



TRENDS REPORT

2025 EDITION



FOODSERVICE PACKAGING
INSTITUTE®

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INTRODUCTION

Every year, the Foodservice Packaging Institute (FPI) receives numerous requests from media, analysts, conference organizers and others for information on the latest trends in foodservice packaging. In response to these requests and to provide additional value to members, FPI has produced the 2025 “Trends Report,” now in its 17th year.

FPI sent the survey to members in September and October 2025 asking for their opinions on trends throughout the foodservice packaging supply chain, namely related to:

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

This report contains two sections, “According to FPI Members” and “According to FPI Staff.” The first section compiles member submissions to the survey. Please note that submissions were taken verbatim, with only minor edits. The second section provides the top trends in the foodservice packaging industry. These are based on FPI staff analysis of members’ submissions to this recent survey. FPI staff also considered the recent entries in FPI’s “Packaging Innovations and Insights” newsletter and other general industry observations.

All comments, reactions and suggestions for future editions are welcome. Please contact Ashley Elzinga, Director, Sustainability and Outreach, at aelzinga@fpi.org.

SECTION 1: ACCORDING TO FPI MEMBERS

Question: What trends are you seeing with foodservice packaging?

According to raw material and machinery suppliers...

- A lot of to go boxes out of molded fiber.
- A shift from cost-optimized packaging to value and sustainability-focused packaging.
- Desire for home compostability especially for cutlery, and more requests for more options for coating paper and board.
- Interest in minimizing how poly is used in certain applications.
- Moderate steady sales - Confusion over sustainability claims - Confusion regarding EPRs and associated PRO fees.
- Molded fiber is a big one now.
- More focus on packaging end of life - compostability, recyclability.
- Move to PP, higher clarity or clarity needs and expectations.
- Plastics to paper.
- Take and go containers.
- The legislative landscape for food service packaging is changing how food service packaging is made and used. Many state and local governments are banning or limiting single-use plastics, like EPS plates, certain types of plastic cups, and straws. Because of this, companies are looking for alternatives such as paper, molded fiber, and compostable materials to stay in compliance and meet customer expectations.
- The push for sustainable packaging that was very popular over the last couple of years seems to be waning recently. Since PE coated paper is getting certified as recyclable, the packaging companies can continue to run their equipment with the material they are used to and no one cares that the majority of that paper will never be recycled. Brands are still expecting the same shelf life that plastic provided and are not willing to compromise for a more sustainable package.
- Thermoformed molded fiber as a replacement for thermoformed plastic bowls, trays, and take-out containers.
- Transition to what is viewed to be more sustainable whether it really is or isn't, and some changes due to legislation.

According to converters...

- A significant number of consumers are on some kind of GLP-1 which is changing their eating habits - smaller/snack size portions, low fat, low sugar. Imports are still in the game putting pressure on price and margin.
- Bans: Continued legislative bans related to single use packaging.
- Brands are heavily increasing their ask and their requirements for very detailed specification data and that's only going to get worse as EPR continues to be implemented by states.
- Clear.
- Confusion on all laws across the state-to-state landscape.
- End-users are looking for visibility in sustainable packaging. Fiber is great, but they want visibility for the marketing factor. This lends me to believe that bioplastics will go up in popularity with proper testing at compost facilities and implementation.
- FS packaging manufacturers are cutting spend through layoffs and plant closures, and shift to OSVs.
- Further industry consolidation as large food service packaging manufacturers advance mergers and acquisitions in 2025 i.e., Novolex acquired Pactiv, Amcor acquired Berry Global, Georgia Pacific acquired Anchor Packaging, Handgards acquired Inno-Pak, etc.
- Generally static no growth, with regulation overlaying it creates a cloudy industry.
- Growing demand for recyclability and inclusion of post-consumer recycled content.
- Growth due to trade action in our material area (aluminum) and tariffs impacting imports.
- Growth of food seal film within packaging to reduce plastic content, prevalent in produce packaging.
- In states where EPR is being implemented, we are seeing a push towards molded fiber packaging since the fines are a fraction of those of plastic packaging. In states where EPR is not being implemented, we are seeing a push towards less expensive packaging.
- Increase regulations.
- Increased innovation in tamper proof to service the growing delivery sector; recycled materials; instructions (i.e., - microwavable, freezer safe, dishwasher safe); imported products.
- Increases in bans for foodservice packaging.
- Light weighting the substrate, moving away from paper to clear substrates to accentuate the product offering, more recycling.
- Meal bundle boxes - Eat right in the box on the go.
- More fiber-based products for single-use sit-down or to-go orders.
- More regulations required.
- More requests for alternatives to foam, alternatives to imports that face tariffs, products with PCR content.

