INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Pouches

US Industry Study with Forecasts for 2020 & 2025

Study #3383 | February 2016 | $5400

Demand for pouches in the US will grow 4.4 percent per year through 2020 to $10.1 billion, primarily 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. Food and beverage markets comprise the vast majority of pouch demand. However, the nonfood market will post faster growth, with increased pouch use in medical, consumer, and industrial markets boosting gains. In the food category, pet food; meat, poultry, and seafood; and beverage applications will grow the fastest.

Stand-up pouches to remain the fastest growing product segment

Since the greatest growth opportunities for pouches lie in transitions away from rigid packaging, stand-up pouch formats will continue to be the fastest growing product segment through 2020. Stand-up pouches offer a more distinctive appearance and can usually boast environmental advantages over rigid alternatives through the use of less material. The greatest market penetration has occurred in early adopter applications such as the beverage and pet food markets. However, the fastest gains will be observed in the cheese and produce markets, which have only recently begun to transition from flat bags or pouches to stand-up types.

Pillow pouches to sustain the flat pouch segment

Demand for flat pouches is forecast to increase at below the average industry rate through 2020, sustained by continued demand for pillow pouches. Pillow pouches will still be the largest segment through 2020 due to the low cost and production efficiency of this format, and its entrenched position in markets such as candy and snacks. However, future growth for flat pouches will primarily be bolstered by sustained increases in demand for side-seal pouches, which benefit from the continued adoption of unit-of-use packaging in detergents and other products.

Value added features to stimulate gains

Pouches with value added features will continue to stimulate growth overall, with spouted products and resealable systems posting fast gains. The increased use of pouches employing these attributes can be linked to lifestyle trends that see traditional meals being replaced by snacks. Resealable closures for pouches also make products more convenient for those with fast-paced lifestyles because a secure fastener can allow the pouch to be stored in a bag or vehicle for easy snacking. Resealable pouches can also extend the shelf life of foods, which makes the products more desirable to smaller households.

Study coverage

This study analyzes US demand for pouches. It presents historical data (2005, 2010, 2015) and forecasts (2020 and 2025) by product (e.g., flat, stand-up), feature (resealable, vacuum, retort, shaped, spouted, aseptic), market (e.g., food and beverage packaging, nonfood packaging), and production method (form/fill/seal, preformed). The study also considers market environment factors, evaluates company market share, and profiles 38 industry players.

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FOOD & BEVERAGE PACKAGING

Pouch Demand: Candy & Snack Food

Demand for pouches for the packaging of candy and snack f
proje ? billion in 2020.
75 p :hes, based on th
prev :er packaging. Pi
pouc dy and confectio
clud paper, and foil w
base tamper evidence
pouc nant, stand-up p
will al, reclosability, p
bility, ıg snacks. A subs
portion of candy and snack food pouches are made captively by p
manufacturers on form/fill/seal equipment. However, stand-up po
used in this market are more frequently purchased in premade for
to their higher level of complexity (e.g., incorporation of reclosab
zippers) than flat pouches and the tendency of product manufactur
outsource the filling of stand-up pouches to contract packagers.

Pouches are used to package a wide array of candy and snack
products, including potato and tortilla chips, pretzels, cookies, cra
snack cakes and pies, candy bars and pieces, nuts, dried fruit, read
to-eat and candied popcorn, meat snacks, and energy bars. The be
opportunities for pouches will be in the nuts and dried fruit segme
Growth will be largely due to growing consumer awareness of nuts as a source of protein and dietary fiber, combined with favorable publicity regarding the benefits to heart health of moderate consumption of nuts. Pouch demand will also be aided by the use of resealable zippers, which provide enhanced convenience and freshness protection for the storage of nuts, dried fruit, and trail mixes.

Gains for pouches in candy and confections and bakery snacks will be around the average or slightly above, reflecting some degree of

TABLE V-1

NONFOOD PACKAGING POUCH DEMAND BY APPLICATION & TYPE (million dollars)

Item	2005	2010	2015	2020	2025
Total Pouch Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]10
% nonfood	2				7
Nonfood Packaging Pouch Demand	1(				)
By Application:					
Medical & Pharmaceutical					)
Consumer Products					)
Industrial & Other					)
By Type:					
Flat					)
Four-Side-Seal					)
Three-Side-Seal					)
Pillow					)
Stand-Up					)
cents/unit					8
Nonfood Packaging Pouches (bil units)	17.[illegible]	[illegible]	[illegible]	[illegible]	[illegible]6.0

Source: The Freedonia Group

TABLE III-3

PILLOW POUCH DEMAND BY MARKET (million dollars)

Item	2005	2010	2015	2020	2025
Flat Pouch Demand	411[illegible]	[illegible]	[illegible]	[illegible]	[illegible]610
% pillow	5				0
Pillow Pouch Demand	2[illegible]				0
Candy & Snacks	1[illegible]				0
Processed Foods					0
Produce					5
Cheese					0
Pet Food					5
Other Food & Beverage					0
Nonfood					0
cents/unit					.4
Pillow Pouch Demand (bil units)	27.[illegible]	[illegible]	[illegible]	[illegible]	[illegible]6.8

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

World Wine Packaging

This study analyzes global demand for wine packaging. It presents historical demand data (2005, 2010, and 2015) and forecasts (2020 and 2025) by container (e.g., glass bottles, bag-in-box, plastic bottles, aseptic cartons), closure (e.g., natural corks, synthetic corks, aluminum screw caps), accessory (e.g., labels, capsules, wire hoods), bulk package, world region, and major country. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry competitors.

#3406.................. May 2016 .... $6300

Aseptic Packaging

Demand for aseptic packaging in the US is projected to rise 6.8 percent annually to $6.4 billion in 2020. Gains will be driven by advantages in processing and ambient temperature storage. Prefillable syringes and plastic bottles will be the fastest growing products, with syringes replacing bottles as the largest segment. Beverages will be the fastest growing market. This study analyzes the $4.6 billion US aseptic packaging market, with forecasts for 2020 and 2025 by product and market. The study also evaluates company market share and profiles industry competitors.

#3386................ March 2016.................. $5200

Food Containers: Rigid & Flexible

US demand for food containers will rise 2.8 percent yearly to $31.2 billion in 2020. Plastic containers will continue to supplant paperboard, metal and glass as the product mix shifts toward flexible packaging. Novel formats such as clear plastic cans and squeezable spouted pouches will continue to emerge as package redesigns outpace new food products. This study analyzes the $27.1 billion US rigid and flexible food container industry, with forecasts for 2020 and 2025 by product and market. The study also evaluates company market share and profiles industry players.

#3367.............. February 2016 .... $5400

Active & Intelligent Packaging

US demand for active and intelligent packaging is forecast to grow 7.3 percent annually to $4.0 billion in 2019. Intelligent packaging such as time-temperature monitors and smartphone-enabled interactive labels and tags will be the fastest growing segment, increasing at a double-digit annual rate. This study analyzes the $2.8 billion US active and intelligent packaging industry, with forecasts for 2019 and 2024 by product and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#3338............... October 2015 .... $5300

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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

About The Freedonia Group

The Freedonia Group 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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