

CLICK TO VIEW

- Table of Contents 2
- List of Tables & Charts 3
 - Study Overview 4

Sample Text, Table & Chart **5**

Sample Profile, Table & Forecast **6**

Order Form & Corporate
Use License 7

About Freedonia, Custom Research, Related Studies, 8

Pouches

US Industry Study with Forecasts for 2018 & 2023

Study #3157 | April 2014 | \$5200 | 342 pages



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Industry Study with Forecasts for 2018 & 2023



Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	
Macroeconomic Outlook	
Demographic Trends	
Consumer Income & Spending	
Retail Sales	16
Manufacturing Outlook	20
Food & Beverage Industry Overview	24
Packaging Industry Overview	28
Paper	30
Plastic	31
Metal	32
Glass & Wood	33
Pricing Trends	34
Machinery Trends	36
Raw Material & Component Trends	40
Plastic Film, Paper, & Foil	40
Adhesives, Inks, & Coatings	44
Closures & Other Components	48
Environmental & Regulatory Issues	52
International Activity & Foreign Trade	255

PRODUCT & MARKET OVERVIEW

Pouch Definition	59
Product Types	
Flat Pouches	
Pillow (Back Seal)	
Markets	
Product Characteristics	71
Four-Side-Seal	71
Markets	72
Product Characteristics	
Three-Side-Seal	
Markets	
Product Characteristics	
Stand-Up Pouches	
Markets	82
Product Characteristics	87
Product Features	89
Resealable Pouches	90
Vacuum Pouches	
Retort Pouches	
Shaped Pouches	
Shaped I ouches	101

Spouted Pouches	103
Aseptic Pouches	108
Stick Pouches	109
Markets & Production Methods	112
Form/Fill/Seal	116
Preformed	117

FOOD & BEVERAGE PACKAGING

Candy & Snack Food Outlook124Pouch Demand126Savory Snacks129Candy & Confections131Bakery Snacks133Nuts & Dried Fruit135Other Snack Foods137
Savory Snacks
Candy & Confections
Bakery Snacks
Nuts & Dried Fruit
Other Snack Foods137
n
Processed Foods 139
Processed Foods Outlook 139
Pouch Demand 142
Dry Foods 145
Frozen Foods 149
Sauces & Condiments 152
Other Processed Foods 154
Fresh Produce159
Fresh Produce Outlook 159
Pouch Demand
Beverages 166
Beverage Outlook
Pouch Demand
Juices & Fruit Drinks 171
Other Beverages 174
Meat, Poultry, & Seafood178
Meat, Poultry, & Seafood Outlook 179
Pouch Demand 181
Pet Food 186
Pet Food Outlook 187
Pouch Demand 188
Cheese 191
Cheese Outlook
Pouch Demand
Other Foods196
NONFOOD PACKAGING

General 201

Medical & Pharmaceutical...... 204

Medical & Pharmaceutical	
Products Outlook	205
Pouch Demand	209
Pharmaceuticals	210
Medical Supplies & Devices	213
Consumer Products	215
Lawn & Garden Products	216
Wipes	218
Soaps & Cleaning Products	219
Other Consumer Products	221
Industrial & Other Products	222

INDUSTRY STRUCTURE

General Merchant vs. Captive Market Share Acquisitions & Divestitures Competitive Strategies Manufacturing Marketing & Distribution	229 232 239 243 245 246
3	
Cooperative Agreements	249

COMPANY PROFILES

Advance Polybag	254
Amcor Limited	256
American Packaging	259
Ampac Packaging	
Barry-Wehmiller Companies	
Bemis Company	
Berry Plastics	
Bosch (Robert) GmbH	273
CDF Corporation	
Coating Excellence International	277
Coesia SpA	278
Coveris	
DuPont (EI) de Nemours	284
Graphic Packaging	287
Hearthside Food Solutions	
Hood Companies	
Illinois Tool Works	292
InterFlex Group	295
LPS Industries	
Mondi Group	
Multifilm Packaging	301
Oliver Products	303

(continued on following page)

Industry Study with Forecasts for 2018 & 2023



Table of Contents

(continued from previous page)

Oracle Flexible Packaging 30)5
Packaging Coordinators 30)7
PouchTec Industries 30	8(
Printpack Incorporated 30)9
Prolamina Corporation 31	11
Reynolds Group 31	13
Robbie Manufacturing 31	15
Rollprint Packaging Products 31	16
ROVEMA GmbH31	18
Salzgitter AG 32	20
Sealed Air 32	22
Sigma Plastics 32	25
Sonoco Products 32	27
St. Johns Packaging 32	29
Totani Corporation 33	30
UDG Healthcare 33	32
Wihuri Oy 33	34
Other Companies Mentioned In Study. 33	36