- Moving towards biobased/biodegradable materials.
- Non-black plastic: Increase in black plastic alternative offerings (white, clear, natural).
- Not willing to pay for more expensive packaging.
- Ongoing market volatility (e.g., tariffs, legislation) is complicating business planning, with research groups reverting to COVID-era “good, better, best” scenario forecasting to navigate uncertainty.
- Overall increase in out-of-home food consumption, QSR, dining, Uber Eats.
- Paper and fiber: Rising as preferred solutions to plastic alternative.
- Performance and price are the most important factors in purchasing decisions driven by inflation and high food costs.
- Price pressures, customer demand for better food quality, legislative impacts from EPR and other packaging legislation, including microplastics coming up more frequently. Difficulty in complying with California labeling laws and keeping track of the variables for all the states that have passed EPR.
- Recyclable.
- Replacement of foam and MFPP.
- Requests for sustainable solutions.
- Strong departure from plastics.
- Sustainability continues to be important but less so than performance and price.
- Sustainability, SKU deductions, downsizing.
- Sustainable options, unique sizes and shapes, certifications are important, city and state foam bans, domestically made products.
- The consistent expectation for plastic to be removed.
- The first two state executions of EPR legislation have hit - not really feeling an impact yet on shifting packaging substrates. Obviously, the ever-growing focus on recyclability for foodservice packaging is still alive and well.
- The market for foam trays is shrinking as legislation is brought in to ban the product.
- Trying to reduce overall costs.
- USA Made to avoid tariffs.

According to operators and distributors...

- Aesthetic & consumer experience integration.
- Compostable materials, lightweighting, recycled content, strawless lids, label transparency.
- Fiber based options.

- Regulatory & policy pressure (with compliance becoming a driver): Extended Producer Responsibility (EPR) frameworks are being introduced in many markets, foodservice operators will increasingly need to comply with municipal/local mandates.
- Regulatory challenges.
- Reuse / refillable / returnable systems: Pilot models of reusable foodservice containers, some cities or states may incentivize or require reuse systems, which will push more operators to integrate those models.
- Smarter / active / intelligent packaging: packaging that does more than “hold food.”
- Sustainability: There’s rising adoption of biodegradable, compostable, or bio-based materials.
- We are experiencing an uptick in the number of states/areas that are passing legislation around packaging.

Question: What trends are you seeing with raw materials used for foodservice packaging?

According to raw material and machinery suppliers...

- A slow migration to water-based coatings from poly laminated or extruded substrates.
- Growth in unbleached, natural appearance for paperboard packaging.
- I am still seeing interest in paper-based food service packaging but there is still the argument that paper that touches food is landfill anyway so why move away from non-sustainable options that are used today.
- Increased use of post-consumer recycled material content in an effort to comply with the consumer demand for optimizing the circularity of a package.
- Lots of questions and concerns about microplastics and PFAS.
- Molded fiber expansion.
- Molded fiber is the clear winner and coatings that can help with water and hot oil.
- Plastics to paper.
- PP acceptance vs other polymers.
- Replacement of plastic with paper. Cost barrier of using recycled paper fiber versus virgin fiber, particularly eucalyptus.
- Rules that ban certain materials or require products to be compostable or recyclable are pushing raw materials into new and unfamiliar areas. Many companies are racing to develop barrier materials that

work well, can be recycled or composted, and are affordable. However, regulators often reject these new materials citing the same problems those materials were designed to fix (e.g., contamination).

- Some desire to move from PS to PP or PET and some investigation into NIR black.
- Sustainable materials.
- Water based coatings, brown fiber - compostability seems to be less important.

