



Freedonia Focus Reports
US Collection

Foodservice Disposables: United States

December 2017



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About This Report

Scope & Method

This report forecasts to 2021 US foodservice disposables demand in nominal US dollars at the manufacturer level. Total demand is segmented by type in terms of:

- packaging
- serviceware and other types such as napkins, moist towelettes, and placemats

Total demand is also segmented by market as follows:

- eating and drinking places
- retail establishments
- institutional
- lodging and hospitality
- sports and recreation
- other markets such as cafeteria and coffee services, military bases, and airlines

To illustrate historical trends, total demand is provided in annual series from 2006 to 2016; the various segments are reported at five-year intervals for 2006, 2011, and 2016.

This report examines the US market for foodservice single-use (disposable) products. For the purposes of this report, “single-use” products refers to items used in the service of food and beverages that are intended to be disposed of after use. Items with increased durability that allow multiple uses for various applications, such as plastic takeout containers, are included. Disposable items used for the preparation of food or beverages that do not reach the end user are excluded. Also excluded are products sold at retail for home use, though disposables for commercial use that are sold in retail outlets such as club stores are included. Other exclusions include packaging for supermarket and convenience store items not prepared at the store (e.g., fresh produce, baked goods, and deli meats).

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when

About This Report

assessing particular annual values along the forecast trend, including in the forecast year. Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Foodservice Disposables: United States (FF30029) is based on *Foodservice Single-Use Products in the US*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | Industry Codes Related to Foodservice Disposables

| NAICS/SCIAN 2007 | | SIC | |
|---|--|----------------------------------|--|
| North American Industry Classification System | | Standard Industry Classification | |
| 322212 | Folding Paperboard Box Mfg | 2656 | Sanitary Food Containers, Except Folding |
| 322215 | Nonfolding Sanitary Food Container Mfg | 2657 | Folding Paperboard Boxes, Including Sanitary |
| 322291 | Sanitary Paper Product Mfg | 2676 | Sanitary Paper Products |
| 322299 | All Other Converted Paper Product Mfg | 2679 | Converted Paper & Paperboard Products, NEC |
| 326140 | Polystyrene Foam Product Mfg | 3086 | Plastics Foam Products |
| 326150 | Urethane & Other Foam Product (except Polystyrene) Mfg | 3089 | Plastics Products, NEC |
| 326199 | All Other Plastics Product Mfg | | |

Source: US Census Bureau

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Resources

The Freedonia Group

Foodservice Single-Use Products in the US, December 2017

Freedonia Industry Studies

Stretch & Shrink Film Market in the US, September 2017

Nonwovens Market in the US, August 2017

Packaging Films Market in the US, July 2017

Wipes Market in the US, June 2017

Converted Flexible Packaging Market in the US, May 2017

Cups & Lids, August 2016

Corrugated & Paperboard Boxes, April 2016

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Barrier Films: United States

Converted Flexible Packaging: United States

Corrugated & Paperboard Boxes: United States

Cups & Lids: United States

Global Protective Packaging

Labels: United States

Nonwovens: United States

Packaging Films: United States

Pharmaceutical Packaging: United States

Restaurants & Foodservice: United States

Stretch & Shrink Film: United States

Wipes: United States

Freedonia Custom Research

Trade Publications

Chain Store Age

Convenience Store News

Fast Casual

Foodservice Equipment & Supplies

Flexible Packaging

FoodService Director

Nation's Restaurant News

Packaging World

Perishable News

Plastics News

PlasticsToday

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Retail Leader

Tissue World

Agencies & Associations

Foodservice Packaging Institute

National Restaurant Association

International Foodservice Distributors Association

United States Census Bureau

United States Department of Agriculture

United States Environmental Protection Agency

United States Federal Trade Commission

United States Food and Drug Administration