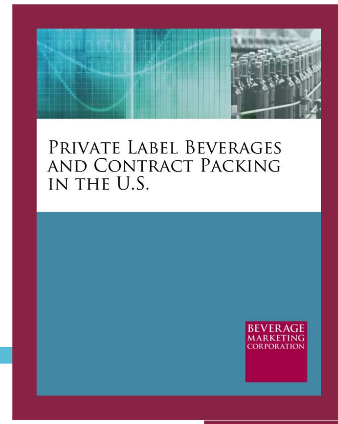
Private Label Beverages and Contract Packing in the U.S.

2019 Edition (Published October 2019. Data through 2018.)
More than 400 pages, with extensive text analysis, graphs, charts, more than 40 tables and more than 200 company profiles.



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:

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

- How is the market for private label beverages performing?
- What trends are shaping the private label industry?
- Who can co-pack my products?
- 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 Refresco, 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.

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BEVERAGE MARKETING CORPORATION

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October 2019

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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Appendix

Today virtually all established beverage categories have some private label volume. Many consumers today purchase private label beverages with regularity.

- There was a time when private label beverages were exclusively focused on big categories, but this has changed over the last decade as consumer tastes have broadened.
- Private label marketers have gotten more sophisticated and products have begun to span most beverage categories.
- Today, the greatest growth opportunity is in niche categories. Non-carbonated products, like bottled water, teas and fruit beverages, and other products with better margins have proliferated.

Private label is the most developed in big brand categories, especially those with the weakest brand development, but has begun to develop more in niche categories.

- Carbonated soft drinks (CSDs), milk, bottled water and fruit beverages offer the greatest volume opportunities in private label beverages.
- The sheer size of the CSD category makes it a logical choice for private label manufacturers and retailers along with the fact that the category utilizes price promotion so routinely.
- Milk is also a large category with few dominant brands and minimal brand marketing, making it a target for private label.

Alcohol offers a markedly different picture when it comes to private label.

- Alcoholic beverages like beer, wine and distilled spirits have minimal private label sales and show little sign of having that change anytime soon.
- While brands are king in most of the non-alcoholic categories, brands are even more in demand in the alcoholic categories. Private label wine shows perhaps the most promise although it remains a small business.

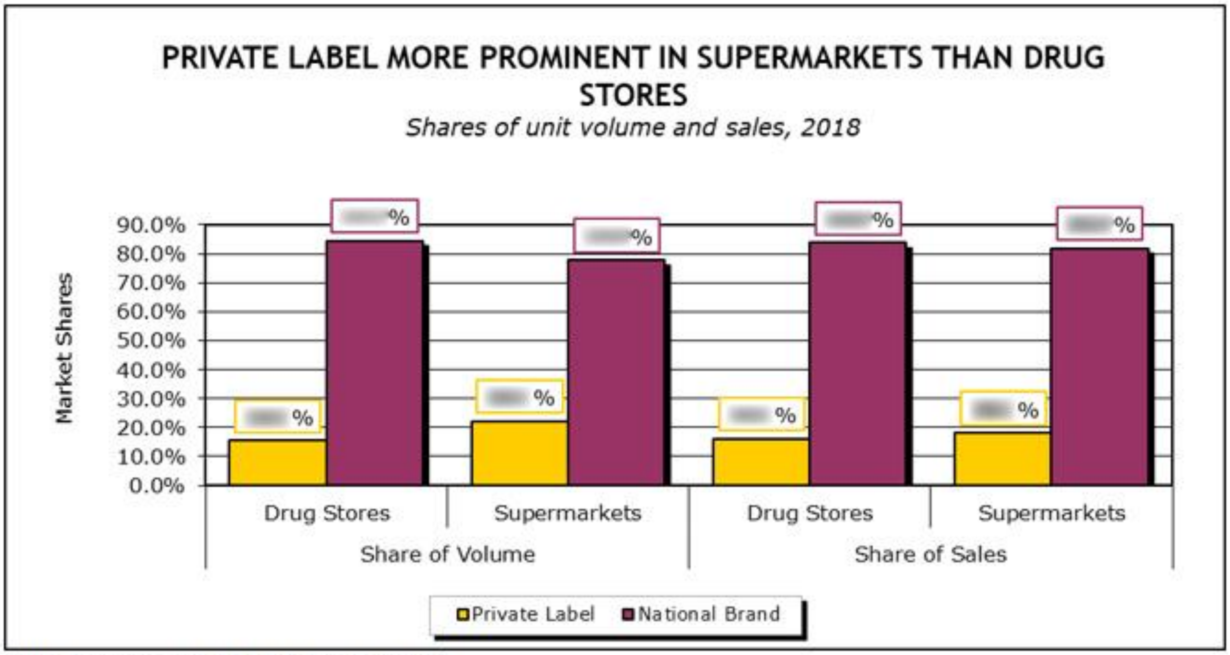
Exhibit 2.13

U.S. CARBONATED SOFT DRINK MARKET
NATIONAL BRANDS VS. PRIVATE LABEL
GROWTH
1994 – 2018

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]%
2016/17	[illegible]%	[illegible]%	[illegible]%
2017/18	[illegible]%	[illegible]%	[illegible]%

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

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation