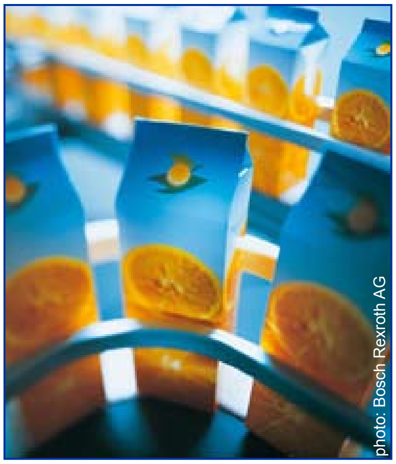
photo: Bosch Rexroth AG

World Aseptic Packaging

Industry Study with Forecasts for **2015 & 2020**

Study #2859 | March 2012 | $5900 | 322 pages

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World Aseptic Packaging

Industry Study with Forecasts for ***2015 & 2020***

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NORTH AMERICA

WESTERN EUROPE

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OTHER REGIONS

INDUSTRY STRUCTURE

Study #2859
March 2012
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World Aseptic Packaging

Industry Study with Forecasts for ***2015 & 2020***

Aseptic packaging will benefit from a rising number of applications, its cost and convenience attributes, and strong growth in developing regions, particularly in China, India and Brazil.

World demand to increase 9.1% yearly through 2015

Global demand for aseptic packaging is projected to grow 9.1 percent per year to $35.8 billion in 2015. Gains will be driven by the rising number of applications and the cost and convenience benefits associated with aseptic packaging (especially in terms of ambient storage and transportation). Strong growth is expected in developing countries, where the lack of a cold supply chain infrastructure will continue to fuel demand for shelf-stable products packaged aseptically. These packaged products generally have a shelf life of six to twelve months or more without refrigeration.

World Aseptic Packaging Demand
($35.8 billion, 2015)

Cartons to continue aseptic packaging dominance

In 2010, aseptic cartons accounted for 44 percent of the aseptic packaging market worldwide. Gains will be aided by their widespread use in milk packaging applications. Additional factors providing momentum include favorable consumption trends in other beverages, such as teas and nondairy milk alternatives, and in liquid food applications.

Growth opportunities will exist in other product segments, especially for high-value pharmaceutical packaging products. For instance, prefillable syringes will exhibit rapid gains due to growing applications in the delivery of critical care, emergency and patient-administered parenteral medication.

Beverages will continue to represent over half of the global aseptic packaging market. Demand for aseptic packaging in beverage applications will benefit from output growth coupled with expanding applications resulting from cost and sustainability benefits of aseptic packaging. Gains in the food market will be driven by expanding applications with liquid, low-particulate and pumpable foods, often through the replacement of metal cans and glass jars. Demand for aseptic packaging in pharmaceutical applications will be fueled by preferences for unit-dose and other convenient drug delivery formats combined with the rising availability and consumption of biotechnology-based drugs, which require the use of aseptic packaging to prevent contamination and assure product sterility.

Asia, Central/South America to lead regional growth

While the US accounted for only 15 percent of the world aseptic packaging market in 2010, the country represented one-third of the aseptic pharmaceutical packaging market. Gains in the US will reflect the broadening aseptic filling requirements with liquid pharmaceuticals. Overall, the fastest growth in the aseptic packaging market will be posted in Asia, with India and China expected to see the fastest advances worldwide. Between 2015 and 2020, China alone will account for 28 percent of global market value gains. Central and South America will also post above-average advances, with Brazil in particular continuing to exhibit double-digit annual growth through 2020.

World Aseptic Packaging

Industry Study with Forecasts for ***2015 & 2020***

Sample Text, Table & Chart

TABLE VI-5

**CHINA:
ASEPTIC PACKAGING MARKET ENVIRONMENT**

Item	2000	2005	2010	2015	2020
Population (mil persons)					7
$ GDP/capita					0
Gross Domestic Product (bil 2009$)					0
$ packaging/capita					0
Packaging Demand (bil $)					0
$ aseptic packaging/capita					7
$ aseptic packaging/000$ GDP					3
$ aseptic packaging/000$ packaging					6
Aseptic Packaging Demand (mil $)					00

SAMPLE TABLE

MARKETS

China: Aseptic Packaging Demand

Demand for aseptic packaging in China totaled $4.5 bill representing 56 of total demand in the Asia/Pacific region. C decade, China's market has experienced very strong growth, ing more than 19 percent per annum between 2000 and 2010 gains in manufacturing activity, personal income levels and c expenditures, combined with favorable urbanization trends, w to boost demand for packaged goods. In the coming years, th will continue to support aseptic packaging requirements in C increased exports of Chinese goods to more advanced consum mies (which will create the need for higher-quality packaging).

Through 2015, demand for aseptic packaging in China is forecast to increase 0 billion, faster than both the re kets -- beverages, food and p ce robust gains, although g een over the 2000-2010 perio n overall economic growth and manufacturing activity. Still, continued healthy expansion in the main end-use sectors (e.g., milk packaging) will support aseptic packaging demand through the forecast period and beyond.

