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# World Protective Packaging

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Industry Study with Forecasts for **2014 & 2019**

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Study #2651 | June 2010 | \$5800 | 380 pages

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*Growth in protective packaging demand will be driven by an upswing in manufacturing activity and the continued proliferation of Internet shopping in both developed and developing regions.*

## Global demand to grow 7.8% yearly through 2014

World demand for protective packaging is projected to increase 7.8 percent per year to \$22.2 billion in 2014. This represents a notable acceleration from the pace of the 2004-2009 period. Advances will be stimulated by an upswing in manufacturing activity and the continued proliferation of Internet shopping in both developed and developing regions. These factors will necessitate heightened requirements for cost-effective packaging used in the protection of goods from shock, vibration, abrasion and other damaging effects of shipping and handling.

## Developing regions to see most rapid increases in demand

While the US is by far the world's largest user of protective packaging, the most rapid increases will occur in developing regions. The Asia/Pacific region, Central and South America, and the Africa/Mideast region will all outpace the global average. Population growth, greater urbanization, industrialization trends and increases in international trade activity will support advances in these regions' generally underdeveloped packaging sectors. Rising consumer income levels and expanding middle classes will also generate robust internal demand for packaged consumer goods, boosting protective packaging requirements. Some of the best growth opportunities



will occur in Asia, which is expected to see double-digit annual growth through the forecast period. In particular, China alone is expected to account for one-quarter of global value gains in protective packaging demand between 2009 and 2014.

## Protective mailers, air pillows, bubble packaging to grow the fastest

Overall, foamed plastic protective packaging will remain the largest product type by a wide margin. Demand will be aided by foamed plastic's light weight and excellent cushioning capabilities compared to paperboard and other materials. However, the growing empha-

sis on packaging sustainability -- especially in developed countries with more established environmental regulations -- will constrain opportunities for conventional foamed plastic protective packaging to some extent. Protective mailers and other protective packaging products such as air pillows and bubble packaging will continue to experience the fastest gains. Among factors driving growth will be performance and environmental advantages, as well as a continued robust outlook for electronic commerce, which will fuel the need for packaging products offering enhanced resistance to impact, abrasion and temperature changes during movement of goods through the supply chain.

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## Sample Text, Table & Chart

### MARKETS

#### India: Protective Packaging Demand

Demand for protective packaging in India totaled \$ 2009, accounting for five percent of the regional market. represents a relatively underdeveloped packaging market its huge, impoverished and mostly rural population. Per levels remain very low, by both regional and global standards result, per capita spending on packaged goods is minimal the use of cheap and/or reusable packaging alternatives, paper, jute bags and wood crates, in lieu of more expensive packaging will also limit demand.

Nonetheless, while the usage intensity of protective packaging in India is among the lowest in the world, demand is experiencing fast growth. Demand will continue to be fueled by rapid development in the country's manufacturing sector. Gains will also be propelled by the expansion of India's urban middle classes, the primary consumers of packaged products. In addition, strong growth in the number of retail stores as well as the number of online shoppers will continue to boost demand for protective packaging.

Through 2014, protective packaging demand in India is projected to increase at a robust 10.5 million. This represents one of the most rapid growth rates over the forecast period -- albeit from a much smaller base compared to the US or China). Strong manufacturing activity, growth in packaged goods and use of environmentally friendly packaging will also fuel growth as the role of market equipment will improve product quality, further bolstering packaging sales

162

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**SAMPLE  
TEXT**

TABLE VI-7

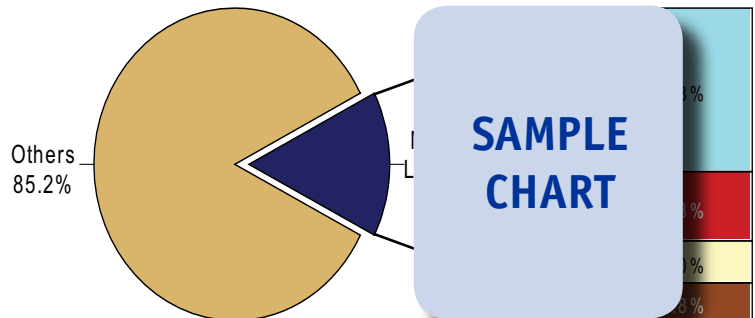
### INDIA -- PROTECTIVE PACKAGING MARKET ENVIRONMENT

Item	1999	2004	2009	2014	2019
Population (million persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2008\$)					
% manufacturing					
Manufacturing Value Added (bil 2008\$)					
\$ protective packaging/000\$ MVA					
Protective Packaging Demand (mil \$)					
% India					
Asia/Pacific Protective Packaging (mil \$)					

