

Poultry Packaging Market in the US

Industry Study with Forecasts for 2021

Study #3503 | March 2017 | \$4900



Growth in US demand for poultry packaging is expected to be spurred by a steady consumption of poultry products and trends favoring convenience.

Consumer preference for easy meal preparation and healthy alternatives to processed foods will help to propel gains for poultry packaging overall as most convenience-oriented products utilize high performance packaging products. In the fresh poultry market, increased use of individual portion packaging has bolstered demand for vacuum pouches.

Trays dominate fresh segment

Despite incursion from all-film packaging such as pouches and chubs, the tray and overwrap packaging format is still the most widely used in the packaging of fresh poultry for retail sale. Foam trays, partnered with low-barrier films, present a traditional appearance and keep costs relatively low while maintaining product integrity and safety.

Markets touting healthy eating & convenience growing faster

The fastest growing market for poultry packaging will be the small ready-to-eat poultry market. This market is well positioned to capitalize on trends favoring convenience as consumers use rotisserie chicken or other fresh prepared items to shorten or eliminate meal preparation time while still eating foods perceived to be healthy.

The processed poultry market will also register good gains based on the fact that many of the products are marketed as healthy alternatives to meat-based products. Increased concern about the health effects of red meat have spurred advances for products such as turkey bacon and sausage that can be formulated to have a similar flavor. Although fresh chicken and turkey products remain popular, opportunities will be stifled by market maturity, the convenience of processed alternatives, and the drop in cost of fresh red meat.

Study coverage

This Freedonia industry study analyzes the US poultry packaging market. It presents historical demand data plus forecasts for 2021 by product (corrugated boxes, trays, folding cartons, paperboard sleeves, plastic containers, cans, foil containers, plastic film, bags, pouches, paper and foil wrap, other packaging products, labels, absorbent pads, and other accessories), market (fresh and frozen, processed, and ready-to-eat), and application (chicken, turkey, duck, goose, other poultry). The study also details technologies used in poultry packaging (MAP, vacuum packaging, case-ready packaging, retort packaging, interactive labels, TTIs, susceptors, and moisture control packaging) and evaluates company market share and industry participants such as Bemis, Berry Plastics, Georgia-Pacific, Graphic Packaging, International Paper, NOVIPAX, Sealed Air, Silgan Holdings, Packaging Corporation of America, Pactiv, Viscofan Group, Winpak, and WestRock.

PACKAGING ACCESSORIES

Several types of labels are used in poultry packaging, including:

- primary packaging labels
- variable information labels for retail products sold and priced by
- instructional and descriptive labels
- interactive labels

Label Size & Appearance

Poultry labels range from smaller to larger sizes and are applied to various types of packaging. Labels offer increased visual appeal for cases and can also offer suggestions. Clear labels which offers a premium improved visibility

Interactive Labels

Interactive poultry packaging labels include TTI labels and smartphone-enabled labels. In general, TTIs are used with fresh poultry to monitor temperature history or provide a visual indicator of temperature and/or freshness. TTI label types include:

- color changing types that use specialized inks and coatings to indicate that a certain temperature threshold has been reached
- electronic temperature tracking types that use digital sensors to track and report changes in temperature based on established thresholds

Smartphone-enabled labels include QR codes and NFC-enabled components that allow consumers and retailers to scan the item with smartphone cameras to receive more information about the product. These labels are not expected to see widespread usage in poultry packaging primarily due to the commodity nature of most products. However, QR codes can link users to recipes, coupons, or origin information and can

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Table 5-1 | Flexible Packaging Demand in Poultry Packaging, 2006 - 2021 (million dollars)

Item	2006	2011	2016	2021
Total Poultry Packaging Demand % flexible				
Flexible Poultry Packaging Demand				
Plastic Film				
Bags				
Pouches				
Paper & Foil				

Source: The Freedonia Group

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

Item	2006	2011	2016	2021
Total Poultry Packaging Demand % rigid				
Rigid Poultry Packaging Demand				
Corrugated Boxes				
Trays				
Plastic Containers				
Folding Cartons				
Metal Cans				
Paperboard Sleeves				
Other*				

*Other rigid packaging includes aluminum foil containers, blister packs, & glass jars

Source: The Freedonia Group

Table 7-2 | Fresh & Frozen Poultry Packaging Demand by Product, 2006 - 2021 (million dollars)

Item	2006	2011	2016	2021
Fresh & Frozen Poultry Packaging Demand				
Rigid:				
Corrugated Boxes				
Trays				
Folding Cartons				
Other				
Flexible:				
Plastic Film				
Bags				
Pouches				
Paper & Foil				
Accessories:				
Labels				
Other Accessories				

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

Meat Packaging Market in the US

US demand for meat packaging is expected to grow 3.1 percent per year to \$5.9 billion in 2021. Corrugated boxes, plastic film, bags and trays will continue to hold the majority of product demand, while pouches and plastic containers will rise the fastest. The ready-to-eat sector and the fresh meat sectors will see the fastest market gains. This study provides historical data plus forecasts for 2021 for demand by product and market. The study also details the industry structure, evaluates company market share and analyzes industry players.

#3495..... February 2017 \$4900

Rigid Bulk Packaging

Through 2020, US demand for rigid bulk packaging will rise 3.3 percent per year to \$7.2 billion. Growth will be boosted by a favorable outlook for chemicals and pharmaceuticals, the largest market for these products. Pails will hold the largest portion of rigid bulk packaging demand, while rigid intermediate bulk containers (RIBCs) will offer the fastest growth. This study assesses the \$6.1 billion US rigid bulk packaging market, with forecasts for 2020 and 2025 by product and market. The study also examines the industry structure and analyzes company market share.

#3460..... September 2016..... \$5300

World Wine Packaging: Containers, Closures & Accessories

Global demand for wine packaging (containers, closures, accessories) is forecast to rise 2.3 percent yearly through 2020 to \$22.8 billion. Europe will remain the largest regional wine packaging market. Glass will still dominate the container segment, while cork stoppers remain the leading closure type. The study offers forecasts (2020, 2025) for supply and demand, plus demand by type, in five regions and 24 countries. The study also considers market environment factors, evaluates company market share and profiles global competitors.

#3406..... July 2016 \$6300

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

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