

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

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Foodservice Disposables

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

Study #3081 | September 2013 | \$5300 | 341 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

| | |
|--|----|
| General | 4 |
| Macroeconomic Outlook | 6 |
| Demographic Trends | 9 |
| Consumer Income & Spending | 13 |
| Retail Sales Outlook | 16 |
| Consumer Food Expenditure Trends ... | 20 |
| Foodservice Industry Outlook..... | 23 |
| Eating & Drinking Places | 25 |
| Limited Service Restaurants | 26 |
| Quick Service Restaurants | 27 |
| Fast Casual Restaurants | 29 |
| Coffee & Snack Shops | 30 |
| Buffets & Cafeterias | 30 |
| Other Eating & Drinking Places ... | 31 |
| Other Foodservice Establishments | 33 |
| Raw Materials | 36 |
| Paper & Paperboard | 37 |
| Plastic..... | 40 |
| Aluminum | 44 |
| Price Trends | 44 |
| Environmental Issues..... | 48 |
| Degradable Materials | 53 |
| Regulatory Issues..... | 56 |
| International Activity/Foreign Trade . | 58 |

PRODUCTS

| | |
|-----------------------------------|----|
| General | 62 |
| Packaging | 66 |
| Containers | 70 |
| Paperboard Foodservice | |
| Boxes & Cartons | 72 |
| Materials | 76 |
| Producers | 78 |
| Clamshells | 78 |
| Foam Clamshells | 80 |
| Rigid Plastic Clamshells | 81 |
| Other Clamshells | 83 |
| Producers | 84 |
| Other Foodservice Containers..... | 86 |
| Paper Cups, Buckets, & Pails.... | 88 |
| Aluminum Foil Containers | 90 |
| Foam Containers | 91 |
| All Other | 92 |

| | |
|----------------------------------|-----|
| Lids & Domes | 96 |
| Cup Lids..... | 97 |
| Other Lids | 100 |
| Producers | 101 |
| Wraps..... | 102 |
| Bags | 106 |
| Product Types | 107 |
| Producers | 110 |
| Other Packaging..... | 111 |
| Serviceware..... | 114 |
| Cups..... | 117 |
| Beverage Cups | 119 |
| Paper..... | 124 |
| Plastic | 126 |
| Foam | 128 |
| Producers | 130 |
| Portion Cups..... | 134 |
| Dinnerware..... | 137 |
| Product Types | 138 |
| Producers | 142 |
| Utensils | 143 |
| Cutlery..... | 145 |
| Straws & Stirrers | 146 |
| Producers | 147 |
| Other Serviceware..... | 148 |
| Trays & Carriers | 150 |
| All Other Serviceware | 152 |
| Napkins & Other Disposables..... | 154 |
| Napkins | 155 |
| Moist Towelettes | 158 |
| All Other..... | 160 |

MARKETS

| | |
|-------------------------------------|-----|
| General | 163 |
| Eating & Drinking Places..... | 167 |
| Limited Service Restaurants | 169 |
| Quick Service Restaurants | 173 |
| Coffee & Snack Shops..... | 181 |
| Fast Casual Restaurants | 186 |
| Buffets & Cafeterias..... | 189 |
| Other Eating & Drinking Places..... | 190 |
| Retail & Vending Machines | 197 |
| Institutional | 204 |
| Lodging & Hospitality..... | 211 |
| Sports & Recreation..... | 214 |
| Other Markets..... | 217 |

INDUSTRY STRUCTURE

| | |
|----------------------------------|-----|
| General | 221 |
| Market Share | 225 |
| Acquisitions & Divestitures..... | 232 |
| Competitive Strategies..... | 237 |
| Marketing & Distribution | 240 |

COMPANY PROFILES

| | |
|---|-----|
| Airlite Plastics..... | 244 |
| Anchor Packaging | 245 |
| Bemis Company | 248 |
| Berry Plastics | 249 |
| Burrows Paper | 251 |
| Cascades Incorporated | 252 |
| D&W Fine Pack..... | 255 |
| Dart Container..... | 260 |
| Duro Bag Manufacturing..... | 266 |
| Fabri-Kal Corporation..... | 268 |
| Graphic Packaging..... | 270 |
| Hindalco Industries | 272 |
| Hoffmaster Group..... | 274 |
| Huhtamaki Oyj..... | 276 |
| Inline Plastics | 279 |
| International Paper | 281 |
| Kimberly-Clark Corporation | 284 |
| Koch Industries | 285 |
| Letica Corporation..... | 288 |
| Menasha Corporation | 289 |
| New WinCup Holdings | 291 |
| Packaging Dynamics | 293 |
| Pattison (Jim) Group | 296 |
| Placon Corporation..... | 299 |
| Reynolds Group..... | 301 |
| Rock-Tenn Company | 305 |
| Sabert Corporation | 309 |
| Sealed Air..... | 311 |
| Seda International Packaging..... | 313 |
| Sonoco Products | 314 |
| Southern Champion Tray..... | 316 |
| Stephen (Douglas) Plastics | 318 |
| Svenska Cellulosa..... | 320 |
| Tekni-Plex Incorporated | 321 |
| Waddington Group..... | 322 |
| Additional Companies in Foodservice Disposables..... | 327 |

List of Tables

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 Macroeconomic Indicators..... 9
 2 Population & Households..... 13
 3 Personal Consumption Expenditures..... 16
 4 Retail Sales 20
 5 Consumer Food Expenditures 22
 6 Foodservice Revenues by Establishment Type 25
 7 Limited Service Restaurant Revenues by Type 27
 8 Other Eating & Drinking Establishment Revenues by Type 33
 9 Other Foodservice Establishment Revenues by Type 36
 10 Raw Material Demand in Foodservice Disposables..... 37
 11 Selected Foodservice Disposables Prices 48

PRODUCTS

1 Foodservice Disposables Demand by Type 65
 2 Foodservice Disposable Packaging Demand by Type 69
 3 Foodservice Disposable Container Demand..... 72
 4 Paperboard Box & Carton Demand in Foodservice Applications..... 76
 5 Clamshell Container Demand in Foodservice Applications..... 80
 6 Other Foodservice Container Demand..... 87
 7 Foodservice Lid & Dome Demand. 97
 8 Foodservice Wrap Demand.....106
 9 Foodservice Bag Demand107
 10 Other Foodservice Packaging Demand.....114
 11 Serviceware Demand by Type116
 12 Foodservice Cup Demand by Type118

13 Beverage Cup Demand in Foodservice Applications.....122
 14 Foodservice Portion Cup Demand.....136
 15 Foodservice Dinnerware Demand138
 16 Foodservice Utensils Demand.....144
 17 Other Serviceware Demand149
 18 Napkins & Other Disposables Demand in Foodservice Applications155
 19 Napkin Demand in Foodservice Applications158
 20 Moist Towelette Demand in Foodservice Applications.....160
 21 All Other Foodservice Disposables Demand.....162

MARKETS

1 Foodservice Disposables Demand by Market166
 2 Eating & Drinking Places Market for Foodservice Disposables....169
 3 Limited Service Restaurant Market for Foodservice Disposables....173
 4 Quick Service Restaurant Market for Foodservice Disposables....174
 5 Coffee & Snack Shop Market for Foodservice Disposables....185
 6 Fast Casual Restaurant Market for Foodservice Disposables....188
 7 Buffet & Cafeteria Market for Foodservice Disposables.....189
 8 Other Eating & Drinking Places Market for Foodservice Disposables.....192
 9 Retail & Vending Machine Market for Foodservice Disposables....198
 10 Institutional Market for Foodservice Disposables.....206
 11 Lodging & Hospitality Market for Foodservice Disposables.....214
 12 Sports & Recreation Market for Foodservice Disposables.....217
 13 Other Markets for Foodservice Disposables220

