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**NEW** US industry forecasts for 2014 & 2019

# Green Packaging

Study # 2721 | January 2011 | $5100

## US green packaging demand to top $42 billion in 2014

US demand for recycled content, reusable and biodegradable packaging is projected to exceed $42 billion in 2014. Growth will outpace overall packaging but will be moderated by the maturity of many products and the already-high prevalence of recycled content in paperboard and metal packaging. Advances for green packaging will be driven by the increased prominence of environmental issues as a result of elevated raw material and fuel costs. This has resulted in heightened activity among product manufacturers and packaging companies to offer product lines that reduce costs and that are more environmentally friendly.

## Recycled plastic packaging among fastest growing types

Stimulants promoting solid advances for recycled content plastic packaging will include increased collection activity and processing volume of recycled material, especially food-contact approved resin grades. Gains will also be helped by rising interest among packaged goods producers and retailers in improving the environmental friendliness of their packaging. Preventing faster growth will be supply limitations due to competition for recovered materials from nonpackaging users and the significant level of recycled PET that is exported from the US. Glass recycled content packaging demand will outpace the green packaging average as a result of rising recycling rates for glass containers and concerted efforts by glass packagers to increase collection and incorporate higher levels of recycled content in glass containers.


## Reusable packaging to grow at above-average pace

Reusable packaging demand is forecast to expand at an above-average pace, the result of improved manufacturing output as the economy recovers from the recession that began in December 2007. Demand for reusable plastic containers and intermediate bulk containers will expand above the average pace. Good opportunities for reusable insulated shipping containers will be based on rapid growth for temperature-sensitive biotechnology-based drugs. Though reusable drum demand will benefit from an expected rebound in chemical production from a severe downturn in 2009, prospects will be tempered by competition from larger capacity products such as intermediate bulk containers.

## Cups, plates, bowls and containers to pace biodegradable segment

Among biodegradable packaging applications, the fastest gains are expected in cups, plates and bowls; and containers. Opportunities in cups, plates and bowls will be stimulated by lower costs, greater product availability, increased spending at eating and drinking places, and growing interest among consumers and restaurants in green products. Gains for containers will be supported by increased cost competitiveness compared to petroleum-based resins, and material performance improvements.

## Non-biodegradable "green" plastics to debut in 2011

The green packaging market will be further expanded by the emergence of non-biodegradable plant-based plastics in commercial quantities, such as polyethylene from sugar cane-based ethanol. Packaging from "green" polyethylene will make its debut in the US in 2011. Though higher in price than traditional resins, the willingness of many consumers to pay a modest premium for bio-based materials will assure a significant market for these materials.

## Study coverage

This new Freedonia US industry study, ***Green Packaging***, is priced at $5100. It presents historical demand data (1999, 2004, 2009) plus forecasts (2014, 2019) by product and market. The study also considers market environment factors, assesses company market share and profiles more than 45 industry competitors.

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# #2721 - Green Packaging

## Company Profiles

**COMPANY PROFILES**
Profiles over 45 competitors in the US industry such as Ball, Graphic Packaging, Huhtamaki, Innovia Films, International Paper, Rock-Tenn and Sonoco



**Plastic**

US demand for plastic recycled content packaging is projected to climb nearly ten percent per year to $2.7 billion in 2014, helped by increased collection activity and processing volume of recycled material, along with greater interest among packaged goods producers and retailers in improving the environmental friendliness of their packaging. Robust gains for plastic will also be the result of upward momentum from a much smaller base since recycling rates for plastic containers are much lower than those of aluminum and steel cans.

**TABLE IV-6**

**PLASTIC RECYCLED CONTENT PACKAGING DEMAND BY TYPE & MATERIAL (million dollars)**

| Item | 1999 | 2004 | 2009 | 2014 | 2019 |
|---|---|---|---|---|---|
| Plastic Packaging Demand (bil $) | | | | | |
| % with recycled content | | | | | |
| Plastic Recycled Content Packaging | | | | | |
| By Type: | | | | | |
| Bottles | | | | | |
| Other | | | | | |
| By Material: | | | | | |
| PET | | | | | |
| HDPE | | | | | |
| Other | | | | | |
| $/lb | | | | | |
| Plastic Recycled Content Pkg (bil lbs) | | | | | |
| % plastic | | | | | |
| Total Recycled Content Pkg (bil lbs) | | | | | |

