This report provides the latest data on the beverage packaging mix. It offers market insights as well as statistical break-outs by type and size (in units) for eleven beverage categories. The report covers beverage-packaging issues and trends by category and by beverage type. It includes discussion of leading companies, their histories and their products. It also features Beverage Marketing’s five-year projections.

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HAVE QUESTIONS?
Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com
**The answers you need**

- What are the latest developments in beverage packaging in the U.S. market?
- Which packaging segments and sizes grew in 2012, and which did not?
- What are the unit volumes for each of the leading beverage types, including beer, bottled water, carbonated soft drinks, distilled spirits, ready-to-drink tea and coffee, energy drinks, fruit beverages, wine and sports beverages?
- What are the latest packaging innovations devised by industry leaders?
- What percentage of unit volume have tea pods claimed?
- What percentage of shelf stable fruit drink units are sold in pouches?
- What are the growth prospects - by beverage type and package type - in the coming years?

**This report features**

*Beverage Packaging in the U.S.* provides a comprehensive overview of the U.S. beverage market from a packaging perspective. It features:

- A review of the evolution of beverage packaging from the crudest pioneer bottle structure to the shaped two-piece aluminum cans and stand-up pouch. Also, an investigation of the strategic design of a package and its psychological effect on purchasing decisions
- Comprehensive analysis of the types of packaging materials - metal, glass, plastic and paper - and their relative importance in the different beverage segments
- A detailed discussion and data on packaging materials and sizes for each industry including: carbonated soft drinks, bottled water, beer, wine, distilled spirits, fruit beverages, sports and energy drinks and coffee, tea and milk
- An in-depth review of the leading packaging manufacturers looking at their offerings, marketing strategy, production facilities and financial position. Companies covered include Amcor, Ball Corporation, Constar International, Crown Holdings, DAK Americas, International Paper, MeadWestvaco, Novelis, O-I, Rexam and Reynolds Group Holdings
- *Beverage Marketing*’s growth projections a for the various packaging materials by beverage category and discussion of the trends that will drive the beverage packaging market through 2017
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Helping cans along is the trend of craft brewers like Ska Brewing, Sierra Nevada and Oskar Blues Brewery packaging their beers in cans, dispelling the myth that quality beers must come in bottles. A much larger brewer, the Boston Beer Company, also expanded into cans.

- The brewer’s “Sam can,” named for its flagship brand, Sam Adams, features a larger opening and an extended lip for ease of sipping.
- The Sam can took two years and an R&D budget north of $1 million to develop. The hourglass-shaped ridge at the top purports to enhance aromatics and excel carbonation.
- In June 2013, the brewer inked a deal with Jet Blue Airways to serve its newly canned beer on Jet Blue flights nationwide.
- In other can innovations, Pennsylvania-based Sly Fox Brewing Company in April 2013 debuted a can with a removable lid dubbed the “360 lid.”
- The lid, made by Crown Holdings, is entirely removable and turns the beer can into a glass of sorts, obviating the need to pour the beer into an actual glass. According to Sly Fox, it is the first brewer in North America to offer beer with the 360 lid.

The major brewers, of course, have taken note of cans’ resurgence, and have offered their own variations and innovations.

- In June 2013, Bud Light, after two years of R&D, introduced a new 12-ounce “Vented Can” that integrates the vent mechanism into the tab itself.
- After popping the tab, the beer drinker can give the tab an extra push to activate the vent, which allows additional air flow and creates a smoother pour with less “gurg.”
- The Bud Light Vented Can launched exclusively in Kentucky, with a national rollout planned for later in 2013.
- In a similar vein, Coors in July 2013 rolled out Coors Light and Molson Canadian in the “Vented End” beer can, which features a dual aperture opening. Beer drinkers pop the top in the usual manner, then rotate the tab to align over a button, and then press down to open the second vent. The Vented End can is also made by Crown.
- Before these two vented innovations, Miller Lite took a more DIY approach in 2012 with its “Punch Top” cans, which feature a second hole that needs to be punched opened with objects such as house keys or golf tees. A television ad asked “How do you punch it?” and demonstrated how such household items as spark plugs, drum sticks and even fishing lures can puncture its Punch Top can.
- May 2013 saw the debut of Budweiser’s “Bow Tie” can, an aluminum can cinched in the middle to emulate the brand’s familiar bow-tie-shaped logo.
- Due to the can’s slimmer middle, it holds 11.3 ounces of beer rather than the traditional 12 ounces, and is available in eight-packs rather than six-packs.
### SHELF-STABLE FRUIT DRINKS

**CHANGE IN UNIT VOLUME BY CONTAINER SIZE**

*2008 – 2012*

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<tbody>
<tr>
<td><strong>128-Ounce</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastic</td>
<td>%</td>
<td>%</td>
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<td>%</td>
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<td><strong>64-Ounce</strong></td>
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<tr>
<td>Glass</td>
<td>%</td>
<td>%</td>
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<tr>
<td>Plastic</td>
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<tr>
<td><strong>44- to 48-Ounce</strong></td>
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<td>Glass</td>
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<td>Glass</td>
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<tr>
<td><strong>20- to 26-Ounce</strong></td>
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<td><strong>6- to 19-Ounce</strong></td>
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<tr>
<td>Plastic</td>
<td>%</td>
<td>%</td>
<td>%</td>
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|               |      |      |      |      |      |
| **Subtotal**   |      |      |      |      |      |
| Total Glass    | %       | %       | %       | %       | %       |
| Total Can      | %       | %       | %       | %       | %       |
| Total Plastic  | %       | %       | %       | %       | %       |
| Pouch          | %       | %       | %       | %       | %       |
| Aseptic*       | %       | %       | %       | %       | %       |
| **TOTAL**      | %       | %       | %       | %       | %       |

*The predominant size is the 250-ml box.*

**Source:** Beverage Marketing Corporation
NON-SPARKLING CLEARLY PREFERRED TO SPARKLING
Sparkling vs. non-sparkling unit volume, 2007 - 2012

Source: Beverage Marketing Corporation

PLASTIC CLEARLY PREFERRED TO OTHER PACKAGES FOR WATER
Bottled water packaging by type, 2012

Source: Beverage Marketing Corporation