Snack Food Packaging

US Industry Study with Forecasts to **2010 & 2015**

Study #2057 | May 2006 | $4300 | 239 pages

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Gains in US snack food packaging demand will slightly outpace expected growth in snack product shipments, reflecting changes in food consumption patterns and the way snack food is packaged.

US demand to reach $5.6 billion by 2010

US demand for snack food packaging is projected to advance 3.7 percent per year to $5.6 billion in 2010. Gains will slightly outpace expected growth in snack product shipments, reflecting changes in food consumption patterns and trends that are changing the way snack food is packaged. One such trend is the downsizing of package sizes, which increases demand since smaller packages use more packaging relative to their volume than standard-sized products. Demand will also be driven by greater use of higher-value packaging or unique packaging chosen for increased marketing appeal.

US Snack Food Packaging Demand
($4.7 billion, 2005)

Nutrition bars, savory snacks among fastest growing applications

The best advances in snack food packaging applications are anticipated for nutrition bars, which will benefit from rising interest in healthier snacks and the need for convenient and portable meal replacements. Packaging demand growth is also expected to be favorable in savory snacks and nuts and dried fruit. Savory snack packaging will be aided by a rebound in snack shipments as well as expanded offerings of single-serving size products and a healthy outlook for quick casual sandwich restaurants, which tend to sell small bags of chips as side items. Nut and dried fruit packaging will benefit from rising interest in snacks that are perceived as more healthful, and a plethora of new product introductions, such as flavored nuts, nut clusters, trail mixes and combinations of fruit and nuts. Health and wellness trends and increased demand for single-serving items will also aid prospects for related packaging in candy and confection and bakery snack applications.

Flexible packaging to outpace rigid containers

Flexible packaging will present above-average opportunities through 2010, with best advances anticipated for pouches, including stand-up and side seal types, the result of cost, performance, convenience and differentiation advantages.

Flexible packaging, while continuing to expand its overall share of snack packaging, will face growing competition from smaller rigid containers such as cups, canisters and other molded containers as these latter types can differentiate products and their compatibility with car cup holders provides greater on-the-go convenience. This latter trend will fuel opportunities in the slower-growing rigid packaging segment, with boxes also benefitting from heightened demand for single-serving bags packaged as multi-packs in folding cartons. Plastic containers will log the fastest growth among rigid snack packaging products, driven by conversions from glass, metal and paperboard containers as well as some inroads into flexible packaging.

Sample Text, Table & Chart

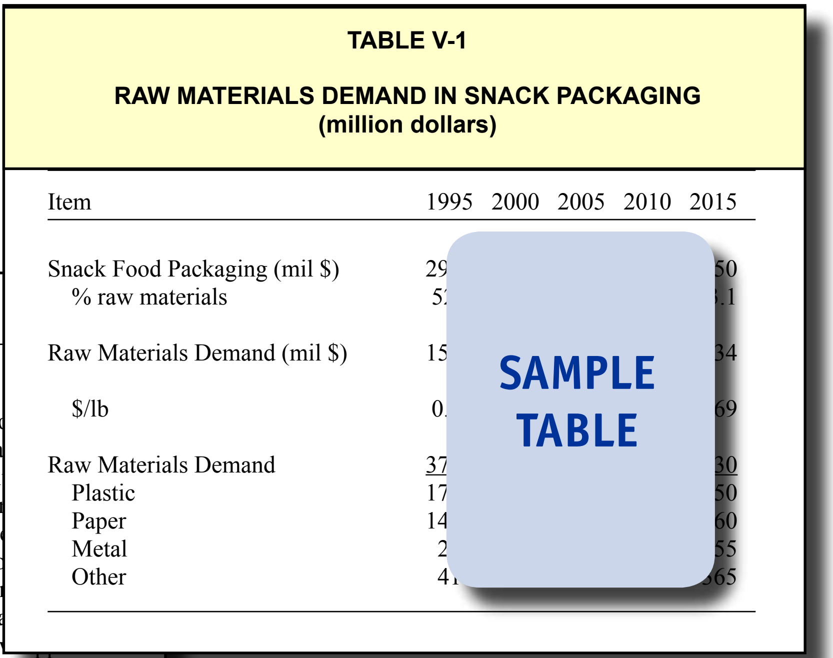
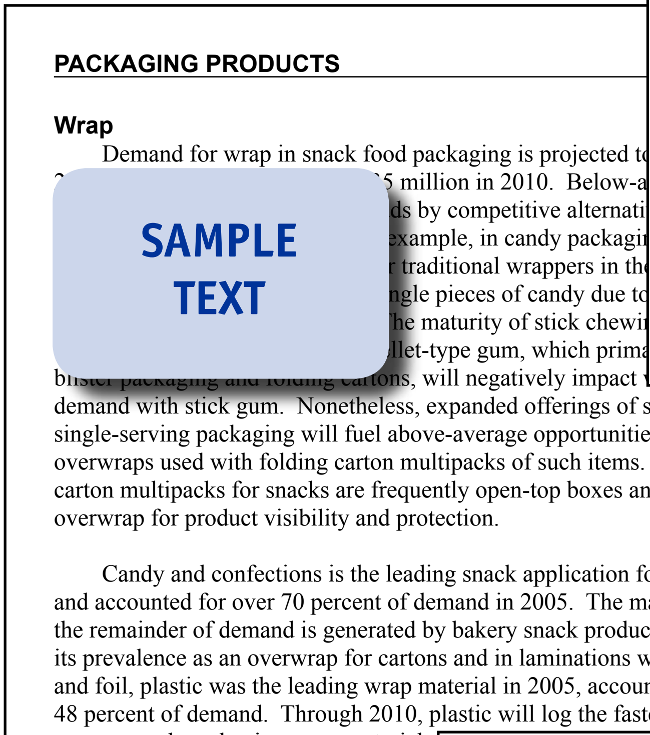


TABLE V-1

RAW MATERIALS DEMAND IN SNACK PACKAGING
(million dollars)

Item	1995	2000	2005	2010	2015
Snack Food Packaging (mil $)	29				50
% raw materials	5				.1
Raw Materials Demand (mil $)	15				34
$/lb	0.				69
Raw Materials Demand	37				30
Plastic	17				50
Paper	14				60
Metal	2				55
Other	4				65

SAMPLE TABLE



PACKAGING PRODUCTS

Wrap

Demand for wrap in snack food packaging is projected to
5 million in 2010. Below-a
ds by competitive alternati
example, in candy packagi
traditional wrappers in th
ngle pieces of candy due to
he maturity of stick chewi
llet-type gum, which prima
blister packaging and folding cartons, will negatively impact
demand with stick gum. Nonetheless, expanded offerings of snacks in single-serving packaging will fuel above-average opportunities for film overwraps used with folding carton multipacks of such items. Folding carton multipacks for snacks are frequently open-top boxes and use film overwrap for product visibility and protection.

Candy and confections is the leading snack application for wraps and accounted for over 70 percent of demand in 2005. The majority of the remainder of demand is generated by bakery snack products. Due to its prevalence as an overwrap for cartons and in laminations with paper and foil, plastic was the leading wrap material in 2005, accounting for 48 percent of demand. Through 2010, plastic will log the fastest growth among snack packaging wrap materials.

Wrap demand in candy and confec
increase 2.0 percent per year to nearly $
average growth the result of inroads by
especially pillow packs, in the packagin
of candy and chewing gum. The preval
paper, film, foil and laminates of these
options.

SAMPLE TEXT

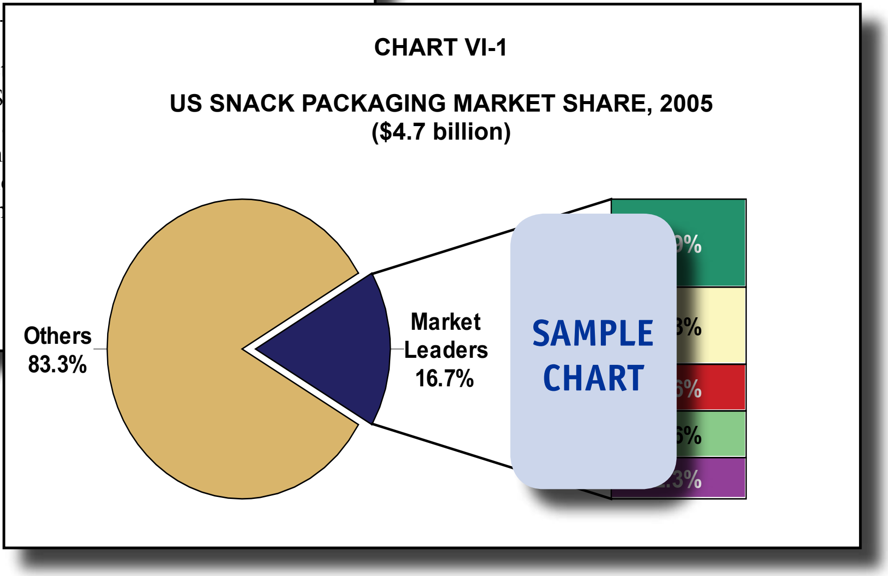


CHART VI-1

US SNACK PACKAGING MARKET SHARE, 2005
($4.7 billion)

