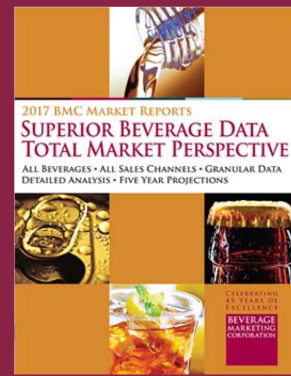
PRIVATE LABEL BEVERAGES AND CONTRACT PACKING IN THE U.S.

2017 EDITION (Published November 2017. Data through 2016.)
More than 400 pages, with extensive text analysis, graphs, charts, more than 40 tables and more than 170 company profiles.



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This research report from Beverage Marketing Corporation offers insight into private label beverage market 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 industry. It includes an extensive contract packing directory, providing contact information for co-packers and details on their product, process and production capabilities.

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INSIDE:

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

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, suppliers who sell product to contract bottlers or anyone requiring a better understanding of the specific processing capabilities of contract bottling operations.

- Which beverage categories have the most developed private label business?
- What are the key trends in the private label industry?
- Are private label or branded beverage products growing faster? How does private label beverage market share compare to branded product share in each beverage category?
- 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

The report 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. It also includes a section devoted to performance of private label beverages and key manufacturers operating in this arena including the factors driving their performance. Contract packing trends and agreements are also discussed and a sample co-packing agreement is provided.

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 unique and incredibly useful 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 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.
- A beverage contract packer list / indexed directory 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.

November 2017

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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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.

Bottled water has a significant private label presence that has seen brisk growth. Branding water has proven to be more challenging than branding other beverage products.

- Private label has the most significant presence in jug water, which generally serves as a tap water replacement.
- Both PET water and sparkling water, which serve as refreshment beverages, are more dominated by brands, although there is a private label presence in both segments. And private label is growing dramatically in PET water.

BEVERAGE CONTRACT PACKERS

ABC Company

P.O. Box 123
Springfield, KS 12345
Phone: (555) 123-4567
Fax: (555) 123-8912
E-mail: contact@domain.com

Key Personnel

General Manager: John Smith

Beverage Categories

Beer, Fruit Beverages, Soft Drinks, Flavored Water, Fruit Beverages, Soft Drinks

Production Lines

Cold Fill:	2
Hot Fill:	3
Carbonation:	2
Tunnel:	2

Cap Sizes

28mm, 35mm

Labeling Capabilities

1 pc, 2 pc

Capping Capabilities

Crimp, ROPP

Production Processes

Cold Fill Can 8.3 oz, 12 oz, 16 oz
Cold Fill Glass 7 oz, 10 oz, 12 oz, 16 oz, 20 oz, 24 oz

Produce Private Label Products

Yes

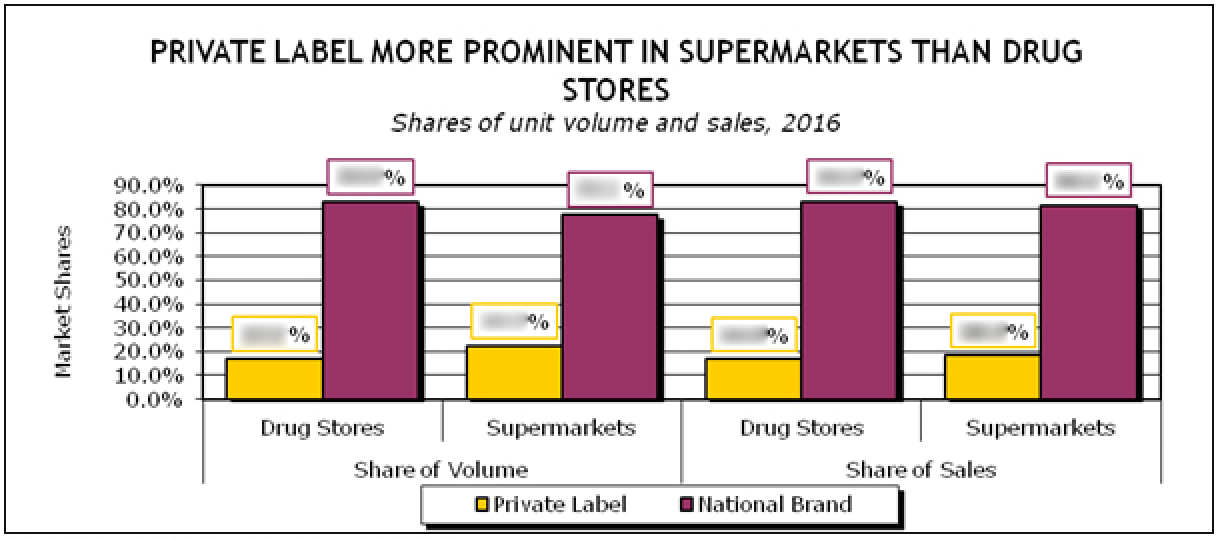
Exhibit 2.13

U.S. CARBONATED SOFT DRINK MARKET
NATIONAL BRANDS VS. PRIVATE LABEL
GROWTH
1994 – 2016

Year	National Brands*	Private Label	Total CSDs
1993/94	[illegible]%	[illegible]%	[illegible]%
1994/95	[illegible]%	[illegible]%	[illegible]%
1995/96	[illegible]%	[illegible]%	[illegible]%
1996/97	[illegible]%	[illegible]%	[illegible]%
1997/98	[illegible]%	[illegible]%	[illegible]%
1998/99	[illegible]%	[illegible]%	[illegible]%
1999/00	[illegible]%	[illegible]%	[illegible]%
2000/01	[illegible]%	[illegible]%	[illegible]%
2001/02	[illegible]%	[illegible]%	[illegible]%
2002/03	[illegible]%	[illegible]%	[illegible]%
2003/04	[illegible]%	[illegible]%	[illegible]%
2004/05	[illegible]%	[illegible]%	[illegible]%
2005/06	[illegible]%	[illegible]%	[illegible]%
2006/07	[illegible]%	[illegible]%	[illegible]%
2007/08	[illegible]%	[illegible]%	[illegible]%
2008/09	[illegible]%	[illegible]%	[illegible]%
2009/10	[illegible]%	[illegible]%	[illegible]%
2010/11	[illegible]%	[illegible]%	[illegible]%
2011/12	[illegible]%	[illegible]%	[illegible]%
2012/13	[illegible]%	[illegible]%	[illegible]%
2013/14	[illegible]%	[illegible]%	[illegible]%
2014/15	[illegible]%	[illegible]%	[illegible]%
2015/16	[illegible]%	[illegible]%	[illegible]%

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

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation