



TRENDS REPORT

2025 EXECUTIVE SUMMARY



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.

The survey includes responses from the entire value chain in North America, including:

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

The results of the survey were compiled to create FPI’s “2025 Trends Report.” This year’s 16-page report contains two sections: a compilation of member submissions and the top trends based on FPI staff analysis of members’ submissions and other general industry observations. The report is available to all FPI members. Highlights from the 2025 Trends Report are included in this Executive Summary.

Please contact Ashley Elzinga, Director, Sustainability and Outreach, at aelzinga@fpi.org with any questions.

EXECUTIVE SUMMARY

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 the Extended Producer Responsibility (EPR) patchwork and unclear definitions has been the largest pain point for FPI members. But it is not the only pain point. Many pressures push and pull our industry, such as cost from tariffs, inflation, providing good value for consumers, and many consumers choosing 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.

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.

There have been significant mergers and acquisitions within our 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.

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.