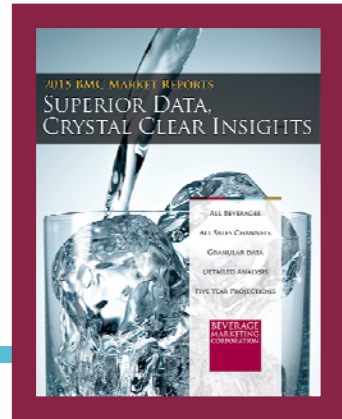


PRIVATE LABEL BEVERAGES & CONTRACT PACKING IN THE U.S.

2015 EDITION (Published October 2015. Data through 2014.)

More than 400 pages, with extensive text analysis, graphs, charts, more than 40 tables and more than 170 company profiles.



This report offers insight on private label beverage production, quantifies the private label market, sheds light on issues related to contract packing and discusses the trends affecting the private label and contract packing markets. It includes an extensive directory of contract packers by product, process and production capabilities.

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

Private Label Beverages and Contract Packing in the U.S. is suitable for those seeking a comprehensive understanding of the market for private label products and contract packing, those seeking a contract packer for their beverage product or anyone requiring a better understanding of the specific processing capabilities of contract bottling operations.

- What are the latest trends in the private label industry?
- Which categories have the most developed private label business?
- Are private label or branded beverage products growing faster?
- What private label categories are growing the fastest?
- What are the pricing trends in contract packing?
- Which contract packers have the right product and processing capabilities for my brand?

THIS REPORT FEATURES

Private Label Beverages and Contract Packing in the U.S. features a comprehensive analysis of the market for private label products as well as a look at the behind the scenes issues involved in contract bottling. Performance of private label beverages is discussed including the factors driving their performance. Contract packing trends and agreements are addressed. Additionally, the report features a directory of contract packers which serves as a resource for those in need of contract packing services or those who act as suppliers to the contract packing industry. This report includes:

- Historical and current data on the overall private label category with specific detail on the private label market for beverages
- An overview of the major suppliers of private label beverages in the U.S. including Advanced H2O, Cott Corporation, Dean Foods, Louis Dreyfus Citrus, Niagara Bottling and others
- Trends in contract packing by beverage category and a discussion of key issues
- Average pricing of contract packing for conversion-only as well as full-product contracts and full-product cost makeup and contract packing contract issues. Includes a sample contract
- Directory of contract packers featuring contact information, product and processing capabilities, # of hot and cold fill lines, label specifications, capping capabilities and more
- Contract fillers' product production capabilities across a broad range of beverage categories including carbonated soft drinks, dairy, beer, bottled water, wine and spirits based beverages, nutritional beverages, cocktail mixes, frozen concentrates, every drinks, energy shots, enhanced waters, fruit beverages and more
- Indication of contract fillers ability to address various processing requirements including hot fill, cold fill, aseptic, HPP, HYPA, heat sealed, ambient and carbonation, cross referenced by capabilities for filling various packaging types including PET, HDPE, paperboard, can, aseptic, glass, pouch, polypropylene, aluminum, kegs etc.
- Indexed by location, product, process capabilities and more for easy access to packers meeting the right specifications

Private Label Beverages & Contract Packing in the U.S.

October 2015



RESEARCH • DATA • CONSULTING

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

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Bottled water is the fastest growing private label category in the beverage universe. The category has been one of the reigning stars of the beverage category in recent years, but the pace of growth of private label water has exceeded that of the total category. Bottled water has grown from an upstart to the second most popular beverage in the United States today.

- Growth has been immense since the early 1990s – double-digits in most years.
- In recent years, U.S. volume has been increasing more rapidly than dollar sales, but in both respects, the industry’s performance is unrivaled.
- During the depths of the recession in 2008 and 2009, the bottled water category stumbled. But it has since regained its growth – albeit at a slightly lesser rate than in pre-recessionary times.

