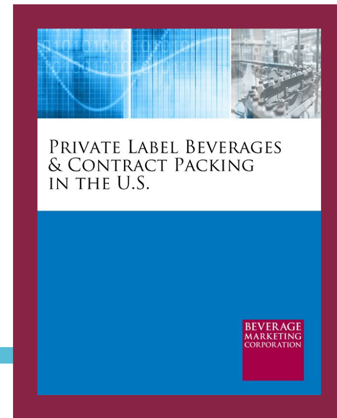
Private Label Beverages & Contract Packing in the U.S.

2024 Edition (Published November 2024. Data through 2023.)

More than 650 pages, with extensive text analysis, graphs, charts, more than 40 tables and 240 company listings.



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 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 also 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 250
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BEVERAGE MARKETING CORPORATION

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Value Bundle Get the *Contract Packing Directory Database* in Excel (regularly $4,995) for just $2,000 when purchased in conjunction with *Private Label Beverages and Contract Packing in the U.S.* report. Search, use as contact list to augment PDF co-packer directory found in report as well as to build on the insights into private label and co-packing information found in the Private Label report.

The answers you need

Private Label Beverages and Contract Packing in the U.S. was developed 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 private label and contract packing research 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 for more than 300 co-packing locations.
- 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.

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BEVERAGE
MARKETING
CORPORATION

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

November 2024

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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BEVERAGE CONTRACT PACKERS

ABC Company

P.O. Box 123
Anywhere, AL 12345
Phone: (555) 123-4567
Fax: (555) 123-8912
Website: www.abccompany.com
E-Mail: 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

While price remains the primary reason consumers opt for private label products, it takes more than price to keep consumers coming back for repeat purchases. Quality is increasingly key.

- Retailers have shifted, focusing on both product quality and better packaging graphics.
- Because of this, more consumers view private label products as brands — competing in the same realm as other branded products.
- If consumers can purchase high-quality “brands” at a discount to national brands, they often will. This has given private label a leg-up competitively on some of the branded products.
- Even with the improved product quality and packaging graphics, price remains the primary reason people purchase private label products.
- Consider the share disparity in units versus dollars for all private label products in supermarkets. In 2023, all private label products accounted for 22.8% of unit volume, but only 18.5% of dollar sales.
- The roughly four percentage-point gap between unit volume share and dollar share has remained relatively consistent in recent years.

A study conducted by McKinsey & Co. in 2021 said private label benefitted from the pandemic and may continue to grow in the future.

- High availability and low price made private label more popular with consumers then and possibly in the future.
- Another study by Daymon, a private innovation and development firm, claims that 89% of consumers today trust private label and 82% say private label is a better value, according to Daymon’s 2020 Private Brand Intelligence Report.

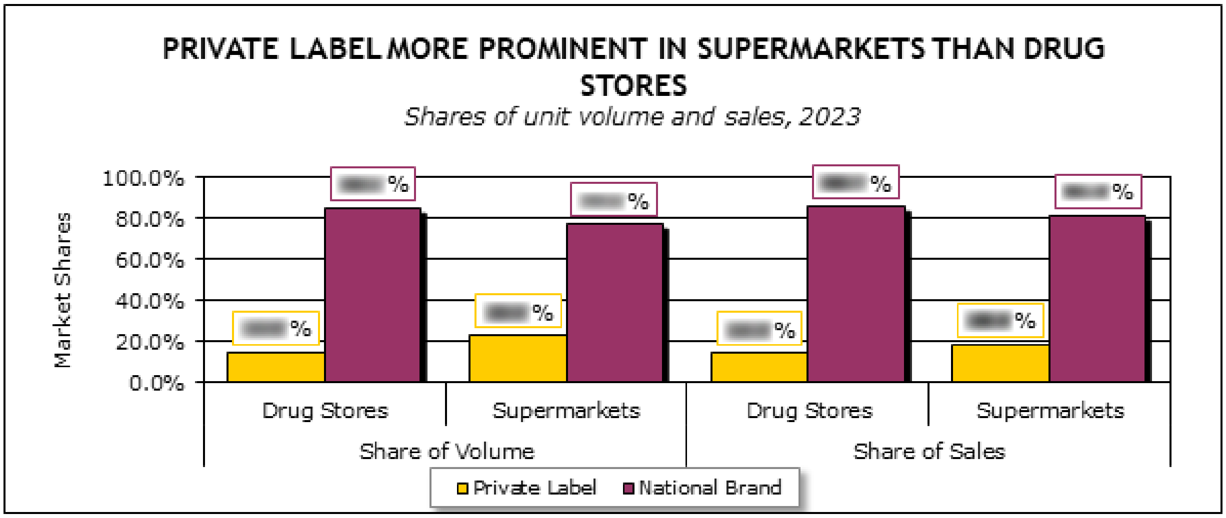
Exhibit 2.13

U.S. CARBONATED SOFT DRINK MARKET
NATIONAL BRANDS VS. PRIVATE LABEL
GROWTH
1994 – 2023

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]%
2018/19	[illegible]%	[illegible]%	[illegible]%
2019/20	[illegible]%	[illegible]%	[illegible]%
2020/21	[illegible]%	[illegible]%	[illegible]%
2021/22	[illegible]%	[illegible]%	[illegible]%
2022/23	[illegible]%	[illegible]%	[illegible]%

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

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation