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# World Cups & Lids

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Industry Study with Forecasts for **2017 & 2022**

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Study #3012 | June 2013 | \$6100 | 359 pages

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*Advances will be driven by above average gains for food and beverage packaging cups and by growth in the quick service restaurant industry, which will remain the primary user of cups and lids.*

## World demand to rise 5.0% annually through 2017

World demand for cups and lids is projected to rise 5.0 percent per year to nearly \$26 billion in 2017. Advances will be driven by above average gains for food and beverage packaging cups as well as a favorable outlook for global foodservice revenues. In particular, increases will be fueled by growth in the quick service restaurant industry, which will remain the primary user of disposable cups and lids. Other factors contributing to rising cup and lid demand include an upsurge in world food and beverage processing output, increased consumer spending on packaged food worldwide, and the growing presence of environmentally friendly items (e.g., compostable cups and cups incorporating significant levels of recycled content), which tend to be higher in price than conventional products.

## Foodservice to remain largest market

Foodservice will remain by far the largest cup and lid market, accounting for more than three-fifths of overall market value through 2017. While the large, established foodservice industry and market maturity in developed regions will prevent faster gains, several trends will bolster cup and lid demand. These include expanded beverage offerings in quick service and other restaurants, and the significant growth potential in countries with underdeveloped foodservice



industries. Cup and lid demand will also be supported by the rising number of coffee shops worldwide and the continued popularity of coffee (especially premium types) as a beverage consumed away from home. Moreover, value gains will be aided by the prevalence of costlier specialty lids in coffee and snack shops. However, growing concerns about the environmental impact of disposable coffee cups will have a moderating effect on cup and lid demand. These concerns -- centering on the unrecyclable nature of the cups -- have prompted companies such as Starbucks to offer discounts to customers who bring in their own reusable mugs rather than use the store's disposable cups.

## Food & beverage market to grow the fastest

The fastest growth will be seen in the food and beverage packaging market, reflecting the convenience, portability, and portion control advantages that food packaging cups offer. Healthy eating trends will provide further upward momentum for yogurt, the largest packaging cup end use. On the other hand, gains will be moderated by competition from pouches in applications such as snacks, candy, sauces, and condiments. The lack of widespread retail infrastructures in many developing areas will limit overall gains in the retail sector, while the aging of the population in developed countries will support gains in health care applications (e.g., portion cups used in handling pills, disposable cups for rinsing and spitting, cups to collect urine samples, etc.), as older age groups tend to require more medical and dental visits than younger persons.

## Study Coverage

This industry study, **World Cups & Lids**, presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by cup and lid product, material, market, world region, and for 18 major countries. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles 44 industry competitors such as Dart Container, Georgia-Pacific, and Reynolds Group.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### Australia: Cup & Lid Markets

Foodservice represents the largest cup and lid market in Australia, accounting for 35% of total demand in 2012. The country's population, and eating and drinking away from home, are a part of the Australian lifestyle. In particular, consumers will see above average gains, as these venues offer lower prices than full service venues. Significant demand for disposable cups and lids, such as those used in shops.

Demand for cups and lids in food and beverage packaging applications will continue to experience above average growth. This trend is toward highly packaged convenient foods and a significant rebound in the country's food and beverage output. Good opportunities will exist for plastic packaging cups, boosted by gains in plastic food packaging (over glass and metal packaging). Furthermore, environmental concerns and regulations will continue to influence Australia's food and beverage packaging industry. In particular, the country's National Packaging Covenant is designed to minimize the environmental impact from the disposal of used packaging, conserve resources through better design and production processes, and facilitate the reuse and recycling of used packaging materials. The Covenant includes several recycling and waste minimization targets, such as increasing recycling rates and ensuring there is no increase in the level of packaging going to landfills. Such initiatives will continue to influence the materials used in food and beverage packaging, including cups and lids.

Cup and lid demand in retail and other markets will see above average growth, due to market maturity. Still, consumer interest in eco-friendly products will boost demand for more expensive, sustainable cups, such as those with a plant-based plastic lining. In addition, the aging of the population will support gains in medical and

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TABLE VI-3

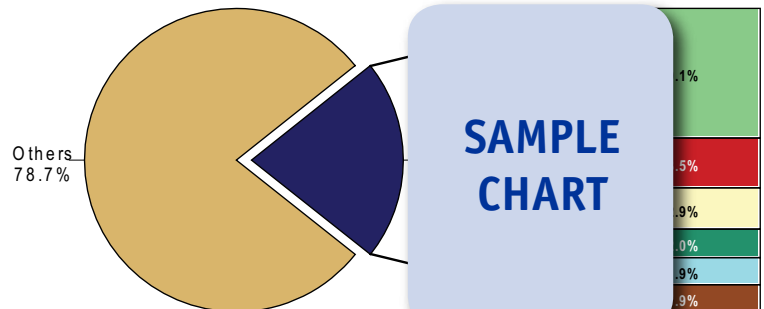
AUSTRALIA: CUP & LID DEMAND  
(million US dollars)

Item	2002	2007	2012	2017	2022
Population (mil persons)	21.1	21.5	21.9	22.3	22.7
\$ GDP/capita	30,000	35,000	40,000	45,000	50,000
Gross Domestic Product (bil 2011 US\$)	630	700	770	840	910
Personal Consumption Exp (bil 2011 US\$)	420	480	540	600	660
Food & Beverage MVA (bil 2011 US\$)	120	140	160	180	200
Foodservice Revenues (bil US\$)	100	120	140	160	180
Cup & Lid Demand					
Cups:					
Drinking Cups					
Other Cups					
Lids					
% Australia					
Asia/Pacific Cup & Lid Demand					

SAMPLE  
TABLE

CHART VIII-1

WORLD CUP & LID MARKET SHARE BY COMPANY  
(\$20.3 billion, 2012)



SAMPLE  
CHART

## Sample Profile, Table & Forecast

**TABLE VI-4**  
**AUSTRALIA: CUP & LID DEMAND BY MARKET**  
 (million US dollars)

Item	2002	2007	2012	2017	2022
Population (mil persons)					
\$ cups & lids/capita					
Cup & Lid Demand					
Foodservice					
Food & Beverage Packaging					
Retail & Other Markets					

**SAMPLE  
 TABLE**

**COMPANY PROFILES**

**Detmold Packaging Group**  
 45 Chief Street  
 Brompton, South Australia  
 61-8-8348-320  
 http://www.detmold.com.au

Annual Sales:  
 Employment:  
 Key Products: cups, plastic lids

Detmold Packaging is a converter of paper- and board-based packaging products. The privately held company operates through three segments: Detpak, Detmold Consumer Goods Packaging, and Paper-Pak.

The Company participates in the world cup and lid industry through the Detpak segment, which comprises the activities of the Detpak subsidiary (Australia). Detpak manufactures and markets food-service disposables for quick service restaurant and other foodservice applications. Among these products are paper hot and cold beverage cups, food cups, and plastic lids.

Detpak's paper hot beverage cups include RIPPLE-WRAP types, which feature a corrugated outer layer for enhanced heat retention and hand comfort. Other products include single wall hot cups, and REBBIT compostable paper hot cups, which are offered in single wall or RIPPLE-WRAP styles. The company makes black or white plastic lids for its hot cups in standard, button, and spout configurations. Paper cold beverage cups from Detpak are available in sizes between 9 and 24 ounces, with polyethylene linings and optional custom printing.

**SAMPLE  
 PROFILE**

“Through 2017, aggregate cup and lid demand in Australia is forecast to grow at a rate of 3.5% per year. To the extent that the rate of growth will be below the regional average, it will surpass that of other developed areas, such as Western Europe and Japan. Interest in environmentally friendly products will fuel demand for recyclable and/or compostable cups and lids, ...”

**SAMPLE QUOTE**

--Section VI, pg. 148

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**OTHER STUDIES**

**World Food Containers**

World demand for food containers is forecast to rise 4.5 percent annually to \$139 billion in 2017. While the US remains by far the world's largest user of food containers, the most significant growth will occur in India and China. Bags and pouches will remain the largest category based on their light weight, portability and convenience. This study analyzes the \$111.4 billion world food container industry, with forecasts for 2017 and 2022 by product, market, world region, and for 22 countries. The study also evaluates company market share and profiles industry players.

#3124 ..... February 2014 ..... \$6100

**Active & Intelligent Packaging**

US active and intelligent packaging demand is forecast to increase 8.0 percent annually to \$3.5 billion in 2017. Intelligent packaging will record double digit annual gains, led by time-temperature indicator labels. Gas scavengers, susceptor packaging and self-venting packaging will be among the fastest growing active packaging types. This study analyzes the \$2.4 billion US active and intelligent packaging industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3117 ..... January 2014 ..... \$5100

**World Packaging Machinery**

Growth in worldwide demand for packaging machinery is expected to climb at a 4.6 percent annual pace through 2017 to \$41.8 billion. Machines used in the packaging of chemicals, pharmaceuticals, and personal care products will post the most rapid gains. The Asia/Pacific region will remain the fastest growing market. This study analyzes the \$33.4 billion world packaging machinery industry, with forecasts for 2017 and 2022 by product, market, world region, and for 31 countries. The study also evaluates company market share and profiles industry players.

#3063 ..... September 2013 ..... \$6200

**Food Containers: Rigid & Flexible**

US food container demand will rise 2.9 percent per year to \$27.6 billion in 2017. The plastic container, and bag and pouch segments will grow the fastest based on further inroads into paperboard, metal, and glass containers. The best market prospects include snack foods, sauces and condiments, dairy products, and meat and related products. This study analyzes the \$24 billion US rigid and flexible food container industry, with forecasts for 2017 and 2022 by type and market. The study also evaluates company market share and profiles industry players.

#3013 ..... April 2013 ..... \$5300

**World Caps & Closures**

World demand for caps and closures is projected to rise 5.3 percent per year to \$46 billion in 2016, led by developing regions. Beverages will remain the dominant market, while opportunities in the food market will benefit from dispensing and other value-added closures such as non-drip flip top pourer caps. This study analyzes the \$35.8 billion world cap and closure industry, with forecasts for 2016 and 2021 by material, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.

#2986 ..... February 2013 ..... \$6300

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