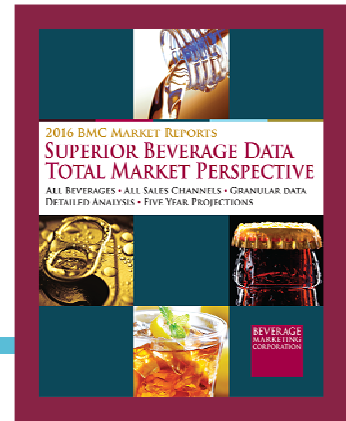


BEVERAGE PACKAGING IN THE U.S.

2016 EDITION (Published September 2016. Data through 2015. Market projections through 2020.) More than 400 pages, with extensive text analysis, graphs, charts and tables



This beverage packaging research report offers market insights as well as statistical breakouts by type and size (in units) for eleven beverage categories, making it the most comprehensive research report available. It covers beverage-packaging issues, trends and innovations by category and by beverage type. It also includes discussion of leading companies, their history and products.

FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO bmcreports.com

AVAILABLE FORMAT & PRICING



Direct
Download

\$4,995

To learn more, to place an advance order or to inquire about additional user licenses **call**: Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com

INSIDE:

REPORT OVERVIEW

A brief discussion of this report's key features. 2

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 5

SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. 14



HAVE
QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

BEVERAGE
MARKETING
CORPORATION

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

THE ANSWERS YOU NEED

You won't want to miss BMC's industry report and its insights on the ever-changing beverage packaging marketplace. As consumer environmental concerns grow and their need for convenience continues, industry ingenuity is at peak levels. Innovation abounds as packaging suppliers strive to develop new packaging formats and solutions to meet consumer demands. You'll find answers to your questions including:

- What are the latest developments in beverage packaging in the U.S. market?
- Which packaging segments and sizes grew in 2015, and which did not?
- How have the various packaging materials divided up the beverage packaging market share pie and what share shifts can be expected in the future? What trends will drive the changes?
- What are the unit volumes for each of the leading beverage types, including beer, bottled water, carbonated soft drinks, distilled spirits, ready-to-drink tea and coffee, energy drinks, fruit beverages, wine and sports beverages?
- What are the latest packaging innovations devised by industry leaders including cans, bottles, flexible packaging and plastic?
- What percentage of unit volume have tea pods claimed?
- What percentage of shelf-stable fruit drink units are sold in pouches?
- What are the growth prospects through 2020 - by beverage type and package type?

THIS REPORT FEATURES

Beverage Packaging in the U.S. offers the most comprehensive beverage packaging research available, providing a comprehensive overview of the U.S. beverage market from a packaging perspective. It features:

- A review of the evolution of beverage packaging from the simplest bottle structure to the shaped two-piece aluminum cans and stand-up pouch.
- Investigation of the strategic packaging design and its psychological effect on purchasing decisions.
- Comprehensive analysis of the types of packaging materials - metal, glass, plastic and paper - and their relative importance in the different beverage segments.
- A detailed discussion and data on packaging materials and sizes for each industry including: carbonated soft drinks, bottled water, beer, wine, distilled spirits, fruit beverages, sports and energy drinks and ready-to-drink coffee, tea and milk.
- An in-depth review of the beverage packaging industry suppliers and the leading packaging manufacturers, looking at their offerings, marketing strategy, production facilities and financial position. Companies covered include Alcoa, Amcor, Ball Corporation, Crown Holdings, DAK Americas, International Paper, Novelis, O-I, Plastipak Packaging, Reynolds Group Holdings and WestRock.
- In this comprehensive beverage packaging market report, Beverage Marketing also offers growth projections for the various packaging materials by beverage category and discussion of the trends that will drive the beverage packaging market through 2020.

Beverage Packaging in the U.S.

September 2016



RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

Copyright © 2016 Beverage Marketing Corporation of New York, 850 Third Avenue, New York, New York 10022, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS -----	i
DEFINITIONS USED IN THIS REPORT-----	x
INTRODUCTION -----	xii

Chapter

1. THE U.S. BEVERAGE PACKAGING MARKET

The National Beverage Packaging Market-----	1
• Overview-----	1
• Environmental Issues -----	5
• Historical Development -----	9
The Role of Packaging in Product Marketing-----	16
• Overview-----	16
• Form and Function -----	17
• Value-----	20
• Consumer Appeal -----	23
The National Beverage Packaging Market by Type -----	28
• Overview-----	28
Aluminum Cans	
• Overview-----	33
• By Beverage Type-----	34
Plastic Packaging	
• Overview-----	36
• By Beverage Type-----	37
Glass Packaging	
• Overview-----	40
• By Beverage Type-----	40
Paper Packaging	
• Overview-----	43
• By Beverage Type-----	44
Aseptic Packaging	
• Overview-----	46
Pouch Packaging	
• Overview-----	48
Exhibits	
1.1 U.S. Beverage Packaging Market Unit Volume by Category 2010 – 2015 -----	50
1.2 U.S. Beverage Packaging Market Share of Unit Volume by Category 2010 – 2015 -	51
1.3 U.S. Beverage Packaging Market Change in Unit Volume by Category 2011 – 2015	52
1.4 U.S. Beverage Packaging Market PET and Aluminum Recycling Rates 1998 – 2015	53
1.5 U.S. Beverage Packaging Market Unit Volume by Package Type 2010 – 2015 -----	54

TABLE OF CONTENTS

Chapter

1. THE U.S. BEVERAGE PACKAGING MARKET (cont'd)	
<i>Exhibits (cont'd)</i>	
1.6 U.S. Beverage Packaging Market Share of Unit Volume by Package Type 2010 – 2015 -----	55
1.7 U.S. Beverage Packaging Market Change in Unit Volume by Package Type 2011 – 2015 -----	56
1.8 Can Packaging Unit Volume by Beverage Type 2010 – 2015 -----	57
1.9 Can Packaging Share of Unit Volume by Beverage Type 2010 – 2015 -----	58
1.10 Can Packaging Change in Unit Volume by Beverage Type 2011 – 2015 -----	59
1.11 Plastic Packaging Unit Volume by Beverage Type 2010 – 2015 -----	60
1.12 Plastic Packaging Share of Unit Volume by Beverage Type 2010 – 2015 -----	61
1.13 Plastic Packaging Change in Unit Volume by Beverage Type 2011 – 2015 -----	62
1.14 Glass Packaging Unit Volume by Beverage Type 2010 – 2015 -----	63
1.15 Glass Packaging Share of Unit Volume by Beverage Type 2010 – 2015 -----	64
1.16 Glass Packaging Change in Unit Volume by Beverage Type 2011 – 2015 -----	65
1.17 Paper Packaging Unit Volume by Beverage Type 2010 – 2015 -----	66
1.18 Paper Packaging Share of Unit Volume by Beverage Type 2010 – 2015 -----	67
1.19 Paper Packaging Change in Unit Volume by Beverage Type 2011 – 2015 -----	68
2. U.S. CARBONATED SOFT DRINK PACKAGING	
Carbonated Soft Drink Packaging -----	69
• Overview-----	69
• Package Sizes -----	89
• Secondary Packaging -----	92
<i>Exhibits</i>	
2.20 Carbonated Soft Drink Packaging Volume 1975 – 2015 -----	94
2.21 Carbonated Soft Drink Packaging Share of Volume 1975 – 2015 -----	95
2.22 Carbonated Soft Drink Packaging Change in Volume 1985 – 2015-----	96
2.23 Carbonated Soft Drink Packaging Volume by Size and Type 2010 – 2015-----	97
2.24 Carbonated Soft Drink Packaging Share of Volume by Size and Type 2010 – 2015	98
2.25 Carbonated Soft Drink Packaging Change in Volume by Size and Type 2011 – 2015	99
2.26 Carbonated Soft Drink Sales in Supermarkets Shares by Secondary Package Type 2010 – 2015 -----	100
3. U.S. BEER PACKAGING	
Beer Packaging -----	101
• Overview-----	101
• Container Types -----	105
• Secondary Packaging -----	114

TABLE OF CONTENTS

Chapter

3. U.S. BEER PACKAGING (cont'd)***Exhibits***

3.27	Beer Packaging Volume by Container Type 1980 – 2015 -----	117
3.28	Beer Packaging Share by Container Type 1980 – 2015 -----	118
3.29	Beer Packaging Growth by Container Type 1981 – 2015 -----	119
3.30	Beer Packaging Estimated Dollar Shares by Secondary Package Type 2015 -----	120

4. U.S. BOTTLED WATER PACKAGING

Bottled Water Packaging -----	121
• Overview-----	121
• Domestic Sparkling Water -----	139
• Domestic Non-Sparkling Water-----	142

Exhibits

4.31	Bottled Water Packaging Unit Volume by Material 2010 – 2015-----	146
4.32	Bottled Water Packaging Share of Unit Volume by Material 2010 – 2015 -----	147
4.33	Bottled Water Packaging Change in Unit Volume by Material 2011 – 2015-----	148
4.34	Domestic Sparkling Water Unit Volume by Material and Size 2010 – 2015-----	149
4.35	Domestic Sparkling Water Share of Unit Volume by Material and Size 2010 – 2015	150
4.36	Domestic Sparkling Water Change in Unit Volume by Material and Size 2011 – 2015 -----	151
4.37	Domestic Non-Sparkling Water Packaging Volume by Material and Size 2010 – 2015 -----	152
4.38	Domestic Non-Sparkling Water Packaging Share of Unit Volume by Material and Size 2010 – 2015-----	153
4.39	Domestic Non-Sparkling Water Packaging Change in Unit Volume by Material and Size 2011 – 2015-----	154

5. U.S. WINE AND DISTILLED SPIRITS PACKAGING

Distilled Spirits Packaging -----	155
• Overview-----	155
• Package Sizes -----	158
Wine Packaging-----	160
• Overview-----	160
• Package Sizes -----	168

Exhibits

5.40	Distilled Spirits Packaging Unit Volume and Growth 1981 – 2015-----	169
5.41	Distilled Spirits Packaging Estimated Unit Volume by Size 2010 – 2015-----	170
5.42	Distilled Spirits Packaging Estimated Share of Unit Volume by Size 2010 – 2015---	171
5.43	Distilled Spirits Packaging Estimated Change in Unit Volume by Size 2011 – 2015	172
5.44	Distilled Spirits Packaging Estimated Glass vs. Plastic Volume 2015 -----	173
5.45	Distilled Spirits Packaging Estimated Glass vs. Plastic Share 2015-----	174

TABLE OF CONTENTS

Chapter

5. U.S. WINE AND DISTILLED SPIRITS PACKAGING (cont'd)

Exhibits (cont'd)

5.46 Domestic Wine Packaging Unit Volume and Growth 1979 – 2015----- 175
 5.47 Domestic Wine Packaging Estimated Unit Volume by Size 2010 – 2015----- 176
 5.48 Domestic Wine Packaging Estimated Share of Unit Volume by Size 2010 – 2015--- 177
 5.49 Domestic Wine Packaging Estimated Change in Unit Volume by Size 2011 – 2015- 178

6. U.S. FRUIT BEVERAGE PACKAGING

Fruit Beverage Packaging----- 179
 • Overview----- 179
 Frozen Concentrate Fruit Juice Packaging ----- 183
 • Overview----- 183
 Chilled, Ready-to-Serve Fruit Juice Packaging----- 185
 • Overview----- 185
 • Package Sizes ----- 186
 Shelf-Stable Fruit Juice Packaging ----- 189
 • Overview----- 189
 • Package Sizes ----- 189
 Shelf-Stable Fruit Drink Packaging----- 192
 • Overview----- 192
 • Package Sizes ----- 193
 Chilled, Ready-to-Serve Fruit Drink Packaging ----- 195
 • Overview----- 195
 Frozen Concentrate Fruit Drink Packaging ----- 196
 • Overview----- 196

Exhibits

6.50 Frozen Concentrate Fruit Juice Unit Volume by Size of Can 1991 – 2015 ----- 197
 6.51 Frozen Concentrate Fruit Juice Share of Unit Volume by Size of Can 1991 – 2015 - 198
 6.52 Frozen Concentrate Fruit Juice Change in Unit Volume by Size of Can
 1992 – 2015 ----- 199
 6.53 Chilled, Ready-to-Serve Fruit Juice Unit Volume by Container Size 2010 – 2015 --- 200
 6.54 Chilled, Ready-to-Serve Fruit Juice Share of Unit Volume by Container Size
 2010 – 2015 ----- 201
 6.55 Chilled, Ready-to-Serve Fruit Juice Change in Unit Volume by Container Size
 2011 – 2015 ----- 202
 6.56 Shelf-Stable Fruit Juice Unit Volume by Container Size 2010 – 2015 ----- 203
 6.57 Shelf-Stable Fruit Juice Share of Unit Volume by Container Size 2010 – 2015----- 204
 6.58 Shelf-Stable Fruit Juice Change in Unit Volume by Container Size 2011 – 2015 ---- 205
 6.59 Shelf-Stable Fruit Drinks Unit Volume by Container Size 2010 – 2015 ----- 206
 6.60 Shelf-Stable Fruit Drinks Share of Unit Volume by Container Size 2010 – 2015 ---- 207
 6.61 Shelf-Stable Fruit Drinks Change in Unit Volume by Container Size 2011 – 2015 -- 208
 6.62 Chilled, Ready-to-Serve Fruit Drinks Unit Volume by Container Type 2010 – 2015 209

TABLE OF CONTENTS

Chapter

6. U.S. FRUIT BEVERAGE PACKAGING (cont'd)	
<i>Exhibits (cont'd)</i>	
6.63 Chilled, Ready-to-Serve Fruit Drinks Share of Unit Volume by Container Type 2010 – 2015 -----	210
6.64 Chilled, Ready-to-Serve Fruit Drinks Change in Unit Volume by Container Type 2011 – 2015 -----	211
6.65 Frozen Concentrate Fruit Drinks Unit Volume by Size of Can 1991 – 2015 -----	212
6.66 Frozen Concentrate Fruit Drinks Share of Unit Volume by Size of Can 1991 – 2015 -----	213
6.67 Frozen Concentrate Fruit Drinks Change in Unit Volume by Size of Can 1992 – 2015 -----	214
7. U.S. READY-TO-DRINK COFFEE PACKAGING	
RTD Coffee Packaging-----	215
• Overview-----	215
<i>Exhibits</i>	
7.68 RTD Coffee Packaging Unit Volume by Type 1993 – 2015 -----	226
7.69 RTD Coffee Packaging Share of Unit Volume by Type 1993 – 2015 -----	227
7.70 RTD Coffee Packaging Change in Unit Volume by Type 1994 – 2015 -----	228
8. U.S. TEA PACKAGING	
Tea Packaging -----	229
• Overview-----	229
• Ready-to-Drink Tea Packaging -----	235
<i>Exhibits</i>	
8.71 Tea Packaging Unit Volume by Type 2010 – 2015 -----	239
8.72 Tea Packaging Share of Unit Volume by Type 2010 – 2015 -----	240
8.73 Tea Packaging Change in Unit Volume by Type 2011 – 2015 -----	241
8.74 Ready-to-Drink Tea Packaging Volume by Size and Type 2010 – 2015-----	242
8.75 Ready-to-Drink Tea Packaging Share of Unit Volume by Size and Type 2010 – 2015 -----	243
8.76 Ready-to-Drink Tea Packaging Change in Unit Volume by Size and Type 2011 – 2015 -----	244
9. U.S. MILK PACKAGING	
Milk Packaging-----	245
• Overview-----	245
<i>Exhibits</i>	
9.77 Milk Packaging Unit Volume by Type 2010 – 2015 -----	254
9.78 Milk Packaging Share of Unit Volume by Type 2010 – 2015 -----	255
9.79 Milk Packaging Change in Unit Volume by Type 2011 – 2015 -----	256

