World Foodservice Disposables

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

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

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OVERVIEW

NORTH AMERICA

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INDUSTRY STRUCTURE

Factors behind rising demand will include growth in foodservice revenues and trends toward convenience-oriented food, a result of fast-paced lifestyles and increasing personal incomes.

Global demand to rise 4.8% annually through 2013

World demand for foodservice disposables is forecast to increase 4.8 percent per year to $48.6 billion in 2013. While the US will remain the largest user of foodservice disposables by a wide margin, the most rapid increases will continue to occur in China and the world's other developing regions. Overall, factors contributing to rising demand will include growth in foodservice revenues and trends toward convenience-oriented food options as a result of fast-paced lifestyles and increasing personal income levels. In particular, gains will be fueled by advances in the quick service restaurant industry, which will remain the main user of all major types of foodservice disposables. Products made from biodegradable materials will post robust advances, albeit from a small base, as a result of increased pressure on foodservice operators to reduce their environmental footprint and growing bans on polystyrene-based disposables.

China, India, Russia among fastest growing markets

Gains in Asia, Latin America, Eastern Europe and the Africa/Mideast region will outpace the global average. Some of the best growth rates are expected in China, India and Russia. Between 2008 and 2013, China is projected to account for more than one-quarter of world value

World Foodservice Disposable Demand, 2008

($38.5 billion)

gains in foodservice disposables demand and will surpass Japan to become the second largest market worldwide. Throughout the developing regions, strong growth will be attributable to not only increases in the number of fast food and coffee chains (which are heavy users of disposables), but also to the popularity of takeaway from myriad independent restaurants and street vendors. Advances in North America and Western Europe will be below average, though still favorable, with market value supported by increasing use of biodegradable and compostable disposables, which tend to be more expensive.

Demographic trends will also continue to have significant influence on disposables demand. For instance, the growing percentage of women in the workforce and increases in the number of single-person households will fuel away-from-home food spending, due to more limited time for meal preparation and convenience benefits. However, great disparity in per capita foodservice expenditures will remain among the different regions, which will affect demand for disposables used in restaurants and other foodservice establishments. Cultural differences between countries will also impact demand, as the frequency and the types of establishments visited on eating and drinking out occasions vary considerably from one country to the next.

Sample Text, Table & Chart

TABLE III-3

WORLD FOODSERVICE DISPOSABLE SERVICEWARD DEMAND BY PRODUCT & REGION (million dollars)

Item	1998	2003	2008	2013	2018
World Foodservice Disposables					
% serviceware					
Foodservice Disposable Serviceware					
By Product:					
Cups					
Dinnerware					
Utensils					
Other					
By Region:					
North America					
United States					
Canada & Mexico					
Western Europe					
Asia/Pacific					
China					
Japan					
Other					
Other Regions					
Latin America					
Eastern Europe					
Africa/Mideast					

SAMPLE TABLE

ASIA/PACIFIC

South Korea: Foodservice Disposables Demand

In 2008, demand for foodservice disposables in South K $920 million, representing eight percent of the regional mark third largest consumer in the region, after China and Japan. styles and trends toward convenience will continue to benefit However, the market for disposables will be hindered by the popularity of fast food due to health concerns. In addition, v ronmental protection initiatives will serve to limit consumpti service disposables, which are often the target of "green" car

Through 2013, demand for foodservice disposables in S is projected to advance billion. will be supported by co nt, ready- options, especially resta y and pre from retail stores -- all kaging su tainers, boxes, trays, w hand, tre environmental friend and for d especially cups and bags. restaurants shops will continue to be under pressure to offer alternative t ables (e.g., using reusable cups or accepting costumers' own employ disposables made from recycled content, and collect and recycle disposables after use.

SAMPLE TEXT

Disposable serviceware will continue to represent the largest product segment through 2013. While significant quantities of single-use chopsticks (mostly imported from China) are still in use in South Korea, most large restaurants have switched to reusable metal chopsticks in efforts to reduce waste. The popularity of coffee shops will support demand for cups, although environmental pressures will restrain gains. For instance, the international coffee chain Starbucks recently announced plans to achieve 30 percent reusable mug usage rates in its South Korean stores by the end of the year 2010.

