

Food Containers: Rigid & Flexible

Industry Study with Forecasts for 2020 & 2025

Study #3367 | February 2016 | \$5400



Overall growth for food containers in the US is projected to be in line with growth in domestic food production. However, this suggests greater stability than is in fact the case, as a variety of trends are reshaping the food container market. Among these trends are a shift from rigid packaging formats to flexible containers, efforts to improve both the reality and optics of sustainability initiatives, greater use of package revisions to reignite interest in sluggish product categories, and novel packaging formats such as clear plastic cans and squeezable spouted pouches.

Pouches, plastic containers to continue taking market share

Pouches and plastic containers will record above average growth, the result of further supplantation of paperboard, metal, and glass containers. Plastic container usage will be driven by advantages of light weight, clarity, and shatter resistance, along with the increased presence of containers with enhanced barrier and heat resistance properties. Competition from flexible packaging such as pouches, which offer greater source reduction capability as well as reduced shipping costs, will moderate advances somewhat.

Pouches will make further inroads into rigid packaging applications due to cost and performance advantages. The perception, especially among younger consumers, of stand-up pouches as a more contemporary packaging format than cans, bottles, and cartons will also propel gains. Bag demand will increase more slowly based on

maturity of many applications as well as competition from pouches. Among more mature segments, favorable graphics and the capability to improve microwave oven performance in certain uses will support continued demand for paperboard food containers. Despite a loss of food container market share, metal cans will remain an important segment of the food container mix due to their long shelf life and positioning as a means of controlling food expenditures. Prospects for glass containers will be aided by a premium image along with their use for natural and organic products, which occupy a larger share of the food landscape than they once did.

Healthful food products to register strong advances

Food products perceived and marketed as healthful, such as yogurt and nuts, will register strong advances through 2020, boosting demand for related packaging including plastic tubs, cups, and jars, as well as pouches. Greater consumer awareness of environmental and sustainability issues will also influence the food container product mix.

Study coverage

This study analyzes the US market for rigid and flexible food containers. It presents historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) for demand by material (plastic, paperboard, metal, glass) and market. In addition, the study considers market environment factors, assesses the industry structure, analyzes company market share and profiles 32 competitors in the US industry.

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POUCH & BAG DEMAND BY MARKET
(million dollars)

Item	2005	2010	2015	2020	2025
Pouch & Bag Demand					
Fruits & Vegetables:					
Fresh Produce					
Processed					
Baked Goods					
Snack Foods					
Grain Products:					
Pet Food					
Other Grain Products					
Meat & Related Products					
Candy & Confections					
Dairy Products					
Other Foods					

Source: The Freedonia Group

GLASS FOOD CONTAINERS

Glass Bottles

Demand for glass bottles is expected to increase annually to \$1.5 billion in a number of specialty containers. However, plastic glass bottle still dominates. ketchup, will continue to make inroads as advances in barrier properties broaden their potential range of use.

Glass bottles are distinguished by a neck that is considerably smaller than the container body. This configuration is designed to facilitate pouring and the attachment of closures. While such containers are generally considered more aesthetically pleasing than straight glass jars, the latter's shape makes them easier to stack and store. Glass bottles (including jugs) are used primarily to package salad dressings, vinegars, syrups (including honey and molasses), and other condiments (soy, barbecue, and hot sauce, etc.); as well as oils, seasonings, and flavorings (e.g., vanilla, almond, and other extracts, and coffee flavoring syrups). Although demand for many of these food products will experience good growth over the next decade, competition from plastic bottles will limit opportunities for glass bottles.

Despite overall losses to plastic, rising demand for specialty and flavored vinegars will provide a niche growth area for glass bottles. These products are frequently packaged in glass to convey a premium image and to take advantage of glass's excellent barrier properties. Plastic bottles have already largely replaced glass in applications such as cooking oils (aside from olive oils, which are often bottled in Europe or the Middle East for export to the US). However, the emergence of a

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DAIRY PRODUCT CONTAINER DEMAND BY MATERIAL
(million dollars)

Item	2005	2010	2015	2020	2025
Dairy Product Shipments (bil \$)					
\$ containers/000\$ dairy					
Dairy Product Container Demand					
Rigid Containers:					
Plastic					
Paperboard					
Metal & Glass					
Pouches & Bags					
% dairy products					
Total Food Container Demand					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Pouches

Demand for pouches in the US will grow 4.4 percent annually through 2020 to \$10.1 billion. Growth will be driven by the introduction of pouch packaging into new markets and the integration of high value features, such as resealable closures and spouts, in more mature markets. Stand-up pouches will remain the fastest growing type. This study analyzes the \$8.2 billion US pouch industry, with forecasts for 2020 and 2025 by product type, feature, market, and production method. The study also evaluates company market share and profiles industry players.

#3383..... February 2016 \$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

World Cups & Lids

Global cup and lid demand will rise 5.2 percent annually to \$30.2 billion in 2019. The important foodservice market will see faster-than-average growth as Western-style fast food restaurants and coffee shops become more prevalent. Central and South America and the Asia/Pacific region will be the fastest growing markets. This study analyzes the \$23.4 billion world cup and lid industry, with forecasts for 2019 and 2024 by product and market for six world regions and 18 major countries. The study also evaluates company market share and profiles industry competitors.

#3283..... July 2015 \$6400

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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