Pet Food Packaging

US Industry Study with Forecasts for 2018 & 2023

Study #3170 | July 2014 | $5200 | 251 pages
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1. US Pet Food Packaging Market Share, 2013 .............. 170
US demand to rise 4.8% annually through 2018

US demand for pet food packaging is expected to rise 4.8% annually to $2.5 billion in 2018. Growth will be based on the use of higher-value, more-sophisticated packaging and continued strength in pet food shipments fueled by an expected rebound in the pet population. The proliferation of premium pet food brands providing healthier, more nutritious alternatives (corresponding to the continuing humanization of pets by their owners) also will spur packaging demand growth, as higher-value bags, pouches, and rigid containers will be required to provide superior graphics, puncture resistance, and barrier protection for these more expensive, higher-quality products.

Plastic pouches to be fastest growing types

As with other food categories, plastic pouches will be the primary beneficiary of the trend toward more advanced pet food packaging. Pouch demand in pet food packaging is forecast to rise 8.3% percent per annum to $540 million in 2018, the fastest pace of growth among pet food packaging types. Pouch demand will be bolstered by features that are inherently convenient for consumers, including zippered closure mechanisms and light weight, as well as by reduced transportation costs due to their light weight. Pouch growth will be strong in both dry and wet food. For small packages of dry food -- those less than 10 pounds -- pouches will continue to supplant bags. For wet food, retort pouches will continue to gain acceptance as an alternative to metal cans, especially in applications where strength and stiffness are not primary factors.

Demand for tubs and cups will benefit from the need for convenience features and light weight in pet food packaging. As a result, tubs and cups will continue to supplant metal containers in wet food, growing in popularity due to peelable lids that are easier to open and allow the consumer to avoid cuts from metal edges. In addition, the ability to package tubs and cups in multipacks for ease of handling will bolster growth. Tubs and cups will compete with pouches as alternatives to metal cans for wet pet food, with tubs and cups favored for applications where strength and ease of grasping are factors.

Plastic to be top packaging material in value terms

Among materials, paper accounted for the largest share of pet food packaging demand in 2013. In volume terms, paper will remain the leading material in 2018, based on the large number of unit shipments for paper bags. However, in value terms, by 2018 plastic will overtake paper due to the growth of plastic pouches, as well as the use of expensive features and graphics on those packages.
**Package Types**

**Paper Bags**

Multiwall paper bags represent the largest packaging type for pet food bags, with demand growing 4.9 percent annually to $630 million in 2018. This growth is above average for the pet food bag market but is lower than overall demand for pet food. Multiwall paper bags are a natural extension from stand-up pouches and other flexible barrier packaging in bulk dry pet food packaging. Larger sized packages weighing from 16 to 50 pounds are widely used for the packaging of bulk dry cat and dog foods. Dry pet food is frequently packaged in kraft paper bags lined with polyethylene or polypropylene. The smooth surface of paper bags enables high quality printing, giving the packages increased visual appeal. The use of extensible and other high performance kraft papers, which are lighter in weight than traditional multiwall sack papers, has helped improve the strength of such bags.

In the pet food market, paper multiwall bags will face competition from woven polypropylene bags and stand-up and quad seal pouches. Paper bag demand will be driven by the development of dry pet food that is deemed healthier or more nutritious, supporting bag sales at higher price points and shifting demand from lower-priced bags. The addition of more complex closure mechanisms on bags, including the heightened use of top sliders, zippers, click-and-close, and press-to-close formats, will extend value to bags and spur sales growth. Developments launched in 2013 include the VELCRO PRESS-LOK hook-to-hook closure system introduced for paper bags. The closures were developed by Velcro and produced by Peel Plastic Products for use by Hill’s Pet Nutrition (Colgate-Palmolive) for bags of SCIENCE DIET pet food. The system allows hooks on either side of the bag to engage without precise alignment, offering burst strength to prevent opening in transit and an audible click upon closing.

---

**Table III-3**

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Sonoco Products Company
1 North Second Street
Hartsville, SC 29550
843-383-7000
http://www.sonoco.com

Sales: $4.8 billion (2013)
US Sales: $3.2 billion (2013)
Employment: 19,900 (2013)
Key Products: easy-open and reclose packs, pouches, rigid paper containers, and metal ends and closures

Sonoco Products is a vertically integrated manufacturer of paperboard and plastic packaging products. The Company operates through four segments: Consumer Packaging, Paper and Industrial Converted Products, Display and Packaging, and Protective Solutions.

The Company participates in the US pet food packaging industry through the Consumer Packaging segment, which reported sales of $1.9 billion in 2013. Via this segment, Sonoco Products manufactures flexible packaging, rigid packaging, and metal ends and closures that are utilized by a variety of markets, including pet and other food, personal care, and home care.

Among the Company’s flexible packaging products suitable for pet food and treat packaging applications are easy-open and reclose packs, and pouches. These items are made from thin-gauge, flexographic, rotogravure, and combination printed film, including high-performance laminations. Sonoco Products’ easy-open and reclose packs, which are intended to preserve freshness, feature SEALTAB and SMARTSEAL open and reclose systems. SEALTAB systems, which...
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World Pouches

Global demand for pouches will rise 6.2 percent annually to $37.3 billion in 2018. Stand-up pouches will grow the fastest, while flat pouches remain dominant. The adoption of pouches with higher value features in developed markets will support value gains, while faster volume growth is expected in China and other developing nations. This study analyzes the $27.6 billion world pouches industry, with forecasts for 2018 and 2023 by product, market, world region, and for 16 countries. The study also evaluates company market share and profiles industry players.

#3220 .......... November 2014 ............... $6200

World Labels

World label demand will rise 4.9 percent yearly to 58 billion square meters in 2018, valued at $114 billion. The Asia/Pacific region will be the fastest growing market, due to the continued rapid expansion of Chinese and Indian label demand. The product mix will continue to shift away from glue-applied paper labels. This study analyzes the 45 billion square meter world label industry, with forecasts for 2018 and 2023 by application method, material, market, world region, and for 19 countries. The study also evaluates company market share and profiles industry participants.

#3185 .......... August 2014 ............... $6300

Pouches

Demand for pouches in the US is projected to increase 4.6 percent per year to $9.4 billion in 2018. Stand-up pouches will remain a major growth segment while flat pouches will remain dominant. Nonfood markets will outpace the dominant food and beverages segment, driven by expanded consumer product and medical and pharmaceutical applications. This study analyzes the $7.1 billion US pouches industry, with forecasts for 2018 and 2023 by type, feature, market and production method. The study also evaluates company market share and profiles industry players.

#3157 .......... April 2014 ............... $5200

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