INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Stretch & Shrink Film

US Industry Study with Forecasts for **2015 & 2020**

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Stretch & Shrink Film

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Gains in stretch and shrink film will be driven mainly by accelerating demand for product packaging and for the bundling and protection of goods during warehousing and distribution.

US demand to rise 3.3% annually through 2015

Demand for stretch and shrink film in the US is forecast to rise 3.3 percent yearly to $2.4 billion in 2015, driven by accelerating demand for product packaging and for the bundling and protection of goods during warehousing and distribution, as well as competitive advantages over other packaging materials. Other stimulants include resin and machinery improvements, and opportunities in areas such as stretch hoods and stretch labels and sleeves.

LDPE stretch/shrink film resins to remain dominant

Demand for stretch and shrink film resins is expected to rise 2.5 percent annually to 1.9 billion pounds in 2015. Low density polyethylene (LDPE) is the leading stretch and shrink film resin and is forecast to see healthy growth in volume demand through 2015. Polyvinyl chloride (PVC) stretch and shrink film demand will remain flat through 2015 in volume terms, though value gains will be based on price increases.

Shrink film to outpace dominant stretch film

Stretch film demand will increase 2.8 percent annually through 2015 to $1.4 billion, accounting for almost three-fifths of the total. The fastest growth is anticipated for stretch hoods due to their cost advantages, high throughput rates and excellent load integrity and weather protection. Stretch film advances will result from advantages in energy and labor savings. Demand for shrink film will grow 4.2 percent annually to $970 million in 2015. Advances will be promoted by shrink film's high clarity and excellent print capabilities, greatly enhancing product marketability. In particular, growth will be aided by increased use in labels. Shrink film also provides a better seal and moisture barrier than stretch film, and is frequently used in conjunction with corrugated trays as a case overwrap. Shrink film is well-suited for covering heavy, non-uniform pallet loads such as heavy equipment or bricks due to its higher puncture resistance and ability to help maintain load integrity.

US Stretch & Shrink Film Demand
($2.4 billion, 2015)

Storage and distribution market to grow the fastest

Storage and distribution markets for stretch and shrink film will increase 3.9 percent per year to $1.3 billion in 2015, accounting for 54 percent of the total. Advances will be stimulated by increasing retail trade and industrial activity, as well as export markets. The primary growth driver will be pallet wrap, due to its competitive advantages over strapping, tape and other bulk unitization methods. Product packaging demand will rise 2.8 percent annually to $1.1 billion in 2015, stimulated by growing retail trade and concomitant needs for product packaging for food, beverage, consumer and other items.

Stretch & Shrink Film

US Industry Study with Forecasts for ***2015 & 2020***

Sample Text, Table & Chart

TABLE III-13

SHRINK FILM DEMAND IN PRODUCT PACKAGING BY USE
(million dollars)

Item	2000	2005	2010	2015	2020
Plastic Packaging Shipments (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ film/000$ packaging	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Shrink Film Demand in Product Pkg	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Food & Beverages:	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Meat, Poultry & Seafood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Dairy	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Produce	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other Food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Beverages	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Paper & Textile Products	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Consumer	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% packaging	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Shrink Film Demand	[illegible]	[illegible]	790	970	1190

SAMPLE TABLE

RESINS

Linear Low Density Polyethylene

Demand for linear low density polyethylene stretch and … is forecast to expand … billion poun… accounting for 63 pe… …k film. Opp… will reflect LLDPE's … …ength, as wel… elongation propertie… …o more punc… tant and has greater … conventiona… permitting resin savi… …osts. Metallo… grades of stretch film … and lower haz… ties compared to ethylene vinyl acetate and very low density … ene. Metallocene films also seal at lower temperatures and a… enabling reduced film thicknesses. Downgauging, which red… consumption, partially offsets the higher per pound cost of m… grades.

SAMPLE TEXT

Among the metallocene-based stretch film offered by producers are Pinnacle Films' (Inteplast) seven-layer cast films produced under the APEX, PEAK and PALLETLOCK NANOLAYER brand names. These films are based on EXCEED metallocene-based linear low density polyethylene resins from ExxonMobil Chemical. APEX stretch films are designed to provide maximum clarity, puncture resistance and toughness, while PEAK stretch films feature quiet unwinding, ultraviolet light resistance and consistent cling. PALLETLOCK NANOLAYER stretch films are engineered to reduce thickness while maintaining holding force and puncture resistance.

LLDPE stretch film will see growth due to its lower cos… lent performance properties in diverse applications ranging f… wrap to sleeve labels and product packaging. Gains are also … LLDPE shrink film, with advances fueled by good opportuni… such as multipack beverage packaging and sleeve labels. Sh… have advantages over stretch films in the labeling of contour…

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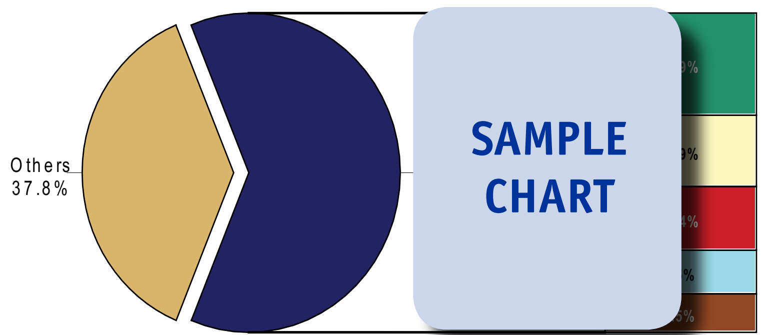
CHART VI-1