INDUSTRY STRUCTURE

1 US Foodservice Disposables Sales by Company, 2012.....223
 2 Selected Acquisitions & Divestitures235

List of Charts

MARKET ENVIRONMENT

1 Degradable Foodservice Disposables Demand by Type, 2012..... 56

PRODUCTS

1 Foodservice Disposables Demand by Type, 2012 65
 2 Foodservice Disposable Packaging Demand by Type, 2012..... 70
 3 Serviceware Demand by Type, 2012117
 4 Foodservice Beverage Cup Demand by Material, 2012.....123

MARKETS

1 Foodservice Disposables Demand by Market, 2012167
 2 Quick Service Restaurant Market for Foodservice Disposables, 2012 175
 3 Coffee & Snack Shop Market for Foodservice Disposables, 2012 186
 4 Fast Casual Restaurant Market for Foodservice Disposables, 2012 188
 5 Other Eating & Drinking Places Market for Foodservice Disposables, 2012.....193
 6 Retail & Vending Machine Market for Foodservice Disposables, 2012.....199
 7 Institutional Market for Foodservice Disposables, 2012 207

INDUSTRY STRUCTURE

1 US Foodservice Disposables Market Share, 2012226

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Growth will be driven by increased purchases of disposables by foodservice establishments, reflecting an improved outlook for consumer spending, which will drive greater frequency of restaurant visits.

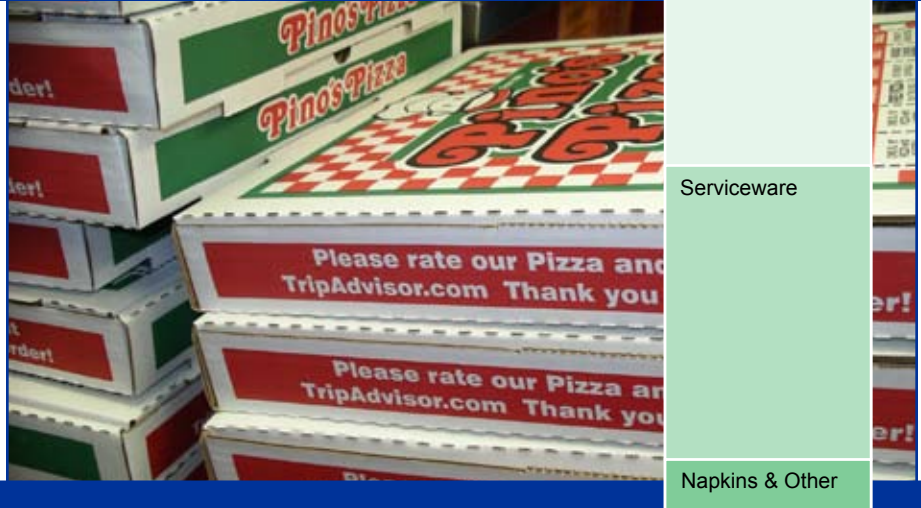
US demand to rise 3.6% annually through 2017

US demand for foodservice disposables is forecast to climb 3.6 percent per year to \$19.7 billion in 2017. Growth will be driven by increased purchases of disposables by foodservice establishments, reflecting an improved outlook for consumer spending, which will drive greater frequency of restaurant visits. Other factors driving growth of away-from-home food expenditures include rising interest in international cuisines, the growing popularity of snacking as an alternative to traditional meals, and expanded marketing activity in terms of discounts and loyalty reward programs. Overall growth in value will be held back by more moderate material price increases relative to the previous period.

Packaging products to be fastest growing types

Packaging products will achieve the fastest gains through 2017, with demand expected to outpace all other product categories and rise at an above average annual rate. Growth will be driven by revenue increases in the limited service segment, which accounts for over half of restaurant revenues but generates a much higher share of foodservice disposables demand. Expanding menu options in limited service restaurants, longer hours to incorporate breakfast and snacking beyond traditional meal times, and ongoing development of new restaurant concepts will also bode well for related packaging. The popularity of

US Foodservice Disposables Demand (\$19.7 billion, 2017)



takeout food from full service restaurants and widening prepared food options from retail stores will also fuel packaging demand. Products that maintain freshness and enhance the visual appeal of prepared foods will experience solid opportunities in the retail market.

