This Freedonia industry study analyzes the $10.7 billion US meat, poultry, and seafood packaging industry. It presents historical demand data and forecasts for 2024 and 2029 by material (plastic, paper and paperboard, metal and glass), by product (film, trays, bags, pouches, rigid containers, blister packs, corrugated boxes, folding cartons, paperboard sleeves, other paper, metal cans, aluminum foil, glass jars, labels, other accessories), application (beef, pork, lamb and other meat, chicken, turkey and other poultry, seafood), and market (fresh and frozen, processed, ready-to-eat).
# Table of Contents

1. **Executive Summary**  

2. **Overview**  
   - Key Findings  
   - Historical Market Trends  
   - Demand by Material  
   - Meat, Poultry, & Seafood Industry Overview  
     - Key Industry Trends & Outlook  
     - Meat  
     - Poultry  
     - Seafood  
   - Pricing Trends  
   - Factors Driving Packaging Innovation  
     - Convenience  
     - Sustainability  
     - Experience  
     - Quality  
     - Differentiation & Personalization  
     - E-Commerce  
     - Innovation in Food & Beverage Packaging Machinery  
   - Consumer Attitudes  
     - Priorities for Packaging Features  
     - Safety & Handling Concerns  
     - Recycling & the Environment  
     - Meat Buying Habits  
   - Regulations  
   - Foreign Trade & Tariffs

3. **Technologies**  

---

*Meat, Poultry, & Seafood Packaging*  
©2020 The Freedonia Group. All rights reserved.
# Table of Contents

## 4. Plastic Packaging  
60

### Key Findings  
60
### Demand by Product  
61
### Plastic Film  
63
- Plastic Film: Scope & Product Features  
63
- Plastic Film: Demand by Application & Market  
65
- Plastic Film: Demand by Type & End Use  
68
- Overwrapping & Lidding  
70
- Chub Packaging  
71
- Brick Packs  
72
- Vacuum Skin Packaging (VSP)  
73
- Plastic Film: Suppliers  
75

### Trays  
76
- Plastic Trays: Scope & Product Features  
76
- Plastic Trays: Demand by Application & Market  
79
- Plastic Trays: Foam vs. Rigid Plastic  
82
- Plastic Trays: Suppliers  
84

### Bags  
85
- Plastic Bags: Scope & Product Features  
85
- Plastic Bags: Demand by Application & Market  
87
- Plastic Bags: Suppliers  
90

### Pouches  
91
- Plastic Pouches: Scope & Product Features  
91
- Plastic Pouches: Demand by Application & Market  
94
- Plastic Pouches: Suppliers  
97

### Rigid Containers  
98
- Rigid Plastic Containers: Scope & Product Features  
98
- Rigid Plastic Containers: Demand by Application & Market  
100
- Rigid Plastic Containers: Suppliers  
103

### Blister Packs  
104
- Blister Packs: Scope & Product Features  
104
- Blister Packs: Demand by Application  
105
- Blister Packs: Suppliers  
106

## 5. Paper & Paperboard Packaging  
107

### Key Findings  
107
### Demand by Product  
108
### Corrugated Boxes  
110
- Corrugated Boxes: Scope & Product Features  
110
- Corrugated Boxes: Demand by Application & Market  
112
- Corrugated Boxes: Suppliers  
115
## Table of Contents (continued)

