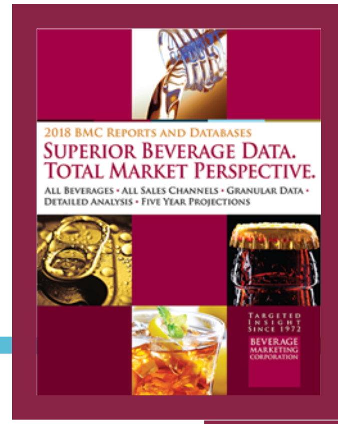
BEVERAGE PACKAGING IN THE U.S.

2018 EDITION (Published November 2018. Data through 2017. Market projections through 2022.) 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.

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BEVERAGE MARKETING CORPORATION

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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 2017, 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 2022 – 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 2022.

Beverage Packaging in the U.S.

November 2018

BEVERAGE MARKETING CORPORATION

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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Matching the characteristics of the packaging material to how and where a beverage is likely to be consumed helps determine the best choice for the target market. Each packaging material– glass, plastic, metal (steel and aluminum), paper or a composite – has advantages and disadvantages.

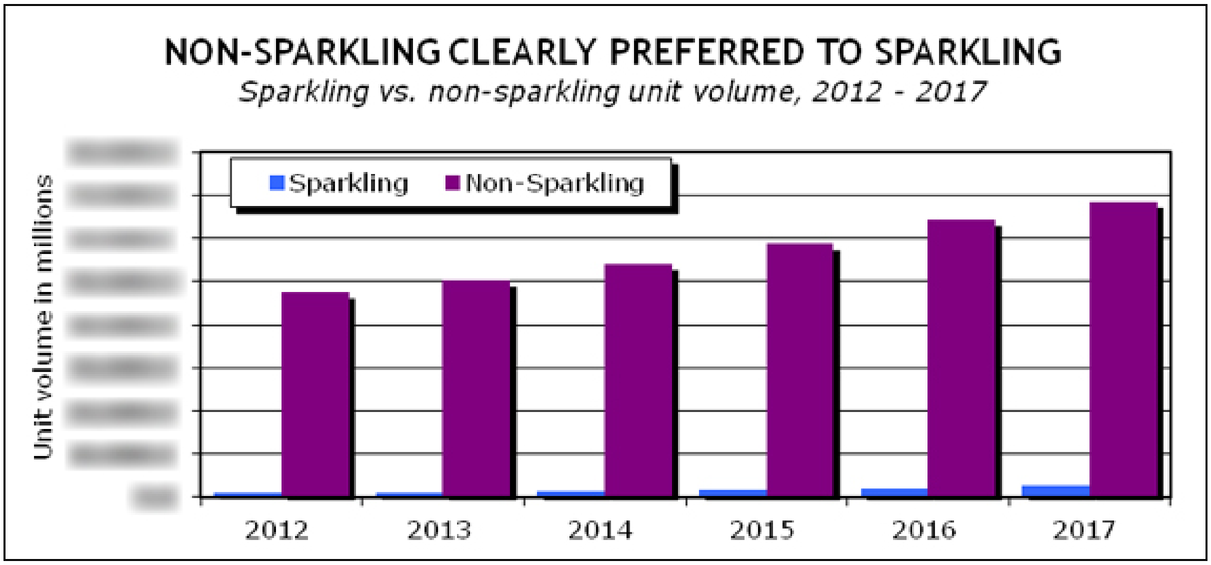
- Plastic bottles are highly portable due to light weight, shatter resistance, reclosability and compatibility with multipacking. Plastic containers also offer product visibility and can be molded into recognition-enhancing custom shapes, which can include handholds for easy gripping and pouring and cup-holder friendly footprints to suit today's mobile consumers.
- As a result, plastic is a popular choice for single-serving containers intended for on-the-go consumption as well as multi-serving sizes formerly packaged in heavier or nonreclosable formats. Because of these factors, use of plastic containers has expanded significantly during the past two decades.
- A higher price point and the popularity of larger reclosable plastic containers is driving the vending channel to convert from 12-ounce cans to 16-, 20- or 24-ounce polyethylene terephthalate (PET) bottles. Although these containers officially contain two or more servings (typically 8-ounce), many consumers see them as single-serve and consume them as such.
- Concern about America's obesity epidemic and a Food and Drug Administration (FDA) recommendation to expand Nutrition Facts information for multi-serving products that could be, and often are, consumed as a single serving is prompting brand owners like Coca-Cola and Kraft to add nutritional information for the contents of the entire container.
- The label changes also may include flagging the number of actual "single" servings (generally 8-ounce) on the front of the container.
- Hot-filled or pasteurized beverages like tea, fruit juice and beer, which once were limited to more heat-tolerant metal and glass packaging options or cold filling are now commonly found in PET due to improvements in resin, container design and blowing techniques that have boosted barrier properties and heat resistance. As a result, new glass/metal-to-plastic conversions are occurring.
- Cans are lightweight, low cost, fillable at high speeds, quick chilling, unbreakable, stackable and easily multipacked for bulk sales.
- However, lack of resealability generally limits aluminum beverage cans to single-serving sizes, with 12-ounce being the most common, although 16-ounce and slim line roughly 8.4-ounce are commonly chosen for energy drinks and 24-ounce are seeing expanded usage for beer.

