Food Containers: Rigid & Flexible

US Industry Study with Forecasts for **2011 & 2016**

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US Industry Study with Forecasts for ***2011 & 2016***

Table of Contents

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List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

FOOD CONTAINER MARKETS

CONTAINER OVERVIEW

BAGS & POUCHES

PAPERBOARD FOOD CONTAINERS

PLASTIC FOOD CONTAINERS

METAL FOOD CONTAINERS

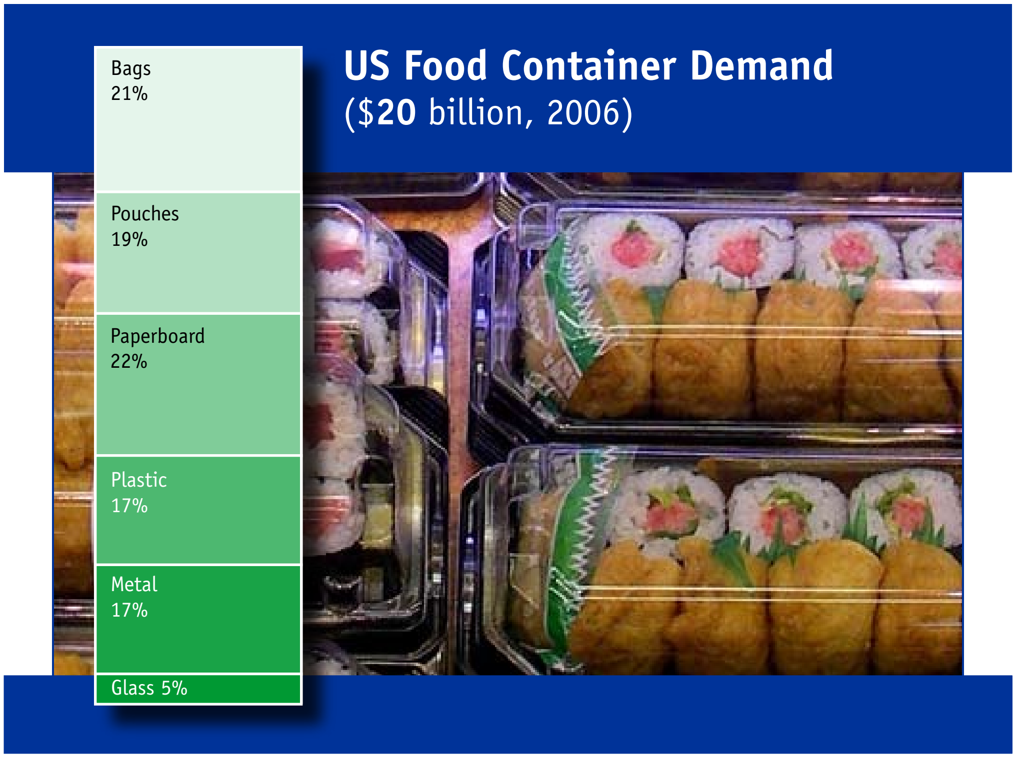
GLASS FOOD CONTAINERS

INDUSTRY STRUCTURE

US food container demand will benefit from trends toward smaller household sizes, more convenient foods, and value-added packaging that protects freshness and increases convenience.

US demand to reach $23.5 billion in 2011

US demand for food containers is forecast to climb 3.3 percent per year to $23.5 billion in 2011, representing nearly 300 billion units. Advances will be stimulated by an expanding population base, rising disposable personal income levels, smaller household sizes, heightened demand for more convenient foods, and trends toward value-added packaging that provides freshness protection and increased convenience. Unit growth will be aided by the popularity of single-serve packaging, such as plastic cups and pouches, in an expanding range of applications, as these containers meet the need for food that is convenient and portable.



Both rigid, flexible plastic containers to lead gains

Plastic containers, and bags and pouches will log the fastest growth among container types, benefitting from performance attributes and heightened demand for smaller package sizes. Additionally, plastic containers will continue to supplant paperboard, metal and glass counterparts, while bags and pouches will make inroads into rigid container applications. Plastic food container demand is projected to climb 6.3 percent yearly to $4.5 billion in 2011, attributable to performance advantages such as higher barrier properties resulting from advances in resin and processing technologies. Moderating further rigid plastic inroads will be competition from flexible pouches. Cost and performance advantages will drive opportunities for bags and pouches, for which demand is expected to rise 4.4 percent annually to almost $10 billion in 2011. Growth will be driven by robust gains for stand-up pouches based on their excellent visual appeal, product differentiation, convenience, portability, reclosability and freshness protection. In addition to replacing other containers in existing products, opportunities for pouches are anticipated in initial launches of new products. Bag demand will increase more slowly based on the maturity of many applications as well as competition from pouches.

Paperboard, metal, glass also present opportunities

The more mature paperboard, metal and glass food container segments will also present areas of opportunity. For instance, the relatively small aseptic carton segment will log rapid gains based on expanding applications and greater consumer interest in natural or minimally processed foods. Metal container competitiveness will benefit from the presence of nontraditional can types, such as retortable aluminum bowls and microwaveable cans. Glass prospects will benefit from a premium and high purity image, key advantages with organic and/or natural foods, which are growing in popularity.

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Sample Text, Table & Chart

TABLE VIII-1

METAL FOOD CONTAINER DEMAND BY TYPE

Item	1996	2001	2006	2011	2016
Food Shipments (bil 2000$)					
containers/000$ shpts					
Metal Food Containers (mil units)					
Steel & Bi-Metal Cans					
Aluminum Cans					
Aerosol Cans					
cents/unit					
Metal Food Container Demand (mil $)					
% metal					
Total Food Container Demand (mil $)					

SAMPLE TABLE

PLASTIC FOOD CONTAINERS

Plastic Tubs & Cups

Demand for plastic tubs and cups (including bowls) is p... billion in 2011, represe... ed to climb 3.0 percent... ill be driven by increas... ds, dips, ice cream, cot... s, which are typically p... of other food packaging... for tubs and cups, espe... single-serving forms, such as pre-cut fresh fruit, processed fr... pudding, dry snack foods, baby food, cereal, soups, pasta, entrees, and sauces and condiments. Healthy growth in the foodservice market will bode well for portion packaging cups, which are widely used with coffee creamers, butter, margarine, cream cheese, and various sauces and dressings. Unit expansion will outpace resin growth based on the trend toward smaller single-serving containers, frequently sold in multipacks.

SAMPLE TEXT

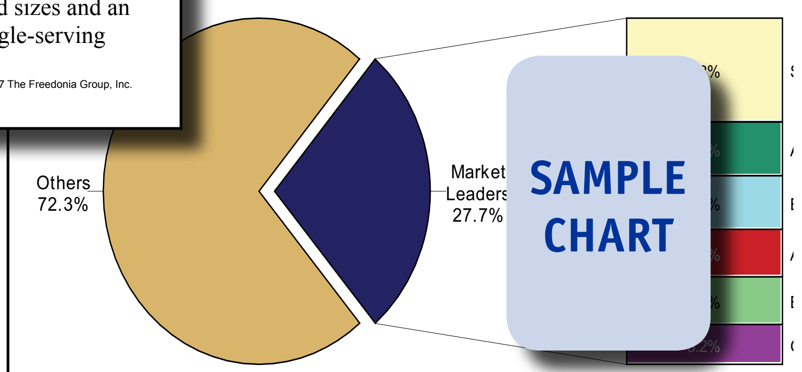
Plastic cups will continue to gain ground in food packaging as they meet consumer demand for convenience and portability, with the small size of most cups especially advantageous in products targeted at children or products where the emphasis on smaller portion size is important. Plastic tub and cup demand will be further aided by the increased marketing of single-serving shelf-stable foods in alternative retail channels, such as student book stores, sporting goods stores, convenience stores and vending machines. Moreover, cups will benefit from trends toward healthier menu offerings at quick service restaurants, such as the choice of a fruit cup instead of french fries. Competition from alternative packaging media, such as pouches in products like yogurt, pudding, gelatin and snack foods, will limit advances to some degree.

