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World Food Containers

Industry Study with Forecasts for **2017 & 2022**

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OVERVIEW

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

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In developing countries, demand will be supported by the continued emergence of a strong middle class, the rise of two-income households, and the shift to larger urban centers.

World demand to rise 4.5% annually through 2017

World demand for food containers is forecast to increase 4.5 percent annually to $139.1 billion in 2017. Demand increases will be especially noteworthy in the emerging markets of Central and South America, Eastern Europe, the Africa/Mideast region, and the Asia/Pacific region. Food container demand will be driven by demographic factors in these regions, including the continued emergence of a strong middle class and the rise of two-income working households. Greater sophistication, including interest in Western-style packaged food, will be supported by an overarching population shift to larger urban centers worldwide, where large supermarkets selling packaged food items are replacing the traditional rural vendor or market stall selling raw, minimally packaged items. Within the more mature, developed regions such as North America and Western Europe, the continued conversion to premium packaging (i.e., containers offering high barrier and convenience features) will fuel moderate growth.

World Food Container Demand
($139.1 billion, 2017)

Bags, pouches to remain largest package type

Overall, bags and pouches will remain the largest package type by a wide margin. Bags and pouches are light weight, portable, and convenient. Their use will be bolstered by a continued global rise in the popularity of chilled and processed food, ready-to-eat meals, snack foods, grain mill and bakery items, and other products presented in flexible packaging. Plastic-based packaging generally will offer the fastest global growth prospects, continuing to supplant metal and glass containers for many food items. The continued emergence of quick-prepared meals and packaged cooking ingredients (e.g., cooking fats and oils, packaged spices, seeds and nuts, and single-serve noodles and rice) favors plastics over less portable types.

India, China to see most significant growth

While the US remains by far the world's largest user of food containers, the most significant growth will occur in India and China, where double digit annual increases in food container consumption are forecast through 2017. By 2022, China is expected to become the largest global consumer of food packaging, surpassing the US based on increasing urbanization, rising personal incomes, and an escalating interest in packaged foods. Robust food container demand growth is also expected in other emerging markets such as Thailand, Brazil, Argentina, and Turkey. For developed countries, especially those in North America and Western Europe, market maturity will restrict growth, but technological innovation and higher end formats will boost particular material and package types.

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Sample Text, Table & Chart

TABLE III-6

WORLD METAL FOOD CONTAINER DEMAND BY REGION
(million dollars)

Item	2002	2007	2012	2017	2022
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					
Central & South America					
Eastern Europe					
Africa/Mideast					

SAMPLE TABLE

WESTERN EUROPE

France: Food Container Demand

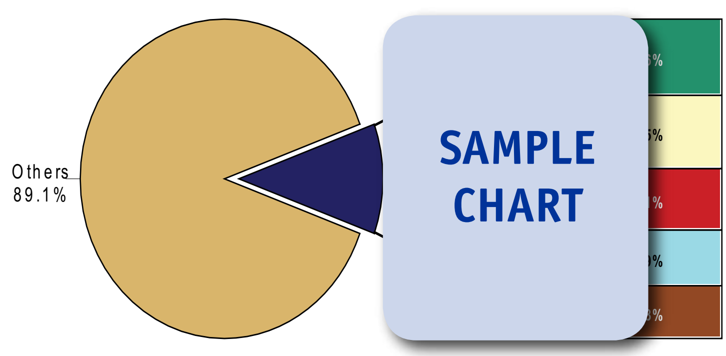
Demand for food containers in France totaled $
accounting for 15 percent of the West European aggr
to that of the United Kingdom and behind Germany.
was stagnant from 2007 to 2012, and French consum
shifting to less expensive food alternatives, such as d
frozen meal alternatives, and lower-cost takeout goo
mium products. This has led to a decline in the value
and has affected demand for packaging in the short t
French staples such as artisanal bread and cheese, as
declined, affecting growth in plastic and paper flexib
paperboard cartons. The recent horsemeat scandal (a
cessing firm was accused of selling tainted, mislabel
further impacted demand for meat products, as consumers are skeptical of purchasing raw, packaged beef, lamb, and mutton.

Through 2017, demand for food containers in France is projected to
rise billion. Advances will be fueled by
the and ambient food, primarily in rigid
plas nd for packaging used with chilled
mea r pace due to the horsemeat issue.
Ma ng longer hours and have less time
to c t or at a patisserie (a French bakery).
The dal will wane, but fresh beef purchases
will suffer, leading to an uptick in demand for processed poultry and seafood in plastic containers. Prepared, chilled meals also will increase in consumption due to heightened purchases of lower
contributing to growth in bags and pouches with add-
ease of opening mechanisms. Healthy gains are also e
serving items benefiting from the rise of working adu
demand for portion packaging cups, such as those for

SAMPLE TEXT

CHART VIII-1

WORLD FOOD CONTAINER MARKET SHARE
($111.4 billion, 2012)



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Sample Profile, Table & Forecast

TABLE VI-8

INDIA: FOOD CONTAINER DEMAND
(million dollars)

Item	2002	2007	2012	2017	2022
Asia/Pacific Food Container Demand2					
% India					
Food Container Demand					
Bags & Pouches					
Paperboard Containers					
Plastic Containers					
Metal Containers					
Glass Containers					

SAMPLE TABLE

COMPANY PROFILES

Rock-Tenn: Consumer Packaging Segment
In FY 2013, the Consumer Packaging segment generated sales of $2.5 billion. Through this segment, Rock-Tenn manufactures paperboard and folding cartons, among other items.

Paperboard Products & Operations -- Paperboard products from the Company comprise coated recycled board (CRB), uncoated recycled board (URB), and virgin solid bleached sulfate (SBS) board, all of which are used internally by Rock-Tenn, as well as sold to third party manufacturers of folding cartons and other paperboard products.

Rock-Tenn's CRB products include CLASSIC multi-ply board; MILLMASK and DURATOTE varieties, which are approved for direct food contact applications by the US Food and Drug Administration (FDA); DURAFRAME and DURAFREEZE high strength CRB for refrigerated and frozen food packaging end uses; and ANGELCOTE low density CRB, which can be used to package cookies, crackers, cereals, and other dry foods. It makes URB in plain chip, bending chip, and tube and core types that are resistant to moisture, abrasion, corrosion, and fire. Among Rock-Tenn's URB offerings is MILLENIUM board, which is compliant with the US FDA's requirements for dry, fatty, and aqueous food packagin ich is marketed under the (es suitable for packaging These single ply boards featu gh barrier properties.

Rock-Tenn produ igan; St. Paul, Minnesota; St nd Sheldon Springs, Verm ed production capacity of pany makes URB at plants in Aurora, Illinois; Eaton, Indiana; Cincinnati,

SAMPLE PROFILE

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STUDY COVERAGE

This Freedonia study, ***World Food Containers***, offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for supply and demand, as well as demand by material in 6 regions and 22 major countries. The study also details key market environment factors, assesses the industry structure, evaluates company market share and profiles 41 competitors in the worldwide food container industry.