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folding Cartons</td>
<td>116</td>
</tr>
<tr>
<td>Folding Cartons: Scope &amp; Product Features</td>
<td>116</td>
</tr>
<tr>
<td>Folding Cartons: Demand by Application &amp; Market</td>
<td>118</td>
</tr>
<tr>
<td>Folding Cartons: Suppliers</td>
<td>121</td>
</tr>
<tr>
<td>Paperboard Sleeves</td>
<td>122</td>
</tr>
<tr>
<td>Paperboard Sleeves: Scope &amp; Product Features</td>
<td>122</td>
</tr>
<tr>
<td>Paperboard Sleeves: Demand by Application &amp; Market</td>
<td>123</td>
</tr>
<tr>
<td>Paperboard Sleeves: Suppliers</td>
<td>125</td>
</tr>
<tr>
<td>Other Paper (Butcher Paper, Trays, &amp; Bags)</td>
<td>126</td>
</tr>
<tr>
<td>Other Paper &amp; Paperboard Products: Scope &amp; Product Features</td>
<td>126</td>
</tr>
<tr>
<td>Other Paper &amp; Paperboard Products: Demand by Product, Application, &amp; Market</td>
<td>127</td>
</tr>
<tr>
<td>Other Paper &amp; Paperboard Products: Suppliers</td>
<td>130</td>
</tr>
<tr>
<td>6. Other Packaging &amp; Accessories</td>
<td>131</td>
</tr>
<tr>
<td>Key Findings</td>
<td>131</td>
</tr>
<tr>
<td>Demand by Product</td>
<td>132</td>
</tr>
<tr>
<td>Metal Cans</td>
<td>133</td>
</tr>
<tr>
<td>Metal Cans: Scope &amp; Product Features</td>
<td>133</td>
</tr>
<tr>
<td>Metal Cans: Demand by Application &amp; Market</td>
<td>135</td>
</tr>
<tr>
<td>Metal Cans: Suppliers</td>
<td>137</td>
</tr>
<tr>
<td>Aluminum Foil</td>
<td>138</td>
</tr>
<tr>
<td>Aluminum Foil: Scope &amp; Product Features</td>
<td>138</td>
</tr>
<tr>
<td>Aluminum Foil: Demand by Application &amp; Market</td>
<td>140</td>
</tr>
<tr>
<td>Aluminum Foil: Suppliers</td>
<td>141</td>
</tr>
<tr>
<td>Glass Jars</td>
<td>142</td>
</tr>
<tr>
<td>Glass Jars: Scope &amp; Product Features</td>
<td>142</td>
</tr>
<tr>
<td>Glass Jars: Demand by Application &amp; Market</td>
<td>143</td>
</tr>
<tr>
<td>Glass Jars: Suppliers</td>
<td>144</td>
</tr>
<tr>
<td>Accessories</td>
<td>145</td>
</tr>
<tr>
<td>Accessories: Demand by Product</td>
<td>145</td>
</tr>
<tr>
<td>Labels</td>
<td>148</td>
</tr>
<tr>
<td>Labels: Scope &amp; Product Features</td>
<td>148</td>
</tr>
<tr>
<td>Labels: Demand by Application &amp; Market</td>
<td>150</td>
</tr>
<tr>
<td>Labels: Suppliers</td>
<td>152</td>
</tr>
<tr>
<td>Other Packaging Accessories</td>
<td>152</td>
</tr>
<tr>
<td>Other Accessories: Demand by Product</td>
<td>152</td>
</tr>
<tr>
<td>Other Accessories: Demand by Application &amp; Market</td>
<td>154</td>
</tr>
<tr>
<td>Other Accessories: Suppliers</td>
<td>155</td>
</tr>
<tr>
<td>7. Applications</td>
<td>156</td>
</tr>
<tr>
<td>Key Findings</td>
<td>156</td>
</tr>
</tbody>
</table>
### Table of Contents (continued)

**Demand by Application** 157  
**Meat** 159  
  - Demand by Meat Type & Market 159  
  - Beef & Veal 161  
  - Pork 162  
  - Lamb & Other Meat 164  
**Poultry** 165  
  - Demand by Poultry Type & Market 165  
  - Chicken 167  
  - Turkey & Other Poultry 168  
**Seafood** 170  
  - Seafood: Demand by Market 170  
  - Seafood: Demand by Packaging Product 172  

