INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Foodservice Disposables

US Industry Study with Forecasts for **2011 & 2016**

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MARKET ENVIRONMENT

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MARKETS

INDUSTRY STRUCTURE

Rising away-from-home food expenditures will be driven by consumer willingness to pay for convenience, interest in more food choices, and reduced time or desire for home food preparation.

US demand to grow 3.8% annually through 2011

Foodservice disposables demand in the US is projected to increase 3.8 percent annually to $16.6 billion in 2011. Growth will be fueled by rising disposable personal income and increased spending for food eaten or prepared away from home. Such spending will reflect consumer willingness to pay for convenience, along with interest in more sophisticated food choices. Rising away-from-home food expenditures will also be driven by reduced time or desire for home food preparation. This trend will largely be fueled by faster paced lifestyles and demographic trends such as greater numbers of households where all adults work, growth in empty nest households as baby boomers age, and smaller average household sizes.

Packaging products to show the most rapid gains

Fastest advances are anticipated for packaging products, which are forecast to increase at a 4.4-percent annual pace to $7.7 billion in 2011. Demand will be propelled by favorable growth for limited service restaurants, which account for nearly half of overall restaurant revenues. Such restaurants are popular with consumers for their convenience and value and are also major users of foodservice disposable packaging for both onsite and offsite sales. Continued solid growth of smaller limited service segments, such as fast casual and snack/bakery/coffee shop restaurants, will also boost packaging demand. Other trends that will stimulate gains include strong sales of takeout food from full service restaurants, increased catering activity among full and limited service restaurants, and expanded prepared food offerings from supermarkets, convenience stores and other retail stores. Lids and wraps are expected to post the strongest gains, with most container types also logging good growth. In addition, disposables made from degradable materials will post robust advances from a low base, the result of high prices for petroleum-based plastic materials and growing legislative bans on polystyrene-based disposables.

Demand for serviceware, including cups, dinnerware, utensils and other products, is projected to climb 3.5 percent yearly to $7.6 billion in 2011. Growth will be aided by increased carryout food and beverage sales from restaurants and retail stores, and ongoing demand in institutional and other markets. Also adding momentum will be the popularity of coffee houses, increased promotion of premium coffee by quick service restaurants and convenience stores, and increased catering activity by restaurants. Gains will be further supported by trends such as the shift to larger cups for fountain beverages and strength enhancements in dinnerware. Demand for napkins and other products will lag the overall industry based on cost saving measures such as general downsizing of napkins.

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Sample Text, Table & Chart

TABLE IV-2

EATING & DRINKING PLACES MARKET FOR FOODSERVICE DISPOSABLES (million dollars)

Item	1996	2001	2006	2011	2016
Eating & Drinking Revenues (bil $)					0
$ disposables/000$ revenue					1
Foodservice Disposables Demand					0
Limited Service Establishments					0
Other Eating & Drinking Places					0
% eating & drinking					8
Total Foodservice Disposables					0

SAMPLE TABLE

MARKETS

Eating & Drinking Places

Eating and drinking places are by far the largest market vice disposables, accounting in 200 2011, demand for foodservi drink is forecast to increase 3.9 pe Ad will be fueled by healthy re servi and heightened requirement vice r Disposables growth in full s mulated by strong demand for takeout m g activity, which will drive increased requirements for items such as containers, lids, bags, dinnerware, cutlery and portion cups.

SAMPLE TEXT

While full service restaurants have typically used disposables mainly for packaging leftovers, the packaging of entire meals for carryout and the supply of larger quantities of food via catering are becoming more significant generators of sales. Moreover, these trends will create increased opportunities for larger-sized containers as well as value-added containers and lids capable of maintaining food temperature while protecting food from spilling and suitable for use in reheating such foods. Demand for bags, especially printed types, which fill a functional need while also serving as a marketing and image-making tool, will also benefit from the popularity of takeout foods.

Limited service restaurants accounted for 81 percent of foodservice disposables demand in eating and drinking places in 2006. This segment will register disposables advances in line with the overall eating and drinking places average through 2011 as a result of slightly slower but still healthy revenue growth for quick service restaurants, which account for the majority of disposables demand by limited service restaurants. Moderation in revenue growth in the quick service segment will result from the growing maturity of the segment and heightened competition

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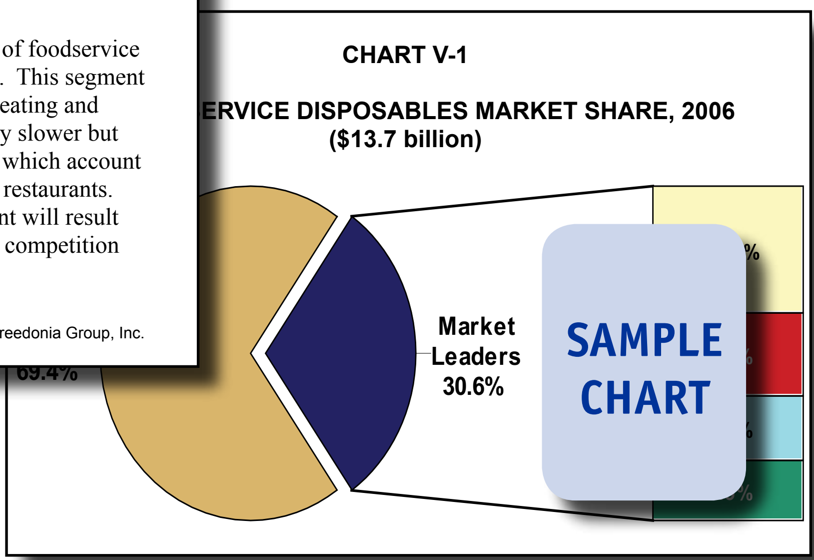