Sample Profile, Table & Forecast

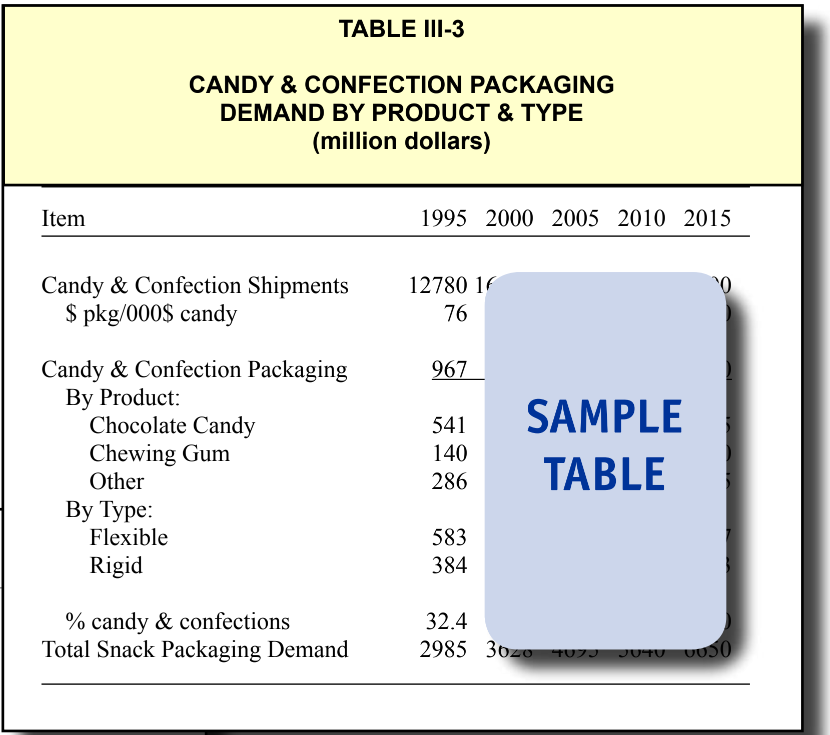
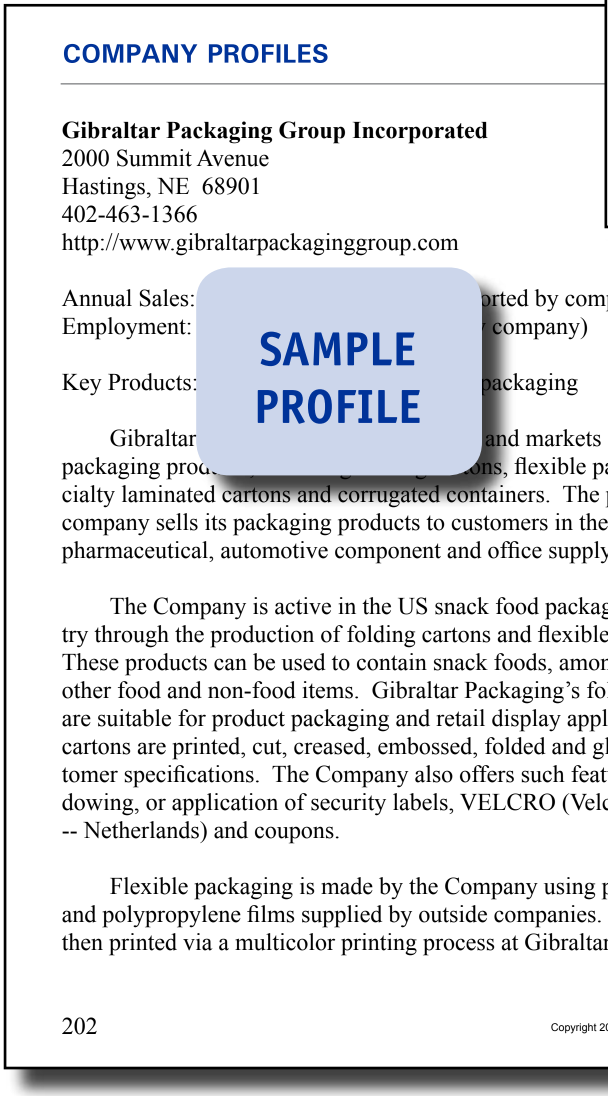


TABLE III-3

CANDY & CONFECTION PACKAGING DEMAND BY PRODUCT & TYPE (million dollars)

Item	1995	2000	2005	2010	2015
Candy & Confection Shipments	12780	[redacted]	[redacted]	[redacted]	[redacted]
$ pkg/000$ candy	76	[redacted]	[redacted]	[redacted]	[redacted]
Candy & Confection Packaging	967	[redacted]	[redacted]	[redacted]	[redacted]
By Product:					
Chocolate Candy	541	[redacted]	[redacted]	[redacted]	[redacted]
Chewing Gum	140	[redacted]	[redacted]	[redacted]	[redacted]
Other	286	[redacted]	[redacted]	[redacted]	[redacted]
By Type:					
Flexible	583	[redacted]	[redacted]	[redacted]	[redacted]
Rigid	384	[redacted]	[redacted]	[redacted]	[redacted]
% candy & confections	32.4	[redacted]	[redacted]	[redacted]	[redacted]
Total Snack Packaging Demand	2985	[redacted]	[redacted]	[redacted]	[redacted]



COMPANY PROFILES

Gibraltar Packaging Group Incorporated
2000 Summit Avenue
Hastings, NE 68901
402-463-1366
http://www.gibraltarpackaginggroup.com

Annual Sales: [redacted] orted by company)
Employment: [redacted] company)

Key Products: [redacted] packaging

Gibraltar [redacted] and markets a variety of packaging prod[redacted]ons, flexible packaging, specialty laminated cartons and corrugated containers. The privately held company sells its packaging products to customers in the food, textile, pharmaceutical, automotive component and office supply markets.

The Company is active in the US snack food packaging industry through the production of folding cartons and flexible packaging. These products can be used to contain snack foods, among numerous other food and non-food items. Gibraltar Packaging's folding cartons are suitable for product packaging and retail display applications. The cartons are printed, cut, creased, embossed, folded and glued to customer specifications. The Company also offers such features as windowing, or application of security labels, VELCRO (Velcro Industries -- Netherlands) and coupons.

Flexible packaging is made by the Company using polyethylene and polypropylene films supplied by outside companies. The film is then printed via a multicolor printing process at Gibraltar Packaging's

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> "Demand for candy and confection packaging is forecast to rise 3.5 percent annually to $1.8 billion in 2010. Growth will be based on a favorable outlook for candy and confection shipments, buoyed by increased marketing of products toward adults rather than traditional marketing aimed at children. Favorable publicity regarding possible health benefits associated with dark chocolate and expanded varieties of sugarless candy and gum will..."
>
> --Section III, pg. 39

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OTHER STUDIES

Converted Flexible Packaging

US converted flexible packaging demand will grow 4.2% annually through 2011. Gains will be driven in part by advantages over most rigid packaging and by developments in breathable and self-venting films and resealable features. Pouches will be the fastest growing type while bags remain the largest segment. This study analyzes the $13.4 billion US converted flexible packaging industry, with forecasts for 2011 and 2016 by material, product and market. It also evaluates market share and profiles major players.

#2275 .... 11/2007.................... $4600

Food Containers: Rigid & Flexible

US food container demand will reach $23.5 billion in 2011. Growth trends include heightened demand for more convenient foods and a shift toward value-added packaging. Plastic containers, and bags and pouches will log the fastest growth. Meat and dairy products and frozen specialties will lead gains by market. This study analyzes the 263 billion unit US food container industry, with forecasts given for 2011 and 2016 by product and market. It also evaluates company market share and profiles major players.

#2208 .... 07/2007.................... $4500

Beverage Containers in China

Demand for beverage containers in China will grow 8.9% per annum through 2010. Plastic will remain the dominant material in unit terms while paperboard will grow the fastest. Milk will stay the largest market and be one of the fastest growing, with fruit beverages posting the fasted gains. This study analyzes the ¥60.5 billion beverage container industry in China, with forecasts for 2010 and 2015 by market and material. The study also evaluates company market share and profiles leading industry participants.

#2183 .... 05/2007.................... $4900

Produce Packaging

US produce packaging demand will grow 4.6% per year through 2010. Growth will be fueled by rising demand for fresh-cut, ready-to-eat produce, which favors more value-added packaging than bulk produce. Corrugated boxes will remain the leading format while plastic containers and bags and liners will grow faster. The study analyzes the $3.4 billion US produce packaging industry to 2010 and 2015 by type, application and end user. It also evaluates company market share and profiles major competitors.

#2094 .... 08/2006.................... $4400

Pouches

US demand for pouches will grow 6.3% annually through 2010, driven by healthy gains for stand-up and flat pouches. The fastest-growing markets for stand-up pouches will be cheese, processed foods, and consumer and industrial products, while flat pouches will do best in fresh produce, medical and pharmaceutical products, and consumer items. This study analyzes the $4.8 billion US pouch industry to 2010 and 2015 by product and market. It also details company market share and profiles leading players.

#2087 .... 07/2006.................... $4400

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