According to converters...

- Activists are pushing elected officials to include ingredients into EPR laws that will result in de-facto bans and deselection and ultimately result in industry harmonization of material choices.
- Bio-resins other than PLA.
- Bracing for potential seismic shifts in packaging material preferences driven by EPR laws and high fee schedules tied to weight and material type.
- Certified packaging is becoming a must (FSC / SFI etc).
- Chemically recycled PP, although chemically recycling is under duress.
- Compostable.
- Departure from plastics (EPS restrictions).
- Desire to move to sustainable materials. Fiber-based solutions growing.
- Downgrading board without losing functionality; still the pressure and focus on plastic free packaging or on product claims that can be made on the converted product based on the raw material.
- End-users of plastic recycled content developing in-house recycling operations to guarantee access to raw materials.
- EPR: Extended Producer Responsibility.
- I see clearer need to showcase food and beverage innovations.
- If plastics, must be 1, 2 or 5.
- Including PCR in packaging.
- Increased prices.
- Increased raw material pricing, additional volume from UK.
- Increasing (aluminum 60%).
- Manufacturers investing in sustainable material supply sources.
- More recycled content, reduce the over packaging content, more gaming options for promotions.
- Must be brandable.
- No major changes occurring this past year.
- Non-PE paper coatings.
- Paper for cost savings, plastic for brand enhancement.

- Plastics being called out along the value chain for microplastics. Price pressure for recycled material - low virgin resin creating economic headwinds for recyclers & reclaimers.
- Polypropylene, particularly clear.
- Price is fairly stable.
- Raw material costs have jumped, especially from Asia, but nothing crazy like we saw during the pandemic.
- Recycled paper fiber and the search for compostable barriers and sealing.
- Reduction in MFPP.
- rPET recycled content.
- Single substrate with no additives such as BPA or PFAS, products that meet APR design guidelines.
- Sustainable materials.
- Trending towards paper, bagasse/molded fiber, PLA, PP and PET Plastics.
- With the shift toward no PFAS, packaging manufacturers have been challenged to still provide a high performing product (hold out) with different material inputs.

According to operators and distributors...

- Bio-based polymers / bioplastics: Increasing adoption of plastics derived from renewable biomass, blends or hybrid materials: mixing biopolymers with conventional polymers to balance cost, performance, and biodegradability.
- Novel / emerging biomaterials: seaweed / algae-derived materials, mycelium / fungal composites, nanocellulose / cellulose nanofibers, protein-based or plant-protein films.
- Paper / fibers, “paperization,” and fiber-based substrates: A continued push to replace plastic (or plastic-coated) packaging with paper, molded fiber, or pulp-based substrates.
- We are hearing more about US produced items due to tariffs, and more about sustainable items due to state packaging legislations.

Question: What trends are you seeing with machinery that converts foodservice packaging?

According to raw material and machinery suppliers...

- Equipment capable of converting lighter weight basis weights for the paper-based market.
- Fiber thermoforming is gaining traction due to single use plastic negative attention.
- Focus on reliability and reducing downtime.

- More used equipment being sold as companies downsize.
- Not familiar with this segment of the market.
- Thermoforming and thin-wall injection molding.
- Water-based bio-polymer coatings as a replacement for plastic/wax coatings for foodservice wrap.

According to converters...

- Automation / Co-Bots that work with employees.
- Automation.
- Film technology: TETR resealable film, puncture resistant film, film seal on molded fiber.
- Flexibility is key - doing more without huge investment in new equipment.
- Focus on equipment that allows for quick changeovers; top seal market is growing (applicable more to home meal planning, HMR etc).
- Higher pricing.
- Higher speed & better graphics.
- Inconsequential.
- Increased demand and lead times in automation equipment.
- Lead times increasing; more machinery coming from China.
- Less being made, capital spend for new equipment is down.
- Lots of interest in fiber.
- More automation in packing the packaging.
- More automation; still a bit of a labor issue.
- Not much at the present.
- Nothing new or specific comes to mind.
- Parts are outrageously expensive and limited availability.
- Smaller footprints, more agile in changeover.
- Tariffs hitting the cost and planning for companies purchasing raw materials, supplies and equipment from overseas.
- Tooling cost.

