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photo: Carrie Cups

World Cups & Lids

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

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World Cups & Lids

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

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World Cups & Lids

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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.

Global demand to rise 5% annually through 2014

World demand for cups and lids is projected to rise 5.0 percent per year to $23.4 billion in 2014. 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 disposable cups and lids. Products made from biodegradable, recyclable or recycled materials will post robust advances. This will be due to pressure on foodservice establishments and packaging producers to reduce their environmental footprint, especially in developed countries with more established environmental regulations.

US to remain largest consumer by wide margin

The US will remain the largest consumer of cups and lids in the world by a wide margin (in 2014, the US will represent 35 percent of the global cup and lid market -- down by only one percent from 2009). This leading position stems from the US' large foodservice, and food and beverage packaging industries; greater use of more expensive cups and lids; trends favoring single-serving food cups; and the expanded specialty beverage offerings in quick service restaurants. These factors will continue to drive demand for cups and lids in the US in the coming years. Even though faster growth is expected in developing countries, the US alone will still account for close to one-third of market value gains between 2009 and 2014.

Demand in developing regions to outpace global average

Demand for cups and lids in Asia, Central and South America, Eastern Europe and the Africa/Mideast region will increase faster than the global average, boosted by rising living standards and the rapidly growing number of limited service restaurants serving on-the-go food and beverages packaged in cups and using lids. Furthermore, industrialization trends will fuel demand for cups and lids in these regions' generally underdeveloped food and beverage processing industries. Some of the best growth rates are expected in China, India and Indonesia, with Brazil and Russia also expected to see healthy gains. Advances in North America and Western Europe will be below average, with market value supported by increasing use of biodegradable and compostable products, which tend to be more expensive. While Japan's cup and lid market will see the slowest growth, the country will remain the second biggest national market, after the US.

World Cups & Lids

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Sample Text, Table & Chart

TABLE VI-6

CHINA -- CUP & LID DEMAND BY MARKET
(million dollars)

Item	1999	2004	2009	2014	2019
Population (million persons)					
$ cups & lids/capita					
Cup & Lid Demand					
Foodservice					
Food & Beverage Packaging					
Retail & Other Markets					

SAMPLE TABLE

ASIA/PACIFIC

China: Cup & Lid Markets

In 2009, foodservice accounted for over two-thirds of to
and lid demand, by far the largest market in China. This mar
continue to see double-digit annual growth through the forec
supported by strong gains in the limited service restaurant se
particular, China's expanding middle class and the increasing popularity of international fast food and coffee chains (especially in urban areas) will fuel demand for disposable cups and lids. For example, Starbucks had over 400 stores spread over more than 30 cities throughout China in 2010, and the company plans to operate at least 1,500 stores in the country by 2015. Disposable cups will also remain widely used by numerous street vendors selling soy milk or congee for breakfast to drink and eat on-the-go. While most products are very inexpensive, they are consumed in large quantities.

China's food and beverage processing indu
in the world, will see robust gains in cup and lid
the 1999-2009 decade, growth in demand for cu
and beverage packaging applications averaged
ing forward, however, advances will decelerate
that period, in part due to a slowdown in the country's food and beverage output and competition from flexible packaging, such as pouches. Still, cup and lid demand will benefit from trends toward convenience-oriented, highly packaged food and beverages. In addition, China's urban population, who consume more packaged products than their rural counterparts, will continue to increase (from 46 percent in 2009 t
in 2014), further supporting demand for packaging cups and

Good opportunities for cups and lids will also exist in th
tor, boosted by strong gains in personal income and consume
levels. Demand for cups and lids in the medical and dental r
benefit from rapid growth in health spending over the long te

