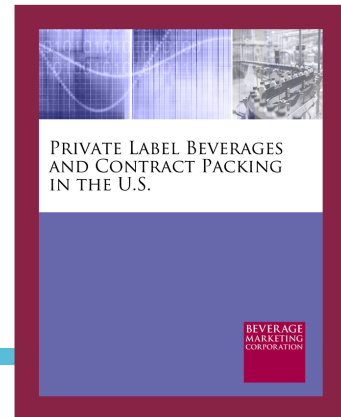


# PRIVATE LABEL BEVERAGES AND CONTRACT PACKING IN THE U.S.

2022 EDITION (Published October 2022. Data through 2021.)

More than 500 pages, with extensive text analysis, graphs, charts, more than 40 tables and 240 company listings.



**G**et 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 vs. branded market, offers representative pricing, 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?

Contact Charlene Harvey: 212-688-7640 x 1962  
[charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)

BEVERAGE  
MARKETING  
CORPORATION

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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, Dairy Farmers of America, 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, cannabis drinks, 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 and many more.
- 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 2022

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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 – 2021 ----- 13

1.2 U.S. Private Label Industry Supermarket Unit Volume 2016 – 2021 ----- 14

1.3 U.S. Private Label Industry Change in Supermarket Unit Volume 2017 – 2021 ----- 15

1.4 U.S. Private Label Industry Supermarket Sales 2016 – 2021----- 16

1.5 U.S. Private Label Industry Change in Supermarket Sales 2017 – 2021----- 17

1.6 U.S. Private Label Industry Share of Supermarket Sales & Unit Volume 2016 – 2021 18

1.7 U.S. Private Label Industry Drug Store Unit Volume 2016 – 2021 ----- 19

1.8 U.S. Private Label Industry Change in Drug Store Unit Volume 2017 – 2021 ----- 20

1.9 U.S. Private Label Industry Drug Store Sales 2016 – 2021 ----- 21

1.10 U.S. Private Label Industry Change in Drug Store Sales 2017 – 2021 ----- 22

1.11 U.S. Private Label Industry Share of Drug Store Sales & Unit Volume 2016 – 2021 - 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 – 2021 -----	38
2.13	U.S. Carbonated Soft Drink Market National Brands vs. Private Label Growth 1994 – 2021 -----	39
2.14	U.S. Carbonated Soft Drink Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2021 -----	40
2.15	U.S. Carbonated Soft Drink Market National Brands vs. Private Label Sales by Retail Channel 2021 -----	41
2.16	U.S. Shelf-Stable Fruit Beverage Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2021 -----	42
2.17	U.S. Shelf-Stable Fruit Beverage Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2021-----	43
2.18	U.S. Shelf-Stable Fruit Beverage Market National Brands vs. Private Label Sales by Retail Channel 2021 -----	44
2.19	U.S. Bottled Water Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2021 -----	45
2.20	U.S. Bottled Water Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2021 -----	46
2.21	U.S. Bottled Water Market National Brands vs. Private Label Sales by Retail Channel 2021 -----	47
2.22	U.S. RTD Tea Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2021 -----	48
2.23	U.S. RTD Tea Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2021 -----	49
2.24	U.S. RTD Tea Market National Brands vs. Private Label Sales by Retail Channel 2021-----	50
2.25	U.S. RTD Coffee Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2021 -----	51
2.26	U.S. RTD Coffee Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2021 -----	52
2.27	U.S. RTD Coffee Market National Brands vs. Private Label Sales by Retail Channel 2021-----	53
2.28	U.S. Sports Drink Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2021 -----	54
2.29	U.S. Sports Drink Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2021 -----	55