According to operators and distributors...

[no submissions]

Question: What trends are you seeing within the foodservice distribution community?

According to raw material and machinery suppliers...

- Consolidation.
- Food service distributors are under pressure to balance sustainability with rising costs. Customers and regulators expect eco-friendly packaging like compostable or recyclable options, but inflation in fuel, labor, and raw materials makes it harder to manage margins. As a result, distributors are focusing on greener products while also finding efficiencies, such as lightweight packaging and optimized deliveries, to keep costs in check.
- Price is still the king so many sustainable options are pushed to the back due to costs.
- Technology advancements provide customers more choices than ever.
- We are a raw material manufacturer - No exposure to distribution.

According to converters...

- A disconnect between distributors and the other nodes of the foodservice packaging supply chain. Evident in the lack of dialogue between the distribution community and others on EPR legislation.
- Consolidation (Latest merger - ImperialDade with BradyPlus).
- Consolidation.
- Consolidation.
- Consolidation.
- Consolidations with large distributors growing larger.
- Continued consolidation and private labeling as well as on-shoring.
- Cutting back inventory, more just in time.
- E-commerce interaction with suppliers has now become table stakes and not a nice-to-have anymore. The appeal of the 'good enough' specs and performance along with a more attractive price has some distributors moving that way.
- Expansion of private label product lines and continued push to grow private label sales.
- Growth of ecommerce as a source for researching & purchasing disposable packaging.
- Imperial/Dade is still gobbling up smaller distributors here in Northern California which actually opens more doors for service based family owned distributors.
- Increase in damages due to staffing issues.
- Labor shortages, including drivers.
- LTO is not very dependable.
- Margins continue to erode.

- Merging! BradyPLUS and Imperial Dade along with PFG acquiring.
- More difficult to work with.
- Obvious consolidation of packaging companies with Imp Dade purchasing Brady plus. It seems as though many of the broadliners are trying to consolidate to one manufacturer to avoid multiple companies on like items.
- Pressure to reduce costing.
- The continuation of consolidation, direct purchasing from overseas suppliers.
- USA sourced (to avoid tariffs).

According to operators and distributors...

- We use the same distribution for packaging as we do for our food. Our DCs are involved with the state packaging legislation that is being passed.

Question: What trends are you seeing within the foodservice operator community?

According to raw material and machinery suppliers...

- A lot of the companies appear to be struggling a bit to maintain desired profitability.
- Balancing the higher cost of labor, value pricing, and picking higher profit ingredients in menu development.
- Food service operators are phasing out foam and problematic plastics to meet growing regulations and customer expectations. Many are frustrated by the patchwork of local regulations. In some areas, foam is banned, in others plastic straws are restricted, and operators often end up carrying multiple packaging SKUs just to stay compliant across locations. This creates added cost and complexity, even as they work toward more sustainable solutions.
- Heavy focus on efficiency, how to optimize packaging for fewer workers.
- Intense pushback on implementing anything that would raise packing costs, particularly the use of recycled fiber.
- Lots of chatter about getting involved in reuse systems, but the costs are concerningly high and systems are relying on "more plastic".
- Not familiar with this segment of the market.
- Skew optimization.
- We are a raw material manufacturer - No significant contact with operators. We do hear from operators that are looking into solutions, especially on the West Coast and Colorado.

According to converters...