Demographic trends such as smaller average household sizes and an aging of the US population will also boost prospects for single-serving

209

CHART X-1

FOOD CONTAINER MARKET SHARE, 2006
($20.0 billion)



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Sample Profile, Table & Forecast

TABLE VI-3

FOLDING CARTON DEMAND IN FOOD APPLICATIONS (million dollars)

Item	1996	2001	2006	2011	2016
Paperboard Food Carton Demand	3[illegible]	[illegible]	[illegible]	[illegible]	[illegible]90
% folding cartons	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].8
Folding Carton Demand	2[illegible]	[illegible]	[illegible]	[illegible]	[illegible]90
Grain Mill Products	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]52
Baked Goods	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]23
Frozen Specialties	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]70
Dairy Products	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]60
Candy & Confectionery	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]00
Meat & Related	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]95
Other Foods	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]90
cents/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].4
Folding Carton Demand (mil units)	30[illegible]	[illegible]	[illegible]	[illegible]	[illegible]950

SAMPLE TABLE

COMPANY PROFILES

Ring Container Technologies
One Industrial Park
Oakland, TN 38060
901-465-3607
http://www.ri

Annual Sales
Employment

SAMPLE PROFILE

Key Products [illegible] sity polyethyl- ene container

Ring Container Technologies manufactures plastic specialty bottles and other containers used for packaging food; beverages; and agricultural, household and industrial chemicals. The Company is privately held and includes two divisions: Ring Industrial Group LP and Rapac Incorporated.

The Company is active in the US food containers industry through the manufacture of plastic containers for packaging a range of food items. These containers, made using polyethylene terephthalate (PET) and high density polyethylene, include TRIM-LITE, dressing and sauce, edible oil and dry food types. TRIM-LITE containers, which are offered in 16- and 32-ounce sizes, are made using technology designed to make lighter weight PET containers for packaging condiments and other foods. For example, TRIM-LITE jars are used to package SKIPPY peanut butter made by Unilever Group (United Kingdom). Containers for dressings and sauces comprise clear 1/2- and 1-gallon jars, and transparent wide mouth 1-gallon jars. Ring Container's edible oil products include a range of F-style bottles in 1-, 2-1/4-, 2-1/2- and 5-gallon sizes. In addition, the Company makes HALFPAK bottles for packaging edible oil. These bottles are designed for easy dispensing,

345

"**Rigid Containers** -- Demand for paperboard containers in dairy product applications is expected to rise 3.1 percent per year to over $960 million in 2011, trailing the dairy product container average due to general maturity and competition from plastic containers in applications such as cream and butter. Nonetheless, paperboard tubs will maintain their dominance in ice cream packaging based on ..."
--Section III, pg. 69

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Other Studies

Foodservice Disposables

Foodservice disposables demand in the US will grow 3.8% annually through 2011 as more food is eaten or prepared away from home. Packaging will lead gains and surpass serviceware as the largest category by 2011. The eating and drinking places market will remain dominant while the retail and vending segment grows the fastest. This study analyzes the $13.7 billion US foodservice disposables industry, with forecasts for 2011 and 2016 by type and market. It also details market share and profiles major players.

#2256 ....

Active & Intelligent Packaging

US demand for active and intelligent packaging will grow 13% yearly through 2011. Intelligent packaging will grow the fastest, driven by the emergence of lower cost time-temperature indicator (TTI) labels. Active packaging will be paced by gas scavengers. Pharmaceuticals, beverages and food will offer the best market prospects. This study analyzes the US active and intelligent packaging industry, with forecasts for 2011 and 2016 by product and market. It also details market share and profiles major players.

#2236 .... 08/2007..................... $4400

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

Meat, Poultry & Seafood Packaging

US demand for meat, poultry and seafood packaging will grow 4.2% annually through 2011. Smaller, more convenient packaging sizes and an increasing variety of items that are further processed will provide opportunities. Flexible packaging such as pouches and high barrier film will outpace rigid types. This study analyzes the $6.6 billion US meat, poultry and seafood packaging industry to 2011 and 2016 by material, product, application and market. It also details market share and profiles major players.

#2176 .... 03/2007..................... $4400

High Visibility Packaging: Clamshells, Blisters & Other

US demand for high visibility packaging will grow 5.1% annually through 2010, based in part on advantages in theft and tamper deterrence and product showcasing. Carded blister packs and clamshells present the best opportunities. Food will remain the largest market while the drug and medical product segment will lead gains. This study analyzes the $6.6 billion US high visibility packaging industry to 2010 and 2015 by material, product and market. It also evaluates market share and profiles major players.

#2128 .... 11/2006..................... $4300

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