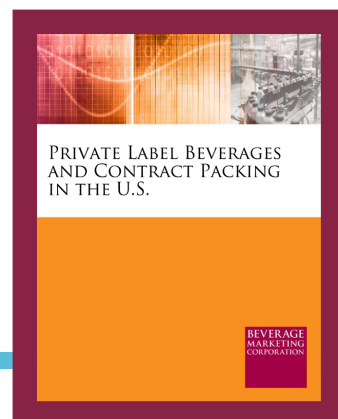


PRIVATE LABEL BEVERAGES AND CONTRACT PACKING IN THE U.S.

2020 EDITION (Published October 2020. Data through 2019.)

More than 400 pages, with extensive text analysis, graphs, charts, more than 40 tables and more than 225 company profiles.



Get behind the scenes for an in-depth look at private label and co-packing trends and issues, plus get the low-down on capabilities of players in the co-packing industry. 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:

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. 10



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, 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.



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

BEVERAGE
MARKETING
CORPORATION

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

October 2020



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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Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS	i
DEFINITIONS USED IN THIS REPORT	vi
INTRODUCTION	viii

Chapter

1. CURRENT TRENDS IN PRIVATE LABEL

The Private Label Industry.....	1
• Overview.....	1
• Supplier Capabilities	5
The Private Label Industry by Distribution Channel	8
• Overview.....	8
• Supermarkets	8
• Drug Stores.....	10
• Convenience/Gas.....	11

Exhibits

1.1 U.S. Private Label Industry Retail Dollar Sales 1997 – 2019	13
1.2 U.S. Private Label Industry Supermarket Unit Volume 2014 – 2019	14
1.3 U.S. Private Label Industry Change in Supermarket Unit Volume 2015 – 2019	15
1.4 U.S. Private Label Industry Supermarket Sales 2014 – 2019.....	16
1.5 U.S. Private Label Industry Change in Supermarket Sales 2015 – 2019.....	17
1.6 U.S. Private Label Industry Share of Supermarket Sales & Unit Volume 2014 – 2019	18
1.7 U.S. Private Label Industry Drug Store Unit Volume 2014 – 2019	19
1.8 U.S. Private Label Industry Change in Drug Store Unit Volume 2015 – 2019	20
1.9 U.S. Private Label Industry Drug Store Sales 2014 – 2019.....	21
1.10 U.S. Private Label Industry Change in Drug Store Sales 2015 – 2019	22
1.11 U.S. Private Label Industry Share of Drug Store Sales & Unit Volume 2014 – 2019 -	23

2. PRIVATE LABEL BEVERAGES BY CATEGORY

Private Label Beverages	24
• Overview.....	24
• Carbonated Soft Drinks	25
• Fruit Beverages	28
• Alcoholic Beverages	29
• Milk.....	31
• Bottled Water.....	32
• Ready-to-Drink Tea and Coffee	35
• Sports and Energy Drinks	36
• Dairy Alternatives	37

TABLE OF CONTENTS

Chapter

2. PRIVATE LABEL BEVERAGES BY CATEGORY (cont'd)***Exhibits***

2.12	U.S. Carbonated Soft Drink Market National Brands vs. Private Label Volume and Share 1993 – 2019 -----	38
2.13	U.S. Carbonated Soft Drink Market National Brands vs. Private Label Growth 1994 – 2019 -----	39
2.14	U.S. Carbonated Soft Drink Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2019 -----	40
2.15	U.S. Carbonated Soft Drink Market National Brands vs. Private Label Sales by Retail Channel 2019 -----	41
2.16	U.S. Shelf-Stable Fruit Beverage Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2019 -----	42
2.17	U.S. Shelf-Stable Fruit Beverage Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2019 -----	43
2.18	U.S. Shelf-Stable Fruit Beverage Market National Brands vs. Private Label Sales by Retail Channel 2019 -----	44
2.19	U.S. Bottled Water Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2019 -----	45
2.20	U.S. Bottled Water Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2019 -----	46
2.21	U.S. Bottled Water Market National Brands vs. Private Label Sales by Retail Channel 2019 -----	47
2.22	U.S. RTD Tea Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2019 -----	48
2.23	U.S. RTD Tea Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2019 -----	49
2.24	U.S. RTD Tea Market National Brands vs. Private Label Sales by Retail Channel 2019 -----	50
2.25	U.S. RTD Coffee Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2019 -----	51
2.26	U.S. RTD Coffee Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2019 -----	52
2.27	U.S. RTD Coffee Market National Brands vs. Private Label Sales by Retail Channel 2019 -----	53
2.28	U.S. Sports Drink Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2019 -----	54
2.29	U.S. Sports Drink Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2019 -----	55
2.30	U.S. Sports Drink Market National Brands vs. Private Label Sales by Retail Channel 2019 -----	56