SAMPLE TEXT

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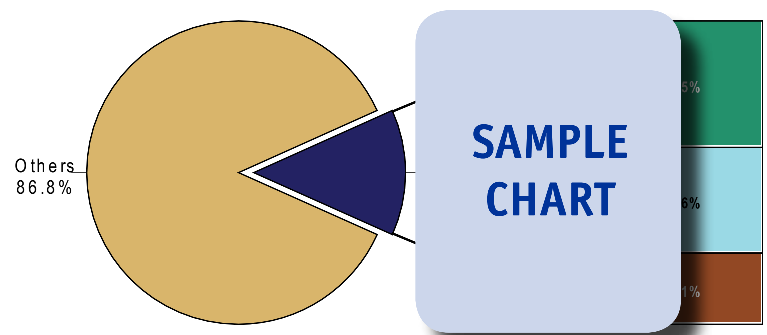
CHART VIII-1

WORLD CUP & LID MARKET SHARE BY COMPANY
($18.3 billion, 2009)



SAMPLE CHART

World Cups & Lids

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Sample Profile, Table & Forecast

TABLE VI-5

CHINA -- CUP & LID DEMAND
(million dollars)

Item	1999	2004	2009	2014	2019
Population (million persons)					
$ GDP/capita					
Gross Domestic Product (bil 2008$)					
Personal Consumption Expend (bil 20(					
Food & Beverage MVA (bil 2008$)					
Foodservice Revenues (bil $)					
Cup & Lid Demand					
Cups:					
Drinking Cups					
Other Cups					
Lids					
% China					
Asia/Pacific Cup & Lid Demand					

SAMPLE TABLE

COMPANY PROFILES

F. Bender Limited
Gresford Industrial Park
Chester Road
Wrexham LL1
United Kingdo
44-1978-855-6
http://www.be

Annual Sales:
Employment:

Key Products: lastic lids

SAMPLE PROFILE

F. Bender is a manufacturer of paper hot and cold beverage cups. The Company is owned by United Kingdom (UK)-based Barclay Ventures, a private equity firm.

The Company participates in the world cup and lid industry through the manufacture of a variety of paper hot and cold beverage cups, and plastic lids. For example, F. Bender's paper hot beverage cups include standard, premium, ATTRIBUTE and BARRIER insulated, and polylactic acid-lined compostable types. Cold beverage cups, which range in size from 9 to 22 ounces, include products with COCA-COLA (Coca-Cola Company -- US) and PEPSI (PepsiCo Incorporated -- US) logos. The Company also makes hot and cold beverage vending cups. Lids from F. Bender encompass standard, domed and drink-through lock-tab lids.

F. Bender operates a manufacturing facility and distribution center in Wrexham, the UK. Products are distributed throughout the UK, as well as internationally, via a network of wholesalers.

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"Through 2014, demand for cups and lids in China is forecast to increase 11.7 percent per annum to $1.6 billion, well above both the regional and global averages. All major product types are expected to experience robust gains, although growth rates will decelerate from the pace seen over the 1999-2009 period. This will follow similar decelerations in overall economic growth and manufacturing activity. Still, ..."

--Section VI, pg. 146

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Other Studies

Green Packaging

US demand for green packaging will rise 3.9 percent 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 Caps & Closures

World demand for caps and closures will rise 4.6 percent annually through 2014. Growth will be based in part by a shift toward higher-value closures such as child-resistant, tamper-evident and dispensing types. Some of the best opportunities will be found in the Asia/Pacific region, where over two-fifths of market gains will occur. This study analyzes the $32 billion world cap and closure industry, with forecasts for 2014 and 2019 by material, market, world region and for 18 countries. It also evaluates company market share and profiles industry participants.

#2719 ....January 2011 .... $6100

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

Foodservice Packaging: Bulk & Portion Control

US foodservice packaging demand will climb 2.5 percent 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

Cups & Lids

US demand for cups and lids will increase 4.4 percent per year through 2014, driven by expanding foodservice revenues and favorable prospects for food packaging cups. Value gains will be bolstered by increasing demand for environmentally friendly cups, such as cups made from higher-value biodegradable resins or recycled content. This study analyzes the $6.6 billion US cups and lids industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.

#2679 .... August 2010 .... $4800

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