#### 8. Markets 174  
**Key Findings** 174  
**Demand by Market** 175  
**Fresh & Frozen** 177  
  - Fresh & Frozen: Demand by Application 177  
  - Fresh & Frozen: Demand by Packaging Product 178  
**Processed** 181  
  - Processed: Demand by Application 181  
  - Processed: Demand by Packaging Product 183  
**Ready-to-Eat** 185  
  - Ready-to-Eat: Demand by Application 185  
  - Ready-to-Eat: Demand by Packaging Product 187  

#### 9. Competitive Analysis 189  
**Key Findings & Industry Composition** 189  
**Market Share** 191  
**Mergers & Acquisitions** 200  
**Cooperative Agreements** 202  
**Selected Industry Participants** 203  

#### 10. Appendix 206  
**Scope** 207  
**Definitions** 210  
**Abbreviations** 212  
**Freedonia Methodology** 213  
**Study-Specific Methodology** 228  
**Sources** 229
# Table of Contents

(continued)

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associations &amp; Agencies</td>
<td>230</td>
</tr>
<tr>
<td>Related Studies &amp; Reports</td>
<td>231</td>
</tr>
<tr>
<td>Macroeconomic Assumptions</td>
<td>233</td>
</tr>
<tr>
<td>Economic Environment</td>
<td>233</td>
</tr>
<tr>
<td>Demographic Trends</td>
<td>235</td>
</tr>
</tbody>
</table>
List of Tables

2. Overview
   Table 2-1 | Meat, Poultry, & Seafood Packaging Demand by Material, 2009 – 2029 (million dollars) 19
   Table 2-2 | Meat, Poultry, & Seafood Production & Consumption, 2009 – 2029 (billion pounds) 22
   Table 2-3 | Meat Shipments by Type & Market, 2009 – 2029 (billion dollars) 25
   Table 2-4 | Poultry Shipments by Type & Market, 2009 – 2029 (billion dollars) 26
   Table 2-5 | Seafood Shipments by Market, 2009 – 2029 (billion dollars) 28
   Table 2-6 | Pricing for Selected Meat, Poultry, & Seafood Packaging Products, 2009 – 2029 (cents per unit) 30
   Table 2-7 | Consumer Insights: Opinions on Meat & Poultry Packaging Features, 2019 (percent of total respondents) 39
   Table 2-8 | Consumer Insights: Opinions on Food Product Safety, 2019 (percent of total respondents) 40
   Table 2-9 | Consumer Insights: Opinions on Recycling Meat & Poultry Packaging, 2019 (percent of total respondents) 42

3. Technologies
   Table 3-1 | Factors Influencing Adoption of Case-Ready Packaging by Product Type 51
   Table 3-2 | Case-Ready Packaging Demand by Application, 2009 – 2029 (million dollars) 51
   Table 3-3 | Modified Atmosphere Packaging: Advantages & Disadvantages 53
   Table 3-4 | Modified Atmosphere Packaging Demand by Application, 2009 – 2029 (million dollars) 53
   Table 3-5 | Factors Impacting Vacuum Meat Packaging Demand by Market 55
   Table 3-6 | Vacuum Packaging Demand by Application, 2009 – 2029 (million dollars) 55
   Table 3-7 | Active & Intelligent Product Types & Key Features 56
   Table 3-8 | Active & Intelligent Packaging Demand by Product & Application, 2009 – 2029 (million dollars) 57
   Table 3-9 | Retort Packaging Demand by Application, 2009 – 2029 (million dollars) 59