**SAMPLE  
TABLE**

CHART VIII-1

### WORLD PROTECTIVE PACKAGING MARKET SHARE (\$15.3 billion, 2009)

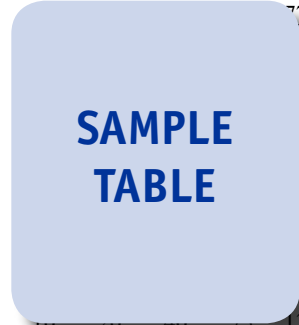


**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE VI-8**  
**INDIA -- PROTECTIVE PACKAGING DEMAND**  
**BY PRODUCT & MARKET**  
**(million dollars)**

Item	1999	2004	2009	2014	2019
Protective Packaging Demand					775
By Product:					
Foamed Plastics					90
Paperboard Protectors					40
Protective Mailers					85
Other Protective Packaging					50
By Market:					
Manufacturing					75
Internet & Catalogs					70
Retail & Other Markets	10	20	40	75	130



**COMPANY PROFILES**

**Polyair Inter Pack Incorporated**  
 330 Humberline Drive  
 Toronto, Ontario M9W 1R5  
 Canada  
 416-679-6600  
 http://www.polyair.com

Annual Sales:  
 Employment:  
 Key Products: and packaging systems

**SAMPLE PROFILE**

Polyair Inter Pack is a privately held manufacturer of packaging, insulation products and pool covers. In July 2009, the Company was acquired by Glencoe Skydome Holdings LP (Chicago, Illinois), an operating unit of Glencoe Capital LLC (Chicago, Illinois).

The Company participates in the world protective packaging industry through the manufacture of various packaging products. Specific items comprise bubble material, foam products, mailers and packaging systems.

**Products** -- Bubble material from Polyair is marketed under the DURABUBBLE brand name. DURABUBBLE material, which is offered in standard and antistatic types, features 1/2-, 4/5-, and 1-1/4-centimeter bubble heights. It manufactures such DURABUBBLE dispensers as BOX-A-BUBBLE, which is an octagonal-shaped carton containing a 1-1/5-meter-wide roll of DURABUBBLE perforated at 30-1/2 centimeters for convenient tear-off sheets; and HANDI-PAK products that dispense DURABUBBLE in 30-1/2- or -centimeter widths for use in retail stores, mail rooms, warehouses or other uses.

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“... faster gains will be precluded by the low levels of personal income and the low percentage of urban population (only 30 percent in India in 2009, compared to the regional average of 41 percent, and 51 percent worldwide). While the number of supermarkets will swiftly multiply in larger cities, most areas in the country will remain too poor and lacking in resources to support a large retail industry (both traditional and online), which will limit protective packaging requirements.”  
 --Section VI, pg. 163

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**OTHER STUDIES**

**Degradable Plastics**

US demand for degradable plastics is forecast to rise 16.6% annually to 2014, driven by interest in environmentally friendly products. Polylactic acid (PLA) and starch-based plastics will remain the dominant types and see strong growth. Polyhydroxyalkanoate (PHA) will be the fastest growing type, from a small base. This study analyzes the 151 million pound US degradable plastic industry, with forecasts for 2014 and 2019 by type, product and market. It also evaluates company market share and profiles industry players.  
 #2648 ..... August 2010 ..... \$4800

**Protective Packaging**

US demand for protective packaging is forecast to climb 6.2% annually through 2014, driven in part by the continued proliferation of Internet shopping. Value gains will be helped by greater interest in recycled or biodegradable materials. The fastest growth is expected for air pillows, foamed plastics and bubble packaging. This study analyzes the \$3.8 billion US protective packaging industry, with forecasts for 2014 and 2019 by function, market and product. It also evaluates company market share and profiles industry players.  
 #2619 ..... March 2010 ..... \$4800

**Corrugated & Paperboard Boxes**

US corrugated and paperboard box demand will rise 2.4% yearly through 2014. Gains will be driven in part by higher-value types with better graphics capabilities, including folding cartons and corrugated boxes. Internet-based shopping will also support box demand. Durable goods will be the fastest growing market. This study analyzes the \$32.3 billion US corrugated and paperboard box industry, with forecasts for 2014 and 2019 by material, product and market. It also evaluates company market share and profiles industry players.  
 #2598 ..... March 2010 ..... \$4800

**Foamed Plastics**

US foamed plastics demand will reach 8.4 billion pounds in 2013 as key construction and motor vehicle markets recover. Foamed urethane will remain the largest segment while foamed LDPE grows the fastest. Construction will provide the best opportunities based on growth in insulation and carpet underlay applications. This study analyzes the \$22.5 billion US foamed plastics industry, with forecasts for 2013 and 2018 by market and product. It also evaluates company market share and profiles industry players.  
 #2532 ..... July 2009 ..... \$4700

**Active & Intelligent Packaging**

US demand for active and intelligent packaging will climb 8.3% yearly through 2013, driven in part by food safety concerns and losses in perishables. Intelligent packaging will grow the fastest, propelled by time-temperature indicators and other products that offer product differentiation, traceability and interactive features. This study analyzes the \$1.3 billion US active and intelligent packaging industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.  
 #2515 ..... July 2009 ..... \$4700

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