- Changes to drive-thru models to increase speed, dedicated lanes for mobile order pickup.
- Confused.....Trying new things around food and beverage to see what brings consumers to the table.
- Consolidation of Food Service packaging at operators.
- Consumer cost pressures are minimizing "up-selling".
- Continued focus on dedicated pick-up areas, particularly for 3rd party delivery drivers.
- Customers are becoming just or more interested in quality of products and good customer service as they are pricing. Another benefit to being a smaller distributor with fewer layers to deal with. Customers want answers quickly, not waiting for the salesperson to communicate with the sales manager who communicates with purchasing etc.
- Dealing with higher cost and navigating certain bans in areas.
- Delivering dine-in quality of food in all off-premise occasions.
- Economic headwinds that include inflation, legislation (EPR), consumers being priced out of the market and lack of resources to tackle all of the major issues.
- Elevated costs are driving up menu prices, resulting in traffic shifting from restaurants to other segments (especially retail/supermarkets).
- Emphasis on value, cost cutting due to inflation.
- Focus on innovation as it pertains to sustainable packaging, packaging that preserves the integrity of the food, especially on delivery, more value meal offerings.
- Focus on reducing costs to manage inflation, including smaller portions.
- Inflation & Higher prices remain primary headwinds to overall consumer spending in the US.
- Interest in exploring reusable options.
- Looking for lowest cost options. "Sustainability" is the buzz word, however operators are "voting with their wallet".
- Looking for savings wherever they can get it and that is translating to more conversations on reusable items.
- Margins are shrinking. Operators challenged financially.
- More cost pressures such as EPR; increasing prices.
- More engaged in legislative requirements, especially PFAS.
- More robotics and tech savvy upgrades.
- Movement toward pacts to set sustainability goals (e.g., Plastics Pact).
- Off premise dining.
- Order through apps and technology for speed of service and labor reduction.

- Price, domestic sourcing, laws are too confusing to build into a business strategy.
- Supermarkets/c-Stores are focusing on packaging for ready-made meals and merchandising.
- The battle for traffic continues. Operators are focused on creating value to drive traffic i.e. limited time offers and unique menu items & flavors.
- To-go orders are still driving sales increases.
- Traffic growth is minimal.
- While consumers are still spending, they're seeking greater value—eating more meals at home, reducing dining frequency, and shifting traffic from QSRs to LSRs for better value.

According to operators and distributors...

- Adoption of automation, data & tech in operations.
- Collaboration & strategic partnerships.
- Delivery / off-premise / continue to expand.
- Extremely cost sensitive.
- Stronger focus on brand & customer experience (especially outside the dining room).
- We are struggling more to hit vendor production minimums that allow us to brand our packaging items.

Question: Any other trends you are seeing that you'd like to mention?

According to raw material and machinery suppliers...

- Across the food service industry, operators, distributors, and suppliers are spending significant time and energy trying to understand and comply with new Extended Producer Responsibility (EPR) laws. These rules vary by state, adding complexity as businesses work to harmonize their packaging choices with recycling and reporting requirements. At the same time, companies must ensure packaging still meets performance needs such as durability, food safety, and convenience, while managing costs. Balancing compliance, quality, and affordability has become a major focus for the entire supply chain.
- Circularity is no longer an introductory concept; it is becoming a holistic design principle that provides a practical and thoughtful approach to sustainability.
- Continued discussion of the feasibility/safety/recyclability of packaging that with food waste. Changes in industrial composting methods (shorter times, new technology) present a challenge for containers that have some type of oil/grease/water barrier.
- EPRs are now being seen as a real and inflationary cost.
- Functionally pushing to expand fit-for-use applications (example, long-cook microwavable).
- Just a great deal of confusion surrounding EPRs and associated fees.

- Many of the biopolymer players are not seeing the switch over from PE due to costs. This then delayed scaling up their plants and keeps costs high; this is a bad circular pattern that is difficult to then break.
- Packaging used to preimmunize the experience.
- While sustainability is still a key word, cost and performance remain the drivers.

According to converters...

- Better barrier options are needed that allow converters to still claim key environmental attributes (i.e., compostable, recyclable).
- Coffee retailers remain strong and I'm seeing more coffee cafes become more of a foody café.
- Customers are sourcing more from Europe.
- EPR fees creating undue burden on operators and consumers with no improvements or investments in circular/recycling infrastructure.
- It appears as though some companies are looking to get out of China as well as reduce the SKU's offered in PLA and CPLA as that raw material is starting to be banned in states and provinces of Canada.
- Legislation affecting the market much more significantly. EPR, tariffs, and trade actions are critical factors in the market.
- Microplastics is a topic that needs to be addressed from a content and policy front. It is the next PFAS issue and legislation is already starting to hit. The MAHA report and the review process for GRAS materials is a concern that keeps me up at night and worth monitoring.
- QSR/fast food traffic down considerably. More people eating at home.
- Self service kiosks have left the customer experience very cold.
- Tariffs and anti-dumping. Two big topics!

