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Foodservice Disposables

US Industry Study with Forecasts for **2015 & 2020**

Study #2787 | August 2011 | \$5100 | 335 pages

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Growth will be driven by a rebound in the broader US economy, which will stimulate increased frequency of dining out, thereby creating opportunities for foodservice disposables.

US demand to rise 4.1% annually through 2015

US demand for foodservice disposables is expected to increase 4.1 percent per year to \$18.8 billion in 2015. Growth will be driven by accelerating foodservice revenue increases resulting from a rebound in the broader US economy, which will stimulate increased frequency of dining out, thereby creating opportunities for disposables. Demographic trends such as high numbers of households where all adults work, growth in empty nest households as baby boomers age, and the relatively small average US household size will tend to favor higher spending for meals eaten or prepared away from home. Other factors driving increased away-from-home food expenditures include rising interest in international cuisines and expanded marketing activity in terms of discounts and loyalty reward programs. Value growth will be similar to the pace of the 2005-2010 period. However, price increases for paper products will be more moderate while price hikes for plastic products will be faster than those for paper and aluminum foil products as resin prices escalate.

Packaging products to achieve fastest gains

Packaging products will achieve the fastest gains, with demand expected to climb at a 4.5 percent annual pace to \$8.8 billion in 2015. Advances will be driven by a healthy outlook for the large

US Foodservice Disposables Demand, 2010 (\$15.3 billion)



Packaging
46%

Serviceware
46%

Napkins & Other 8%

limited service segment, which accounts for half of overall restaurant revenues but generates a much higher share of foodservice disposables demand. Such restaurants are popular with consumers seeking convenience and value. Trends such as widening menu options 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 and prepared foods from retail stores, along with increased catering activity by restaurants, will also propel packaging demand.

Demand for serviceware, including cups, dinnerware, utensils and other products, is projected to increase 4.0 percent per

year to \$8.6 billion in 2015. Gains will be supported by above-average growth for limited service restaurant and retail establishment revenues, and steady demand in institutional and other markets. Other factors providing momentum will be the increased focus on gourmet coffee and specialty cold drinks by quick service restaurants and convenience stores. Value advances will also benefit from heightened interest in higher-cost degradable, recycled content and other green products, especially among institutional establishments such as colleges and universities, and hospitals, as well as in cities with bans on polystyrene foam disposables.

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PRODUCTS

Packaging

Demand for foodservice disposable packaging is projected to increase to \$1.5 billion in 2015. Growth is supported by strong demand for foodservice revenues in the economy following the 2009 recession. Above-average revenue growth in the quick service segment will also fuel demand. While limited service restaurants account for half of overall revenues, quick service restaurants are the primary users of disposables consumed both on-site and off-site. Limited service restaurants are popular with consumers for their convenience and value. Growth will depend on the performance of the 2005-2010 period as a result of more price increases for paper products, with plastic material prices expected to rise more rapidly.

Other trends supporting packaging demand will include menu options in limited service restaurants and longer hours targeted at boosting sales from breakfast and late-night snacking. Additionally, packaging gains will be aided by continued solid revenue growth for fast casual restaurants, which generally feature more sophisticated food choices than traditional quick service restaurants. The popularity of takeout food from full service restaurants will provide a further boost to packaging demand, especially since these restaurants tend to use higher-value disposable containers designed to maintain food temperature and minimize leakage problems. Increased catering activity by full service restaurants will also necessitate heightened requirements for packaging. Beyond eating and drinking places, above-average opportunities for packaging will be found in the retail market as grocery and drug stores expand their offerings of prepared foods.

Environmentally friendly packaging, including degradable and recycled content products, is expected to post robust gains from 2010 to 2015.

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**SAMPLE
TEXT**

TABLE III-4

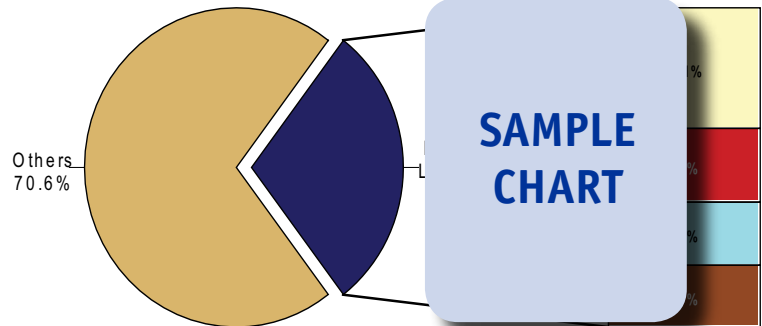
PAPERBOARD BOX & CARTON DEMAND
 IN FOODSERVICE APPLICATIONS
 (million dollars)

