

PROSPECTUS

NORTH AMERICAN

flexible Packaging Strategies 2002

**MARKETS,
MATERIALS &
MACHINES**

**Comprehensive
multiple client study**

**Be at the
forefront of a changing
flexible packaging market!**

**Get unprecedented coverage
of a fast-moving industry.**

A MUST READ FOR ANYONE WITH INTERESTS IN THE FLEXIBLE PACKAGING INDUSTRY:

- **CONVERTERS**
 - **FILM PRODUCERS**
 - **RESIN SUPPLIERS**
 - **EQUIPMENT
MAKERS**
- Key information to effectively serve ever-more-sophisticated customers aligning with strategic suppliers and implementing ever higher quality standards.
 - Vital intelligence to develop strategies to address the increasing pace of competitor consolidation.
 - Crucial data for key business decisions — new products, market expansion, acquisitions — an essential reference source.
 - Learn details of new markets to enter — without tipping your hand to potential competitors.
 - Verify your sources of market information with this thorough, objective, third-party research and analysis.
 - Benefit from insightful analysis and astute “big-picture” recommendations based on extensive industry experience.

**ALSO AVAILABLE!!
EUROPEAN FLEXIBLE
PACKAGING 2002:
THE EMERGING SINGLE
MARKET**

from AJR Associates
(London). See page 6 for
information.



the key to targeting new markets

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Flexible Packaging Strategies 2002 is an invaluable source that will aid you in making sound decisions in packaging strategies for the new millennium.

Clients have profited by over \$100 Million from our results-oriented recommendations backed by diligent research and insightful analysis.

Comments from subscribers after reviewing:

“It’s very useful to us because it breaks down markets by structures used, provides converters with their market shares and identifies growth prospects into the next millennium” –Manager, Marketing Services, Honeywell.

“Keymark Associates’ new report on the flexible packaging market is unique in my experience in the depth and breadth of its coverage of both food and non-food market segments. In addition, its inclusion of the whole range of both commodity and specialty films, coextrusions and laminates, including structures and pricing, makes the report especially useful.” – Business Manager, Hoechst Celanese

We are pleased to present the most comprehensive study of the flexible packaging industry available. Here you can discover growth opportunities unveiled only by our careful study and analysis.

We’ve dissected traditional estimates and scrutinized the individual applications of this complex industry. After you read this study you will agree that there are many substantial and attractive flexible packaging opportunities. Here, as nowhere else, will you learn from an objective and unbiased source how large they really are.

Many market trends are quite surprising. Some markets thought to be high growth are expected to be less than attractive. Others thought to be commodity-driven are taking on a new level of sophistication and change. From our hundreds of end-users, converters, suppliers, and equipment builders you will learn:

- How the aging population is driving the fast growth rate of medical packaging
- Where low-cost stretch film is rapidly replacing corrugated containers
- Which package forms will be used in the hot growth areas of case ready meats
- Whether fresh-cut produce will continue its meteoric growth trajectory
- Whether Olestra will lead to growth of snacks or just cannibalize the market
- How stand-up pouches are changing the pet-food and ag-chem markets

Keymark Associates is proud to offer Flexible Packaging Strategies 2002 – an invaluable resource that will aid you in making sound decisions for flexible packaging strategies for the new millennium.

Huston Keith
Principal
Keymark Associates

HIGHLIGHTS

MEDICAL & PHARMACEUTICAL

Increased life spans and aging baby boomers are spurring demand for medical packaging. Pressures to reduce spiraling costs have increased use of flexible packaging. Labor cost savings are driving growth of pre-packaged surgical kits, plus, fast-growing in-home treatment will increase user-friendly flexible packaging- just to name two hot areas.

PREPARED MEALS

To satisfy consumer demands for convenient, freshly prepared meals, supermarkets and processors are offering ready-to-eat entrees. This trend has surged in popularity since the introduction of the home meal replacement by Boston Market. Innovative processors are using more flexible packaging to overcome in-store prepared foods problems.

PET FOOD

Within the past 5 years the \$9.2 billion pet food market has undergone a major upheaval in product and packaging. Widely used multi-wall bags are declining as plastic based structures take 20% of the market. What are the driving forces behind this big shift? Which structures will prevail?

COFFEE

This giant, yet increasingly fragmented market, offers great opportunity for flexible packaging through specialty roasters growing at 15+% per year. This study details requirements and identifies structures that will benefit from this growth.