Exhibit 6.64

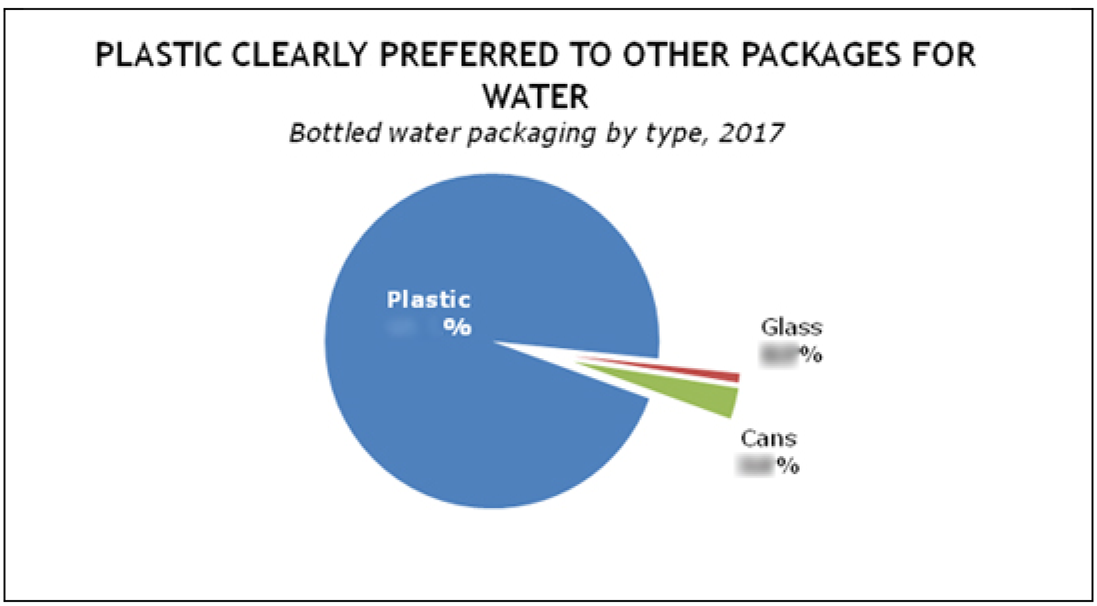
CHILLED, READY-TO-SERVE FRUIT DRINKS
CHANGE IN UNIT VOLUME BY CONTAINER TYPE
2013 – 2017

Type	2012/13	2013/14	2014/15	2015/16	2016/17
Glass					
16 fl. oz.	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
PET Plastic					
128 fl. oz.	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
64 fl. oz.	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
32 fl. oz.	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Other (16 oz.)	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Paper					
64 fl. oz.	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
32 fl. oz.	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Other (14 oz.)	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

Source: Beverage Marketing Corporation; SBAcci



Source: Beverage Marketing Corporation



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