According to operators and distributors...

- Experience economy & premiumization: Guests value “experiences” — not just meals — which means packaging, unboxing, and digital touchpoints are part of the restaurant journey.
- Generational shifts in dining behavior: Gen Z and Gen Alpha are digital-native, sustainability-first consumers. They demand transparency, ethical sourcing, and eco-packaging, Boomers and Gen X prioritize value, convenience, and quality consistency. Operators must straddle both ends of the spectrum.
- I believe that restaurants could use more information about options for more sustainable packaging to ensure that we are in the best possible position if the state legislation around foodservice packaging continue to expand. Additionally, we could use more information about US sourced items to help us to avoid additional tariff-related costs.

- Personalization & customization at scale: Guests increasingly expect meals that fit their dietary, lifestyle, and cultural preferences.

SECTION 2: ACCORDING TO FPI STAFF

This year is brought to you by the letter “C”: confusion, consolidation, challenges, customization, convenience and cost.

The foodservice packaging industry is going through a rapid period of confusion and consolidation, with the increased complexity of higher costs and more customizations. Confusion with differing Extended Producer Responsibility (EPR) regulations being implemented in multiple states with unclear definitions and roles has been the largest pain point for FPI members. EPR has continued to dominate purchasing decisions. Operators are trying to shift their packaging portfolio to meet EPR requirements (or pay lower fees) but are having challenges due to various requirements in different states. There is no “one-size-fits-all” package. As we know, sustainability is no longer a nice-to-have but is being mandated by EPR and other legislative efforts. Gone are the days of aspirational commitments, because in some instances, if organizations don’t meet the requirements, companies will no longer be able to sell your products into their marketplace.

However, EPR is not the only pain point. Many pressures push and pull on our industry, such as cost from tariffs, inflation, providing good value for consumers, and the current landscape as many consumers choose to forego dining out altogether.

Consolidation of companies within our industry and the operator/distributor space through mergers and acquisitions, but also consolidation within some companies to have fewer SKUs on hand. While some may be trying to streamline, others want to provide unique customization products to operators to help provide “experiences” for consumers.

There have been significant mergers and acquisitions within the foodservice packaging industry and in the distributor and operator space in 2025, combining operations to expand product offerings and market presence. Similarly, the operators and distributors have seen a few notable consolidations, with distributors acquiring regional or specialized firms to increase coverage and improve service capabilities.

Rising costs, shifting tariffs and other economic pressures are shaping more value-based purchasing decisions. Cutting costs while still trying to achieve sustainability goals can sometimes come into conflict. On top of the already aforementioned EPR requirements, which, in some instances, are forcing manufacturers and operators

to spend more on materials and finished goods. With the implementation of tariffs earlier this year, there has been a positive shift to domestic manufacturing to avoid the extra costs.

Consumers are also looking to save a buck. Value meals and menus have made a comeback with the tightening of budgets, along with more consumers making food at home. But they still want and need convenience to streamline their busy lives. So, we see the rise of foodservice in the convenience and grocery sectors.

Convenience stores are ramping up foodservice operations and grocery stores are pivoting to meal kits and increasing their pre-made offerings.

Generational differences in purchasing are increasingly shaping the industry, with younger consumers prioritizing experiences and customization over traditional dining. In contrast, older generations may focus more on consistency and value. This shift is driving foodservice providers to adapt offerings and environments to meet the expectations of a more interactive customer base.

From the challenges of EPR to the pressures of rising costs and shifting consumer behaviors, the industry is being pushed and pulled in multiple directions. Sustainability mandates, economic pressures and generational shifts are reshaping how businesses operate and innovate. While confusion and complexity dominate the landscape, consolidation and customization offer opportunities for growth and differentiation. As we look ahead, the industry's ability to adapt to these "Cs" while embracing new trends will determine its success in delivering value, convenience and experiences to an ever-evolving consumer base.