US STRETCH & SHRINK FILM MARKET SHARE
($2.0 billion, 2010)



SAMPLE CHART

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Stretch & Shrink Film

US Industry Study with Forecasts for ***2015 & 2020***

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Sample Profile, Table & Forecast

TABLE IV-3

FOOD MARKETS FOR STRETCH & SHRINK FILM BY TYPE & USE (million dollars)

Item	2000	2005	2010	2015	2020
Food Shipments (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ film/000$ food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Food Stretch & Shrink Film	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Stretch	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Shrink	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Use:					
Meat, Poultry & Seafood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Dairy	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Fresh Produce	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other Food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Stretch/Shrink Film in Product Pkg	735	875	955	1095	1265

SAMPLE TABLE

COMPANY PROFILES

Alliance Plastics LLC
398 York Southern Road
Fort Mill, SC 29715
803-802-7955
http://www.al[illegible]

Annual Sales: [illegible]
Employment: [illegible]

Key Products: [illegible] specialty stretch films

SAMPLE PROFILE

Alliance P[illegible] stretch films and cornerboard. The Company also sells steel strapping, carton sealing tape and carton sealing equipment. Alliance Plastics conducts manufacturing and converting activities at its Fort Mill, South Carolina headquarters facility.

The Company's stretch films encompass converted, machine- and hand wrap, and specialty types. Converted stretch films are available from the Company under the BANDFLEX, STEELFLEX and X-WRAPPER brand names. BANDFLEX products include stretch banding films, which are marketed as an alternative to tape, string and strapping. Among these films are standard, extended core and automatic stretch banding varieties. STEELFLEX extended core stretch film is a high-performance cast film, while X-WRAPPER stretch banding film is engineered to reduce hand fatigue.

Machine wrap films from Alliance Plastics consist of OMEGA 80+, OMEGA and OPTIFLEX offerings. OMEGA 80+ film features enhanced puncture resistance and clarity, while OMEGA film provides one-sided cling characteristics and pre-stretch levels of up to 250 percent. OPTIFLEX film is a three-layer blown film that is designed to

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"Demand for stretch and shrink film in the packaging of meat, poultry and seafood is expected to expand 2.6 percent per annum to $328 million in 2015. Growth will reflect stretch and shrink film's advantages over other packaging materials in terms of source reduction capabilities, performance characteristics (e.g., high clarity and puncture resistance) and aesthetic appeal. For example ..."

--Section IV, pg. 97

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Other Studies

Protective Packaging

This study analyzes the US protective packaging industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by function, market and product (e.g., molded foam, foam-in-place polyurethane, polyolefin rolls, protective mailers, paperboard protectors, bubble packaging, insulated shipping containers, air pillows, paper fill, dunnage bags, loose fill, molded pulp). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2839 .... February 2012 .... $5100

Converted Flexible Packaging

Demand for converted flexible packaging in the US will rise 3.8 percent annually through 2015. Pouches will lead gains based on continued conversions to stand-up pouches and healthy gains for flat pouches, along with lighter weight and reduced material use. Bags will remain the largest segment. Food markets will outpace nonfood uses. This study analyzes the $15.1 billion US converted flexible packaging industry, with forecasts for 2015 and 2020 by material, product and market. The study also evaluates company market share and profiles industry players.

#2807 .... October 2011 .... $5100

Labels

US label shipments will rise 4.8 percent annually through 2015. Pressure sensitive labels will remain dominant, but will continue to face growing competition from stretch sleeve, heat-shrink, in-mold and other labeling methods. Paper will remain by far the leading stock material, but will continue to lose market share to plastic. This study analyzes the $15.7 billion US label industry, with forecasts for 2015 and 2020 by raw and stock material, application method, printing technology and function. The study also evaluates company market share and profiles industry players.

#2784 .... August 2011 .... $5100

Pallets

US demand for pallets is forecast to rise 6.1 percent annually through 2015. Pallets made from wood -- primarily lumber -- will continue to account for nearly 95 percent of demand, while plastic and metal pallets grow at double-digit rates. New pallet demand will outpace the dominant refurbished pallet segment. This study analyzes the 967 million unit US pallet industry, with forecasts for 2015 and 2020 by material, product, market and region. The study also evaluates company market share and profiles industry competitors.

#2766 .... May 2011 .... $4800

World Bulk Packaging

World bulk packaging demand will rise 5.8 percent yearly through 2015. Advances will be driven by growth in manufacturing activity, especially in key end-use industries such as chemicals and pharmaceuticals, and food and beverages. China and the US -- the two largest markets -- will account for nearly half of all value gains. This study analyzes the $42.3 billion world bulk packaging industry, with forecasts for 2015 and 2020 by type, material, market, world region and for 18 countries. The study also evaluates company market share and profiles industry players.

#2764 .... May 2011 .... $6100

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