Serviceware to be supported by favorable market trends

Demand for serviceware -- which includes cups, dinnerware, utensils, and other products -- is forecast to increase at the second fastest annual rate through 2017. Below average value gains will result from a moderation in material prices along with growing competition from Asian imports in some segments.

Nonetheless, prospects will be supported by a favorable outlook for limited service restaurant and retail establishment foodservice revenue growth, along with steady demand in the institutional and other markets. Also supporting gains will be the increased focus on gourmet coffee and specialty cold drinks by quick service restaurants and convenience stores and increased catering activity by restaurants. Robust advances are anticipated for degradable or compostable packaging and serviceware from a relatively small base, the result of the heightened prominence of environmental concerns, efforts by foodservice establishments to differentiate themselves, and growing local bans on foamed polystyrene disposables.

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Sample Text, Table & Chart

PRODUCTS

Packaging

Demand for foodservice disposable packaging is projected to reach \$10 billion in 2017. Growth will be driven by foodservice revenues relative to the total foodservice market. Additionally, gains will be fueled by the large limited service segment. Limited service restaurants account for slightly more than half of total foodservice revenues and generate about 80 percent of disposable packaging demand. Disposables are widely used for prepared foods consumed both on-site and off-site. Limited service restaurants are popular with consumers for their convenience and value. Growth increases are expected to be more moderate going forward, and will be similar to that of the 2007-2012 performance based on continued use of disposables by retailers for in-store prepared foods.

Other trends supporting packaging demand will include menu options in limited service restaurants and longer hours of operation 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, favorable opportunities for packaging will exist in the retail market as grocery and other food retailers expand their offerings of prepared foods.

Environmentally friendly packaging, including degradable and recycled content products, is expected to post robust gains from 2012 to 2022.

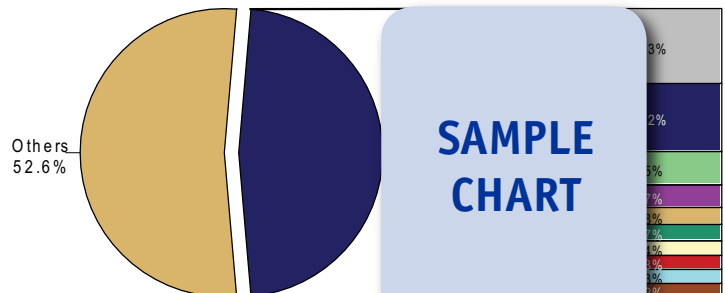
TABLE III-4

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

| Item | 2002 | 2007 | 2012 | 2017 | 2022 |
|---------------------------------------|------|------|------|------|------|
| Total Foodservice Container Demand | 20 | 25 | 30 | 35 | 40 |
| % boxes & cartons | 10 | 12 | 14 | 16 | 18 |
| Foodservice Box & Carton Demand | 10 | 13 | 16 | 19 | 22 |
| Pizza Boxes | 5 | 6 | 7 | 8 | 9 |
| French Fry Cartons | 5 | 6 | 7 | 8 | 9 |
| Corrugated Clamshells | 5 | 6 | 7 | 8 | 9 |
| Doughnut Boxes | 5 | 6 | 7 | 8 | 9 |
| Other | 5 | 6 | 7 | 8 | 9 |
| cents/unit | 8 | 9 | 10 | 11 | 12 |
| Foodservice Boxes/Cartons (mil units) | 10 | 13 | 16 | 19 | 22 |
| Pizza Boxes | 5 | 6 | 7 | 8 | 9 |
| French Fry Cartons | 5 | 6 | 7 | 8 | 9 |
| Corrugated Clamshells | 5 | 6 | 7 | 8 | 9 |
| Doughnut Boxes | 5 | 6 | 7 | 8 | 9 |
| Other | 5 | 6 | 7 | 8 | 9 |

