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Packaging Intelligence. Delivered.

Published August 2013

Biopolymers in Packaging 2013 to 2017

Global Markets, Environmental Impact, and Technologies

"Biopolymers in Packaging" is a global study of the biopolymer industry. It first examines the total biopolymer market, then focuses on biopolymers within the packaging market, which comprises nearly 70% of the total market for biopolymers.

Suppliers, converters, and users around the globe are making huge investments in biopolymers, which will impact every facet of the packaging industry. As a result, the biopolymer market will increase 25% per year during the next five years.

"Biopolymers in Packaging" evaluates each biopolymer and its manufacturing technology, production capacity, converting challenges, market drivers, and market projections. The market projections include volume, price, value, and many segmentations such as by plant source, package type and geographic region.

What Sets this Study Apart?

> current and projected capacity for each supplier of each biopolymer

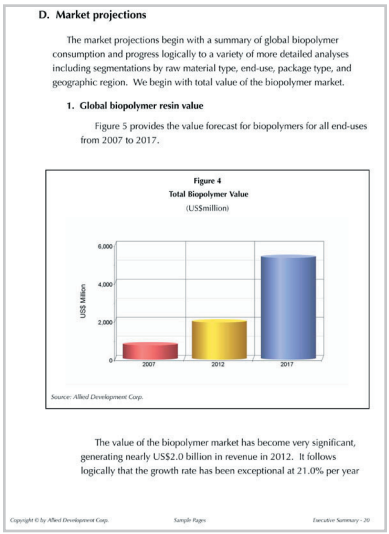
> detailed profiles of all biopolymer producers

> consumption projections for volume, price, and value of each biopolymer

> multiple market segmentations and drivers for each biopolymer

> economic and environmental impact analyses

Sample Pages



D. Market projections

The market projections begin with a summary of global biopolymer consumption and progress logically to a variety of more detailed analyses including segmentations by raw material type, end-use, package type, and geographic region. We begin with total value of the biopolymer market.

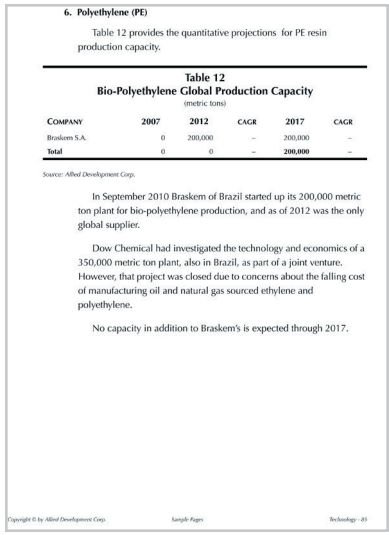
1. Global biopolymer resin value

Figure 5 provides the value forecast for biopolymers for all end-uses from 2007 to 2017.

Figure 4
Total Biopolymer Value
(US$million)

Source: Allied Development Corp.

The value of the biopolymer market has become very significant, generating nearly US$2.0 billion in revenue in 2012. It follows logically that the growth rate has been exceptional at 21.0% per year



6. Polyethylene (PE)

Table 12 provides the quantitative projections for PE resin production capacity.

Table 12
Bio-Polyethylene Global Production Capacity
(metric tons)

Company	2007	2012	CAGR	2017	CAGR
Braskem S.A.	0	200,000	–	200,000	–
Total	0	0	–	**200,000**	–

Source: Allied Development Corp.

In September 2010 Braskem of Brazil started up its 200,000 metric ton plant for bio-polyethylene production, and as of 2012 was the only global supplier.

Dow Chemical had investigated the technology and economics of a 350,000 metric ton plant, also in Brazil, as part of a joint venture. However, that project was closed due to concerns about the falling cost of manufacturing oil and natural gas sourced ethylene and polyethylene.

No capacity in addition to Braskem's is expected through 2017.

Market Intelligence Study from Allied Development

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320 Pages

Learn About:

> The future of biopolymers in packaging with detailed segment forecasts to 2017
> In-depth analysis of emerging trends, market conditions, and market drivers
> Current consumption volumes with projections to 2017
> The latest technology developments and the opportunities they create

Who Should Buy This Study:

> Packaging Converters
> Raw Material Suppliers
> Equipment and Machinery Suppliers
> Brand Owners
> Industry Analysts

What is included:

> Detailed analysis of the trends and drivers of this unique and challenging market with volume forecasts to 2017
> More than 320 pages of detailed information not available anywhere else
> Details of market opportunities and forecasts broken down by end-use segments and geographic regions

Market Matrix:

Biopolymer Market Segmented by:

- Packaging Use vs Non-packaging Use
- Polymer Type
  - Cellulose ester (CE)
  - Polyamide (PA)
  - Polybutalene succinate (PBS)
  - Polyethylene (PE)
  - Polyethylene terephthalate (PET)
  - Polyhydroxyalkonate (PHA)
  - Polylactic acid (PLA)
  - Polypropylene (PP)
  - Polytrimethylene terephthalate (PTT)
  - Polyurethane (PU)
  - Polyvinyl chloride (PVC)
  - Thermoplastic starch (TPS)
  - Other
- Plant Sources
  - Corn
  - Other starch plants
  - Sugar cane
  - Other sugar plants
  - Soybean
  - Other oil-base plants
  - Other
- Geographic Area
  - North America
  - Europe
  - Asia
  - ROW

Individual Polymers Segmented by:

- Capacity
- Volume total
- Volume used in packaging
- Suppliers
- Value
- End-use Markets
  - Retail food
  - Retail non-food
  - Foodservice
  - Other
- Package Types
  - Bags and pouches
  - Bottles, jars, and tubes
  - Carrier and qaste bags
  - Cups, cartons, and corrugated
  - Flexible film and lidstock
  - Pots
  - Transportation packaging
  - Trays and bowls
  - Other

Additional Allied Development Capabilities

SavvyPack® Intelligent Packaging Analysis

Allied Development's SavvyPack® Packaging Analysis Service is the industry standard for economic and environmental analysis of packaging.

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