Converted Flexible Packaging

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

Study #3333 | October 2015 | $5500 | 481 pages

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US Industry Study with Forecasts for *2019 & 2024*

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Growth will be driven by the inherent cost and performance advantages of lightweight bags and pouches, and by their value in achieving supply chain sustainability via source reduction and space savings.

US demand to rise 3.3% annually through 2019

Demand for converted flexible packaging is projected to increase 3.3 percent annually to $20.7 billion in 2019. Although growth will slow from the past decade's pace, converted flexible packaging will remain a growth area in both food and nonfood applications due to the inherent cost and performance advantages of lightweight bags and pouches. Moreover, converted flexible packaging's source reduction, space savings, and lower production and transportation costs will be increasingly valued for their supply chain sustainability by retailers and packaged goods firms. All of these factors will drive further conversions from rigid to flexible formats.

US Converted Flexible Packaging Demand, 2019
($20.7 billion)

Pouches to outpace bags

Pouches will experience above average gains, reflecting continued opportunities in both food and nonfood segments and for new conversions from rigid packaging. Growth will benefit from the increased prevalence of value-added features, such as spouts and fitments. In addition, the development of newer stand-up pouch constructions will provide expanded opportunities with heavier weight contents. Bag demand will rise more slowly due to the maturity of a number of applications, competition from pouches, and, to some degree, rigid packaging such as clamshells and blister packaging. Overall advances will be helped by growth in food production, an expanding elderly population, and the use of bags for bulk and other larger-sized packages in such markets as pet food, chemicals, building materials, and agricultural and horticultural products.

Applications to favor both food & nonfood markets

Growth in nonfood markets will be led by above average gains in pharmaceutical and medical product applications due to the expanding healthcare needs of a steadily aging population, the significance of unit-of-use packaging, and improvements in barrier and ease-of-use properties. Food markets will increase as pouches and bags continue to capture share from rigid packaging in such areas as baked goods, snack foods, candy and confections, frozen food, grain mill products, pet foods, and beverages.

Plastic materials to outpace paper & foil

With respect to growth in converted flexible packaging materials, the dominant plastic film segment will outpace that of paper and foil due to performance benefits such as barrier protection, light weight, graphics properties, and suitability for easy-open features. Paper demand will fall slightly though the material's lower cost than film, status as a natural-based, environmentally friendly material, and suitability for film and foil laminations will be advantageous.

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Sample Text, Table & Chart

TABLE VI-19

OTHER NONFOOD PRODUCTS: CONVERTED FLEXIBLE PACKAGING DEMAND BY TYPE & APPLICATION (million dollars)

Item	2004	2009	2014	2019	2024
Consumer Nondurables (bil $)					
$ pkg/000$ nondurables					
Other Nonfood Flexible Packaging					
By Type:					
Bags					
Pouches					
Wraps					
By Application:					
Building Materials					
Health & Beauty Aids					
All Other					
% other nonfood					
Nonfood Flexible Packaging Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

MATERIALS

Nonfood Packaging - Polyester film demand for non
flexible packaging is forecast to
pounds in 2019. Above average
maceutical uses, where the film
of polyester's innate performanc
these markets, especially the film
tion, and outstanding barrier pro
tion at lower temperature, reducin
also offer enhanced tensile strength for difficult applications.
films compete with PVC resins for pharmaceutical blister pa
offering a strong material but one that is not as inexpensive o
protective for moisture as PVC.

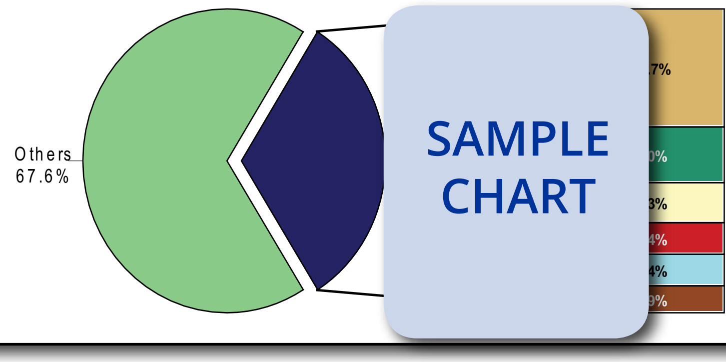
SAMPLE TEXT

Polyester film is used frequently for intravenous bags a disposable medical devices such as blood glucose, diagnostic assay, and biosensor films. Polyester's heat sensitivity and temperature resistance properties make it a durable performer in the category. Newer technologies also are emerging in printable anti-microbial films for bacteria protection in pharmaceutical packaging and for devices used during surgical procedures. The anti-bacterial film can be applied to such items as surgical or bed trays, IV stands, medical carts, or monitoring equipment.