4. Plastic Packaging
   Table 4-1 | Plastic Packaging Demand by Product, 2009 – 2029 (million dollars) 61
   Table 4-2 | Selected Plastic Film Materials: Primary Applications & Advantages 64
   Table 4-3 | Plastic Film Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars) 66
   Table 4-4 | Plastic Film End Uses: Primary Applications & Growth Opportunities 68
Table 4-5 | Meat, Poultry, & Seafood Plastic Film Demand by Type & End Use, 2009 – 2029 (million dollars) 69
Table 4-6 | Selected Plastic Film Producers & Product Offerings 75
Table 4-7 | Advantages of Selected Tray Colors & Shapes in Meat, Poultry, & Seafood Packaging 78
Table 4-8 | Plastic Tray Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars & million units) 80
Table 4-9 | Foam & Rigid Plastic Trays: Advantages & Disadvantages 83
Table 4-10 | Meat, Poultry, & Seafood Plastic Tray Demand by Type, 2009 – 2029 (million dollars) 83
Table 4-11 | Selected Plastic Tray Producers & Product Offerings 84
Table 4-12 | Features & Attributes of Specific Types in Meat, Poultry, & Seafood Packaging 86
Table 4-13 | Plastic Bag Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars & million units) 88
Table 4-14 | Selected Plastic Bag Producers & Product Offerings 90
Table 4-15 | Attributes & Applications of Plastic Pouch Types in Meat, Poultry, & Seafood Packaging 93
Table 4-16 | Plastic Pouch Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars & million units) 95
Table 4-17 | Selected Plastic Pouch Producers & Product Offerings 97
Table 4-18 | Advantages & Disadvantages of Rigid Plastic Containers in Meat, Poultry, & Seafood Packaging 99
Table 4-19 | Rigid Plastic Container Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars & million units) 101
Table 4-20 | Selected Rigid Plastic Container Producers & Product Offerings 103
Table 4-21 | Blister Pack Demand by Meat, Poultry, & Seafood Application, 2009 – 2029 (million dollars) 105

5. Paper & Paperboard Packaging
Table 5-1 | Meat, Poultry, & Seafood Paper & Paperboard Packaging Demand by Product, 2009 – 2029 (million dollars) 108
Table 5-2 | Corrugated Boxes: Value-Added Components & Benefits for Retail- & Case-Ready Products 111
Table 5-3 | Corrugated Box Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars & million units) 113
Table 5-4 | Selected Corrugated Box Producers & Product Offerings 115
Table 5-5 | Folding Carton Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars & million units) 119
Table 5-6 | Selected Folding Carton Producers & Product Offerings 121
List of Tables (continued)

Table 5-7 | Paperboard Sleeve Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars & million units) 124
Table 5-8 | Other Paper & Paperboard Product Demand by Product, Meat, Poultry, & Seafood Application, & Market, 2009 – 2029 (million dollars) 128
Table 5-9 | Selected Other Paper & Paperboard Packaging Producers & Product Offerings 130

6. Other Packaging & Accessories
   Table 6-1 | Other Meat, Poultry, & Seafood Packaging & Accessories Demand by Product, 2009 – 2029 (million dollars) 132
   Table 6-2 | Metal Cans: Advantages & Disadvantages 134
   Table 6-3 | Metal Can Demand by Meat, Poultry, & Seafood Application, 2009 – 2029 (million dollars & million units) 136
   Table 6-4 | Aluminum Foil Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars) 140
   Table 6-5 | Glass Jar Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars) 143
   Table 6-6 | Meat, Poultry, & Seafood Packaging Accessory Demand by Product, 2009 – 2029 (million dollars) 146
   Table 6-7 | Label Types & Key Added Features by Packaging Market or End Use 149
   Table 6-8 | Label Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars) 151
   Table 6-9 | Other Meat, Poultry, & Seafood Packaging Accessory Demand by Product, 2009 – 2029 (million dollars) 153
   Table 6-10 | Other Meat, Poultry, & Seafood Packaging Accessory Demand by Application & Market, 2009 – 2029 (million dollars) 154