TABLE OF CONTENTS

Chapter

2. PRIVATE LABEL BEVERAGES BY CATEGORY (cont'd)	
<i>Exhibits (cont'd)</i>	
2.31 U.S. Energy Drink Market National Brands vs. Private Label Sales by Retail Channel 2019 -----	57
2.32 U.S. Dairy Alternative Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2019 -----	58
2.33 U.S. Dairy Alternative Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2019 -----	59
3. MAJOR PRIVATE LABEL BEVERAGE SUPPLIERS	
Leading Private Label Companies -----	60
• Overview-----	60
Refresco Group	
• Overview-----	64
• Marketing-----	69
Dean Foods	
• Overview-----	71
Louis Dreyfus Citrus	
• Overview-----	76
Niagara Bottling	
• Overview-----	78
<i>Exhibits</i>	
3.34 U.S. Fruit Beverage Market Key Contract Packed Beverage Brands Estimated Share of Volume Co-Packed 2019 -----	81
3.35 U.S. RTD Tea Market Key Contract Packed Beverage Brands Estimated Share of Volume Co-Packed 2019 -----	82
4. CURRENT TRENDS IN CONTRACT PACKING	
The Contract Packing Industry -----	83
• Overview-----	83
• Recent Developments-----	84
5. CONTRACT PACKING BY BEVERAGE CATEGORY	
Contract Packed Beverages-----	87
• Overview-----	87
• Beer-----	87
• Carbonated Soft Drinks-----	89
• Bottled Water-----	90
• Fruit Beverages-----	90
• Ready-to-Drink Tea and Coffee-----	91
• Sports Drinks-----	92

TABLE OF CONTENTS

Chapter

5. CONTRACT PACKING BY BEVERAGE CATEGORY (cont'd)	
<i>Exhibit</i>	
5.36 Contract Packed Beverages Estimated Shares and Volumes 2019 -----	93
6. PRICING OF CONTRACT PACKING	
Contract Packing Pricing -----	94
• Overview-----	94
Representative Pricing Data -----	95
• Conversion Only-----	95
• Full-Product Contracts -----	95
Full-Product Cost Estimates -----	97
• Overview-----	97
<i>Exhibits</i>	
6.37 Representative Conversion-Only Contract Packing Prices for Carbonated Beverages	98
6.38 Representative Conversion-Only Packing Prices for Non-Carbonated Beverages -----	99
6.39 Representative Full-Product Packing Prices -----	100
6.40 Representative Full-Product Costs-----	101
7. CONTRACT PACKING CONTRACT ISSUES	
Contract Issues-----	102
• Overview-----	102
8. DIRECTORY OF BEVERAGE CONTRACT PACKERS	
Beverage Contract Packers -----	105

Indexes

INDEXES TO DIRECTORY OF BEVERAGE CONTRACT PACKERS	
Geographical Index -----	342
Beverage Category Index -----	361
Production Process Index -----	454
Personnel Index -----	501

Appendix

BEVERAGE PACKING AGREEMENTS	
Co-Pack Agreement -----	528
Manufacturing/Packing Agreement Terms & Conditions -----	531

All established beverage categories have some private label volume today. Many consumers 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 – 2019**

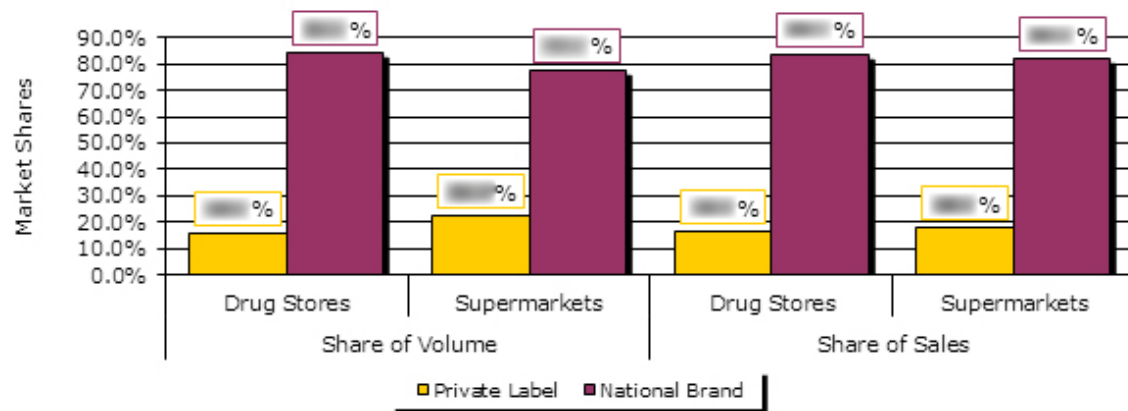
Year	National Brands*	Private Label	Total CSDs
1993/94	■ %	■ %	■ %
1994/95	■ %	■ %	■ %
1995/96	■ %	■ %	■ %
1996/97	■ %	■ %	■ %
1997/98	■ %	■ %	■ %
1998/99	■ %	■ %	■ %
1999/00	■ %	■ %	■ %
2000/01	■ %	■ %	■ %
2001/02	■ %	■ %	■ %
2002/03	■ %	■ %	■ %
2003/04	■ %	■ %	■ %
2004/05	■ %	■ %	■ %
2005/06	■ %	■ %	■ %
2006/07	■ %	■ %	■ %
2007/08	■ %	■ %	■ %
2008/09	■ %	■ %	■ %
2009/10	■ %	■ %	■ %
2010/11	■ %	■ %	■ %
2011/12	■ %	■ %	■ %
2012/13	■ %	■ %	■ %
2013/14	■ %	■ %	■ %
2014/15	■ %	■ %	■ %
2015/16	■ %	■ %	■ %
2016/17	■ %	■ %	■ %
2017/18	■ %	■ %	■ %
2018/19	■ %	■ %	■ %

** 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, 2019



Source: Beverage Marketing Corporation