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World Food Containers

Industry Study with Forecasts for **2013 & 2018**

Study #2601 | February 2010 | $5800 | 410 pages

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World Food Containers

Industry Study with Forecasts for ***2013 & 2018***

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World Food Containers

Industry Study with Forecasts for ***2013 & 2018***

Factors contributing to rising food container demand include growth in global food output and trends toward convenience-oriented food options as a result of fast-paced lifestyles.

Global demand to increase 3.9% yearly through 2013

World demand for food containers is forecast to increase 3.9 percent per year to $124 billion in 2013. Factors contributing to rising demand include growth in global food output and trends toward convenience-oriented food options as a result of fast-paced lifestyles. Demographic trends will also influence food container demand, such as the growing percentage of urban population and women in the workforce, coupled with increases in the number of single-person households. This will fuel consumer spending on packaged and processed foods, due to more limited time for meal preparation and convenience benefits.

World Food Container Demand
($124 billion, 2013)

Developing regions to see most rapid increases

While the US is by far the world's largest user of food containers, the most rapid increases will occur in the world's developing regions. Asia, Latin America, Eastern Europe and the Africa/Mideast region will all outpace the global average. Population growth and greater urbanization, industrialization trends, and expanding international trade will support advances in these regions' generally underdeveloped packaging sectors. Rising consumer income levels and expanding middle classes will also generate robust internal demand for packaged consumer goods like processed foods, boosting food container consumption. Some of the best gains are expected in the BRIC countries of Brazil, Russia, India and China. In particular, China alone is expected to account for nearly one-quarter of global value gains in food container demand between 2008 and 2013.

Plastic containers to be fastest growing products

Overall, bags and pouches will remain the largest product type by a wide margin, supported by ongoing developments in high-barrier resins and value-added features such as microwaveable bags and resealable stand-up pouches. In addition, demand for bags and pouches will benefit from their favorable environmental profile, since they are often used as part of waste reduction efforts, impart storage space savings, and generally require less energy to produce and transport compared to rigid packaging.

The fastest gains are anticipated for plastic containers, based on improvements in plastic container performance and their price competitiveness. Still, metal cans will remain an important segment of the food container mix due to the economic advantages of canned items in controlling food expenditures. While glass has traditionally been used in smaller wide-mouth container applications such as baby food, plastics are making inroads in these areas as well due to barrier property enhancements and improvements in hot-fill bottle construction and capabilities.

World Food Containers

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Sample Text, Table & Chart

TABLE III-5

WORLD METAL FOOD CONTAINER DEMAND BY REGION
(million dollars)

Item	1998	2003	2008	2013	2018
World Food Container Demand					
% metal					
World Metal Food Container Demand					
North America:					
United States					
Canada & Mexico					
Western Europe					
Asia/Pacific:					
China					
Japan					
Other Asia/Pacific					
Other Regions:					
Latin America					
Eastern Europe					
Africa/Mideast					

SAMPLE TABLE

ASIA/PACIFIC

India: Food Container Demand

Demand for food containers in India totaled $1.1 billion accounting for less than four percent of the regional market. represents a relatively underdeveloped packaging market, du its huge, impoverished and mostly rural population. Persona levels remain very low, by both regional and global standard result, per capita spending on food is minimal. The country' processing industry is one of the least developed in the worl periencing one of the fastest growth rates. Key markets incl other grains and food crops, various processed foods, vegeta products, coffee, tea, spices, and betel nut-related products s masala. Food packaging requirements largely consist of ine containers, which holds down market value. The use of chea reusable packaging alternatives, such as newspaper, jute bag crates, in lieu of food containers will also limit demand. No gains will be propelled by the expansion of India's urban middle classes, the primary consumers of packaged consumer products. In addition, strong growth in the number of food retail stores will continue to fuel demand for high-quality and higher-priced containers that meet international standards, such as those used in Western-style grocery stores.

Food container demand in India is projected to increase at a robust billion in 2013. This represents the most ld over the forecast period -- albeit from d to Japan or China). Strong economic duction, rising domestic consumption ation trends and the growing middle gains. Interest in higher-quality, more will also fuel growth as the role of marketing takes on greater importance. In addition, efforts to improve sanitation and food safety, and reduce the country's high rate of food waste and spoilage will further support demand for food containers. However,

SAMPLE TEXT

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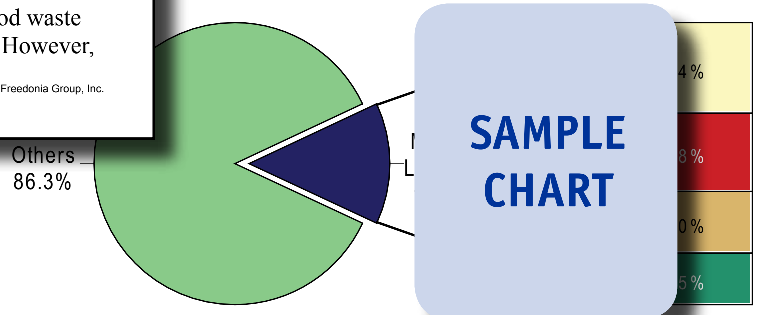
CHART VIII-5