7. Applications
   Table 7-1 | Meat, Poultry, & Seafood Packaging Demand by Application, 2009 – 2029 (million dollars) 157
   Table 7-2 | Meat Packaging Demand by Meat Type & Market, 2009 – 2029 (million dollars) 160
   Table 7-3 | Beef & Veal Packaging Demand by Product, 2009 – 2029 (million dollars) 162
   Table 7-4 | Pork Packaging Demand by Product, 2009 – 2029 (million dollars) 163
   Table 7-5 | Lamb & Other Meat Packaging Demand by Product, 2009 – 2029 (million dollars) 164
   Table 7-6 | Poultry Packaging Demand by Meat Type & Market, 2009 – 2029 (million dollars) 166
   Table 7-7 | Chicken Packaging Demand by Product, 2009 – 2029 (million dollars) 168
   Table 7-8 | Turkey & Other Poultry Packaging Demand by Product, 2009 – 2029 (million dollars) 169
List of Tables (continued)

Table 7-9 | Seafood Packaging Demand by Market, 2009 – 2029 (million dollars) 171
Table 7-10 | Seafood Packaging Demand by Product, 2009 – 2029 (million dollars) 173

8. Markets
Table 8-1 | Meat, Poultry, & Seafood Packaging Demand by Market, 2009 – 2029 (million dollars) 175
Table 8-2 | Fresh & Frozen Meat, Poultry, & Seafood Packaging Demand by Application, 2009 – 2029 (million dollars) 178
Table 8-3 | Fresh & Frozen Meat, Poultry, & Seafood Packaging Demand by Product, 2009 – 2029 (million dollars) 180
Table 8-4 | Processed Meat, Poultry, & Seafood Packaging Demand by Application, 2009 – 2029 (million dollars) 182
Table 8-5 | Processed Meat, Poultry, & Seafood Packaging Demand by Product, 2009 – 2029 (million dollars) 183
Table 8-6 | Ready-to-Eat Meat, Poultry, & Seafood Packaging Demand by Application, 2009 – 2029 (million dollars) 186
Table 8-7 | Ready-to-Eat Meat, Poultry, & Seafood Packaging Demand by Product, 2009 – 2029 (million dollars) 187

9. Competitive Analysis
Table 9-1 | Leading Participants in the US Meat, Poultry, & Seafood Packaging Industry, 2019 (million dollars) 190
Table 9-2 | Selected Mergers & Acquisitions 200
Table 9-3 | Selected Cooperative Agreements 202
Table 9-4 | Selected Industry Participants 203

10. Appendix
Table 10-1 | Meat, Poultry, & Seafood Packaging Products Included in Report Scope 207
Table 10-2 | Relevant Industry Codes 209
Table 10-3 | Abbreviations & Acronyms Used in Study 212
Table 10-4 | Macroeconomic Indicators, 2009 – 2029 (billion 2012 dollars) 234
Table 10-5 | Population & Households, 2009 – 2029 (million persons) 236
# List of Figures

1. **Executive Summary**
   - Figure 1-1 | Meat, Poultry, & Seafood Packaging Market | 14

2. **Overview**
   - Figure 2-1 | Key Findings for Meat, Poultry, & Seafood Packaging | 15
   - Figure 2-2 | Meat, Poultry, & Seafood Packaging Demand, 2009 – 2019 (million dollars) | 17
   - Figure 2-3 | Meat, Poultry, & Seafood Packaging Demand by Material Type, 2009 – 2029 (% CAGR) | 20
   - Figure 2-4 | Meat, Poultry, & Seafood Production, 2009 – 2024 (billion pounds) | 23
   - Figure 2-5 | Per Capita Consumption of Meat, Poultry, & Seafood Products, 2009 – 2024 (pounds per capita) | 23
   - Figure 2-6 | Consumer Insights: Adherence to Different Eating Practices (percent of total respondents) | 43

3. **Technologies**
   - Figure 3-1 | Key Trends in Meat, Poultry, & Seafood Packaging Technologies | 48