Beverage Packaging in the U.S.
TABLE OF CONTENTS

Chapter

10. U.S. SPORTS AND ENERGY BEVERAGE PACKAGING

Sports Beverage Packaging-----	257
• Overview-----	257
• Package Sizes -----	268
Energy Drink Packaging-----	269
• Overview-----	269
• Package Sizes -----	273

Exhibits

10.80 Sports Beverage Packaging Unit Volume by Size 2010 – 2015-----	283
10.81 Sports Beverage Packaging Share of Unit Volume by Size 2010 – 2015-----	284
10.82 Sports Beverage Packaging Change in Unit Volume by Size 2011 – 2015-----	285
10.83 Energy Drink Packaging Unit Volume by Size 1997 – 2015-----	286
10.84 Energy Drink Packaging Share of Unit Volume by Size 1997 – 2015-----	287
10.85 Energy Drink Packaging Change in Unit Volume by Size 1998 – 2015-----	288

11. THE LEADING BEVERAGE PACKAGING COMPANIES

Beverage Package Manufacturing -----	289
• Overview-----	289

ALCOA

• Overview-----	300
• History -----	304
• Products and Services -----	307
• Financial -----	309

AMCOR

• Overview-----	311
• History -----	315
• Products and Services -----	316
• Financial -----	321

BALL CORPORATION

• Overview-----	322
• History -----	326
• Products and Services -----	330
• Financial -----	341

CROWN HOLDINGS, INC.

• Overview-----	343
• History -----	345
• Products and Services -----	347
• Financial -----	351

Beverage Packaging in the U.S.
TABLE OF CONTENTS

Chapter

11. THE LEADING BEVERAGE PACKAGING COMPANIES (cont'd)

DAK AMERICAS

- Overview----- 353
- History ----- 353
- Products and Services ----- 354
- Financial ----- 356

INTERNATIONAL PAPER

- Overview----- 357
- History ----- 358
- Products and Services ----- 361
- Financial ----- 363

MOSSI & GHISOLFI GROUP

- Overview----- 364
- History ----- 367
- Products and Services ----- 367
- Financial ----- 368

NOVELIS

- Overview----- 369
- History ----- 369
- Products and Services ----- 372
- Financial ----- 373

O-I

- Overview----- 375
- History ----- 377
- Products and Services ----- 380
- Financial ----- 383

PLASTIPAK PACKAGING INC.

- Overview----- 384
- History ----- 384
- Products and Services ----- 385
- Financial ----- 386

REYNOLDS GROUP HOLDINGS

- Overview----- 387
- History ----- 388
- Products and Services ----- 390
- Financial ----- 393

WESTROCK

- Overview----- 394
- History ----- 394
- Products and Services ----- 395
- Financial ----- 396

TABLE OF CONTENTS

Chapter

12. THE PROJECTED U.S. BEVERAGE PACKAGING MARKET

The Projected National Beverage Packaging Market	397
• Overview.....	397
• Unit Volume	402
• The Cost Environment	403
• The Technology Environment.....	404
The Projected Beverage Packaging Market by Type.....	405
• Cans	405
• Plastic.....	406
• Glass	407
• Paper.....	408
The Projected Beverage Packaging Market by Category	410
• Overview.....	410

