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# Foodservice Packaging: Bulk & Portion Control

US Industry Study with Forecasts for **2014 & 2019**

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US Industry Study with Forecasts for ***2014 & 2019***



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### PRODUCTS



### APPLICATIONS



### END USERS



### INDUSTRY STRUCTURE

# Foodservice Packaging: Bulk & Portion Control

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*Growth in foodservice packaging will be driven by consumers who continue to favor convenient, ready-to-eat foods that provide a change of pace from meals prepared at home.*

## US demand to climb 2.5% annually through 2014

US demand for foodservice packaging is forecast to climb 2.5 percent per year to $7.9 billion in 2014. Growth will be driven by rising disposable personal income levels and expanding foodservice revenues as consumers continue to favor convenient, ready-to-eat foods that provide a change of pace from meals prepared at home.

## Flexible packaging demand to outpace rigid

Flexible packaging demand will outpace rigid packaging, advancing 3.3 percent per annum through 2014. Gains will be bolstered by cost, convenience and performance advantages over rigid containers. In addition, concerns about sustainability and environmental friendliness will continue to impact all areas of the packaging industry, benefiting flexible foodservice packaging since such packaging occupies less space in landfills and consumes less material than rigid alternatives.

Pouches are expected to post the fastest gains of all flexible foodservice packaging types, with growth often coming at the expense of metal cans. Bags and sacks will remain the leading flexible packaging format in foodservice uses based on advantages of low cost and suitability for a wide range of food packaging applications.

**US Foodservice Packaging Demand**
($7 billion, 2009)


Rigid foodservice packaging demand is expected to increase 1.9 percent per year through 2014. Gains will be limited by loss of share to flexible alternatives, as well as a moderation in materials pricing, particularly in metal cans. However, growth will be supported by the widespread use of corrugated boxes as shipping containers for a broad range of food items. In addition, demand will be bolstered by healthy gains for plastic containers as a result of heightened use of single-serving plastic ketchup containers, which are making inroads at the expense of pouches. Good prospects for paperboard containers will result from the environmental friendliness of paperboard packaging and inroads by aseptic cartons in many metal can applications.

## Baked goods to be fastest growing application

Fruits and vegetables; and meat, poultry, seafood and eggs were the leading applications for foodservice packaging in 2009, together accounting for 50 percent of demand. Through 2014, foodservice packaging used in baked goods applications will post the fastest gains based on an acceleration in baked goods shipments in real terms and the popularity of snack/bakery/coffee shops. Solid advances in specialty processed food applications will stem from the increasing importance of pre-made food items that can speed food preparation, reduce labor costs and give the appearance of being made from scratch.

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## Sample Text, Table & Chart

**END USERS**

**Institutional**

Demand for foodservice packaging intended for use in i
se ... 3 percent per annum through
$ ... ers consist of organizations
s ... ndary schools, colleges an
t ... useums and prisons. Gains
h ... utional foodservice revenu
i ... ood products (and associate
ing ... enience in terms of preparati
labor requirements. These food products -- frozen vegetable
control meat and poultry, and various canned specialties -- te
more packaging than unprocessed alternatives, which will be
packaging sales.

SAMPLE TEXT

Foodservice packaging demand in schools is forecast to
percent annually through 2014 to $560 million. Packaging demand will benefit from an increase in the 5- to 14-year-old age group after the declines of the 2004-2009 period. An expansion of this cohort, which primarily consists of elementary and middle school-age children, will lead to heightened food requirements for schools and thus boost related packaging sales. In addition, government efforts aimed at improving the nutritional profile of school meals will support packaging demand. While much of the Child Nutrition Act, a federal funding program for school meals due for reauthorization by Congress sometime in 2010, is aimed at making school lunches and other meals more nutritious, new provisions in the reauthorization bill expand access to afters
and make it easier for students in high-poverty areas to parti
school lunch programs. These directives will increase the nu
school meals being served on a daily basis, which will boost
related packaging requirements. In addition, the legislation
government the power to ban sales of junk food in schools, v
potentially encourage students to partake of school meals rat

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**TABLE III-11**

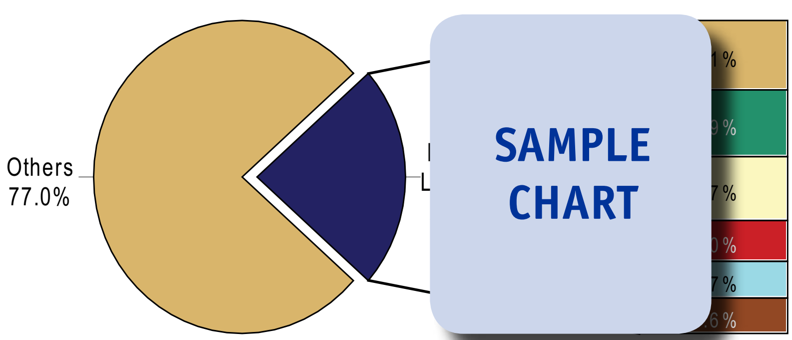
**POUCH DEMAND IN FOODSERVICE APPLICATIONS**
**(million dollars)**

| Item | 1999 | 2004 | 2009 | 2014 | 2019 |
|---|---|---|---|---|---|
| Food Pouch Demand (bil $) | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| % foodservice | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Foodservice Pouch Demand | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Fruits & Vegetables | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Specialty Processed Foods | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Meat, Poultry, Seafood & Eggs | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Baked Goods | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Dairy Products | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Other | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| % pouches | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Total Foodservice Packaging Demand | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |

SAMPLE TABLE

**CHART VI-1**

**US FOODSERVICE PACKAGING MARKET SHARE, 2009**
**($7.0 billion)**

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## Sample Profile, Table & Forecast

**TABLE IV-7**

**DAIRY PRODUCT PACKAGING DEMAND IN FOODSERVICE APPLICATIONS (million dollars)**

| Item | 1999 | 2004 | 2009 | 2014 | 2019 |
|---|---|---|---|---|---|
| Dairy Product Shipments (bil $) | 5 | | | | 3.0 |
| $ packaging/000$ dairy | | | | | .1 |
| | | | | | |
| Foodservice Dairy Packaging Demand | | | | | 35 |
| By Product: | | | | | |
| Cheese | | | | | 80 |
| Ice Cream & Novelties | | | | | 85 |
| Other | | | | | 70 |
| By Type: | | | | | |
| Paper, Film & Foil | | | | | 80 |
| Plastic Containers | | | | | 20 |
| Paperboard Boxes & Containers | | | | | 70 |
| Corrugated Boxes | | | | | 65 |
| Bags & Sacks | | | | | 75 |
| Pouches | | | | | 85 |
| Other | | | | | 40 |
| | | | | | |
| % dairy products | | | | | .9 |
| Total Foodservice Packaging Demand | 45 | | | | 470 |

SAMPLE TABLE

**COMPANY PROFILES**

**Printpack Incorporated**
2800 Overlook Parkway Northeast
Atlanta, GA 30339
404-460-7000
http://www.printpack.com

Annual Sales:
Employment:

Key Products

Printpac ... verter of packaging. Produ ... ners; plastic film, aluminu ... zed film laminations; cast and ... films.

SAMPLE PROFILE

The Company is active in the foodservice packaging industry through the production of various plastic films, bags, and stand-up and other pouches. Examples of Printpack's films include matte-finish and FRESHGARD modified atmosphere packaging (MAP) types. Matte-finish films, which are made from a coextruded film structure of polyethylene and polypropylene, have the appearance of paper. FRESHGARD MAP films are designed to preserve the appearance and flavor of produce, and can be converted into bags, wrapping, lidding and trays. In addition, FRESHGARD films are available in microwaveable varieties.

Bags from Printpack include SHOWPACK flat-bottom types, which can accommodate printing on all five sides and are available with such features as handles and press-to-close zippers. Its stand-up pouches can be used to package such products as cereal, snacks, candy,

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"Demand for foodservice dairy products packaging is expected to advance 2.6 percent annually through 2014 to $885 million, aided by expanding foodservice revenues and the continued importance of dairy products such as cheese and butter as ingredients of foods made by foodservice operators. However, demand for dairy products packaging will be negatively impacted by the high fat content of many dairy items and concerns about obesity, which will limit consumption of dairy products to some extent."
--Section IV, pg. 123-4

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## Other Studies

### Green Packaging

US demand for green packaging will rise 3.9% annually through 2014, outpacing growth in overall packaging demand. The fastest gains are anticipated for degradable packaging -- from a relatively small base -- and for plastic recycled content packaging. This study analyzes the $34 billion US market for recycled content, reusable and degradable packaging, with forecasts for 2014 and 2019 by material, product and market. It also discusses source reduction and recycling activity, details industry structure and profiles industry competitors.

*#2721 ................January 2011 ................. $5100*

### World Food Containers

Global demand for food containers is forecast to increase 3.9% annually through 2013. Bags and pouches will remain the largest product type while plastic containers will grow the fastest. Some of the best gains are expected in the BRIC countries of Brazil, Russia, India and China. This study analyzes the $103 billion world food container industry, with forecasts for 2013 and 2018 by product, market, world region and for 22 countries. It also evaluates company market share and profiles industry players.

*#2601 .............. February 2010................. $5800*

### Frozen Food Packaging

US demand for frozen food packaging will climb 3.7% yearly through 2013. Gains will be driven by the popularity of convenience-type foods, the prevalence of microwave ovens, and technological advances in packaging. Frozen food specialties and meat, poultry and seafood will be the fastest growing applications. This study analyzes the $5.7 billion US frozen food packaging industry, with forecasts for 2013 and 2018 by application and product. It also evaluates company market share and profiles industry players.

*#2594 ................January 2010 ................. $4700*

### World Foodservice Disposables

Global demand for foodservice disposables is forecast to increase 4.8% annually through 2013. The US will remain the largest market by a wide margin, while more rapid growth is expected in China and other developing regions. Disposable foodservice packaging will be the fastest growing product segment. This study analyzes the $38.5 billion world foodservice disposables industry, with forecasts for 2013 and 2018 by product, market, world region and for 18 countries. It also evaluates market share and profiles industry players.

*#2573 ............. November 2009................ $5600*

### 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 ................ August 2009.................. $4700*

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