4. **Plastic Packaging**
   - Figure 4-1 | Key Findings for Plastic Packaging | 60
   - Figure 4-2 | Plastic Packaging Demand by Product, 2009 – 2024 (million dollars) | 62
   - Figure 4-3 | Plastic Film Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) | 67
   - Figure 4-4 | Overwrapping & Lidding: Product Examples | 70
   - Figure 4-5 | Chub Packaging: Product Examples | 71
   - Figure 4-6 | Brick Packs: Product Examples | 72
   - Figure 4-7 | Vacuum Skin Packaging: Product Examples | 74
   - Figure 4-8 | Plastic Trays: Product Examples | 78
   - Figure 4-9 | Plastic Tray Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) | 81
   - Figure 4-10 | Plastic Bags: Product Examples | 87
   - Figure 4-11 | Plastic Tray Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) | 89
   - Figure 4-12 | Plastic Pouches: Product Examples | 93
   - Figure 4-13 | Plastic Pouch Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) | 96
   - Figure 4-14 | Rigid Plastic Containers: Product Examples | 99
List of Figures (continued)

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figure 4-15</td>
<td>Rigid Plastic Container Demand by Meat, Poultry, &amp; Seafood Application, 2009 – 2024 (million dollars)</td>
</tr>
<tr>
<td>Figure 4-16</td>
<td>Blister Packs: Product Examples</td>
</tr>
<tr>
<td>Figure 4-17</td>
<td>Blister Pack Demand by Meat, Poultry, &amp; Seafood Application, 2009 – 2024 (million dollars)</td>
</tr>
</tbody>
</table>

5. **Paper & Paperboard Packaging**
   - Figure 5-1 | Key Findings for Paper & Paperboard Packaging |
   - Figure 5-2 | Meat, Poultry, & Seafood Paper & Paperboard Packaging Demand by Product, 2009 – 2024 (million dollars) |
   - Figure 5-3 | Corrugated Boxes: Product Examples |
   - Figure 5-4 | Corrugated Box Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) |
   - Figure 5-5 | Folding Cartons: Product Examples |
   - Figure 5-6 | Folding Carton Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) |
   - Figure 5-7 | Paperboard Sleeves: Product Examples |
   - Figure 5-8 | Paperboard Sleeve Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) |
   - Figure 5-9 | Other Paper & Paperboard: Product Examples |
   - Figure 5-10 | Other Paper & Paperboard Product Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) |

6. **Other Packaging & Accessories**
   - Figure 6-1 | Key Findings for Other Packaging & Packaging Accessories |
   - Figure 6-2 | Metal Cans: Product Examples |
   - Figure 6-3 | Metal Can Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) |
   - Figure 6-4 | Aluminum Foil: Product Examples |
   - Figure 6-5 | Aluminum Foil Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) |
   - Figure 6-6 | Glass Jars: Product Examples |
   - Figure 6-7 | Glass Jar Demand by Meat, Poultry, & Seafood Application, 2009 – 2024 (million dollars) |
   - Figure 6-8 | Meat, Poultry, & Seafood Packaging Accessory Demand, 2009 – 2024 (million dollars) |

7. **Applications**
   - Figure 7-1 | Key Findings for Meat, Poultry, & Seafood Packaging Applications |
   - Figure 7-2 | Meat, Poultry, & Seafood Packaging Demand by Application, 2009 – 2024 (million dollars) |
# List of Figures (continued)

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figure 7-3</td>
<td>Meat Packaging Demand by Application, 2009 – 2024 (million dollars)</td>
<td>160</td>
</tr>
<tr>
<td>Figure 7-4</td>
<td>Poultry Packaging Demand by Application, 2009 – 2024 (million dollars)</td>
<td>166</td>
</tr>
<tr>
<td>Figure 7-5</td>
<td>Seafood Packaging Demand, 2009 – 2024 (million dollars)</td>
<td>172</td>
</tr>
</tbody>
</table>