CHART V-1

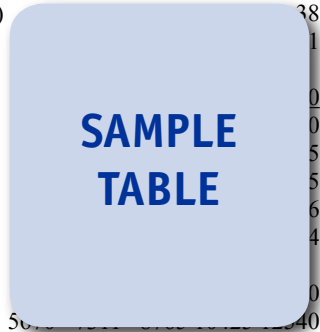
US FOODSERVICE DISPOSABLES MARKET SHARE, 2012
 (\$16.5 billion)



Sample Profile, Table & Forecast

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

| Item | 2002 | 2007 | 2012 | 2017 | 2022 |
|---------------------------------------|------|------|------|------|------|
| Coffee & Snack Shop Revenues (bil \$) | | | | | 38 |
| \$ disposables/000\$ revenue | | | | | 1 |
| Foodservice Disposables Demand | | | | | 2 |
| Beverage Cups & Lids | | | | | 0 |
| Dinnerware & Utensils | | | | | 5 |
| Boxes & Cartons | | | | | 5 |
| Clamshells & Other Containers | | | | | 6 |
| Other | | | | | 4 |
| % coffee & snack shop | | | | | 0 |
| Limited Service Disposables Demand | 5 | | | | 40 |



COMPANY PROFILES

Fabri-Kal Corporation
 600 Plastics Place
 Kalamazoo, MI 49001
 269-385-5050
 http://www.f-k.com

Annual Sales:
 Employment:

Key Products: nk cups, and
corresponding

SAMPLE PROFILE

Fabri-Kal Corporation manufactures stock and custom thermoformed plastic packaging primarily for the foodservice market. The privately held company is among the largest plastic thermoformers in North America.

The Company participates in the US foodservice disposables industry through the manufacture of food containers, portion cups, drink cups, and corresponding lids composed of such materials as polyethylene terephthalate (PET), polystyrene, and polypropylene. Fabri-Kal also produces several foodservice items from INGENEO polylactic acid (PLA), a compostable plant-based polymer made by NatureWorks LLC (Minnetonka, Minnesota), a joint venture between Cargill Incorporated (Minneapolis, Minnesota) and PTT Global Chemical Company Limited (Thailand). These products are sold under the GREENWARE brand name.

Among Fabri-Kal's food containers are delicatessen types, which are sold through the ALUR, KAL-TAINER, and PRO-KAL product lines, as well as INDULGE dessert containers. ALUR containers are clear, round models composed of PET that incorporates a minimum of

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STUDY COVERAGE

Foodservice Disposables, a Freedonia industry study, provides historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for US demand by product and market. The study also examines key market environment factors, analyzes the industry structure, evaluates company market share and profiles 35 players in the US foodservice disposables industry.

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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

Beverage Containers

US demand for beverage containers will rise 1.7 percent annually through 2017 to 265 billion units, valued at \$29.1 billion. Unit gains will be driven by ongoing consumer preference for single-serving containers. Plastic containers will remain both the largest and fastest growing segment, driven by PET containers in the noncarbonated RTD beverage market. This study analyzes the 244 billion unit US beverage container industry, with forecasts for 2017 and 2022 by material and market. The study also evaluates company market share and profiles industry participants.

#3076 September 2013..... \$5100

World Corrugated Boxes

World corrugated box demand will rise 4.2 percent yearly to 234 billion square meters in 2017. The fastest growth will occur in developing areas, especially in the Asia/Pacific and Africa/Mideast regions. Food and beverages will remain the leading market while the nonfood nondurables segment will grow the fastest. This study analyzes the 190.7 billion square meter world box industry, with forecasts for 2017 and 2022 by raw material, market, world region and for 27 major countries. The study also evaluates company market share and profiles industry players.

#3042 July 2013..... \$6100

World Cups & Lids

World cup and lid demand will rise 5.0 percent per year to \$25.9 billion in 2017. The fastest gains will occur in developing regions, while demand in developed areas will be supported by the increasing use of costlier biodegradable and compostable products. Food and beverage packaging will be the fastest growing market. This study analyzes the \$20.3 billion world cup and lid industry, with forecasts for 2017 and 2022 by product, material, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry competitors.

#3012 June 2013 \$6100

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

About The Freedonia Group

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