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....3

MARKET ENVIRONMENT

1	Macroeconomic Indicators	•
2	Population & Households	1
3	Personal Consumption Expenditures	1
4	Retail Sales	2
5	Manufacturers' Shipments	2
6	Food & Beverage Shipments	2
7	Packaging Supply & Demand	3
8	Pouch Prices	3
PRODUCT &		
MARKET OVERVIEW		

by Market, 2013......70

Cht Pillow Pouch Demand

4 Four-Side-Seal Flat Pouch Demand .72
Cht Four-Side-Seal Flat Pouch
Demand by Market, 2013 75
5 Three-Side-Seal Flat
Pouch Demand77
Cht Three-Side-Seal Pouch Demand
by Market, 201379
6 Stand-Up Pouch Demand82
Cht Stand-Up Pouch Demand
by Market, 201287
Cht Pouch Features Comparison,
2003-202390
7 Resealable Pouch Demand94
8 Vacuum Pouch Demand97
9 Retort Pouch Demand 101
10 Shaped Pouch Demand 103
11 Spouted Pouch Demand 107
12 Aseptic Pouch Demand 109
13 Stick Pouch Demand 112
14 Pouch Demand by Market, Production
Method, & Appearance 115

FOOD & BEVERAGE PACKAGING

1	Food & Beverage Packaging Pouch
	Demand by Application & Type . 122
Cht	Food & Beverage Packaging Pouch
	Demand by Application, 2013 123
2	Candy & Snack Shipments 126
3	Candy & Snack Market
	for Pouches 129
4	Savory Snack Market for Pouches . 131
5	Candy & Confection
	Market for Pouches 133
6	Bakery Snack Market for Pouches . 135
7	Nut & Dried Fruit Market
	for Pouches 137
8	Other Snack Food Market
	for Pouches 138
9	Processed Foods Shipments 142
10	Processed Foods Market
	for Pouches 145
11	Dry Foods Market for Pouches 149
12	Frozen Foods Market for Pouches . 152
13	Sauces & Condiments
	Market for Pouches 154
14	Other Processed Foods
	Market for Pouches 159

	Fresh Produce Shipments	162
16	Fresh Produce Market	
	for Pouches	165
17	Beverage Shipments	168
18	Beverage Market for Pouches	171
19	Juice & Fruit Drink Market	
	for Pouches	173
20	Other Beverage Markets	
	for Pouches	178
21	Meat, Poultry, & Seafood	
	Shipments	181
22	Meat, Poultry, & Seafood	
	Market for Pouches	186
23	Pet Food & Treat Shipments	188
24	Pet Food Market for Pouches	191
25	Cheese Shipments	193
26	Cheese Market for Pouches	196
27	Other Foods Markets for Pouches	200

NONFOOD PACKAGING

1	Nonfood Packaging Pouch Demand
	by Application & Type 203
Cht	Nonfood Packaging Pouch Demand
	by Application, 2013 204
2	Medical & Pharmaceutical
	Product Shipments 208
3	Medical & Pharmaceutical
	Market for Pouches 210
4	Pharmaceutical Market
	for Pouches 213
5	Medical Supply & Device
	Market for Pouches 215
6	Consumer Products Market
	for Pouches 216
7	Industrial & Other Markets
	for Pouches 224

INDUSTRY STRUCTURE

1	US Merchant Pouch Sales	
	by Company, 2013	228
Cht	US Merchant Pouch	
	Market Share, 2013	234
2	Captive & Merchant	
	Pouch Demand	231
3	Selected Acquisitions	
	& Divestitures	242
4	Selected Cooperative Agreements.	251

Industry Study with Forecasts for 2018 & 2023



Growth will be fueled by continued solid opportunities for stand-up pouches stemming from functional, sustainability, and marketing advantages over alternative packaging media.

US demand to rise 4.6% annually through 2018

Demand for pouches in the US is projected to increase 4.6 percent per year to \$9.4 billion in 2018. Growth will be fueled by continued solid opportunities for stand-up pouches stemming from functional, sustainability, and marketing advantages over alternative packaging media. Overall pouch unit demand is expected to expand 2.7 percent yearly to 92 billion. Advantages of superior aesthetic appeal, portability, light weight, reduced material use, and significantly lower shipping costs relative to rigid containers will foster strong acceptance in a broad range of consumer packaged goods uses.

Stand-up pouches to remain a major growth segment

Stand-up pouches will remain a major growth segment in the overall packaging industry, with demand forecast to expand 6.5 percent annually to \$2.4 billion in 2018. Advances will reflect rising interest among packaged goods companies based on cost savings due to lighter weight and lower material use compared to rigid containers. Also supporting gains will be the ability of stand-up pouches to differentiate and draw attention to products on store shelves due to their large front panel billboard space and the perception of pouches as a more contemporary packaging format than traditional container types, such as cans, bottles, and cartons.



Demand for flat pouches is forecast to increase 4.0 percent annually to \$7.0 billion in 2018, driven by faster advances for four-side-seal pouches in medical and pharmaceutical markets. Four-sideseal pouches will also experience favorable growth in certain food applications such as meat, poultry, and seafood, and sauces and condiments. In addition, robust gains are anticipated in nonfood uses such as soaps and detergents due to the rising popularity of unit-of-use products packaged in dissolvable pouches. In general, however, flat pouch demand will lag increases for stand-up pouches due to already-high usage in many markets and competition from stand-up pouches.

Nonfood markets to outpace food/beverage uses

Food and beverage markets comprise the majority of pouch demand, accounting for 80 percent of the total in 2013. Through 2018, growth will be similar to the overall pouch average, with the pet food; meat, poultry, and seafood; beverage; and produce markets expected to post the fastest gains. Nonfood markets for pouches will grow more rapidly than food and beverage markets, based on the further development of new applications in consumer goods resulting from sustainability advantages and strong opportunities for dissolvable pouches for laundry detergents.

Copyright 2014 The Freedonia Group, Inc.

Industry Study with Forecasts for 2018 & 2023



Sample Text, Table & Chart

FOOD & BEVERAGE PACKAGING

Pouch Demand

Demand for pouches used to package beverages is fored million in 2018. Advar increase based on nto rigid container appl **SAMPLE** drinks, wine, distilled markets of spout fitments that en premixed **TEXT** ability ar ng will support wider u tinued use of pouches i pouches d fruit drink market, wh predominant application for beverage pouches. However, be age growth will be based on the maturity of pouches in juices

drinks, marginal increases in the 5-14-year-old population, liproduct development activity in the fruit drink market, and control tion from alternatives including small bottles and aseptic care beverages were the first mainstream application for pouches and were also the most visible stand-up pouch application prior to the standard pouch application prior to the s

and were also the most visible stand-up pouch application prior to the late 1990s, when pouches began to find use in numerous other food uses. In contrast, robust growth from a relatively small base is expected for pouches for beverages other than juices and fruit drinks.

Pouches offer a number of advantages over rigid beverage containers, including lighter weight, portability, and less material consumption. The reduced weight and ability to be shipped flat also result in substantially reduced shipping costs and a lower environmental footprint compared to bottles and cans. In addition, pouches are frequently used to differentiate a beverage product from competitive products using more

familiar containers such as bottles and cartons. In some app pouches can serve as a complementary alternative to bottles rather than an outright replacement. Improvements in line s also increase the cost effectiveness of pouches in high volun tions. Stand-up pouches account for nearly all pouch demand beverage market, although pillow and side-seal pouches hav

169 Copyright 201-

TABLE IV-3

CANDY & SNACK MARKET FOR POUCHES (million dollars)

Item 2003 2008 2013 2018 2023

Candy & Snack Shipments (bil \$) \$ pouches/000\$ snacks

Candy & Snack Pouch Demand

By Type:

Flat

Pillow

Side-Seal

Stand-Up

By Application:

Savory Snacks

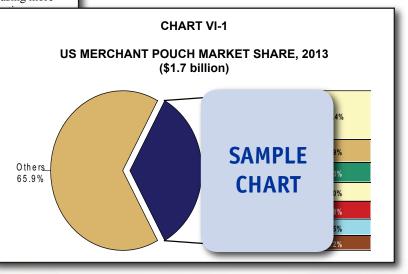
Candy & Confections Bakery Snacks

Dakery Shacks

Nuts & Dried Fruit

Other Snacks

% candy & snacks Total Food/Beverage Pouch Demand SAMPLE TABLE



Industry Study with Forecasts for 2018 & 2023



Sample Profile, Table & Forecast

TABLE V-3

MEDICAL & PHARMACEUTICAL MARKET FOR POUCHES (million dollars)

Item

2003 2008 2013 2018 2023

Medical/Pharmaceutical Shpts (bil \$) 2 \$ pouches/000\$ med & pharma

Medical & Pharmaceutical Pouches By Application:

Pharmaceuticals

Medical Supplies & Instruments By Type:

Flat

Four-Side-Seal Three-Side-Seal & Pillow Stand-Up

% medical & pharmaceutical Total Nonfood Pouch Demand SAMPLE TABLE

COMPANY PROFILES

Multifilm Packaging Corporation 1040 North McLean Boulevard

Elgin, IL 6012 847-695-7600 http://www.m

Annual Sales: Employment:

SAMPLE PROFILE

Key Products:

Multifilm rackaging is a runy integrated producer of flexible packaging for the North American food, beverage, and confectionary markets. The privately held company operates a 78,000 square foot plant in Elgin, Illinois.

