

# RETORT POUCHES & TRAYS 2009

Available December 2005

***The latest information  
available on this  
dynamic market***

- ◆ *Key trends*
- ◆ *Markets and growth projections*
- ◆ *Technologies*
- ◆ *Materials*
- ◆ *Profiles of all major U.S. customers and selected customers worldwide*
- ◆ *70+ supplier profiles*
- ◆ *More than 45 product profiles*

***This study is specifically  
designed for:***

- ◆ ***Producers*** looking for new markets
- ◆ ***Converters*** working to meet growing end-user needs
- ◆ ***Equipment makers*** pursuing new clients
- ◆ ***End-users*** seeking to understand material options for retort pouches and trays

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Glass jars  
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Foodservice

## Markets and Products

### Each includes sales in package units 2004-2009

Major drivers & consumer preferences  
Retailer/wholesaler issues  
Key structures by product:

### Tuna/Seafood

StarKist  
Chicken of the Sea  
Bumble Bee  
E-Fish-Ent salmon  
SeaBear

### Chicken/Beef/Pork

Tyson Chunk Chicken  
Jack Link's Beef  
SPAM Singles

### Prepared Meals - Pouches

Wornick Asian Style  
Knauss Beef  
Esskay Beef  
Rip 'N' Ready entrees  
Hormel entrees  
Preferred Brands entrees  
U.S. Government MREs

### Prepared Meals - Cups & Trays

Homestyle Express  
Armour Lunch Buckets  
Hormel products  
Campbell's Soups  
Chef Boyardee  
Bush's Beans

## Rice Dishes

Masterfoods/Uncle Ben's  
McCormick/ Zatarain's  
Fall River

## Baby Food

Gerber Lil' Entrees

## Pet Food

Friskies  
Kal Kan

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Nestle  
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## Major Customers

### U.S./Canada

Bush's Beans  
ConAgra  
E-Fish-Ent  
Esskay  
Fall River  
Gerber  
Hormel  
Knauss  
Mars/Masterfoods  
McCormick  
Nestle  
Polar  
Preferred Brands  
SeaBear  
StarKist  
TriUnion  
Tupman Thurlow  
Tyson  
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### Worldwide

Brahim's  
Carrefour  
Heinz  
HL Foods  
Sainsbury's  
Singapore Food Industries

## Technology and Economics

### Systems

Batch—Static & Agitating  
Continuous—Rotary & Hydrostatic  
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### Manufacturing Pouches & Trays

Tray  
Sheet coextrusion  
Thermoforming

## Pouches

Foil rolling  
Film extrusion  
Film orientation  
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Lamination  
Printing  
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Fittings & closures  
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Material cost comparisons  
Films & foils  
Laminations  
Pre-made pouches  
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## Materials

### Primary

#### Rollstock/Laminates/ Lidding

Alcan Packaging  
Tetra Recart AB  
Smurfit-Stone  
RJR Packaging  
Sonoco Products  
Fres-co System USA

### Trays

Rexam Containers  
Silgan Containers

### Pouch Converters -- Domestic

KAPAK  
Exopack  
Floeter  
Techflex  
Technipac  
Valley Packaging

### Pouch Converters -- Imported

Amcro Flexibles  
CLP Packaging Solutions  
Hyewon USA  
Lithotype  
Majestic Flex PAC  
Pyramid Flexible

## Secondary

### Barrier Materials

*Foils*  
Alcan Packaging  
Alcoa  
*Coatings – Silicon oxide*  
Alcan Packaging  
*Coatings – Aluminum oxide*  
Amcor Flexibles  
Toppan  
*Coatings – Nanocomposites*  
Mitsubishi Gas Chemical  
Nanocor  
Inmat  
*Coatings – Polyacrylic Acid*  
Kureha

#### *Barrier Resins*

EVAL Company of America  
Nippon Gohsei  
Dow

#### *Tray Resins*

PPO  
GE Advanced Materials  
Polypropylene  
Basell  
BP  
Dow  
Other

#### **Other Materials**

#### *Adhesives*

Liofol  
Rohm & Haas

#### *Closures*

Presto Products  
ZIP-PAK®  
IPN USA

#### *Inks*

Color Converting  
Flint Ink  
Sun Chemical (GPI)

#### *Sealant Films*

American Profol  
Copol  
Pliant  
Tredegar

#### *Structural Films – PET*

DuPont Teijin  
Mitsubishi Polyester Film  
SKC America  
Toray  
Terphane

#### *Structural Films – nylon*

Honeywell  
American Biaxis

#### **Equipment**

#### **Retorting**

Allpax Products  
FMC Technologies  
Malo  
Stock America  
Stork Food & Dairy  
Surdry

#### **Form/Fill/Seal**

Bossar USA  
Laudenberg  
Robert's Packaging

#### **Pouch Fill Seal**

Bossar USA  
Laudenberg  
Nishibe Kikai Co.  
Robert's Packaging  
Toyo Jidoki Co.

#### **Pouchmaking**

Leepak Co.  
River Solutions  
TOTANI America

#### **Quality Assurance**

Pak Technologies  
PTI

#### **Tray Sealers**

Multivac  
Raque Food Systems  
Hans Rychiger

#### **Thermoform/Fill/Seal**

Multivac  
CFS

#### **Others**

Herrmann Ultrasonic

## Scope & Methodology

The scope of this study is the market in the United States and Canada for retort pouches and trays. The study will be based on extensive review of existing data and primary interviews. Sources include trade journals, published studies, relevant information from subscribers and Keymark files not accessible on public databases. Interviews will be conducted with managers and executives, primarily in marketing and technical areas, from over 30 key companies, including film and substrate producers, pouch and tray converters, equipment makers, and end-users such as food processors including tuna, prepared foods, pet food and other key areas.

## Consultant Qualifications

Keymark Associates consults extensively with major chemical firms and converters in flexible and rigid packaging to help them identify and develop new products, businesses and markets. Keymark has conducted a broad range of studies in rigid and flexible packaging, including:

- ◆ Barrier Films & Resins for Food Packaging
- ◆ *Oxygen Absorbers – Hit or Hype?*
- ◆ Nylon Film Markets in North America & Europe
- ◆ *Case Ready Red Meat Packaging Systems*
- ◆ *North American Flexible Packaging Strategies 2002*
- ◆ Oriented Film Pricing & Economics
- ◆ Barrier Sheet & Trays Market & Economics
- ◆ Opportunities for Hot-Filled Foods Packaging
- ◆ *Opportunities for Shrink Labels & Bottles*
- ◆ *Opportunities for Shrink & Stretch Labels 2009*

**Principal:** Huston Keith, MBA, principal of Keymark Associates, 27 years professional market research experience with Amoco, General Electric and Holiday Inns.

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