Other nonfood uses for polyester film include health and beauty aids, tobacco, and other consumer goods, such as detergent and soap packaging. Polyester film finds use in the production of pouches used to house razor blades and trial sizes for shampoos, condition
lotions. Polyester film also competes with polypropylene fil
packaging, but that category is expected to continue its decli
rette consumption drops. Oriented polypropylene film is stil
leader in this category due to its historically lower cost, but s
polypropylene pricing have made polyester more competitiv

CHART VII-1

US CONVERTED FLEXIBLE PACKAGING MARKET SHARE, 2014 ($17.5 billion)



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Sample Profile & Table, & Study Coverage

TABLE V-10

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

Item	2004	2009	2014	2019	2024
Snack Food Shipments (bil 2009$)					
lbs pkg/000$ snack food					
Snack Food Flexible Packaging Demand					
Plastic Film:					
Polypropylene					
Polyethylene					
Polyester					
Other Films					
Paper:					
Glassine & Greaseproof					
Oiled & Waxed					
Aluminum Foil					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

COMPANY PROFILES

Expera Specialty Solutions LLC
600 Thilmany Road
Kaukauna, WI
920-766-4611
http://www.ex

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Expera Specialty Solutions is a leading North American manufacturer 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.

The Company competes in the US converted flexible packaging industry through the manufacture and sale of packaging papers. These papers are suitable for use in baking, confectionary and snack, meat and dairy, medical, industrial, and other applications. For baking end uses, Expera Specialty Solutions produces CULINERA papers. These papers feature food release, wet strength, and grease resistance properties, and incorporated slip treatment. CULINERA papers are typically used for panliners, baking cupstock, and silicone coating bases. The Company's DELICITERA papers are designed for confectionary and snack applications. These papers feature grease and oil resistance properties and are suitable for conversion into snack food bags, as well as confectionary cupstock. Other snack products include TEMPERA microwave papers, which are available in natural or bleached finishes and various oil and grease resistance levels. These papers are suitable for the manufacture of microwave popcorn bags, among other items.

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STUDY COVERAGE

This Freedonia study, ***Converted Flexible Packaging***, presents US historical data (2004, 2009, 2014) plus forecasts (2019, 2024) by type and material for food and nonfood packaging applications. The study also considers market environment factors, details the industry structure, evaluates company market share and profiles 38 US industry competitors.

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Related Studies

Food Containers: Rigid & Flexible

This study analyzes the US rigid and flexible food container industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by market (e.g., fruits and vegetables, dairy products, grain mill products, meat products, baked goods, sauces and condiments, snack foods, candy and confections, frozen specialties) and container/ material type (e.g., bags and pouches, paperboard, plastic, metal, glass). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3367............. December 2015................$5400

Produce Packaging

Demand for produce packaging in the US is forecast to increase 3.2 percent annually to $6.0 billion in 2019. Plastic containers and stand-up pouches will be among the fastest growing package formats, based on their aesthetic appeal and capability to increase brand marketing and recognition. Corrugated boxes will remain the leading type. This study analyzes the $5.1 billion US produce packaging industry, with forecasts for 2019 and 2024 by packaging type, application and end user. The study also evaluates company market share and profiles industry players.

#3319................August 2015...................$5300

Foodservice Disposables

Demand for foodservice disposables in the US is projected to increase 3.9 percent per year to $21.9 billion in 2019. Packaging will remain the most common product segment and will outpace serviceware, napkins and other foodservice disposables. Retail and vending will be the fastest growing market, while eating and drinking places will remain dominant. This study analyzes the $18 billion US foodservice disposables industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

#3313................August 2015...................$5500

Tube & Stick Packaging

Demand for tube and stick packaging in the US is projected to advance 4.0 percent per year to $2.1 billion in 2018. Stick packs will grow the fastest from a small base, while squeeze tubes will remain by far the largest segment. The relatively small food market will grow the fastest, while the cosmetics and toiletries market will remain dominant. This study analyzes the $1.7 billion US tube and stick packaging industry, with forecasts for 2018 and 2023 by product, material, and market. The study also evaluates company market share and profiles industry players.

#3252...............January 2015..................$5200

World Pouches

Global demand for pouches will rise 6.2 percent annually to $37.3 billion in 2018. Stand-up pouches will grow the fastest, while flat pouches remain dominant. The adoption of pouches with higher value features in developed markets will support value gains, while faster volume growth is expected in China and other developing nations. This study analyzes the $27.6 billion world pouches industry, with forecasts for 2018 and 2023 by product, market, world region, and for 16 countries. The study also evaluates company market share and profiles industry players.

#3220............November 2014................$6200

About The Freedonia Group

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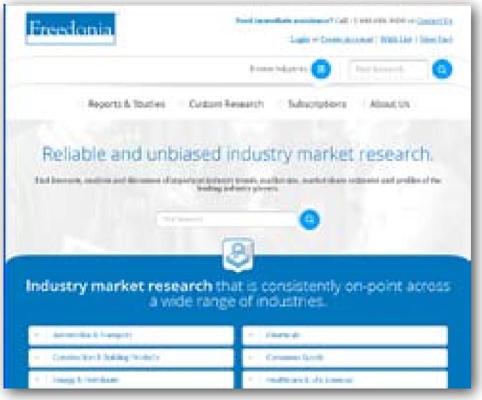

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