PLASTIC FOOD CONTAINER MARKET SHARE
($15.8 billion, 2008)



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World Food Containers

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Sample Profile, Table & Forecast

TABLE VI-8

INDIA -- FOOD CONTAINER DEMAND (million dollars)

Item	1998	2003	2008	2013	2018
Asia/Pacific Food Container Demand 1					0
% India					1
Food Container Demand					0
Bags & Pouches					5
Paperboard Containers					0
Metal Containers					5
Plastic Containers					5
Glass Containers					5

SAMPLE TABLE

COMPANY PROFILES

Mayr-Melnhof Group
Brahmsplatz 6
1041 Vienna
Austria
43-50-13
http://wv

Sales: $
Geograp ria 5%, Other West-
ern Euro ther Countries 4%
Employ

SAMPLE PROFILE

Key Products: virgin and recovered fiber-based cartonboard, folding cartons, and pre-formed bags

Mayr-Melnhof Group is a manufacturer of cartonboard and folding cartons for packaging food, tobacco, detergents and hygiene products. The Company operates through two segments: MM Karton and MM Packaging.

The Company participates in the world food container industry through both segments. Via these segments, Mayr-Melnhof Group manufactures virgin and recovered fiber-based cartonboard, folding cartons, and pre-formed bags.

MM Karton -- The MM Karton segment, which posted sales of $1.1 billion and employed 2,560 in 2008, makes virgin and recovered fiber-based cartonboard that is suitable for use in the production of folding cartons. Of the segment's total 2008 sales, Western Europe accounted for 68 percent, Eastern Europe represented 18 percent, Asia accounted for six percent and other countries represented seven percent. The Company's cartonboard can be used to make folding cartons for

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"... good opportunities will exist for all major types of food containers. Plastic containers, bags and pouches will experience the fastest gains, due to their cost and performance advantages. These products will benefit from strong demand for good barrier properties, as well as value-added features, such as microwave-ability and portability. Unlike in many countries, PET is among the most broadly used packaging materials in India, as the country's abundant domestic PET supplies render the high-performance resin more affordable than in other markets."
--Section VI, pg. 144

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Other Studies

Tube & Stick Packaging

US tube and stick packaging demand will rise 5.1% annually through 2014. The fastest gains are expected for stick packs, driven by advantages of product differentiation, portability and material savings compared to conventional single-portion pouches. The dominant squeeze tube segment will slightly lag the overall industry. This study analyzes the $1.4 billion tube and stick packaging industry, with forecasts for 2014 and 2019 by product type and market. It also evaluates company market share and profiles industry players.

#2631 .... May 2010.................... $4800

Corrugated & Paperboard Boxes

US corrugated and paperboard box demand will rise 2.4% yearly through 2014. Gains will be driven in part by higher-value types with better graphics capabilities, including folding cartons and corrugated boxes. Internet-based shopping will also support box demand. Durable goods will be the fastest growing market. This study analyzes the $32.3 billion US corrugated and paperboard box industry, with forecasts for 2014 and 2019 by material, product and market. It also evaluates company market share and profiles industry players.

#2598 .... March 2010................... $4800

Frozen Food Packaging

US demand for frozen food packaging will climb 3.7% yearly through 2013. Gains will be driven by the popularity of convenience-type foods, the prevalence of microwave ovens, and technological advances in packaging. Frozen food specialties and meat, poultry and seafood will be the fastest growing applications. This study analyzes the $5.7 billion US frozen food packaging industry, with forecasts for 2013 and 2018 by application and product. It also evaluates company market share and profiles industry players.

#2594 ....January 2010 .... $4700

Microwave Packaging

US microwave packaging demand will climb 7% annually through 2013, driven in part by demand for more convenient meals coupled with the prevalence of microwave ovens. Frozen foods will remain the top use while fresh prepared foods will lead gains. Foodservice containers and tubs, cups and bowls will be the fastest growing types. This study analyzes the $1.7 billion US microwave packaging industry, with forecasts for 2013 and 2018 by application and product. It also evaluates company market share and profiles industry players.

#2572 ....December 2009 .... $4700

World Foodservice Disposables

Global demand for foodservice disposables is forecast to increase 4.8% annually through 2013. The US will remain the largest market by a wide margin, while more rapid growth is expected in China and other developing regions. Disposable foodservice packaging will be the fastest growing product segment. This study analyzes the $38.5 billion world foodservice disposables industry, with forecasts for 2013 and 2018 by product, market, world region and for 18 countries. It also evaluates market share and profiles industry players.

#2573 .... November 2009 .... $5600

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