SAMPLE TEXT

Aseptic cartons will continue to dominate China's asept ing market, due to their widespread use in ultra high tempera milk packaging. Demand for aseptically-packaged milk will to increasing personal incomes, which make milk more affor broader range of consumers. Demand for aseptic cartons wi supported by its lengthy unrefrigerated shelf life, which will milk consumption in rural areas without refrigerators. Other markets, such as ready-to-drink teas and wine, will continue tic cartons for product differentiation and cost control. On th

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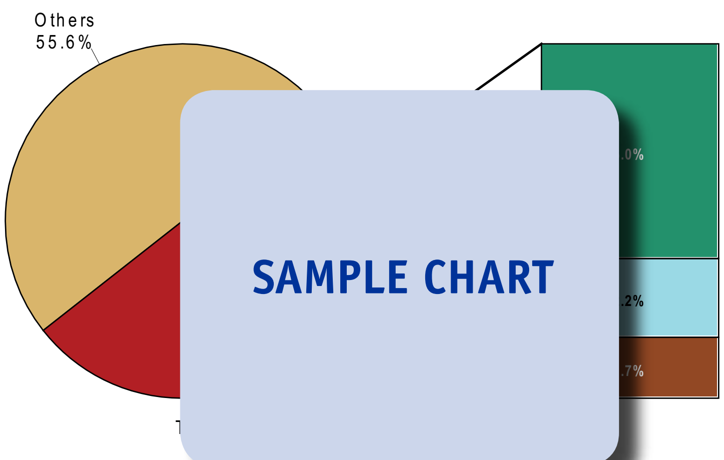
CHART VIII-1

**WORLD ASEPTIC PACKAGING MARKET SHARE
($23.2 billion, 2010)**



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World Aseptic Packaging

Industry Study with Forecasts for ***2015 & 2020***

Sample Profile, Table & Forecast

TABLE VI-6

**CHINA:
ASEPTIC PACKAGING DEMAND BY PRODUCT & MARKET
(million dollars)**

Item	2000	2005	2010	2015	2020
Asia/Pacific Aseptic Packaging Demand					
% China					
Aseptic Packaging Demand					
By Product:					
Cartons					
Bottles					
Bags & Pouches					
Other Aseptic Packaging					
By Market:					
Beverages					
Food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Pharmaceuticals	110	250	530	950	1550

SAMPLE TABLE

COMPANY PROFILES

CFT SpA
Via Paradigna 94/a
Parma 43100
Italy
39-0521-2771
http://www.cf

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

CFT specializes in the development, manufacture and sale of systems and technologies for processing and packaging food and beverage products. The privately held Company conducts research, manufacturing and sales operations at its headquarters in Parma, Italy. CFT serves customers mainly in Europe.

The Company is active in the world aseptic packaging industry through the production of aseptic filling machines sold through the MACROPAK, FLAVOUR MARK ANTARES and LABOPAK product lines. All of CFT's aseptic fillers operate exclusively with steam as the machine and cap sterilizing agent, thus eliminating any possibility of product contamination. A representative product in the MACROPAK range is MACROPAK AF/2 unit, which is a two-head filling machine used to aseptically package semifinished or finished food products, including liquid, semiliquid and highly viscous products, in pre-sterilized bags.

CFT's FLAVOUR MARK ANTARES aseptic vertical form-fill-seal machine is designed for packaging various pumpable foods and liquids with pH level greater than 4.5. This unit provides high speed

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"The fastest gains in aseptic packaging demand are expected in the food market, driven by expanding applications with liquid foods, often via the replacement of metal cans and glass jars. Good opportunities will also be found in the pharmaceutical market. The impact of regulatory reforms, coupled with the country's pursuit of new proprietary medicines and the expansion of drug distribution activities, will underlie gains. Prefillable inhalers, prefillable syringes, parenteral vials and intravenous (IV) containers are among the products expected to ..."
--Section VI, pg. 159-60

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Other Studies

Plastic Containers

US demand for plastic containers is forecast to increase 4.9 percent annually to $32.4 billion in 2016, consuming 14.2 billion pounds of resin. Plastic bottles and jars will remain the dominant segment but will be outpaced by other plastic container types, including tubs, cups, bowls and pails. Among the leading resins, PET will continue outpacing HDPE. This study analyzes the 13 billion pound US plastic container industry, with forecasts for 2016 and 2021 by type and resin. The study also evaluates company market share and profiles industry players.

#2954 .... October 2012 .... $5100

Cups & Lids

US demand for cups and lids is forecast to increase 4.1 percent per year to $8.9 billion in 2016. Although drinking cups will continue to dominate, the fastest gains are anticipated in the packaging cup segment due to solid outlooks for demand in key packaging cup-using markets such as yogurt, coffee and tea, and fresh fruits and vegetables. This study analyzes the $7.2 billion US cups and lids industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2935 .... August 2012 .... $5100

World Foodservice Disposables

World demand for foodservice disposables will rise 5.4 percent per year to $53.3 billion in 2015. Disposable serviceware will remain the largest segment, while disposable packaging grows the fastest. The fastest growth will be seen in Asia, with China and India expected to experience the most rapid increases in the world. This study analyzes the $41 billion world foodservice disposables industry, with forecasts for 2015 and 2020 by product, market, world region and for 18 major countries. The study also evaluates company market share and profiles industry competitors.

#2831 ....December 2011 .... $5900

Aseptic Packaging

US demand for aseptic packaging is projected to expand 8.0 percent per year to $5.1 billion in 2015. Gains will be driven by drug sterility requirements and ambient distribution and storage advantages for food and beverages. Prefillable syringes and plastic bottles will be among the fastest growing types, with pharmaceuticals the fastest growing market. This study analyzes the $3.5 billion US aseptic packaging industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry competitors.

#2827 ....December 2011 .... $4900

Beverage Containers in China

Demand for beverage containers in China will rise 9.6 percent per year through 2015. Plastic beverage containers will remain the largest material segment, while paperboard containers grow the fastest, led by aseptic cartons. Milk containers will be the largest nonalcoholic beverage market, while beer remains the largest alcoholic beverage market. This study analyzes the 297 billion unit beverage container industry in China, with forecasts for 2015 and 2020 by market and material. The study also evaluates company market share and profiles industry participants.

#2815 .... November 2011 .... $5400

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