Demand for meat packaging in the US through 2021 will be supported by continued implementation of case-ready packaging systems in the fresh meat sector and a greater need for the high-performance packaging these systems utilize. In addition, shrinking household sizes will drive meat processors to reduce package weights to provide more convenience to consumers, thus increasing volume demands for packaging overall.

Traditional packaging formats will remain dominant

Corrugated boxes, plastic film, bags, and trays will still hold the majority of all meat packaging demand through 2021. Boxes will see continued growth due partially to greater use of retail-ready packaging in the shipment and display of processed foods. Although trays and bags will see some erosion of share as trayless vacuum packaging formats gain popularity with retailers, all films, bags and trays utilized in the packaging of fresh meat will benefit from greater demands for extended meat shelf life and better package performance.

Pouches, plastic containers to exhibit most rapid growth

The fastest growth products will be in niche packaging formats as they gain some share from other containers in the frozen and processed meat sectors. Pouches will see continued gains in the packaging of frozen meat products while plastic containers register greater usage with fresh prepared entrees and premium processed meat offerings.

Markets associated with fresh foods will show strong gains

The markets that will show the most rapid gains through 2021 are those that are associated with trends favoring minimally processed foods and brands that use clean label practices to promote product transparency. The fresh and frozen meat sector will see good gains as home cooking is still seen as the best way to ensure that dietary guidelines are followed.

Study coverage

This Freedonia industry study analyzes the $5.1 billion US meat packaging market. It presents historic demand data (2006, 2011, 2016) plus a forecast for 2021 by product (corrugated boxes, trays, folding cartons, cans, paper-board sleeves, plastic containers, blister packs, foil containers, glass jars, plastic film, bags, pouches, paper and foil wrap, labels, absorbent pads, oxygen scavengers, tape, tags, netting), market (fresh and frozen, processed, ready-to-eat), and application (beef, veal, pork, lamb, bison, other meat). The study also discusses technologies used in meat packaging (MAP, vacuum packaging, case-ready packaging, retort packaging, interactive labels, TTIs, susceptors, moisture control packaging). Along with evaluation of company market share there is analysis of industry players including Bemis, Berry Plastics, Georgia-Pacific, Graphic Packaging, International Paper, NOVIPAX, Packaging Corporation of America, Pactiv, Sealed Air, Silgan Holdings, Viscofan Group, Winpak, and WestRock.

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**TECHNOLOGY**

**Retort Packaging**

Demand for retort packaging in the meat market is expected to increase through 2021 by 5.8% annually to more than $53 million, driven by expanding use with processed items for both consumer and foodservice markets, including new product introductions and can replacements.

Retort packages are used to refresh the image of these goods or to provide enhanced convenience. Other advantages include:

- larger printing surface of pouches
- greater portability
- lighter weight
- convenience and safety in opening
- reduced storage space requirements
- shorter cooking time, which contributes to improved taste

Despite advantages over cans, retort pouches and bowls will face resistance based on broader shifts among consumers away from canned packaged meat products. Additionally, retort pouches suffer from processing speeds compared to cans.

While pouches are the main retort packaging type in meat, other formats are expected to make inroads as product producers seek to differentiate their product lines while also offering new convenience type products.

Manufacturers of retort pouches and/or retort pouch rollstock include:

- Bemis
- Mondi
- Printpack
- ProAmpac
- Sealed Air

---

**Table 5-10 | Bag Demand in Meat Packaging, 2006-2021 (million dollars)**

<table>
<thead>
<tr>
<th>Item</th>
<th>2006</th>
<th>2011</th>
<th>2016</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meat Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% bags</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bag Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>cents/unit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bag Demand (mil units)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% bags</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexible Meat Packaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group

---

**Table 4-1 | Rigid Packaging Demand in Meat Packaging, 2006 - 2021 (million dollars)**

<table>
<thead>
<tr>
<th>Item</th>
<th>2006</th>
<th>2011</th>
<th>2016</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meat Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% rigid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rigid Meat Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corrugated Boxes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metal Cans</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Folding Cartons</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastic Containers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paperboard Sleeves</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group

---

**Table 7-16 | Lamb & Other Meat Packaging Demand by Product & Market, 2006 - 2021 (million dollars)**

<table>
<thead>
<tr>
<th>Item</th>
<th>2006</th>
<th>2011</th>
<th>2016</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lamb &amp; Other Meat Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Type:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rigid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corrugated Boxes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexible</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastic Film</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bags &amp; Pouches</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accessories</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Market:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresh &amp; Frozen</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Processed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ready-to-Eat</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% other meat</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meat Packaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group
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Cups & Lids
US demand for cups and lids is forecast to rise 3.9% annually to $10.6 billion in 2020. Packaging cups will post the fastest gains through 2020, based mainly on the fact that these products usually are smaller portions. The foodservice market will continue to demand the largest share of cups and lids, with preference for premium coffee and fruit beverages aiding growth. This study assesses the $8.8 billion US market for cups and lids, giving projections for 2020 and 2025 by product and market. In addition, the study details industry structure and analyzes company market share. #3445..............August 2016..............$5300

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

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

Meat, Poultry & Seafood Packaging
US demand for meat, poultry, and seafood packaging will rise 3.8 percent annually to $10.9 billion in 2019. Flexible packaging will outpace rigid based on performance and sustainability advantages of pouches and high barrier films. Fresh and frozen will remain the dominant market, while the ready-to-eat segment will grow the fastest. This study analyzes the $9 billion US meat packaging industry, with forecasts for 2019 and 2024 by technology, raw material, product, application, and market. The study also evaluates company market share and profiles industry players. #3263..............April 2015..............$5300

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- 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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