INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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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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Foodservice Disposables

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

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MARKET ENVIRONMENT

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MARKETS

INDUSTRY STRUCTURE

Foodservice Disposables

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

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 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.

US Foodservice Disposables Demand, 2010
($15.3 billion)

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.

Foodservice Disposables

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Sample Text, Table & Chart

TABLE III-4

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

SAMPLE TABLE

Item	2000	2005	2010	2015	2020
Total Foodservice Container Demand					
% boxes & cartons					
Foodservice Box & Carton Demand					
Pizza Boxes					
French Fry Cartons					
Corrugated Clamshells					
Doughnut Boxes					
Other					
cents/unit					
Foodservice Boxes/Cartons (mil units)					
Pizza Boxes					
French Fry Cartons					
Corrugated Clamshells					
Doughnut Boxes					790
Other	3200	3775	4775	6010	7520

PRODUCTS

Packaging

SAMPLE TEXT

Demand for foodservice disposable packaging is project
increase ... billion in 2015. Growth
supporte ... for foodservice revenues
economy ... 09 recession. Above-ave
enue gro ... ice segment will also fu
While li ... ount for half of overall r
revenues ... ent of disposables consu
restaurant ... y used for packaging foo
both on-site and off-site. Limited service restaurants are pop
consumers for their convenience and value. Growth will dec
the performance of the 2005-2010 period as a result of more
price increases for paper products, with plastic material price
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 f
restaurants will also necessitate heightened requirements for
ing. Beyond eating and drinking places, above-average opp
packaging will be found in the retail market as grocery and c
stores expand their offerings of prepared foods.

Environmentally friendly packaging, including degrada
recycled content products, is expected to post robust gains fr

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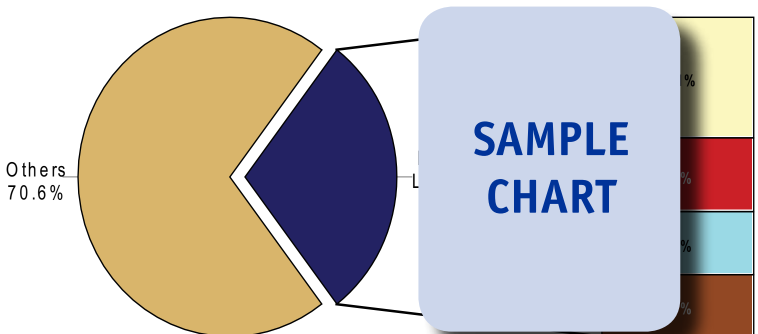
CHART V-1

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



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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 $)					
$ disposables/000$ revenue					
Foodservice Disposables Demand					
Beverage Cups & Lids					
Dinnerware & Cutlery					
Boxes & Cartons					
Clamshells & Other Containers					
Other					
% coffee & snack shop					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
315-823-2
http://w

Annual
Employ

Key Pro d sheets, and cor-
rugated

SAMPLE PROFILE

Burr er and packaging products 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

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