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# Global Foodservice Single-Use Products

June 2020



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# About This Report

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## Scope

This report forecasts to 2024 global demand for foodservice single-use products by type, market, and major world region in nominal US dollars at the manufacturer level. Type segments include:

- cups
- containers
- dinnerware
- napkins
- other types such as utensils, lids and domes, and bags

Reported markets encompass:

- eating and drinking places
- other establishments such as institutional, retail and vending, and lodging and hospitality

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, type, market, and regional demand (including type and market segments) are provided for 2009, 2014, and 2019.

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. “Single-use” and “disposable” are used interchangeably throughout this report. 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.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate at that prevailing in 2019.

Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Global Foodservice Single-Use Products (FW30029)* is based on 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, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and 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 9 | NAICS & SIC Codes Related to Foodservice Single-Use Products

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
322212	Folding Paperboard Box Manufacturing	2656	Sanitary Food Containers, Except Folding
322219	Other Paperboard Container Manufacturing	2657	Folding Paperboard Boxes, Including Sanitary
322220	Paper Bag and Coated and Treated Paper Manufacturing	2673	Plastics, Foil, and Coated Paper Bags
322299	All Other Converted Paper Product Manufacturing	2679	Converted Paper and Paperboard Products, Not Elsewhere Classified
326111	Plastics Bag and Pouch Manufacturing	3083	Laminated Plastics Plate, Sheet, and Profile Shapes
326130	Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing	3086	Plastics Foam Products
326140	Polystyrene Foam Product Manufacturing	3089	Plastics Products, Not Elsewhere Classified
326199	All Other Plastics Product Manufacturing		

Source: US Census Bureau

## About This Report

**Table 10 | HS Codes Related to Foodservice Single-Use Products**

HS Code	Definition
3923.50	Stoppers, lids, caps, and other closures
3924	Tableware, kitchenware, other household articles and hygienic or toilet articles, of plastics
4819.10.20	Cartons, boxes and cases, of corrugated paper or paperboard: Sanitary food and beverage containers
4819.20.20	Folding cartons, boxes and cases of non-corrugated paper or paperboard: Sanitary food and beverage containers
4819.50.20	Other packaging containers: Sanitary food and beverage containers
9902.11.93	Plastic lids certified by the importer for use on food storage containers
9902.11.97	Disposable cutlery of plastics, containing by weight over 96% of polypropylene

Source: United Nations Statistics Division

**Table 11 | NACE Codes Related to Foodservice Single-Use Products**

NACE Code	Definition
17.21	Manufacture of corrugated paper and paperboard and of containers of paper and paperboard
17.22	Manufacture of household and sanitary goods and of toilet requisites
22.22	Manufacture of plastic packing goods
22.29	Manufacture of other plastic products
25.71	Manufacture of cutlery
25.92	Manufacture of light metal packaging

Source: European Commission

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

## About This Report

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia 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 assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Foodservice Single-Use Products*

### Freedonia Industry Studies

*Cannabis Packaging Opportunities*

*Converted Flexible Packaging*

*Corrugated & Paperboard Boxes*

*Food & Beverage Packaging Innovation*

*Global Corrugated Boxes*

*Global Cups & Lids*

*Global Disposable Masks & Respirators: COVID-19 Impact Analysis*

*Global Disposable Medical Gloves: COVID-19 Impact Analysis*

*Global Foodservice*

*Global Single-Use Plastic Packaging Regulations*

*Meat, Poultry, & Seafood Packaging*

*Retail Bags*

*Specialty Films*

*Stretch & Shrink Film*

*Wipes*

### Freedonia Focus Reports

*Beverages: United States*

*E-Commerce: United States*

*Plastic Foams: United States*

*Polypropylene: United States*

*Polystyrene: United States*

*Restaurants & Foodservice: United States*

*Soft Drinks: United States*

*Tableware & Kitchenware: United States*

*Thermoplastic Resins: United States*

### Freedonia Custom Research

### Packaged Facts

*Meal Kits: Trends and Opportunities in the U.S.*

*Online Grocery Shopping in the U.S.*

*U.S. Beverage Market Outlook 2019*

*U.S. Food Market Outlook 2020: Home Cooking, Grocery Shopping, & Food Trends in the Age of Coronavirus*



### 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*

*Restaurant Hospitality*

*Retail Leader*

*Tissue World*

### Agencies & Associations

Asia Food Service Association

Asian Packaging Federation

Environment Canada

European Commission

European Environment Agency

European Organization for Packaging and the Environment

Eurostat

Flexible Packaging Europe

FoodServiceEurope

Foodservice Packaging Institute

Ministry of Ecology and Environment (China)

National Restaurant Association

International Foodservice Distributors Association

International Monetary Fund

Organisation for Economic Co-operation and Development

United Kingdom Environment Agency

United States Census Bureau

United States Department of Agriculture

United States Environmental Protection Agency

United States Federal Trade Commission

World Bank