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

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

**Label Size & Appearance**

Poultry labels range from small pressure sensitive labels to larger glue-applied types for products in cans and jars. Glossy, laminated film labels offer increased visual appeal for products on store shelves or in refrigerator cases and can also be changed to display different recipes or serving suggestions. Clear film labels are increasingly used for a no-label look, which offers a premium appearance and, in the case of clear containers, improved visibility of the contents.

**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 abuse 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

### Table 5-1 | Flexible Packaging Demand in Poultry 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>Total Poultry Packaging Demand</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>Flexible Poultry Packaging Demand</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</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pouches</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paper &amp; Foil</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group

### Table 4-1 | Rigid Packaging Demand in Poultry 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>Total Poultry Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% rigid</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rigid Poultry Packaging Demand</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Corrugated Boxes</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trays</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>Folding Cartons</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metal Cans</td>
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<td></td>
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<tr>
<td>Paperboard Sleeves</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other*</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

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

Source: The Freedonia Group

### Table 7-2 | Fresh & Frozen Poultry Packaging Demand by Product, 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>
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<tr>
<td>Rigid:</td>
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<tr>
<td>Corrugated Boxes</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Folding Cartons</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Other</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Flexible:</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastic Film</td>
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<td></td>
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<tr>
<td>Bags</td>
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<tr>
<td>Pouches</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paper &amp; Foil</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Accessories:</td>
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<tr>
<td>Labels</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Other Accessories</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Source: The Freedonia Group

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#3338............. October 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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