

Rigid Bulk Packaging

US Industry Study with Forecasts for 2020 & 2025

Study #3460 | September 2016 | \$5300



US demand for rigid bulk packaging is expected to show solid growth through 2020, driven by an expansion in chemical and pharmaceutical output as well as trends favoring high-value reusable systems. Products such as rigid intermediate bulk containers (RIBCs) will post above-average gains, though advances will slow due to competition from cheaper alternatives. Bulk boxes, with their low cost and widespread usage in packaging plastic, rubber and fiber goods, will also register fast growth.

Pails & drums hold largest share

Pails and drums will hold the largest share of rigid bulk packaging demand. Pails benefit from their ability to be used with a wide range of mid-sized applications, such as paints and coatings and food and beverages. Drums will also continue to be a critical product for the packaging of larger sized loads, though growth will be mitigated by the popularity of RIBCs, which are large-capacity containers with greater space efficiency.

Storage & handling advantages drive growth for RIBCs

RIBCs will post the fastest growth through 2020, primarily due to their storage and handling advantages as well as their well-established reconditioning infrastructure. Because new RIBCs are expensive, many suppliers offer used RIBCs or pooling services to their customers as a way to lower the initial investment required. Resale and

pooling practices are also common for plastic and steel material handling containers. However, these practices will restrain the need for new RIBCs and material handling containers, resulting in slower demand growth.

Chemical & pharmaceutical industries utilize rigid packaging

The largest market for rigid bulk packaging is chemicals and pharmaceuticals, holding over 40 percent of total demand. Rigid containers are used extensively in the packaging of chemicals due to the high concentration of liquid products. This characteristic makes it less likely for rigid packaging to lose ground to lower cost flexible alternatives, a factor which is affecting many other markets. Particularly strong opportunities are also expected for plastic, rubber, and fiber goods.

Study coverage

This study analyzes the US rigid bulk packaging market. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by material, product (pails, drums, bulk boxes, material handling containers, RIBCs), and market (chemicals and pharmaceuticals; food and beverages; durable goods; agricultural and horticultural products; petroleum and lubricants; plastic, rubber and fiber; and other). In addition, the study considers market environment factors, examines the industry structure, and analyzes company market share.

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Plastic pails are also used to package a wide array of special chemical products, including:

- adhesives and sealants
- agricultural compounds (e.g., fertilizers)
- construction-related chemicals (e.g., joint and roofing compounds)
- ice melting compounds
- pool chemicals

The food and beverage market is the second largest plastic pail market, accounting for almost one-third of sales in 2015. Through plastic pail sales in this market. Plastic pails are extensively used as schools, hospitals and mass retailers. Among these containers are:

- dairy products
- dry foods
- oils
- pet foods
- pie fillings
- pre-cut fruit
- sauces
- syrups

Other markets for plastic pails include durable goods, petroleum and lubricants, agricultural and horticultural products, cat litter, and handling and shipping of hazardous waste, especially medical waste. In the durable goods market, plastic pails are often used to contain gypsum, cement, and related products, as well as fasteners and other small ware items.

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MATERIAL HANDLING CONTAINER DEMAND BY TYPE

Item	2005	2010	2015	2020	2025
Rigid Bulk Packaging Demand (mil units) % material handling					
Material Handling Containers (000 units)					
Plastic:					
Totes					
Crates					
Steel					
\$/unit					
Material Handling Containers (mil \$)					
Plastic:					
Totes					
Crates					
Steel					
Plastic Use (mil lbs)					
Steel Use (mil lbs)					

Source: The Freedonia Group

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CHEMICAL & PHARMACEUTICAL MARKET FOR RIGID BULK PACKAGING BY TYPE (million dollars)

Item	2005	2010	2015	2020	2025
Chemical & Pharmaceutical Shpts (bil \$) \$ pkg/000\$ chemicals					
Chemical & Pharma Rigid Bulk Packaging					
Drums:					
Steel Drums					
Plastic Drums					
Fibre Drums					
Pails:					
Plastic Pails					
Steel Pails					
RIBCs					
Bulk Boxes					
Material Handling Containers					
% chemical market					
Rigid Bulk Packaging 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

Corrugated & Paperboard Boxes

Demand for corrugated and paperboard boxes in the US is forecast to rise 2.6 percent annually to \$41.2 billion in 2020. E-commerce and retail-ready applications will drive growth for corrugated boxes while folding carton demand will be sustained by the food-service and carryout and pharmaceutical markets. This study presents historical data (2005, 2010 and 2015) and forecasts (2020 and 2025) by material and market. The study also evaluates company market share and profiles industry players.

#3398.....April 2016..... \$5500

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

World Corrugated Boxes

World demand for corrugated boxes is expected to increase 3.7 percent annually through 2019, to 260 billion square meters. Gains will be driven by strong growth in e-commerce and a sustainability advantage over plastic containers. The Asia/Pacific region will account for the largest share of net growth. This study analyzes the 217 billion square meter world corrugated box industry, with forecasts for 2019 and 2024 by raw material and market for six world regions and 27 major countries. The study also evaluates company market share and profiles industry players.

#3339..... November 2015 \$6400

World Pharmaceutical Packaging

World demand for pharmaceutical packaging will rise 6.5 percent annually to over \$100 billion in 2019. The Africa/Mideast region will be the fastest growing market, followed by the Asia/Pacific region and Central and South America. Primary containers will remain the dominant segment, led by prefillable syringes and parenteral vials. This study analyzes the \$74 billion world drug packaging industry, with forecasts for 2019 and 2024 by product for six world regions and 16 major countries. The study also evaluates company market share and profiles industry players.

#3269..... July 2015 \$6700

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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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