Foodservice Disposables

US Industry Study with Forecasts for **2013 & 2018**

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US Industry Study with Forecasts for ***2013 & 2018***

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MARKET ENVIRONMENT

PRODUCTS

MARKETS

INDUSTRY STRUCTURE

Demand will be supported by continued growth in away-from-home food expenditures as the economy recovers, along with the willingness of consumers to pay for convenient, ready prepared foods.

US demand to rise 3.5% annually through 2013

US demand for foodservice disposables is projected to advance 3.5 percent per year through 2013. Growth will decelerate from the past decade, but will reflect a recovery from the recent weakness in the US economy. In addition, value advances will be tempered by more moderate price increases for raw materials following sharp spikes, primarily due to resin pricing volatility and high energy and transportation costs, in the 2003-2008 period. Despite these factors, demand for disposables will be supported by continued growth in the share of away-from-home food expenditures as the economy recovers, along with faster-paced lifestyles and the willingness of consumers to pay for convenient, ready prepared foods.

US Foodservice Disposables Demand, 2008
($14.8 billion)

Packaging products to be fastest growing segment

The fastest gains are anticipated for packaging products, which are forecast to increase at a 4.2 percent annual pace through 2013. Advances will be fueled by above-average revenue growth in the large limited service segment, which accounts for nearly half of overall restaurant revenues but generates a much higher share of foodservice disposables demand. Expanding menu options in limited service restaurants and longer hours to incorporate breakfast and late-night snacking will also bode well for related packaging. The popularity of takeout food from full service restaurants will provide a further boost for packaging, especially since these restaurants tend to use higher-value disposable containers designed to maintain food temperature and minimize leakage problems. Additionally, packaging gains will be supported by expanded prepared food offerings in supermarkets and other retail stores, along with increased catering activity by limited and full service restaurants. Through 2013, the fastest growth is expected for wraps and lids, with most container types also expected to register healthy gains.

Serviceware to benefit from several positive trends

Demand for serviceware, including cups, dinnerware, utensils and other products, is forecast to increase 3.2 percent annually through 2013. Though decelerated growth will reflect more moderate material price increases, opportunities will be driven by a favorable outlook for limited service restaurant revenues, solid foodservice revenue growth in retail establishments and steady demand in institutional and other markets. Other factors providing momentum will be the increased promotion of premium coffee by quick service restaurants and convenience stores, and increased catering activity by restaurants. Packaging and serviceware made from biodegradable materials will post robust advances from a low base, the result of increased price competitiveness, rapidly expanding capacity, increased pressure on foodservice operators to reduce their environmental footprint and growing bans on polystyrene-based disposables.

Foodservice Disposables

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Sample Text, Table & Chart

PRODUCTS

Portion Cups -- Demand for portion cups is projected
5 million in 2013. Advances will
ong with the increased availabilit
urants. Menu trends, shifts in co
patterns will also boost demand
of salsas and finger foods using
f many consumers for salad dres
ition from manufacturer-supplied
aged portion condiments and sauces in peelable-lid cups or fl
pouches will limit overall advances, as will intensified compe
supermarkets offering prepared foods. Paper portion cup der
post a slight decline resulting from supplantation by plastic p
based on performance advantages such as leak resistance wh
and the visibility advantages of clear plastic portion cups. O
advances will decelerate from the pace of the 1998-2008 per
more moderate price increases for plastic portion cups.

SAMPLE TEXT

Portion cups, also known as soufflés, typically range in size from 0.5 to 5.5 ounces and are used for holding small amounts of items like coleslaw, salad dressings, sauces, condiments and candies. Portion cups, manufactured largely from paper and plastic, are also used in supermarkets, club and other stores for sampling of prepared and other foods. Aluminum portion cups are also used to a very limited extent in the foodservice market and will remain a niche item due to their cost disadvantage versus paper and plastic portion cups.

Paper portion cups include pleated soufflé types (which are also used in hospitals and elder care facilities for dispensing pills) as well as coated paperboard types similar to beverage cups. Paper soufflé cups are used in applications that do not require lids. Plastic portion cups are similar in appearance to plastic beverage cups and are produced in clear, translucent or opaque styles, typically from polystyrene. These cups are generally available with compatible lids for carryout use.

74

TABLE III-11

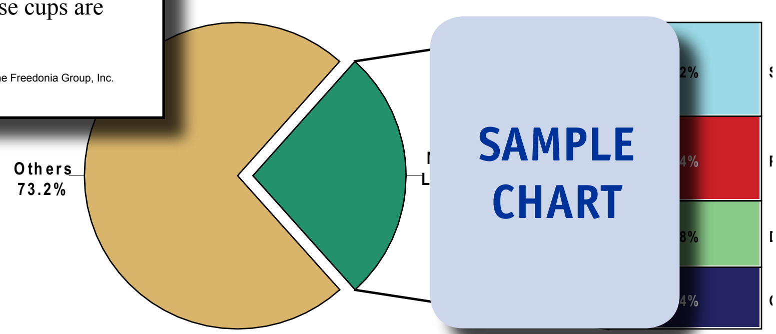
PAPERBOARD BOX & CARTON DEMAND IN FOODSERVICE APPLICATIONS (million dollars)

