



# TRENDS REPORT

2015 EXECUTIVE SUMMARY



**FOODSERVICE PACKAGING  
INSTITUTE®**

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## INTRODUCTION

Every year, the Foodservice Packaging Institute (FPI) conducts a survey to gather information about the latest trends in the industry. The seventh annual survey, sent in September 2015, asked members to share their opinions on the following trends:

- Foodservice packaging;
- Raw materials used to make foodservice packaging;
- Machinery used to convert foodservice packaging;
- Foodservice distribution; and
- Foodservice operations.

The surveys include responses from the entire value chain in North America, including:

- Raw material suppliers;
- Machinery suppliers;
- Converters;
- Foodservice distributors; and
- Foodservice operators.

The results of these surveys were compiled to create FPI's annual "Trends Report." The 20-page report contains two sections: the first lists direct comments and insights by industry players and the second compiles the data with additional insights from FPI staff. The report is available for all FPI members. What follows on page 3 are the highlights from the 2015 report. The full report may be purchased by non-members for \$250.

Please contact FPI's Natha Dempsey, [ndempsey@fpi.org](mailto:ndempsey@fpi.org), with any questions or to purchase the full report.

## EXECUTIVE SUMMARY

The more things change, the more they stay the same. That could be the motto for the Foodservice Packaging Institute's 2015 Trends Report, when considering this year's responses compared to previous years. While there are certainly a number of similarities, a few things jump out, such as overarching themes of sustainability and customization across supply chain.

Major trends include:

- **Packaging:** Environmentally friendly or sustainable packaging remains a long-term overall trend. Specifically, compostable packaging was mentioned in an overwhelming number of responses. Other trends include the shift to a more natural look through the use of “Kraft” paper over bleached paper to promote the belief that “brown is the new green.” Conversely, another trend of note includes an increase in graphics and color as operators recognize the opportunity to promote their brand on packaging.
- **Raw materials:** “Green” packaging is apparent in raw materials, as different resins and papers are trending based on both the real and perceived environmental advantages of those materials.
- **Machinery:** In the machinery used to manufacture foodservice packaging, the desire for highly automated machines that run faster, more efficiently and at lower costs continues — but with little innovation in the industry.
- **Distribution:** Consolidation remains a major trend in foodservice distribution (despite the halted merger of the two largest foodservice distributors), along with SKU rationalization and increased competition from small- and medium-sized distributors.
- **Operations:** In a continued effort to stand out and differentiate themselves from competitors, foodservice operators are increasingly choosing customized food and beverage items, as well as their associated packaging. Other major trends include increased breakfast business, “grab and go” items and smaller portion sizes that reflect the consumer snacking trend.

Finally, cost concerns were seen throughout the foodservice packaging supply chain. Volatility in raw material markets is having an impact, leading to some changes (particularly within the resins). Newer packaging options that have not reached economies of scale are struggling to compete with more traditional options. Machinery suppliers are increasingly looking to automation to lower costs and increase productivity. Smaller distributors are trying to determine how to compete. And operators are concerned about increased expenses in food and labor, while not ignoring other necessary costs like packaging.