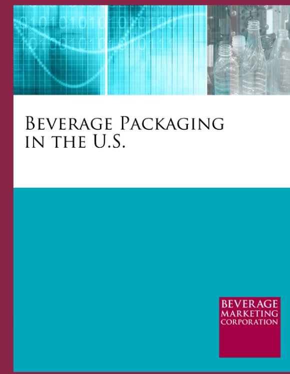
Beverage Packaging in the U.S.

2021 Edition (Published November 2021. Data through 2020. Market projections through 2025.) 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. It discusses the impact of the coronavirus pandemic on the trends.

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INSIDE:

REPORT OVERVIEW
A brief discussion of key features of this report. **2**

TABLE OF CONTENTS
A detailed outline of this report's contents and data tables. **6**

SAMPLE TEXT AND INFOGRAPHICS
A few examples of this report's text, data content layout and style. **15**

HAVE QUESTIONS? Contact Charlene Harvey: 212-688-7640 x 1962
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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 consumers' 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?
- What are the growth prospects through 2025 – by beverage type and package type?
- Which packaging segments and sizes grew in 2020, 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?

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, Pactiv Evergreen, Plastipak Packaging 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 2025.

Beverage Packaging in the U.S.

Beverage Marketing Corporation

Beverage Packaging in the U.S.

November 2021

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

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
- Special Note on Coronavirus ---------- 8
- 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 2015 – 2020 ---------- 50

1.2 U.S. Beverage Packaging Market Share of Unit Volume by Category 2015 – 2020 - 51

1.3 U.S. Beverage Packaging Market Change in Unit Volume by Category 2016 – 2020 52

1.4 U.S. Beverage Packaging Market PET, Aluminum, Glass and Paper Consumer Recycling Rates 2000 – 2020 ---------- 53

TABLE OF CONTENTS

Chapter

1. THE U.S. BEVERAGE PACKAGING MARKET (cont'd)

Exhibits (cont'd)

1.5 U.S. Beverage Packaging Market Unit Volume by Package Type 2015 – 2020 ------ 54
1.6 U.S. Beverage Packaging Market Share of Unit Volume by Package Type 2015 – 2020 ------ 55
1.7 U.S. Beverage Packaging Market Change in Unit Volume by Package Type 2016 – 2020 ------ 56
1.8 Can Packaging Unit Volume by Beverage Type 2015 – 2020 ------ 57
1.9 Can Packaging Share of Unit Volume by Beverage Type 2015 – 2020 ------ 58
1.10 Can Packaging Change in Unit Volume by Beverage Type 2016 – 2020 ------ 59
1.11 Plastic Packaging Unit Volume by Beverage Type 2015 – 2020 ------ 60
1.12 Plastic Packaging Share of Unit Volume by Beverage Type 2015 – 2020 ------ 61
1.13 Plastic Packaging Change in Unit Volume by Beverage Type 2016 – 2020 ------ 62
1.14 Glass Packaging Unit Volume by Beverage Type 2015 – 2020 ------ 63
1.15 Glass Packaging Share of Unit Volume by Beverage Type 2015 – 2020 ------ 64
1.16 Glass Packaging Change in Unit Volume by Beverage Type 2016 – 2020 ------ 65
1.17 Paper Packaging Unit Volume by Beverage Type 2015 – 2020 ------ 66
1.18 Paper Packaging Share of Unit Volume by Beverage Type 2015 – 2020 ------ 67
1.19 Paper Packaging Change in Unit Volume by Beverage Type 2016 – 2020 ------ 68

2. U.S. CARBONATED SOFT DRINK PACKAGING

Carbonated Soft Drink Packaging ------ 69

- Overview & Issues ------ 69
- Package Sizes ------ 77
- Secondary Packaging ------ 80

