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World Foodservice Disposables

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

Study #2831 | December 2011 | \$5900 | 391 pages

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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Advances will be driven by gains in the foodservice industry, based on increasingly fast-paced lifestyles, urbanization trends and growth in away-from-home food spending.

World demand to rise 5.4% annually through 2015

World demand for foodservice disposables is forecast to grow 5.4 percent per year to \$53.3 billion in 2015. Advances will be driven by gains in the foodservice industry, which will accelerate from the rates seen over the 2000-2010 period due to improvements in global economic conditions, increasingly fast-paced lifestyles, urbanization trends and growth in away-from-home food spending. However, great disparity in per capita foodservice expenditures will remain among the various regions, which will affect demand for disposables used in restaurants and other foodservice establishments. Cultural differences between countries will also impact demand, as the frequency and the types of establishments visited vary considerably from one country to the next.

Disposable packaging to be fastest growing type

Disposable serviceware -- including single-use cups, dinnerware and utensils -- will remain the largest product type through the forecast period and beyond. However, the fastest demand growth is expected in the disposable packaging segment, which includes foodservice containers, lids and domes, wraps, bags, and trays. Demand for disposable foodservice packaging will be fueled by rapid global expansion in the limited service restaurant sector, which relies heavily on single-use packaging. Beyond eating and drinking places, good oppor-

World Foodservice Disposables Demand, 2015 (\$53.3 billion)



tunities for disposables will be found in the retail market, as grocery and convenience stores expand their offerings of prepared foods.

In 2010, single-use serviceware accounted for 54 percent of the global foodservice disposables market. Gains will be supported by above-average growth in quick service restaurant and retail establishment revenues. Other factors providing momentum will include the increased focus on gourmet coffee and specialty cold drinks by limited service restaurants and convenience stores. Value advances will also benefit from heightened interest in higher-cost environmentally friendly products, especially in developed regions.

Some of the best opportunities will exist in the disposable packaging segment, boosted by gains in the fast food industry, which uses large quantities of disposables for packaging foods consumed both on-site and off-site. In addition, the popularity of takeout food from full service restaurants will provide a further boost to single-use packaging demand, especially since these restaurants tend to use higher-value disposable containers designed to maintain food temperature and minimize spilling and leakage. Increased catering activity by full service restaurants, and home delivery and takeaway outlets will also necessitate heightened requirements for disposable packaging.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Foodservice Disposables Demand

In 2010, demand for foodservice disposables in India to million, or four percent of the market in the Asia/Pacific regi has seen fast growth over the past decade (averaging 16 per year), but from a small base. Despite the country's vast popu India's market for foodservice disposables remains limited, d lack of infrastructure and the relatively underdeveloped state restaurant industry. Demand largely consists of very inexper ables -- such as wooden sticks and clay cups -- which holds o value. The use of cheap alternatives, such as newspaper in li service wraps, will also hamper demand. Nonetheless, stron the number of quick service restaurants will continue to prop for high-quality and higher-priced disposables that meet international standards, such as those used in Western fast food chains.

Through 2015, demand for foodservice disposables in India is expected to advance billion, the most rapid rate of increase in the od. Strong economic expansion and a rapi population will continue to fuel away-from-ho service restaurants, including fast food c from these trends, as they offer conven food options. Growth will also be spurred by housing, cold storage and transportation network and infrastructures, which historically have limited growth in quick restaurant outlets beyond major cities.

Coffee shops are much less common in India than in de countries, but their number is growing rapidly. This trend w demand for disposable paper, plastic and extruded polystyre cups. In addition, tea is very popular in the country. For ins widely sold by street vendors, as well as in trains and bus sta often served in handmade fired clay cups, which are dispo

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TABLE VI-8

INDIA -- FOODSERVICE DISPOSABLES DEMAND BY PRODUCT & MARKET (million dollars)

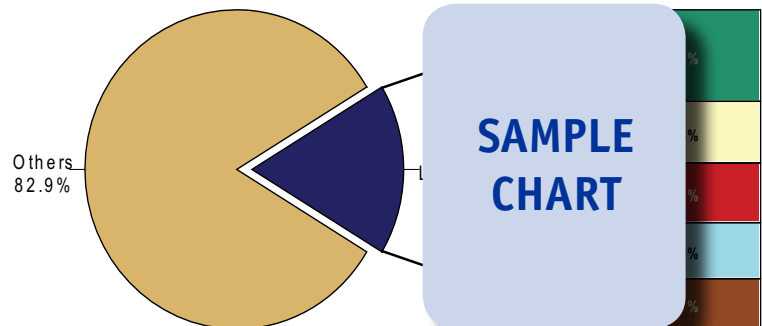
Item	2000	2005	2010	2015	2020
Asia/Pacific Foodservice Disposables					0
% India					7
Foodservice Disposables Demand					0
By Product:					
Serviceware					0
Packaging					5
Other Foodservice Disposables					5
By Market:					
Eating & Drinking Places					00
Other Foodservice Establishments	70	135	295	600	1150

SAMPLE TABLE

SAMPLE TEXT

CHART VIII-1

WORLD FOODSERVICE DISPOSABLES MARKET SHARE (\$41.0 billion, 2010)

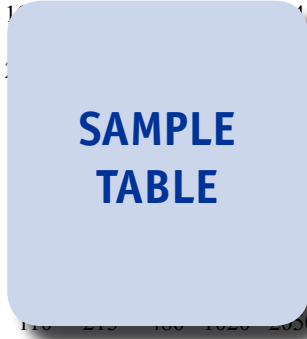


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-7
INDIA --
FOODSERVICE DISPOSABLES MARKET ENVIRONMENT

Item	2000	2005	2010	2015	2020
Population (mil persons)	1,028	1,106	1,197	1,291	1,389
\$ GDP/capita	400	500	600	700	800
Gross Domestic Product (bil 2009\$)	413	553	718	904	1,111
\$ revenues/capita	1.5	2.0	2.5	3.0	3.5
Foodservice Revenues (bil \$)	1.5	2.2	3.0	3.9	4.9
\$ disposables/capita	0.5	0.7	0.9	1.1	1.3
\$ disposables/000\$ GDP	1.2	1.4	1.5	1.6	1.7
\$ disposables/000\$ foodservice revs	33	35	36	37	38
Foodservice Disposables (mil \$)	110	210	300	420	530



COMPANY PROFILES

F. Bender Limited
 Gresford Industrial Park
 Chester Road
 Wrexham LL12 8LX
 United Kingdom
 44-1978-855-6
 http://www.ber

Annual Sales:
 Employment:

Key Products: lids, stirrers
 and straws

F. Bender, which also does business as Benders Paper Cup Company, is a manufacturer of paper-based 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 foodservice disposables industry through the manufacture of a variety of paper-based hot and cold beverage cups, and related products. For example, F. Bender's paper hot beverage cups, which range in size from 4 to 16 ounces, 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. Related products from the Company include standard, domed and drink-through lock-tab lids; plastic coffee and tea stirrers; and standard, jumbo and flexible straws.

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"Through 2015, foodservice revenues in India are projected to increase 9.7 percent annually to \$121 billion, with strong advances from a relatively small base (especially compared to China or Japan). Robust economic expansion and the growing middle class population will support gains. The fastest gains are expected in eating and drinking places. In particular, the limited service restaurant segment -- including Western-style fast food and coffee chains -- is expected to experience double-digit annual growth in India over the forecast period."
 --Section VI, pg. 182

OTHER STUDIES

Aseptic Packaging

US demand for aseptic packaging is projected to expand 8.0 percent per year to \$5.1 billion in 2015. Gains will be driven by drug sterility requirements and ambient distribution and storage advantages for food and beverages. Prefillable syringes and plastic bottles will be among the fastest growing types, with pharmaceuticals the fastest growing market. This study analyzes the \$3.5 billion US aseptic packaging industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry competitors.

#2827December 2011 \$4900

Beverage Containers in China

Demand for beverage containers in China will rise 9.6 percent per year through 2015. Plastic beverage containers will remain the largest material segment, while paperboard containers grow the fastest, led by aseptic cartons. Milk containers will be the largest nonalcoholic beverage market, while beer remains the largest alcoholic beverage market. This study analyzes the 297 billion unit beverage container industry in China, with forecasts for 2015 and 2020 by market and material. The study also evaluates company market share and profiles industry participants.

#2815 November 2011 \$5400

Converted Flexible Packaging

Demand for converted flexible packaging in the US will rise 3.8 percent annually through 2015. Pouches will lead gains based on continued conversions to stand-up pouches and healthy gains for flat pouches, along with lighter weight and reduced material use. Bags will remain the largest segment. Food markets will outpace nonfood uses. This study analyzes the \$15.1 billion US converted flexible packaging industry, with forecasts for 2015 and 2020 by material, product and market. The study also evaluates company market share and profiles industry players.

#2807 October 2011 \$5100

World Green Packaging

World demand for green packaging is projected to rise 5.7 percent annually through 2015. Recycled content packaging will remain the dominant type, while reusable and degradable packaging grow the fastest. The Asia/Pacific region will see above-average gains and remain the largest regional market. This study analyzes the \$160.8 billion global green packaging industry, with forecasts for 2015 and 2020 by product, market, world region and for 19 countries. The study also evaluates company market share and profiles industry players.

#2796 August 2011 \$6100

Foodservice Disposables

US demand for foodservice disposables is expected to increase 4.1 percent annually through 2015. Packaging products will achieve the fastest gains, followed by serviceware, napkins and other products. Retail and vending will be the fastest growing market, while the eating and drinking places segment remains dominant. This study analyzes the \$15.3 billion US foodservice disposables industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.

#2787 August 2011 \$5100

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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