Item	2000	2005	2010	2015	2020
Total Foodservice Container Demand	3200	3775	4775	6010	7520
% boxes & cartons	1	1	1	1	1
Foodservice Box & Carton Demand	5	5	5	5	5
Pizza Boxes	5	5	5	5	5
French Fry Cartons	0	0	0	0	0
Corrugated Clamshells	5	5	5	5	5
Doughnut Boxes	0	0	0	0	0
Other	5	5	5	5	5
cents/unit	5	5	5	5	5
Foodservice Boxes/Cartons (mil units)	0	0	0	0	0
Pizza Boxes	0	0	0	0	0
French Fry Cartons	0	0	0	0	0
Corrugated Clamshells	0	0	0	0	0
Doughnut Boxes	0	0	0	0	0
Other	3200	3775	4775	6010	7520

**SAMPLE
TABLE**

CHART V-1

US FOODSERVICE DISPOSABLES
 MARKET SHARE BY TOP COMPANIES
 (\$15.3 billion, 2010)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-5
COFFEE & SNACK SHOP MARKET
FOR FOODSERVICE DISPOSABLES
 (million dollars)

Item	2000	2005	2010	2015	2020
Coffee & Snack Shop Revenues (bil \$)					35
\$ disposables/000\$ revenue					4
Foodservice Disposables Demand					50
Beverage Cups & Lids					75
Dinnerware & Cutlery					05
Boxes & Cartons					73
Clamshells & Other Containers					37
Other					70
% coffee & snack shop	12.7	13.7	13.8	13.7	13.7
Limited Service Disposables Demand	5235	6518	8065	9890	12110

**SAMPLE
TABLE**

COMPANY PROFILES

Burrows Paper Corporation
 501 West Main Street
 Little Falls, NY 13365
 315-823-2300
 http://www.burrowspaper.com

**SAMPLE
PROFILE**

Annual Sales: \$1.4 billion
 Employees: 1,000

Key Products: Paper and packaging products, including paper sheets, and corrugated cardboard.

Burrows Paper Corporation is a paper and packaging products company that operates in the US, the Netherlands and China. The privately held company does business through two divisions: Paper and Packaging.

The Company participates in the US foodservice disposables industry through the Paper and Packaging divisions. Through these divisions, Burrows Paper produces a range of high-quality, lightweight specialty papers for a variety of packaging, decorative and industrial end uses. Specifically, the Paper division (Little Falls, New York) makes and distributes base papers for various converters for numerous food packaging applications. For foodservice end uses, the division makes such flexible packaging papers as sandwich and tortilla wraps, and waxed interfolded sheets for packaging delicatessen items.

The Packaging division (Franklin, Ohio) manufactures rigid paper and flexible packaging for a broad range of food products. Among the Packaging division's rigid containers are F-LITE and ECO-FLUTE clamshells, which are suitable for packaging appetizers, hamburgers,

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“Demand for foodservice disposables in coffee and snack shops is projected to advance 4.4 percent per year to \$1.4 billion in 2015, slightly above the limited service average. Growth will be aided by a favorable outlook for coffee and snack shop revenues along with expanded food and beverage offerings in these establishments. For instance, in July 2011 Starbucks launched BISTRO BOXES, a line of small meals containing less than 500 calories and priced at under \$7.”
 --Section IV, pg. 169

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OTHER STUDIES

World Green Packaging

This study analyzes the global green packaging industry. Historical demand data (2000, 2005, 2010) and forecasts for 2015 and 2020 are provided. Products covered include recycled content (e.g., paper, metal, plastic, glass), reusable (e.g., drums, plastic containers, intermediate bulk containers) and degradable packaging. Markets include food, beverages, consumer products and others (e.g., shipping, chemicals and foodservice). An overview is presented by product, major market, world region and major country. The study also considers market environment factors, details industry structure and profiles industry players.

#2796 August 2011 \$6100

Food Containers: Rigid & Flexible

US demand for food containers is forecast to increase three percent annually through 2015. Plastic containers and bags and pouches will be the fastest growing segments, continuing to supplant paperboard, metal and glass containers. Best market prospects include frozen specialties, snack foods, dairy products, and sauces and condiments. This study analyzes the \$23 billion US rigid and flexible food container industry, with forecasts for 2015 and 2020 by type and market. The study also evaluates company market share and profiles industry competitors.

#2754 April 2011 \$5100

Meat, Poultry & Seafood Packaging

US demand for meat, poultry and seafood packaging will increase three percent annually through 2015. Flexible packaging will continue to outpace rigid types, bolstered by good opportunities for high barrier film and pouches. The ready-to-eat market will grow the fastest, driven by the growing range of prepared foods in the retail sector. This study analyzes the \$7.9 billion US meat packaging industry, with forecasts for 2015 and 2020 by technology, raw material, product, application and market. The study also evaluates company market share and profiles industry players.

#2753 April 2011 \$4900

World Cups & Lids

World demand for cups and lids will rise five percent per year through 2014, fueled in part by advances in the quick service restaurant industry. Products made from biodegradable, recyclable or recycled materials will post robust advances. The US will remain by far the largest market, while developing regions grow the fastest. This study analyzes the \$18.3 billion world cup and lid industry, with forecasts for 2014 and 2019 by product, market, world region and for 18 countries. It also evaluates company market share and profiles industry players.

#2741 March 2011 \$5800

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

About The Freedonia Group

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