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Cups & Lids

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

Study #2679 | August 2010 | $4800 | 269 pages

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Cups & Lids

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

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MARKET ENVIRONMENT

PRODUCTS

MARKETS

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Gains will be driven in part by expanding foodservice revenues, favorable prospects for foodservice packaging cups, and heightened emphasis on premium coffee by quick service restaurants.

US demand to increase 4.4% yearly through 2014

US demand for cups and lids is expected to increase 4.4 percent per year to $8.2 billion in 2014. Gains will be driven by expanding foodservice revenues and favorable prospects for foodservice packaging cups. In addition, cup and lid demand will be supported by heightened emphasis on premium coffee by quick service restaurants and continued introductions of alternative beverages in foodservice establishments to offset the maturity of the soft drinks segment.

Packaging cups to outpace drinking cups segment

While drinking cups will remain the dominant cup type, packaging cups will register faster gains due to continued expansion in key applications such as yogurt, ice cream novelties and dry coffee as well as development of newer uses where cups provide convenience, portability and portion control. In addition, innovations such as lidded single-serving ketchup cups that allow either dipping or squeezing will boost packaging cup demand at the expense of conventional flexible packets. Among drinking cups, plastic cups will have the fastest growth as they continue to make inroads into traditional paper cup applications for cold drinks in both the foodservice and retail markets. Foodservice paper hot cups will also log rapid increases, driven by expanding sales of premium coffee in quick service restaurants and other foodservice locations.

US Cups & Lid Demand, 2009
($6.6 billion)

Lid demand to outpace cups

Growth in lid demand will outpace that in cup demand, bolstered by an increasing percentage of drinking cups using lids, heightened demand for costlier specialty lids and continued solid advances for single-serving packaging cups. Faster growth is expected for lids in packaging applications due to the continued popularity of single-serving sizes, development of new applications and extensions of existing product lines with cup packaging.

Foodservice to remain dominant market

Foodservice, which represented 68 percent of demand in 2009, will remain the dominant cup and lid market. Although market maturity of the large soft drinks segment will moderate gains, advances will be bolstered by fountain dispenser innovations that enable users to customize beverage flavors. Other growth factors include expanded beverage menus in restaurants; trends toward larger and more expensive drinking cup sizes; and heightened demand for costlier but more environmentally friendly products, such as cups made from biodegradable resins or recycled content. Cup and lid demand in the food and beverage packaging market will post faster gains, aided by continued healthy growth in yogurt and the ongoing popularity of single-serving microwaveable cups for soups, entrees and other foods.

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Sample Text, Table & Chart

TABLE III-11

LID DEMAND BY TYPE & MARKET
(million dollars)

Item	1999	2004	2009	2014	2019
Cup Demand (bil units)					
lids/cup					
Lid Demand (bil units)					
cents/unit					
Lid Demand					
By Type:					
Drinking Cup Lids					
Flexible Lids					
Other					
By Market:					
Foodservice					
Food Packaging & Other					
% lids					
Total Cup & Lid Demand					

SAMPLE TABLE

PRODUCTS

Paper Cups -- Demand for paper drinking cups is exp
advance billion in 2014, with un
reaching rowth will lag the drinki
average per cold drink cup mark
competi h the foodservice and ret
Howeve the 2004-2009 pace larg
result of t cups, which will benef
increasing offees by quick service re
chains and the ongoing popularity of gourmet coffee establis
as Starbucks. In premium coffee applications, paper cups ar
for their upscale image over foam cups, which are associated
lower-quality coffee. In 2009, McDonald's launched its MC
of premium coffees, and Burger King plans to add SEATTLE
COFFEE, a premium brand from Starbucks, to its menu in fa
Such efforts are expected to broaden the appeal of higher-end
coffees and boost associated paper cup demand. The presence of in-store cafes in book stores and other retail establishments will also foster paper cup demand, as coffee in paper cups is typically the leading beverage sold in these locations.

SAMPLE TEXT

In addition, innovations such as the FREESTYLE fountain drink dispenser from Coca-Cola are expected to boost the appeal of fountain drinks in the quick service restaurant market, which in turn will support paper cup demand for cold drink applications. The FREESTYLE self-serve dispenser, which was introduced in May 2010, allows
to choose from and mix more than 100 Coca-Cola beverage
single unit.