TABLE OF CONTENTS

Chapter

<b>2. PRIVATE LABEL BEVERAGES BY CATEGORY (cont'd)</b>	
<i>Exhibits (cont'd)</i>	
2.30 U.S. Sports Drink Market National Brands vs. Private Label Sales by Retail Channel 2021 -----	56
2.31 U.S. Energy Drink Market National Brands vs. Private Label Sales by Retail Channel 2021 -----	57
2.32 U.S. Dairy Alternative Market National Brands vs. Private Label Volume, Share and Growth 2006 – 2021 -----	58
2.33 U.S. Dairy Alternative Market National Brands vs. Private Label Retail Sales, Share and Growth 2006 – 2021 -----	59
<b>3. MAJOR PRIVATE LABEL BEVERAGE SUPPLIERS</b>	
Leading Private Label Companies -----	60
• Overview-----	60
<b>Refresco Group B.V.</b>	
• Overview-----	64
• Marketing-----	69
<b>Dairy Farmers of America</b>	
• Overview-----	72
<b>Louis Dreyfus Citrus</b>	
• Overview-----	74
<b>Niagara Bottling</b>	
• Overview-----	76
<i>Exhibits</i>	
3.34 U.S. Fruit Beverage Market Key Contract Packed Beverage Brands Estimated Share of Volume Co-Packed 2021 -----	79
3.35 U.S. RTD Tea Market Key Contract Packed Beverage Brands Estimated Share of Volume Co-Packed 2021 -----	80
<b>4. CURRENT TRENDS IN CONTRACT PACKING</b>	
The Contract Packing Industry -----	81
• Overview-----	81
• Recent Developments-----	82
<b>5. CONTRACT PACKING BY BEVERAGE CATEGORY</b>	
Contract Packed Beverages -----	85
• Overview-----	85
• Beer-----	85
• Carbonated Soft Drinks-----	87
• Bottled Water-----	88
• Fruit Beverages -----	88



# TABLE OF CONTENTS

## Chapter

<b>5. CONTRACT PACKING BY BEVERAGE CATEGORY (cont'd)</b>	
Contract Packed Beverages (cont'd)	
• Ready-to-Drink Tea and Coffee -----	89
• Sports Drinks -----	90
<b>Exhibit</b>	
5.36 Contract Packed Beverages Estimated Shares and Volumes 2021 -----	91
<b>6. PRICING OF CONTRACT PACKING</b>	
Contract Packing Pricing -----	92
• Overview-----	92
Representative Pricing Data -----	93
• Conversion Only-----	93
• Full-Product Contracts -----	93
Full-Product Cost Estimates -----	95
• Overview-----	95
<b>Exhibits</b>	
6.37 Representative Conversion-Only Contract Packing Prices for Carbonated Beverages	96
6.38 Representative Conversion-Only Packing Prices for Non-Carbonated Beverages -----	97
6.39 Representative Full-Product Packing Prices -----	98
6.40 Representative Full-Product Costs -----	99
<b>7. CONTRACT PACKING CONTRACT ISSUES</b>	
Contract Issues-----	100
• Overview-----	100
<b>8. DIRECTORY OF BEVERAGE CONTRACT PACKERS</b>	
Beverage Contract Packers -----	103

## Indexes

<b>INDEXES TO DIRECTORY OF BEVERAGE CONTRACT PACKERS</b>	
Geographical Index -----	343
Beverage Category Index -----	362
Production Process Index -----	468
Personnel Index -----	525

## Appendix

<b>BEVERAGE PACKING AGREEMENTS</b>	
Co-Pack Agreement -----	553
Manufacturing/Packing Agreement Terms & Conditions -----	556

Private label carbonated soft drinks have underperformed the CSD category in recent years.

- Branded products like Coke, Pepsi and Dr Pepper dominate with more than 90% of the market but the vast size of the category has created an opportunity for private label brands, which are purchased by value-conscious consumers.
- For the most part, the branded company leaders have done an effective job at blunting further inroads of private label through strong marketing of their products, gaining widespread distribution, and pricing their products so that they can be afforded by a mass market.
- Historically, private label has always played a role in the industry. Generally, its share has fluctuated over time within a relatively narrow band. This share has tended to grow when the price gap between nationally branded products and private label is wider and its share has shrunk when the price gap has been narrower.
- Private label CSDs – like most private label products – tend to appeal to very price conscious consumers – those with large families who are likely to consume products in large quantities as well as those with low incomes.
- While private label's share of the CSD market is expected to wane in the coming years, an unforeseen (some would say foreseen) weakening in the economy would broaden the number of consumers that would consider a private label CSD.