## 8. Markets

| Figure 8-1 | Key Findings for Meat, Poultry, & Seafood Packaging Markets | 174 |
| Figure 8-2 | Meat, Poultry, & Seafood Packaging Demand by Market, 2009 – 2024 (million dollars) | 176 |
| Figure 8-3 | Fresh & Frozen Market Packaging Demand Share by Application & Product, 2019 (million dollars) | 180 |
| Figure 8-4 | Processed MPS Packaging Demand Share by Application & Product, 2019 (million dollars) | 184 |
| Figure 8-5 | Ready-to-Eat Meat, Poultry, & Seafood Packaging Demand Share by Application & Product, 2019 (million dollars) | 188 |

## 9. Competitive Analysis

| Figure 9-1 | Meat, Poultry, & Seafood Packaging Market Share by Company, 2019 (billion dollars) | 192 |
| Figure 9-2 | Meat, Poultry, & Seafood Packaging Market: Leading Supplier, 2019 | 193 |
| Figure 9-3 | Meat, Poultry, & Seafood Packaging Market: Second Leading Supplier, 2019 | 194 |
| Figure 9-4 | Meat, Poultry, & Seafood Packaging Market: Third Leading Supplier, 2019 | 195 |
| Figure 9-5 | Meat, Poultry, & Seafood Packaging Market: Fourth Leading Supplier, 2019 | 196 |
| Figure 9-6 | Meat, Poultry, & Seafood Packaging Market: Fifth Leading Supplier, 2019 | 197 |
| Figure 9-7 | Meat, Poultry, & Seafood Packaging Market: Sixth Leading Supplier, 2019 | 198 |
| Figure 9-8 | Meat, Poultry, & Seafood Packaging Market: Seventh Leading Supplier, 2019 | 199 |

## 10. Appendix

| Figure 10-1 | Annual Growth in Real GDP, 2000 – 2019, Compared to 1980 – 2005 Average (percent) | 234 |
| Figure 10-2 | Annual Population Growth, 2004 – 2019 (percent) | 236 |
Table 2-2 | Meat, Poultry, & Seafood Production & Consumption, 2009 – 2029 (billion pounds)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Meat, Poultry, &amp; Seafood Production</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poultry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seafood</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>net exports &amp; stock changes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Meat, Poultry, &amp; Seafood Consumption</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poultry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seafood</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group
Table 3.6 | Vacuum Packaging Demand by Application, 2009 – 2029 (million dollars)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Meat, Poultry, &amp; Seafood Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% vacuum packaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacuum Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poultry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seafood</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group

Table 4.5 | Meat, Poultry, & Seafood Plastic Film Demand by Type & End Use, 2009 – 2029 (million dollars)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Plastic Film Demand*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Type:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High-Barrier</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Film</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By End Use:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overwrapping &amp; Lidding</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chub Packaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brick Packs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacuum Skin Packaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Excludes film converted into bags & pouches.

Source: The Freedonia Group
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper &amp; Paperboard M&amp;P&amp;S Packaging (mil $)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% corrugated boxes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corrugated Box Demand (mil $)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Application:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beef &amp; Veal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pork</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lamb &amp; Other Meat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poultry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chicken</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turkey &amp; Other Poultry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seafood</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Market:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresh &amp; Frozen</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Processed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ready-to-Eat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>cents/unit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corrugated Box Demand (mil units)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group
### Table 6-5 | Glass Jar Demand by Meat, Poultry, & Seafood Application & Market, 2009 – 2029 (million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2029</th>
<th>% Compound Annual Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Meat, Poultry, &amp; Seafood Packaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% glass jars</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Glass Jar Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meet</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beef &amp; Veal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pork &amp; Other Meat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poultry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seafood</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: All glass jar demand is for processed meat, poultry, & seafood products.
Source: The Freedonia Group