Paper cup demand will also be supported by improvem
insulation capabilities, enabling paper cups to be more comp
foam cups in hot beverage applications. Standard paper cup
insulation compared to foam types, making them difficult an

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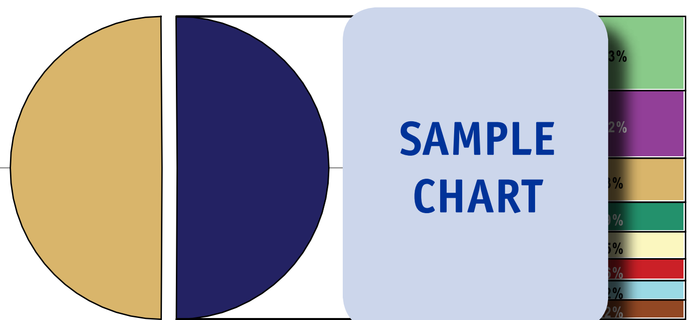
CHART V-1

US CUP & LID MARKET SHARE BY COMPANY
($6.6 billion, 2009)



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Sample Profile, Table & Forecast

TABLE IV-5

COFFEE & SNACK SHOP CUP & LID DEMAND (million dollars)

Item	1999	2004	2009	2014	2019
Coffee & Snack Shops (000)	[illegible]	[illegible]	[illegible]	[illegible]	50
000$ cups & lids/shop	[illegible]	[illegible]	[illegible]	[illegible]	.3
Coffee & Snack Shop Cup/Lid Demand	[illegible]	[illegible]	[illegible]	[illegible]	63
Cups:	[illegible]	[illegible]	[illegible]	[illegible]	73
Drinking Cups	[illegible]	[illegible]	[illegible]	[illegible]	40
Food Cups	[illegible]	[illegible]	[illegible]	[illegible]	33
Lids	[illegible]	[illegible]	[illegible]	[illegible]	90
% coffee & snack shops	[illegible]	[illegible]	[illegible]	[illegible]	5.5
Total Foodservice Cup & Lid Demand	28	[illegible]	[illegible]	[illegible]	6860

SAMPLE TABLE

COMPANY PROFILES

Spirit Foodservice Incorporated
200 Brickstone Square, Suite G-05
Andover, MA 01810
978-964-1551
http://www.sp

Annual Sales:
Employment:

Key Products: ds

SAMPLE PROFILE

Spirit Fo t primarily manufactures i ce bar accessories and extruded polypropylene straws and sip/stirs. The Company also does business through the Master Containers Incorporated subsidiary (Andover, Maryland), a manufacturer of foam cups and other containers for foodservice applications.

The Company participates in the US cup and lid industry through its own operations, as well as through the Master Containers subsidiary. Spirit Foodservice's range of printable cups includes clear plastic, FROST FLEX, foam and stadium types. Clear plastic cups are produced in 9-, 10-, 12- and 16-ounce sizes, while the Company's FROST FLEX frosted white cups are available in 9-, 10- and 14-ounce sizes. Foam cups encompass sizes from 4 to 44 ounces and include 32- and 44-ounce travel sizes. Spirit Foodservice's stadium cups, which range in size from 12 to 32 ounces, include 16- and 22-ounce fluted styles. The Company's stadium cups are produced in numerous colors, including blue, red, white, yellow, beige, black, green, orange and purple.

Master Containers, which has a plant in Mulberry, Florida, produces expanded polystyrene foam cups and containers, and plastic and

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"Demand for cups and lids in coffee and snack shops is expected to increase 5.0 percent annually through 2014 to $829 million, driven by growing numbers of coffee and snack shops and the continued popularity of coffee (especially premium types) as a beverage consumed away from home. The increasing percentage of breakfasts eaten away from home will stimulate demand for cups and lids in coffee chains and doughnut shops, especially as these sites expand their offerings beyond sweet foods. Demand will also be supported by ..."
--Section IV, pg. 116-7

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Other Studies

Paper versus Plastic in Packaging

In selected packaging markets where paper and plastic compete, plastic will make further inroads into paper. Rigid packaging demand will slightly outpace flexible packaging based on above-average growth for tubs and cups, trays, clamshells and two-piece high visibility plastic containers. This study analyzes the 23.2 billion pound competitive plastic and paper packaging industry in the US, with forecasts for 2014 and 2019 by product and market. It also discusses market leaders and profiles selected industry players.

#2698 .... November 2010 .... $4900

Caps & Closures

US demand for caps and closures will rise 4% yearly through 2014. Advances will be aided by greater use of more costly dispensing and child-resistant closures, and by the ongoing popularity of single-serving containers. Plastic will remain the dominant material, while elastomer and rubber stoppers grow the fastest. This study analyzes the $7.8 billion US cap and closure industry, with forecasts for 2014 and 2019 by raw material, product and market. It also evaluates company market share and profiles industry players.

#2688 .... October 2010 .... $4900

Foodservice Packaging: Bulk & Portion Control

US foodservice packaging demand will climb 2.5% annually through 2014. Flexible packaging will outpace rigid based on cost, convenience and performance advantages. Restaurants other than quick service types will post the fastest growth within the dominant eating and drinking places market. This study analyzes the $7 billion US foodservice packaging industry, with forecasts for 2014 and 2019 by product, application and end user. It also evaluates company market share and profiles industry players.

#2642 .... May 2010 .... $4800

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

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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