The Company is involved in the US pouch industry through the manufacture of films and laminates for pouches, which are typically used to package such products as confections, snacks, coffee, dry foods, and beverage mixes. Multifilm Packaging's films and laminations are suitable for vertical and horizontal form/fill/seal (FFS) applications, and include types made from polyethylene, polyester, oriented polypropylene (OPP), and paper.

In addition to conventional films, the Company produces a range of proprietary films suitable for pouchmaking applications, including HI-Z, HI-E, N-COAT, EZ TEAR, and SUPERSEAL types. HI-Z and HI-E pouch films comprise metalized sealant webs that can be laminated to polyester and OPP. These two-ply structures feature high-barrier characteristics, and are intended as an alternative equivalent to triplex materials for vertical and horizontal FFS and stand-up pouch applications. Multifilm Packaging's N-COAT films comprise polyester

Copyright 2014 The Freedonia Group, Inc

301

STUDY COVERAGE

This Freedonia study, *Pouches*, offers historical demand data for 2003, 2008 and 2013, and forecasts for 2018 and 2023 by type, feature, market, and production method. The study also considers market environment factors, details industry structure, evaluates company market share and profiles 39 industry players,

ORDER INFORMATION

Five Convenient Ways to Order

INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS



ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or +1 440.684.9600

FAX: +1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM F-WEB-3157	Name
Pouches \$5200	Title
Corporate Use License (add to study price) * + \$2600 Additional Print Copies @ \$600 each *	Company
Total (including selected option) \$	Division
☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 8% sales tax)	Street (No PO Box please)
☐ Bill my company ☐ American Express ☐ MasterCard ☐ Visa	City/State/Zip
MM YY	Country
Credit Card # Expiration Date	Phone Fax
Signature	Email
* Please check appropriate option and sign below to order an electronic version of the study.	☐ Individual Use License Agreement The undersigned hereby represents that the above captioned study will be used by only individual(s) who are employees of the company and that
☐ Corporate Use License Agreement The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.	the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2600; one additional user, add \$600; two additional users, add \$1200; three additional users, add \$1800.
Signature	Signature

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com



OTHER STUDIES

Cups & Lids

US demand for cups and lids will expand 4.4 percent per year to \$10.0 billion in 2018. Packaging cups will experience the fastest gains based on convenience and single-serving advantages, as well as favorable consumption trends in several key applications. Lids will outpace cups due to more drinking cups using lids and heightened demand for costlier specialty lids. This study analyzes the \$8.1 billion US cup and lid industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players.

#3174.......July 2014.....\$5300

Pet Food Packaging

World Food Containers

World demand for food containers is forecast to rise 4.5 percent annually to \$139 billion in 2017. While the US remains by far the world's largest user of food containers, the most significant growth will occur in India and China. Bags and pouches will remain the largest category based on their light weight, portability and convenience. This study analyzes the \$111.4 billion world food container industry, with forecasts for 2017 and 2022 by product, market, world region, and for 22 countries. The study also evaluates company market share and profiles industry players.

#3124...... February 2014...... \$6100

Produce Packaging

US demand for produce packaging is forecast to increase 3.3 percent per year to \$5.7 billion in 2017. Corrugated boxes will remain the most common type, while plastic containers will grow the fastest. Fruit applications will lead gains based on more fresh-cut fruit marketed for convenience and as a healthy snack option. This study analyzes the \$4.8 billion US produce packaging industry, with forecasts for 2017 and 2022 by produce packaging type, application and end user. The study also evaluates company market share and profiles industry players.

#3097...... November 2013...... \$5100

Converted Flexible Packaging

US demand for converted flexible packaging will rise 3.0 percent annually to \$18.8 billion in 2017. Pouches will be the fastest growing type of flexible packaging, based on new applications and the advantage of lighter weight that can vastly reduce both production and transport costs. The food market will continue to outpace nonfood uses. This study analyzes the \$16.2 billion US converted flexible packaging industry, with forecasts for 2017 and 2022 by material, product and market. The study also evaluates company market share and profiles industry players.

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security
 Electronics • Industrial Components & Equipment • Automotive & Transportation
 Equipment • Household Goods • Energy/Power Equipment

Click here to learn more about Freedonia

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

Click here to learn more about Custom Research



Click here for complete title list



Click here to visit freedoniagroup.com