The category owes much of its growth to the fact it is positioned as a healthy refreshment beverage. But significantly the category also serves as a tap-water replacement for consumers dissatisfied with the quality of what comes from their tap. The characteristics driving bottled water’s growth are clear.

- Many consumers recognize it to be healthy, safe and, in some instances, of superior purity to alternative sources of water.
- It’s a versatile product, suitable for consumption at any time of day and need not be kept cold (like soft drinks or juice) or warm (like coffee or tea).
- As far as ready-to-drink commercial beverages go, it’s relatively inexpensive, and with competitive pricing it is becoming increasingly affordable for consumers.
- Various packaging types, ranging from bulk to single-serve, facilitate a variety of uses. Consumers’ growing interest in healthy, low-calorie products that confer benefits above and beyond refreshment also contributes to the quintessential hydrating beverage’s performance in recent years.
- As concern about obesity grows more widespread and intense, bottled water’s calorie-free contents appear that much more attractive to consumers.

Exhibit 2.13

**U.S. CARBONATED SOFT DRINK MARKET
NATIONAL BRANDS VS. PRIVATE LABEL
GROWTH
1994 – 2014**

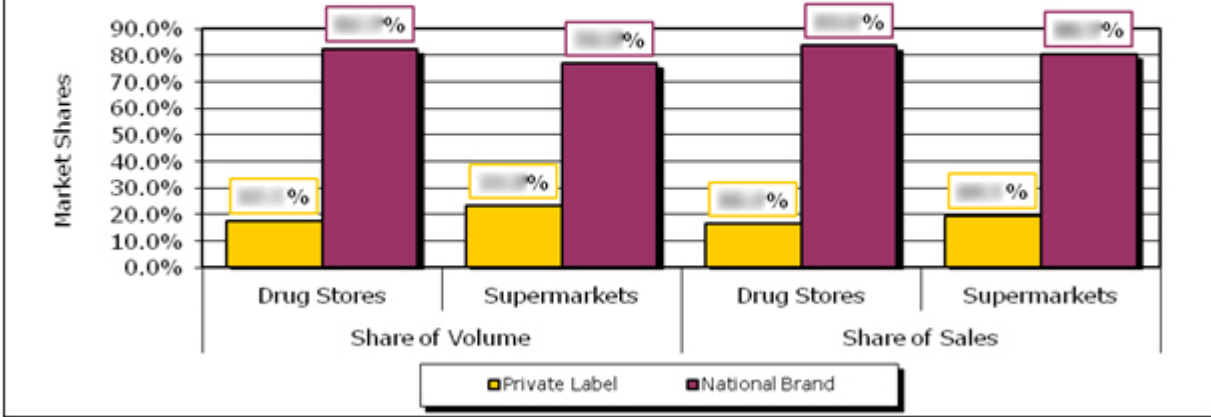
Year	National Brands*	Private Label	Total CSDs
1993/94	100%	100%	100%
1994/95	100%	100%	100%
1995/96	100%	100%	100%
1996/97	100%	100%	100%
1997/98	100%	100%	100%
1998/99	100%	100%	100%
1999/00	100%	100%	100%
2000/01	100%	100%	100%
2001/02	100%	100%	100%
2002/03	100%	100%	100%
2003/04	100%	100%	100%
2004/05	100%	100%	100%
2005/06	100%	100%	100%
2006/07	100%	100%	100%
2007/08	100%	100%	100%
2008/09	100%	100%	100%
2009/10	100%	100%	100%
2010/11	100%	100%	100%
2011/12	100%	100%	100%
2012/13	100%	100%	100%
2013/14	100%	100%	100%

** Includes volume for all non-private label carbonated soft drink brands.*

Source: Beverage Marketing Corporation

PRIVATE LABEL MORE PROMINENT IN SUPERMARKETS THAN DRUG STORES

Shares of unit volume and sales, 2014



Source: Beverage Marketing Corporation