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Sample Profile, Table & Forecast

TABLE III-3

FOODSERVICE CUP DEMAND BY TYPE
(million dollars)

Item	1996	2001	2006	2011	2016
Serviceware Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% cups	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Foodservice Cup Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Beverage Cups	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Portion Cups	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
cents/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Foodservice Cup Demand (bil units)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Beverage Cups	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Portion Cups	33	34	35	37	38

SAMPLE TABLE

COMPANY PROFILES

Jet Plastica Industries Incorporated
1100 Schwab Road
Hatfield, PA 19440
215-362-1501
http://ww

Annual S
Employr

Key Proc … inkware, dinnerware

SAMPLE PROFILE

Jet I … stries, manufactures injection … ed drinking straws and stirrers, drinkware, and dinnerware primarily for the institutional and quick service restaurant markets. The Company is among the leading US producers of plastic disposable cutlery. In September 2006, Jet Plastica was acquired from Trivest Partners LP (Miami, Florida) by MCG Capital Corporation (Arlington, Virginia) and Boyne Capital Advisors (Miami, Florida).

The Company participates in the US foodservice disposables industry through the manufacture of injection-molded polystyrene and polypropylene foodservice disposables, such as cutlery, cutlery kits, straws and stirrers, drinkware, and dinnerware. Jet Plastica's disposable cutlery line includes ADVANTAGE full-size heavyweight polystyrene and polypropylene, CHALLENGER lightweight polypropylene, ELITE medium-weight polypropylene, GOURMET medium heavyweight polystyrene and TREND medium-weight polystyrene types. Disposable cutlery is available boxed, bagged, in bulk or individually wrapped. The Company also assembles cutlery kits, which contain various combinations of cutlery, straws, napkins, moist towelettes, salt, pepper, dry creamer and sugar.

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"Foodservice disposable cups include beverage cups as well as portion cups, which are designed for holding 5.5 ounces or less of food or condiments. Beverage cups are categorized as cold or hot cups based on their intended usage, though there is some usage of hot cups for cold drinks. Demand for foodservice cups is expected to rise 3.6 percent per year to $4.1 billion in 2011. Gains will be fueled by a continued favorable outlook for foodservice revenue growth, coupled with ..."
--Section III, pg. 56

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Other Studies

Converted Flexible Packaging

US converted flexible packaging demand will grow 4.2% annually through 2011. Gains will be driven in part by advantages over most rigid packaging and by developments in breathable and self-venting films and resealable features. Pouches will be the fastest growing type while bags remain the largest segment. This study analyzes the $13.4 billion US converted flexible packaging industry, with forecasts for 2011 and 2016 by material, product and market. It also evaluates market share and profiles major players.

#2275 .... 11/2007.................... $4600

Food Containers: Rigid & Flexible

US food container demand will reach $23.5 billion in 2011. Growth trends include heightened demand for more convenient foods and a shift toward value-added packaging. Plastic containers, and bags and pouches will log the fastest growth. Meat and dairy products and frozen specialties will lead gains by market. This study analyzes the 263 billion unit US food container industry, with forecasts given for 2011 and 2016 by product and market. It also evaluates company market share and profiles major players.

#2208 .... 07/2007.................... $4500

Beverage Containers in China

Demand for beverage containers in China will grow 8.9% per annum through 2010. Plastic will remain the dominant material in unit terms while paperboard will grow the fastest. Milk will stay the largest market and be one of the fastest growing, with fruit beverages posting the fasted gains. This study analyzes the ¥60.5 billion beverage container industry in China, with forecasts for 2010 and 2015 by market and material. The study also evaluates company market share and profiles leading industry participants.

#2183 .... 05/2007.................... $4900

Cups & Lids

US cup and lid demand will grow 4.3% annually through 2010, driven by a favorable outlook for key foodservice markets (e.g., quick service restaurants, coffee shops). Lids will outpace cups based on an increasing percentage of drinking cups using lids, growing demand for higher-value specialty lids and continued gains for single-serving packaging cups. This study analyzes the $5.5 billion US cup and lid industry to 2010 and 2015 by product and market. It also details market share and profiles major players

#2154 .... 01/2007.................... $4300

Paper Versus Plastic in Packaging

In eighteen selected markets where plastic and paper compete as packaging materials, plastic will increase its market share to 53% by 2010. The fastest gains for plastic will occur in soy and other nondairy beverages and pet food applications, followed by frozen food, fruit beverages, detergents and single-serving milk bottles. This study analyzes the 24 billion pound competitive plastic and paper packaging industry to 2010 and 2015 by product and market. It also details company market share and profiles major players.

#2133 .... 12/2006.................... $4400

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