HARDWARE

Fast growing home improvement centers, such as Home Depot and Lowe's, are shifting to pre-packaged screws, nuts and other small hardware items to decrease labor costs and increase inventory control. "Do-it-yourself home projects" and self-serve hardware departments will continue to drive packaging growth.

CASE-READY MEATS

Case-ready packages will grow to 30% of the retail red meat market by 2002. Several major case-ready programs are under way by major supermarkets and packagers. We identify advantages and disadvantages of various packages and which ones grow most.

COOKIES & CRACKERS

Packaging aimed at impulse purchasing is the key to success in this 5 billion unit market. Packaging redesign brought 34% growth in sales to a key end-user. Plus, barrier film sales are expected to show large increases in certain niches.

SNACK FOOD

While Olean fried chips first year sales will top \$400 million, it will revive the flagging low-fat market and generate new packaging opportunities in this \$16 billion market? We've identified key trends in packaging costs and needs for specialized packaging.

CONFECTION

Almost \$14 billion in sales and growing 4-6% per year because candy's not just for kids anymore. Nearly half a billion dollars will be spent on flexible packaging in 2002. We delineate important and unique requirements.

CEREAL

New flexible packages are creating niche opportunities in this giant segment, such as Kellogg's new individual cereal packs with fresh milk. We also identify how quickly flexible packaging will replace rigid cartons.

PALLETIZING AND UNITIZING

Learn how stretch wrap has taken over this function for most manufacturers and distributors, propelling the industry to \$1 billion in sales and reducing costs and worker injuries. New opportunities abound in replacing corrugated containers for a variety of products.

This broad, detailed analysis of the flexible packaging industry covers virtually all food and consumer/industrial markets, and the films, foils and papers they use for wrapping or packaging products for distribution or display. Included are quantity and value data for 1997 with projections to 2002 for each individual market with the United States and Canada

Scope of Study

TABLE OF CONTENTS

Over 50 food, consumer and industrial end-use applications, each with detailed information on:

- **MSI, pounds and converter sales volume 1997 & 2002**
- **Major structures used with advantages disadvantages**
- **Selling prices**
- **Key suppliers (with approximate shares)**
- **End users (with specifications and requirements)**
- **Relevant trends**
- **Market Strategies and recommendations**

Extensive data on materials, including plastic films and resins, foil paper, coatings and adhesives:

- **Pounds and producer sales value 1997 & 2002**
- **Major applications**
- **Prices**
- **Performance characteristics**
- **Key structures and combinations**

EXECUTIVE SUMMARY

OVERVIEW OF MAJOR TRENDS

Consumer influence on Packaging
Governmental and Environmental Regulation
Information Technology
Market Trends

PERISHABLE FOODS

Fresh Red Meat
Processed Meat
Poultry
Fish and Seafood
Cheese and Other Dairy
Fresh Pasta
Refrigerated Prepared Foods
Frozen Prepared Foods
Frozen Novelties
Aseptic Beverages
Food Service
Condiments
Produce

DRY GROCERIES

Snack Foods
Baked Goods
(cookies, crackers, bread)
Confection
Coffee
Cereal
Dry Mixes
Pasta
Pet Food
Milling

CONSUMER & INDUSTRIAL

Medical
Pharmaceutical
Disposable Diapers
Feminine Products
Incontinence
Toilet Paper
Other Paper Products
Personal Care
Tobacco
Hardware & Auto Parts
Office Products
Toys
Apparel & Textiles
Greetings Cards

Audio/Video/Software

Appliances
Household Furniture
Office Furniture
Carpet
Mattresses
Building Products
Agricultural, Lawn & Garden Products
Industrial Chemicals
Photography
Palletizing & Unitizing
Electronics & Computer Industry
Catalogs & Mail Order

MATERIALS

PLASTIC RESINS AND FILMS

Low Density Polyethylene (LDPE)
Linear Low Density Polyethylene (LLDPE)
High Density Polyethylene (HDPE)
Polypropylene (PP)
Cellophane
Ethylene Vinyl Alcohol (EVOH)
Ethylene Vinyl Acetate (EVA)
Polyester (PET)
Polyvinylidene Chloride (PVDC)

OTHER

MATERIALS/SUBSTRATES

Foils

Paper

ADHESIVES

Cold Seal Coatings

Urethanes

Acrylic

Ethyl Methyl Acrylate (EMA)

NEW

MATERIALS/TECHNOLOGIES

Metallocene Polyethylene (MPE)
Stand-Up Pouches
Oxygen Absorbers
New Gas Barrier Materials

KEY PLAYERS

Converters (Top 100)
Film Producers
Foil Producers
Equipment Makers

PROFILE

Mission: Help companies successfully identify and develop new products, businesses and markets.

