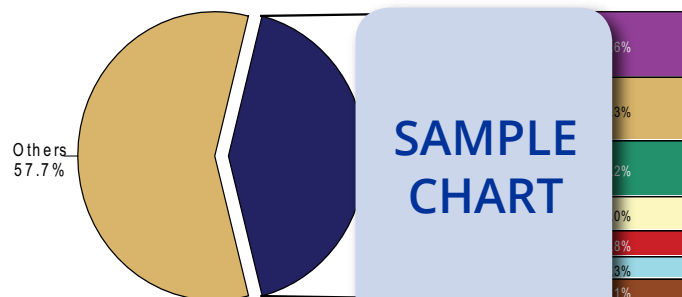
Item	2004	2009	2014	2019	2024
Meat, Poultry, & Seafood Shipments (bil \$)					
\$ pkg/000\$ meat, poultry, & seafood					
Packaging Demand					
By Type:					
Rigid					
Plastic Containers					
Other					
Flexible					
Accessories					
By Product:					
Meat					
Poultry					
Seafood					
% ready-to-eat					
Total Meat, Poultry, & Seafood Packaging					

**SAMPLE
TABLE**

Source: The Freedonia Group, Inc.

CHART VI-1

US MEAT, POULTRY, & SEAFOOD PACKAGING MARKET SHARE (\$9.0 billion, 2014)



**SAMPLE
CHART**

Sample Profile & Table, & Study Coverage

COMPANY PROFILES

AEP Industries Incorporated

95 Chestnut Ridge Road
 Montvale, NJ 07645
 201-641-6600
<http://www.aepindustries.com>

Sales: \$
 US Sales:
 Employe

Key Pro
 specialty

SAMPLE PROFILE

AEP Industries is a leading manufacturer and distributor of commodity and specialty plastic films in North America. Its films are used in the packaging, transportation, food and beverage, automotive, pharmaceutical, chemical, electronic, construction, textile, and agricultural markets. AEP operates through seven product divisions: Custom Films, Stretch Wrap, Food Contact, PROFORMANCE Films, Printed and Converted Films, Canliners, and Other Products and Specialty Films.

AEP is active in the US meat, poultry, and seafood packaging industry via the Food Contact division, which generated sales of \$183 million in FY 2014. The segment manufactures and markets, among other products, polyvinyl chloride (PVC) stretch and shrink films through the RESINITE product line. These films have good oxygen transmission properties, making them especially suitable for packaging fresh meat, poultry, fish, fruits and vegetables, and bakery products. AEP is the largest supplier of films to the supermarket industry.

AEP Industries' RESINITE products include stretch and shrink films for meat, specialty poultry stretch films, and MAPAC film.

TABLE IV-3

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

Item	2004	2009	2014	2019	2024
Total Meat, Poultry, & Seafood Packaging % corrugated boxes					
Corrugated Box Demand					
By Application:					
Meat					
Poultry					
Seafood					
By Market:					
Fresh & Frozen					
Processed					
Ready-to-Eat					
% corrugated boxes					
Rigid Meat, Poultry, & Seafood Packaging					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

STUDY COVERAGE

This Freedonia industry study, *Meat, Poultry & Seafood Packaging*, offers historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by raw material, technology, product, application and market. In addition, the study considers market environment factors, assesses industry structure, details company market share and profiles 38 US industry participants.

Related Studies

Specialty Films

This study analyzes the US specialty film industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by function (e.g., barrier, microporous, safety and security, conductive and insulative, light control, biodegradable, water soluble), resin (e.g., polyolefins, polyester, nylon, polyvinyl butyral), and market (e.g., packaging, personal care products, electronics, transportation equipment, construction). The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#3287.....June 2015.....\$5200

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

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

Active & Intelligent Packaging

US active and intelligent packaging demand is forecast to increase 8.0 percent annually to \$3.5 billion in 2017. Intelligent packaging will record double digit annual gains, led by time-temperature indicator labels. Gas scavengers, susceptor packaging and self-venting packaging will be among the fastest growing active packaging types. This study analyzes the \$2.4 billion US active and intelligent packaging industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3117.....January 2014.....\$5100

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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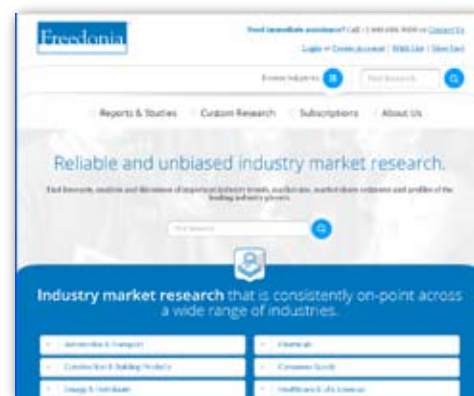
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