Exhibits

2.20 Carbonated Soft Drink Packaging Volume 1975 – 2020 ------ 82
2.21 Carbonated Soft Drink Packaging Share of Volume 1975 – 2020 ------ 83
2.22 Carbonated Soft Drink Packaging Change in Volume 1985 – 2020 ------ 84
2.23 Carbonated Soft Drink Packaging Volume by Size and Type 2015 – 2020 ------ 85
2.24 Carbonated Soft Drink Packaging Share of Volume by Size and Type 2015 – 2020 86
2.25 Carbonated Soft Drink Packaging Change in Volume by Size and Type 2016 – 2020 87
2.26 Carbonated Soft Drink Sales in Supermarkets Shares by Secondary Package Type 2015 – 2020 ------ 88

3. U.S. BEER PACKAGING

Beer Packaging ------ 89

- Overview & Issues ------ 89
- Container Types ------ 93
- Secondary Packaging ------ 100

TABLE OF CONTENTS

Chapter

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

Exhibits

3.27 Beer Packaging Volume by Container Type 1980 – 2020 ---------------------------- 101
3.28 Beer Packaging Share by Container Type 1980 – 2020 ----------------------------- 102
3.29 Beer Packaging Growth by Container Type 1981 – 2020 ---------------------------- 103
3.30 Beer Packaging Estimated Dollar Shares by Secondary Package Type 2020 -------- 104

4. U.S. BOTTLED WATER PACKAGING

Bottled Water Packaging -- 105

- Overview & Issues -- 105
- Domestic Sparkling Water --- 122
- Domestic Non-Sparkling Water --- 124

Exhibits

4.31 Bottled Water Packaging Unit Volume by Material 2015 – 2020--------------------- 128
4.32 Bottled Water Packaging Share of Unit Volume by Material 2015 – 2020 ----------- 129
4.33 Bottled Water Packaging Change in Unit Volume by Material 2016 – 2020---------- 130
4.34 Domestic Sparkling Water Unit Volume by Material and Size 2015 – 2020---------- 131
4.35 Domestic Sparkling Water Share of Unit Volume by Material and Size 2015 – 2020 132
4.36 Domestic Sparkling Water Change in Unit Volume by Material and Size 2016 – 2020 -- 133
4.37 Domestic Non-Sparkling Water Packaging Volume by Material and Size 2015 – 2020 -- 134
4.38 Domestic Non-Sparkling Water Packaging Share of Unit Volume by Material and Size 2015 – 2020-- 135
4.39 Domestic Non-Sparkling Water Packaging Change in Unit Volume by Material and Size 2016 – 2020-- 136

5. U.S. WINE AND DISTILLED SPIRITS PACKAGING

Distilled Spirits Packaging -- 137

- Overview & Issues -- 137
- Package Sizes -- 140

Wine Packaging-- 142

- Overview & Issues -- 142
- Package Sizes -- 150

Exhibits

5.40 Distilled Spirits Packaging Unit Volume and Growth 1981 – 2020-------------------- 151
5.41 Distilled Spirits Packaging Estimated Unit Volume by Size 2015 – 2020------------- 152
5.42 Distilled Spirits Packaging Estimated Share of Unit Volume by Size 2015 – 2020--- 153
5.43 Distilled Spirits Packaging Estimated Change in Unit Volume by Size 2016 – 2020- 154
5.44 Distilled Spirits Packaging Estimated Glass vs. Plastic Volume 2020----------------- 155
5.45 Distilled Spirits Packaging Estimated Glass vs. Plastic Share 2020------------------- 156

TABLE OF CONTENTS

Chapter

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

Exhibits (cont'd)

5.46 Wine Packaging Unit Volume and Growth 1979 – 2020 ---- 157
5.47 Wine Packaging Estimated Unit Volume by Size 2015 – 2020 ---- 158
5.48 Wine Packaging Estimated Share of Unit Volume by Size 2015 – 2020 ---- 159
5.49 Wine Packaging Estimated Change in Unit Volume by Size 2016 – 2020 ---- 160

6. **U.S. FRUIT BEVERAGE PACKAGING**

Fruit Beverage Packaging ---- 161
- Overview & Issues ---- 161

Frozen Concentrate Fruit Juice Packaging ---- 165
- Overview & Issues ---- 165

Chilled, Ready-to-Serve Fruit Juice Packaging ---- 167
- Overview & Issues ---- 167
- Package Sizes ---- 168

Shelf-Stable Fruit Juice Packaging ---- 171
- Overview & Issues ---- 171
- Package Sizes ---- 171

Shelf-Stable Fruit Drink Packaging ---- 174
- Overview & Issues ---- 174
- Package Sizes ---- 175

Chilled, Ready-to-Serve Fruit Drink Packaging ---- 177
- Overview & Issues ---- 177

Frozen Concentrate Fruit Drink Packaging ---- 178
- Overview & Issues ---- 178

Exhibits

6.50 Frozen Concentrate Fruit Juice Unit Volume by Size of Can 1991 – 2020 ---- 179
6.51 Frozen Concentrate Fruit Juice Share of Unit Volume by Size of Can 1991 – 2020 - 180
6.52 Frozen Concentrate Fruit Juice Change in Unit Volume by Size of Can 1992 – 2020 ---- 181
6.53 Chilled, Ready-to-Serve Fruit Juice Unit Volume by Container Size 2015 – 2020 --- 182
6.54 Chilled, Ready-to-Serve Fruit Juice Share of Unit Volume by Container Size 2015 – 2020 ---- 183
6.55 Chilled, Ready-to-Serve Fruit Juice Change in Unit Volume by Container Size 2016 – 2020 ---- 184
6.56 Shelf-Stable Fruit Juice Unit Volume by Container Size 2015 – 2020 ---- 185
6.57 Shelf-Stable Fruit Juice Share of Unit Volume by Container Size 2015 – 2020 ---- 186
6.58 Shelf-Stable Fruit Juice Change in Unit Volume by Container Size 2016 – 2020 ---- 187
6.59 Shelf-Stable Fruit Drinks Unit Volume by Container Size 2015 – 2020 ---- 188
6.60 Shelf-Stable Fruit Drinks Share of Unit Volume by Container Size 2015 – 2020 ---- 189
6.61 Shelf-Stable Fruit Drinks Change in Unit Volume by Container Size 2016 – 2020 -- 190
6.62 Chilled, Ready-to-Serve Fruit Drinks Unit Volume by Container Type 2015 – 2020 - 191

TABLE OF CONTENTS

Chapter

6. U.S. FRUIT BEVERAGE PACKAGING (cont'd)

Exhibits (cont'd)

6.63 Chilled, Ready-to-Serve Fruit Drinks Share of Unit Volume by Container Type 2015 – 2020 ---------- 192
6.64 Chilled, Ready-to-Serve Fruit Drinks Change in Unit Volume by Container Type 2016 – 2020 ---------- 193
6.65 Frozen Concentrate Fruit Drinks Unit Volume by Size of Can 1991 – 2020 ---------- 194
6.66 Frozen Concentrate Fruit Drinks Share of Unit Volume by Size of Can 1991 – 2020 ---------- 195
6.67 Frozen Concentrate Fruit Drinks Change in Unit Volume by Size of Can 1992 – 2020 ---------- 196

7. U.S. READY-TO-DRINK COFFEE PACKAGING

RTD Coffee Packaging ---------- 197
- Overview & Issues ---------- 197

Exhibits

7.68 RTD Coffee Packaging Unit Volume by Type 2015 – 2020 ---------- 206
7.69 RTD Coffee Packaging Share of Unit Volume by Type 2015 – 2020 ---------- 207
7.70 RTD Coffee Packaging Change in Unit Volume by Type 2016 – 2020 ---------- 208

8. U.S. TEA PACKAGING

Tea Packaging ---------- 209
- Overview & Issues ---------- 209
- Ready-to-Drink Tea Packaging ---------- 211

Exhibits

8.71 Tea Packaging Unit Volume by Type 2015 – 2020 ---------- 215
8.72 Tea Packaging Share of Unit Volume by Type 2015 – 2020 ---------- 216
8.73 Tea Packaging Change in Unit Volume by Type 2016 – 2020 ---------- 217
8.74 Ready-to-Drink Tea Packaging Volume by Size and Type 2015 – 2020 ---------- 218
8.75 Ready-to-Drink Tea Packaging Share of Unit Volume by Size and Type 2015 – 2020 ---------- 219
8.76 Ready-to-Drink Tea Packaging Change in Unit Volume by Size and Type 2016 – 2020 ---------- 220

9. U.S. MILK PACKAGING

Milk Packaging ---------- 221
- Overview & Issues ---------- 221

Exhibits

9.77 Milk Packaging Unit Volume by Type 2015 – 2020 ---------- 230
9.78 Milk Packaging Share of Unit Volume by Type 2015 – 2020 ---------- 231
9.79 Milk Packaging Change in Unit Volume by Type 2016 – 2020 ---------- 232

TABLE OF CONTENTS

Chapter

10. U.S. SPORTS AND ENERGY BEVERAGE PACKAGING

Sports Beverage Packaging ---------- 233
- Overview & Issues ---------- 233
- Package Sizes ---------- 237

Energy Drink Packaging ---------- 239
- Overview & Issues ---------- 239
- Package Sizes ---------- 241

Exhibits

10.80 Sports Beverage Packaging Unit Volume by Size 2015 – 2020 ---------- 253
10.81 Sports Beverage Packaging Share of Unit Volume by Size 2015 – 2020 ---------- 254
10.82 Sports Beverage Packaging Change in Unit Volume by Size 2016 – 2020 ---------- 255
10.83 Energy Drink Packaging Unit Volume by Size 1997 – 2020 ---------- 256
10.84 Energy Drink Packaging Share of Unit Volume by Size 1997 – 2020 ---------- 257
10.85 Energy Drink Packaging Change in Unit Volume by Size 1998 – 2020 ---------- 258

11. THE LEADING BEVERAGE PACKAGING COMPANIES

Beverage Package Manufacturing ---------- 259
- Overview & Issues ---------- 259

ALCOA
- Overview ---------- 270
- History ---------- 275
- Products and Services ---------- 278
- Financial ---------- 280

AMCOR
- Overview ---------- 282
- History ---------- 286
- Products and Services ---------- 287
- Financial ---------- 293

BALL CORPORATION
- Overview ---------- 294
- History ---------- 299
- Products and Services ---------- 302
- Financial ---------- 314

CROWN HOLDINGS, INC.
- Overview ---------- 316
- History ---------- 318
- Products and Services ---------- 322
- Financial ---------- 326

TABLE OF CONTENTS

Chapter

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

DAK AMERICAS

- Overview 327
- History 327
- Products and Services 329
- Financial 330

INTERNATIONAL PAPER

- Overview 331
- History 332
- Products and Services 335
- Financial 337

NOVELIS

- Overview 338
- History 338
- Products and Services 341
- Financial 343

O-I

- Overview 345
- History 347
- Products and Services 350
- Financial 353

PLASTIPAK PACKAGING INC.

- Overview 355
- History 355
- Products and Services 356
- Financial 357

PACTIV EVERGREEN

- Overview 358
- History 359
- Products and Services 361
- Financial 364

WESTROCK

- Overview 365
- History 365
- Products and Services 366
- Financial 367

TABLE OF CONTENTS

Chapter

12. THE PROJECTED U.S. BEVERAGE PACKAGING MARKET

The Projected National Beverage Packaging Market ---------- 368
- Overview ---------- 368
- Unit Volume ---------- 373
- The Cost Environment ---------- 374
- The Technology Environment ---------- 375

The Projected Beverage Packaging Market by Type ---------- 376
- Cans ---------- 376
- Plastic ---------- 377
- Glass ---------- 378
- Paper ---------- 379

The Projected Beverage Packaging Market by Category ---------- 381
- Overview ---------- 381

Exhibits

12.86 Projected Beverage Packaging Market Unit Volume by Material Type 2020 – 2025 - 383
12.87 Projected Beverage Packaging Market Share of Unit Volume by Material Type 2020 – 2025 ---------- 384
12.88 Projected Beverage Packaging Market Compound Annual Growth by Material Type 2020 – 2025 ---------- 385
12.89 Projected Can Packaging Unit Volume by Beverage Type 2020 – 2025 ---------- 386
12.90 Projected Can Packaging Share of Unit Volume by Beverage Type 2020 – 2025 ---- 387
12.91 Projected Can Packaging Compound Annual Growth by Beverage Type 2020 – 2025 ---------- 388
12.92 Projected Plastic Packaging Unit Volume by Beverage Type 2020 – 2025 ---------- 389
12.93 Projected Plastic Packaging Share of Unit Volume by Beverage Type 2020 – 2025 - 390
12.94 Projected Plastic Packaging Compound Annual Growth by Beverage Type 2020 – 2025 ---------- 391
12.95 Projected Glass Packaging Unit Volume by Beverage Type 2020 – 2025 ---------- 392
12.96 Projected Glass Packaging Share of Unit Volume by Beverage Type 2020 – 2025 -- 393
12.97 Projected Glass Packaging Compound Annual Growth by Beverage Type 2020 – 2025 ---------- 394
12.98 Projected Paper Packaging Unit Volume by Beverage Type 2020 – 2025 ---------- 395
12.99 Projected Paper Packaging Share of Unit Volume by Beverage Type 2020 – 2025 -- 396
12.100 Projected Paper Packaging Compound Annual Growth by Beverage Type 2020 – 2025 ---------- 397
12.101 Projected Beverage Packaging Market Unit Volume by Beverage Type 2020 – 2025 ---------- 398
12.102 Projected Beverage Packaging Market Share of Unit Volume by Beverage Type 2020 – 2025 ---------- 399
12.103 Projected Beverage Packaging Market Compound Annual Growth by Beverage Type 2020 – 2025 ---------- 400

TABLE OF CONTENTS

Appendix

Conversion Formulas -- 401

Shipment weight, distance traveled and handling requirements influence distribution costs.

- Compared to other beverage packaging materials, glass is heavy. Since shipping costs are based on weight, to keep expenses in line, beverage makers may opt to limit the distribution area (and sales). Another solution is to build regional filling facilities closer to the point of sale, but this increases overhead and may not be practical from the standpoint of capacity utilization.
- For chilled ready-to-serve (RTS) fruit beverages and tea, paperboard carton or plastic jug weight is less of an issue than the need for refrigerated trucks, which are more expensive to run than standard trucks. This expense, combined with a relatively short shelf life, limits the size of the distribution area. As a result, these products frequently are filled by regional dairies, which already have refrigerated distribution networks.
- Lightweight cans and plastic containers are inexpensive and economical to ship. In addition, cans stack easily on pallets to simplify handling in warehousing and distribution.
- Self-manufacture can reduce container costs and ensure availability and quality for the beverage producer. Although less in favor today for cans and glass, which require a considerable manufacturing infrastructure, self-manufacturing appears to be on the upswing for plastic container molding.
- Cooperative ventures between beverage makers and plastic container suppliers locate bottle production facilities on-site or in close proximity to the filling line, in some cases, literally "through the wall." This type of collaborative effort is seen by many as the best of both worlds. The bottle supply chain is very short, yet the bottle maker retains responsibility for production, equipment and labor.

The environment is another value-related variable in the beverage packaging equation. Options include lightweighting (source reduction), use of recyclable materials and incorporation of recycled content.