Keymark Associates consults extensively with major chemical firms and converters in flexible and rigid packaging. We have conducted a wide range of projects, including:

- **Barrier Films & Resins for Food Packaging**
- **Barrier Sheet & Trays Market & Economics**
- **Case-Ready Red Meat Packaging**
- **Flexible Packaging Industry Overview**
- **Foam Tray Pricing and Competitive Analysis**
- **Foil Lidding for Pharmaceuticals**
- **Markets For PET Thermoformed Packaging**
- **Nylon Film Markets in North America & Europe**
- **Opportunities for Barrier Aerosols**
- **Opportunities for Hot-Filled Foods Packaging**
- **Oriented Film Pricing & Economics**
- **Ovenable Tray Markets**
- **Oxygen Absorber Additive Value-in-Use**
- **PET Foam Markets & Technologies**

Principal: Huston Keith, MBA, University of Tennessee —26 years market research and product development experience at Amoco, General Electric, Holiday Inns & consulting with Fortune 100 companies.

- Developed a multimillion dollar packaging product as market development manager for Amoco Foam Products Co., resulting in use by major food companies and total industry product line sales of \$50,000,000.
- Identified market need, quantified demand and recommended successful introduction of Embassy Suites and Hampton Inn hotels as Holiday Inn market research manager.
- Directed hundreds of industrial and consumer market studies in packaging, plastics, hotels, food, travel, consumer durables, building products, aircraft and several other industries.

Associates: Our team of capable, energetic analysts – three from nearby Kennesaw State University (KSU), where the Coles College of Business is ranked 21 by US News & World Report among US business schools for its Entrepreneurship program.

- Richard Terry, MBA, KSU, has 15 years in engineering, at Westinghouse & a plastic equipment supplier. He focused on consumer/industrial markets.
- Carol Williams, MBA, KSU, has had a successful 20-year career as both a marketing entrepreneur and as an educator. She focused on dry groceries.
- Malika Harricharan, BA, Marketing, KSU, conducted secondary research and data analysis.
- Matthew Yeatts, MBA, Marshall University, a former market analyst for Graphic Packaging, conducted secondary research on dry food & industrial markets.
- David Kimmel, BS, Chemistry, University of Virginia, focused on selected perishable foods.
- Carol Forsythe, 12 years of experience in healthcare, handled medical packaging.

Your subscription to North American Flexible Packaging Strategies 2002 includes:

- Two (2) copies of the report, available immediately.
- Telephone consultation with the project team after the study.
- Substantial discounts on future updates.

To collect and analyze this data yourself would require hundreds of manhours. A custom study on just one segment of the industry would cost more than this study covering all segments!

THIS DEFINITIVE STUDY OF OVER 50 MARKETS IS AVAILABLE NOW FOR US\$9,300. \$3,900!

Additional copies and copies on CD-ROM will be available for \$300.00. This report and its contents is for the confidential use of subscribers and their regular employees only and is not to be copied, disclosed or distributed to any other parties.

To enter your subscription to the multiclient study **NORTH AMERICAN FLEXIBLE PACKAGING STRATEGIES 2002** as described here, please **SIGN BELOW AND FAX TO 770/565-5998** (or mail to the address below). You will be invoiced. Terms are net 30 days.

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 If paying by credit card, enter number _____ Expiration Date _____
 Enter 3-4 digit card verification number: _____ Name on card _____



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**By exclusive arrangement with AJR Associates of London, England, we are offering
 EUROPEAN FLEXIBLE PACKAGING 2002: THE EMERGING SINGLE MARKET**

Similar in form and content to our North American study, but crucial issues to Europe market will be addressed as never before:

- *How will the vast economic changes sweeping the European continent affect the flexible packaging market?*
- *How will both converters and end-users adapt to inevitable pan-European standards and practices?*
- *How are astute participants in this industry already creating great opportunities from this change?*
- *How can you realize the almost unimaginable potential of this market?*

This study will show how the flexible packaging industry operates in 8 Western European countries going through the travails of economic unification and in 6 Central European countries struggling with the vagaries of the free market.

DON'T BE LEFT AT THE STARTING GATE.

Take your first step to be knowledgeable about this dynamic situation, since an unplanned strategy could be worse than none at all.

SUBSCRIBE TODAY TO THIS LANDMARK STUDY.

European Flexible Packaging Strategies 2002 is available now for US\$8,800. **Just sign below to enter your subscription today**, or check to just receive a prospectus.

Signature _____

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