### Table 7-5 | Lamb & Other Meat Packaging Demand by Product, 2009 – 2029 (million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2029</th>
<th>% Compound Annual Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meat Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% lamb &amp; other meat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lamb &amp; Other Meat Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Film</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trays</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bags</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pouches</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rigid Containers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paper &amp; Paperboard:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corrugated Boxes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Paper &amp; Paperboard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Packaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accessories</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group
### Table 8-5 | Processed Meat, Poultry, & Seafood Packaging Demand by Product, 2009 – 2029 (million dollars)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Processed MPS Product Packaging Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Film</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trays</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bags</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pouches</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rigid Containers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blister Packs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paper &amp; Paperboard:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corrugated Boxes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Folding Cartons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paperboard Sleeves</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Paper</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Packaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accessories</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group

### Figure 9-1 | Meat, Poultry, & Seafood Packaging Market Share by Company, 2019 (billion dollars)

Source: The Freedonia Group
Search Less. Find More.
Freedonia Group
Knowledge Center

Access our entire library of market data and analysis — all instantly available and fully searchable — saving you time and money.

Powered by world-class technology, the Freedonia Group Knowledge Center offers convenient, unlimited access to Freedonia’s library of unbiased and reliable market research — providing a state-of-the-art platform for research teams where you can use as much as you want, whenever you want, for one fixed fee.

Authoritative content from a trusted name.
Get comprehensive, quality research from a premier global publisher specializing in industrial markets, including construction and building products, packaging, machinery and equipment, industrial components, and many other relevant sectors (see list of industries covered). Freedonia's research is used by top industry decision makers and frequently cited by leading business media and trade journals.

Smarter and faster searching.
Find what you need in seconds. A search on our Knowledge Center allows you to view or filter by report, figures, or tables—giving you a shortcut to the type of content you want to view. You can also preview the search results, allowing you to quickly determine whether that piece of content is relevant.
The Freedonia Advantage

Building on 30 years of expertise, the Freedonia Group Knowledge Center makes it easy for you to confidently obtain the research you need to stay ahead of your competition.*

- Analysis of US & global markets
- Market size & segmentation
- Growth drivers & market environment
- Historical data & forecasts
- Regulatory & technology trends
- Competitive market share
- Numerous graphs & tables

About Us

- We are a leading international industry market research firm with more than 30 years of experience.
- We rely on in-house economists, analysts, and editors to produce high quality research.
- Our research is presented in clear, methodical, exhibit-rich formats.
- Our customers include:
  - More than 90% of the Fortune 500 manufacturing companies
  - Leading global investment banks and private equity firms
  - Leading global management consulting firms
  - Government agencies
  - Top-tier universities and business schools
- We are regularly cited as a credible source by major news outlets such as The Economist, Financial Times, The Wall Street Journal, Forbes, and Bloomberg.

Contact Customer Service

US Tel: 800.927.5900 | Int’l Tel: +1.440.684.9600

kc.marketresearch.com
freedoniagroup.com | freedoniafocusreports.com

*Vertical specific subscriptions are also available. Please contact customer service or your account representative for further details.

Industries Covered

- Automotive & Transport
- Chemical
  - Additives
  - Ag, Lawn & Garden
  - Coatings, Adhesives & Sealants
  - Petroleum & Catalysts
- Construction & Building Products
  - Building Components
  - Building Materials
  - Building Systems
  - Finish Products
  - Outdoor Products
  - Pipe
- Consumer Goods
- Energy & Petroleum
  - Alternative Energy
  - Oilfield Products
  - Petroleum Refining
- Healthcare & Life Sciences
- Industrial Components
- Machinery & Equipment
  - Electrical Equipment
  - Industrial Machinery
  - Off Road Equipment
- Metals, Minerals & Glass
- Packaging
  - Flexible Packaging
  - Food Packaging
  - Rigid Packaging
  - Specialty Packaging
  - Tapes & Labels
- Plastics & Other Polymers
- Security
- Services
- Textiles & Nonwovens
- Water Treatment