Item	1998	2003	2008	2013	2018
Total Foodservice Container Demand					
% boxes & cartons					
Foodservice Box & Carton Demand					
Pizza Boxes					
French Fry Cartons					
Corrugated Clamshells					
Doughnut Boxes					
Other					
cents/unit					
Foodservice Boxes/Cartons (mil units)					
Pizza Boxes					
French Fry Cartons					
Corrugated Clamshells					
Doughnut Boxes					
Other					

SAMPLE TABLE

CHART V-1

SERVICE DISPOSABLES MARKET SHARE, 2008 ($14.8 billion)



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Sample Profile, Table & Forecast

TABLE IV-3

LIMITED SERVICE RESTAURANT MARKET FOR FOODSERVICE DISPOSABLES (million dollars)

Item	1998	2003	2008	2013	2018
Limited Service Revenues (bil $)					40
$ disposables/000$ revenue					.8
Foodservice Disposables Demand	4				30
Quick Service	4				40
Coffee & Snack Shops					90
Fast Casual					55
Buffet/Cafeteria					45
% limited service					.4
Eating & Drinking Disposables	6				40

SAMPLE TABLE

COMPANY PROFILES

Inline Plastics Corporation
42 Canal Street
Shelton, CT 06484
203-924-5933
http://www.inlineplastics.com

Annual Sales:
Employment:

Key Products: ers

SAMPLE PROFILE

Inline Pla ng and related products for th ce markets. The privately l d packaging machinery.

The Company is active in the US foodservice disposables industry through the production of plastic clamshells and two-piece containers for packaging delicatessen items, fresh-cut fruit, salads, baked goods and other foods. These containers are made from such materials as polyethylene terephthalate (PET), recycled PET (RPET), oriented polystyrene (OPS) and polypropylene. Select products incorporate SURE-LOCK systems , which are designed to prevent the lid from opening unexpectedly while handling or during transit. Plastic clamshells and two-piece containers are marketed under such brand names as SAFE-T-FRESH, VALU PACK, EZ OPEN and CRYSTAL VUE.

Inline Plastics' SAFE-T-FRESH clamshells are made from RPET and feature SAFE-T-GARD tamper-resistant tear strips engineered to ensure the container has not been opened since the product was packed. These containers are manufactured in round sizes ranging from 8 to 32

245

"Demand for foodservice disposables in quick service restaurants is projected to increase 3.1 percent per year to $7.4 billion in 2013. Growth will be driven by rising quick service restaurant revenues coupled with extensive requirements for disposables for both carryout and in-restaurant meals. Gains will trail quick service restaurant revenue advances due to slower price increases for most disposables as raw material prices retreat from the sharp spikes of the 2003-2008 period. Growth will also be moderated by ..."
--Section IV, pg. 149

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Other Studies

Meat, Poultry & Seafood Packaging

US demand for meat, poultry and seafood packaging is forecast to grow 3.5% yearly through 2013. Gains will be driven in part by the continuing shift to higher cost case-ready packaging by many retailers as a means to reduce in-store labor costs. Flexible packaging will outpace the larger rigid packaging segment. This study analyzes the $7.7 billion US meat packaging industry, with forecasts for 2013 and 2018 by technology and raw material, product, application and market. It also evaluates market share and profiles industry players.

#2522 .... 06/2009..................... $4700

Food Containers: Rigid & Flexible

US food container demand will reach $25 billion in 2013. Unit expansion will be aided by the growing popularity of single-serving packaging in a widening range of applications. Plastic containers, and bags and pouches will see the fastest growth, often supplanting paperboard, metal and glass containers. This study analyzes the $22 billion US rigid and flexible food container industry, with forecasts for 2013 and 2018 by type and market. It also evaluates company market share and profiles industry competitors.

#2492 .... 05/2009..................... $4800

World Corrugated Boxes

Global corrugated box demand is forecast to grow 3.4% yearly through 2013. Gains will be driven in part by the advance of small flute and high-quality graphic board into traditional folding carton uses. Fastest growth will occur in developing regions, especially China and India. This study analyzes the 180 billion square meter world box industry, with forecasts for 2013 and 2018 by raw material, end-use market, world region and for 24 countries. It also evaluates market share and profiles industry players.

#2485 .... 04/2009..................... $5600

Cups & Lids

US demand for cups and lids will advance 4.3% annually through 2012. Drinking cups will remain the dominant cup type while packaging cups will grow the fastest. Growth in lids will outpace cups as more drinking cups use lids, especially higher-value specialty lids. Foodservice will remain the dominant market while food packaging grows more rapidly. This study analyzes the $6.3 billion US cup and lid industry, with forecasts for 2012 and 2017 by product and market. It also details market share and profiles major players.

#2429 .... 11/2008..................... $4600

Beverage Containers

US demand for beverage containers will grow 2.4% annually through 2012. Gains will be driven a healthy outlook for single serving containers and enhanced or functional beverages. Plastic containers will remain the largest and fastest growing segment. Bottled water will continue to post above-average market gains. This study analyzes the $22.5 billion US beverage container industry, with forecasts for 2012 and 2017 by type and market. It also evaluates company market share and profiles major players.

#2423 .... 11/2008..................... $4700

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