Exhibits

12.86 Projected Beverage Packaging Market Unit Volume by Material Type 2015 – 2020	412
12.87 Projected Beverage Packaging Market Share of Unit Volume by Material Type 2015 – 2020	413
12.88 Projected Beverage Packaging Market Compound Annual Growth by Material Type 2015 – 2020	414
12.89 Projected Can Packaging Unit Volume by Beverage Type 2015 – 2020	415
12.90 Projected Can Packaging Share of Unit Volume by Beverage Type 2015 – 2020----	416
12.91 Projected Can Packaging Compound Annual Growth by Beverage Type 2015 – 2020	417
12.92 Projected Plastic Packaging Unit Volume by Beverage Type 2015 – 2020	418
12.93 Projected Plastic Packaging Share of Unit Volume by Beverage Type 2015 – 2020	419
12.94 Projected Plastic Packaging Compound Annual Growth by Beverage Type 2015 – 2020	420
12.95 Projected Glass Packaging Unit Volume by Beverage Type 2015 – 2020	421
12.96 Projected Glass Packaging Share of Unit Volume by Beverage Type 2015 – 2020 --	422
12.97 Projected Glass Packaging Compound Annual Growth by Beverage Type 2015 – 2020	423
12.98 Projected Paper Packaging Unit Volume by Beverage Type 2015 – 2020	424
12.99 Projected Paper Packaging Share of Unit Volume by Beverage Type 2015 – 2020--	425
12.100 Projected Paper Packaging Compound Annual Growth by Beverage Type 2015 – 2020	426
12.101 Projected Beverage Packaging Market Unit Volume by Beverage Type 2015 – 2020	427
12.102 Projected Beverage Packaging Market Share of Unit Volume by Beverage Type 2015 – 2020	428
12.103 Projected Beverage Packaging Market Compound Annual Growth by Beverage Type 2015 – 2020	429

TABLE OF CONTENTS

Appendix

Conversion Formulas----- 430

A complex interaction of package aesthetics and function makes the sale. This means beverage makers must consider the basics: package material, shape, and size, as well as label graphics and product visibility. Functional characteristics also are important including ease of handling, opening, reclosing and storing.

- Packaging material communicates positioning. For example, glass generally is thought of as upscale. Aluminum and paperboard are economical. Aluminum also is seen as environmentally friendly. Plastic often means portable, particularly in sizes of 24 ounces or less.
- Investing in a proprietary container often is worth the extra cost of the custom tooling because the uniqueness of the resulting silhouette can provide brand recognition at a distance, sometimes even by touch.
- Another attribute, color, frequently is used to identify product categories, brands and flavors. Want a berry flavor? Look for purple or maroon. Need to quickly find your favorite flavor in a multi-flavor line? Check for color-coded labels and/or caps.
- Product visibility also can be an important sales cue, hence the growing use of clear, pressure-sensitive labels, which provide a “no-label” look and showcase the product’s color, or in the case of water, vodka or gin, its clarity. The opposite extreme is popular too, where the product is completely masked by full-body shrink sleeves vividly printed with head-turning graphics.
- Other sensory input, sound, smell, touch also can provide distinguishing features and quick brand recognition.

Interactive qualities should not be overlooked.

- A novel package that amuses the consumer captures his/her attention for a longer period of time than the expected format and fosters brand recognition. One example is the Snapple cap, which has many “Real Facts” printed on the inside to provide a little fun and free trivia while drinking bottled tea.
- Other examples include thermochromic labels, which change color at a certain temperature, and audio-chip-equipped bottles, which play a tune when picked up.
- In May 2014, restaurant chain Chipotle started offering drink cups printed with essays and stories by such notable authors as Toni Morrison, Malcolm Gladwell and George Saunders. Although this novelty is currently limited to Chipotle’s paper cups, it could certainly be transferred to commercial beverage containers, especially larger single-serve packages like 24-ounce aluminum cans or 22-ounce “bomber” bottles.
- In summer 2015, Anheuser-Busch used digital press technology so that 31 different designs could be modified by algorithm to create 31 million different patterns for limited edition Bud Light cans produced for a music festival.