Higher costs in the last couple of years have impacted both private label and branded products. Big name brands like Pepsi and Coke have been forced to raise prices but private label has had to essentially follow suit.

- This change has impacted private label performance and forced many of the private label brands to emphasize quality and other attributes.
- Rather than relying only on lower prices, many private label CSD programs in the 1980s and 1990s embarked on campaigns aimed at attaining "national brand equivalency," whose marketing efforts centered on "compare and save" promotions highlighting not only lower prices but also quality comparable to national brands.

Exhibit 2.13

**U.S. CARBONATED SOFT DRINK MARKET  
NATIONAL BRANDS VS. PRIVATE LABEL  
GROWTH  
1994 – 2021**

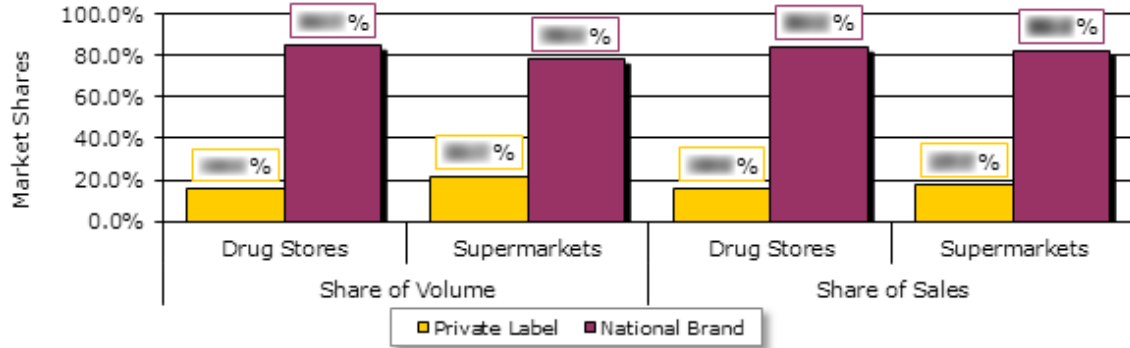
<b>Year</b>	<b>National Brands*</b>	<b>Private Label</b>	<b>Total CSDs</b>
1993/94	███%	███%	███%
1994/95	███%	███%	███%
1995/96	███%	███%	███%
1996/97	███%	███%	███%
1997/98	███%	███%	███%
1998/99	███%	███%	███%
1999/00	███%	███%	███%
2000/01	███%	███%	███%
2001/02	███%	███%	███%
2002/03	███%	███%	███%
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	███%	███%	███%
2019/20	███%	███%	███%
2020/21	███%	███%	███%

\* Includes volume for all non-private label brands.

Source: Beverage Marketing Corporation

## PRIVATE LABEL MORE PROMINENT IN SUPERMARKETS THAN DRUG STORES

*Shares of unit volume and sales, 2021*



Source: Beverage Marketing Corporation

**Directory of Beverage Contract Packers**  
**BEVERAGE CONTRACT PACKERS**

---

**ABC Company**

---

P.O. Box 123  
Anywhere, AL 12345  
Phone: (555) 123-4567  
Fax: (555) 123-8912  
Website: [www.abccompany.com](http://www.abccompany.com)  
E-Mail: [info@abccompany.com](mailto:info@abccompany.com)

**Key Personnel**

*President:* John Smith  
*Director of Operations:* James Jones  
*Sales Manager:* William Johnson

**Beverage Categories**

Alkaline, Bottled Water, Coffee, Dairy Alternatives, Flavored Water, Organic Beverages, Soft Drinks, Sparkling Water

**Production Lines**

*Cold Fill:* 2  
*Hot Fill:* 3  
*Carb:* 2

**Cap Sizes**

28mm, 35 mm

**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

**Certifications**

Kosher, Organic, SQF

**Produce Private Label Products**

Yes