**SAMPLE TABLE**
Historical data for 1999, 2004 and 2009 as well as Freedonia forecasts for 2014 and 2019; data illustrated in over 60 tables and charts





**Foodservice**

Demand for green packaging in foodservice uses is projected to clim[b] ..., representing the fastest-growing g... ...iven by an improved outlook for fo... ..., along with growing awareness on the ...es and further efforts by players in the ...educing their environmental footprint. ...re frequently the target of environmental ...aste generated and safety concerns re... ...led to increased legislative activity at the local level restricting or banning some types of disposables. Upwards of 100 US cities have passed ordinances banning certain types of foodservice disposables. This factor will propel opportunities for green alternatives, such as biodegradable and recycled content products. Recycled content packaging accounted for over 90 percent of demand in the foodservice market in 2009, with nearly all demand generated by paper products.

**SAMPLE PAGE**
Explanations that support each table's data and forecasts

Growth for recycled content packaging will lag the foodservice market average due to the maturity of products such as corrugated clamshells, pizza boxes and molded pulp carriers. Significantly faster advances are anticipated for newer product types such as recycled content paper cups. Starbucks has pledged to make all of its coffee cups fully recyclable by 2015, and in May 2010 cup collection bins were installed in all Starbucks stores in Seattle to divert used cups to recycling operations that can cope with the plastic coating. Researchers have recently demonstrated in laboratory tests that despite the plastic coating, paper cups can be recycled along with old corrugated containers, a situation that could eventually prompt municipal and other recyclers to accept the cups.

Additionally, molded pulp plates, bowls and hinged-lid containers will experience solid growth as a result of bans on polystyrene in some cities and some shifting to renewably sourced materials by establishments seeking to communicate a greener image and demonstrate greater environmental responsibility.



## Freedonia's methods involve:

- Establishing consistent economic and market forecasts
- Using input/output ratios, flow charts and other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts and end users
- Researching a proprietary database that includes trade publications, government reports and corporate literature

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### Paper versus Plastic in Packaging

In selected packaging markets where paper and plastic compete, plastic will make further inroads into paper. Rigid packaging demand will slightly outpace flexible packaging based on above-average growth for tubs and cups, trays, clamshells and two-piece high visibility plastic containers. This study analyzes the 23.2 billion pound competitive plastic and paper packaging industry in the US, with forecasts for 2014 and 2019 by product and market. It also discusses market leaders and profiles selected industry players.

*#2698....................11/2010..................... $4900*

### Cups & Lids

US demand for cups and lids will increase 4.4% per year to 2014, driven by expanding foodservice revenues and favorable prospects for food packaging cups. Value gains will be bolstered by increasing demand for environmentally friendly cups, such as cups made from higher-value biodegradable resins or recycled content. This study analyzes the $6.6 billion US cups and lids industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.

*#2679.................. 08/2010..................... $4800*

### Produce Packaging

US demand for produce packaging will rise 3.6% annually through 2014. Corrugated boxes will remain the leading packaging type, while plastic containers see the fastest gains. Fruit applications will outpace the overall average, aided by trends toward healthier eating and increased availability of ready-to-eat fruit. This study analyzes the $4 billion US produce packaging industry, with forecasts for 2014 and 2019 by type, application and end user. It also evaluates company market share and profiles industry players.

*#2653.................. 06/2010..................... $4800*

### Foodservice Packaging: Bulk & Portion Control

US foodservice packaging demand will climb 2.5% annually through 2014. Flexible packaging will outpace rigid based on cost, convenience and performance advantages. Restaurants other than quick service types will post the fastest growth within the dominant eating and drinking places market. This study analyzes the $7 billion US foodservice packaging industry, with forecasts for 2014 and 2019 by product, application and end user. It also evaluates company market share and profiles industry players.

*#2642.................. 05/2010..................... $4800*

### Lawn, Garden & Agricultural Packaging

US lawn, garden and agricultural packaging demand will reach $1.7 billion in 2013. Consumer preferences for convenient, user-friendly packaging will benefit reclosable pouches, dispensing closures and other value-added types. Agriculture will remain the largest market while the consumer market grows the fastest. This study analyzes the US lawn, garden and agricultural packaging industry, with forecasts for 2013 and 2018 by market, application and product. It also evaluates market share and profiles industry players.

*#2555.................. 09/2009..................... $4600*



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