CHILLED, READY-TO-SERVE FRUIT DRINKS
CHANGE IN UNIT VOLUME BY CONTAINER TYPE (r)
2011 – 2015

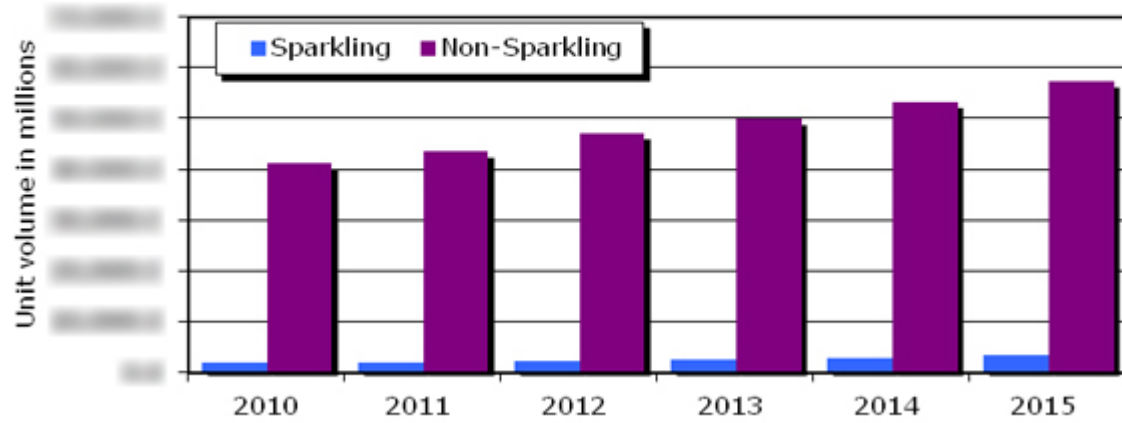
Type	2010/11	2011/12	2012/13	2013/14	2014/15
Glass					
16 fl. oz.	100%	100%	100%	100%	100%
Subtotal	100%	100%	100%	100%	100%
PET Plastic					
128 fl. oz.	100%	100%	100%	100%	100%
64 fl. oz.	100%	100%	100%	100%	100%
32 fl. oz.	100%	100%	100%	100%	100%
Other (16 oz.)	100%	100%	100%	100%	100%
Subtotal	100%	100%	100%	100%	100%
Paper					
64 fl. oz.	100%	100%	100%	100%	100%
32 fl. oz.	100%	100%	100%	100%	100%
Other (14 oz.)	100%	100%	100%	100%	100%
Subtotal	100%	100%	100%	100%	100%
TOTAL	100%	100%	100%	100%	100%

(r) Revised

Source: Beverage Marketing Corporation

NON-SPARKLING CLEARLY PREFERRED TO SPARKLING

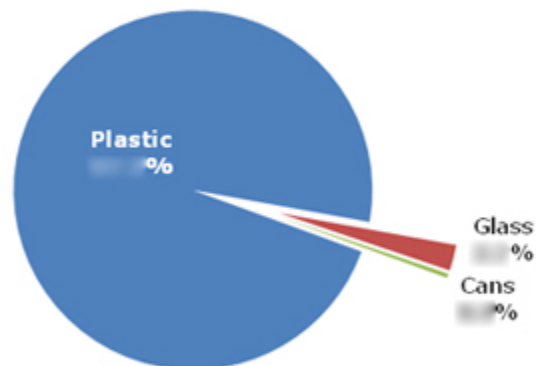
Sparkling vs. non-sparkling unit volume, 2010 - 2015



Source: Beverage Marketing Corporation

PLASTIC CLEARLY PREFERRED TO OTHER PACKAGES FOR WATER

Bottled water packaging by type, 2015



Source: Beverage Marketing Corporation