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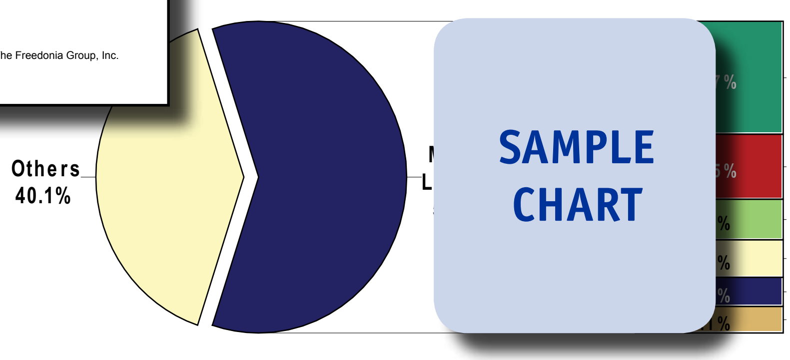
CHART VIII-1

ODSERVICE DISPOSABLES MARKET SHARE, 2008 ($38.5 billion)



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Sample Profile, Table & Forecast

TABLE VI-14

SOUTH KOREA -- FOODSERVICE DISPOSABLES DEMAND
(million dollars)

Item	1998	2003	2008	2013	2018
Foodservice Disposables Demand					10
By Product:					
Serviceware					60
Packaging					00
Napkins & Other					50
By Market:					
Eating & Drinking Places					20
Other Foodservice Establishments					90
% South Korea					5.9
Asia/Pacific Foodservice Disposables	6				300

SAMPLE TABLE

COMPANY PROFILES

Swan Mill Paper Company Limited
Goldsel Road
Swanley, Kent BR8 8EU
United Kingdom
44-322-665-56
http://www.sw

Annual Sales:
Employment:

Key Products: kins, tray mats, table covers, t

SAMPLE PROFILE

Swan Mill paper disposable tableware, gift wrap and accessories, and greeting cards for the catering and wholesale retail markets. The Company is privately held.

The Company participates in the world foodservice disposables industry through the production and marketing of a variety of plastic and paper products under the SWANTEX brand name. For example, Swan Mill Paper makes such plastic disposable products as plates, cups, straws, stirrers and cutlery. Among the Company's paper disposable products are one- and two-ply napkins; SWANSOFT napkins, which are marketed as an alternative to linen varieties; pre-folded napkins, including types that incorporate pockets for holding cutlery; tray mats; and SWANSOFT and SWANSILK table covers and banquet rolls. Manufacturing operations for Swan Mill Paper are conducted at a site in Swanley, the United Kingdom (UK). In Hong Kong, the Company's Swantex Asia Limited subsidiary operates a sales office and showroom that distributes disposable tableware and other products to customers worldwide.

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"Through 2013, foodservice revenues in South Korea are projected to increase 3.7 percent annually to $66 billion. As a result of consumer preference for new and international cuisines, some of the fastest growth is expected in branded full service restaurant chains and franchises, at the expense of small, independent family-owned businesses. Among other eating and drinking places, ..."

--Section VI, pg. 177

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Other Studies

Microwave Packaging

This study analyzes the US microwave packaging industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by microwave packaging application (e.g., frozen food, snack food, shelf-stable meals, fresh prepared foods) and packaging product (e.g., folding cartons, trays, bags, pouches, bowls and cups, sleeves). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2572 .... 12/2009..................... $4700

Foodservice Disposables

US foodservice disposables demand will rise 3.5% yearly through 2013, based on the ongoing popularity of away-from-home eating and ready prepared foods. Packaging products will grow the fastest and overtake serviceware as the largest segment. Eating and drinking places will remain the top market while retail and vending lead gains. This study analyzes the $14.8 billion US foodservice disposables industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2545 .... 08/2009..................... $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

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