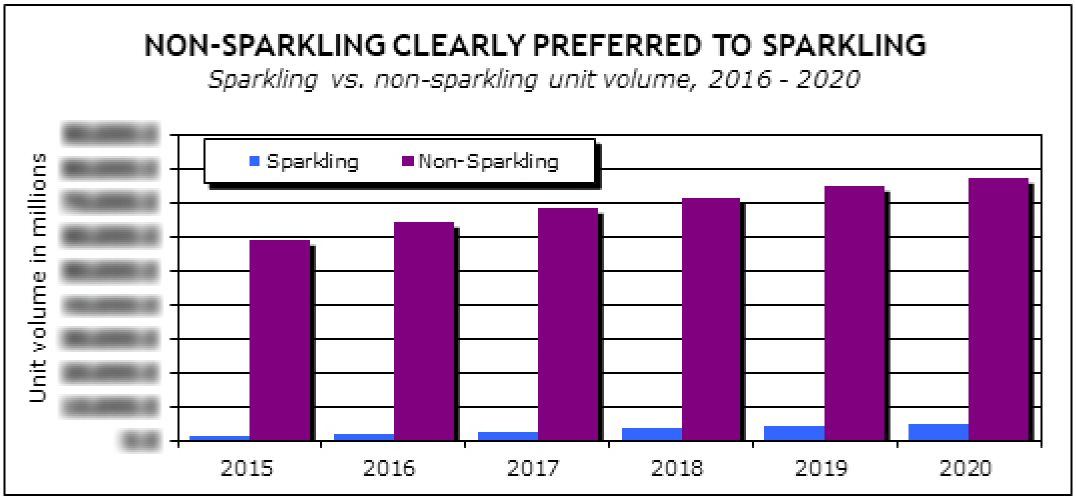
- Source reduction is inevitably a win/win proposition since using less material results in less waste while reducing or, at least containing, material costs.
- Although most beverage packaging materials have the potential to be recycled, whether it is done practically is *the* question when discussing recyclability.
- Most collection programs are limited to glass, metal cans (both aluminum and steel), corrugated, newspaper and the plastics designated number 1 – PETE (polyethylene terephthalate) and number 2 – HDPE (high-density polyethylene). Packaging made from other types of plastics, paperboard or a combination of materials goes to the landfill or incinerator in most areas.

Exhibit 6.64

CHILLED, READY-TO-SERVE FRUIT DRINKS
CHANGE IN UNIT VOLUME BY CONTAINER TYPE
2016 – 2020

Container Type	2015/16	2016/17	2017/18	2018/19	2019/20
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]%
96-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



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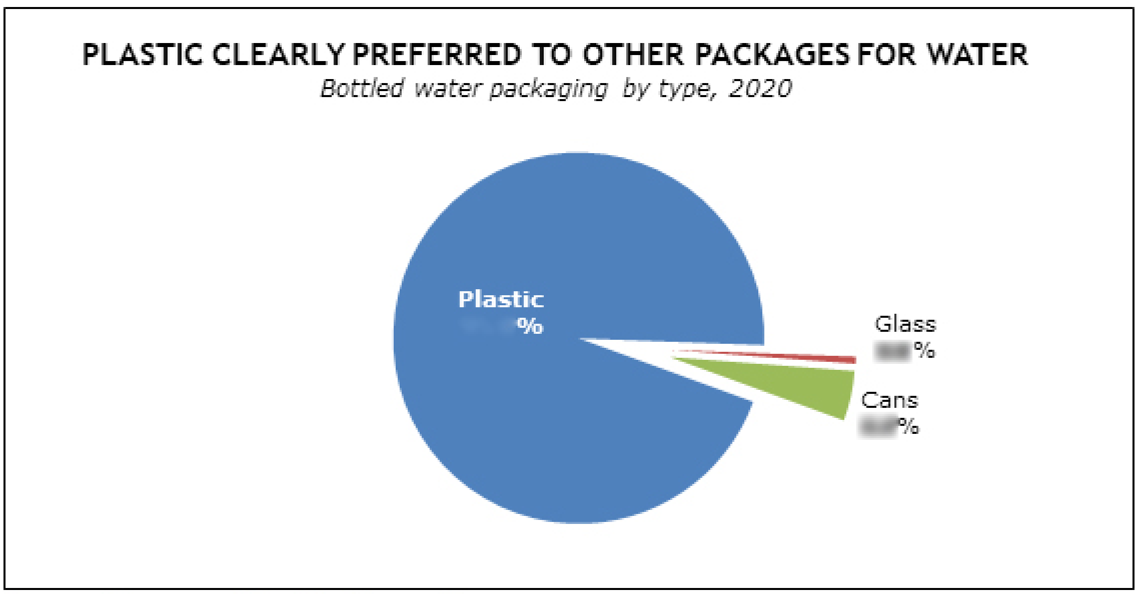

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