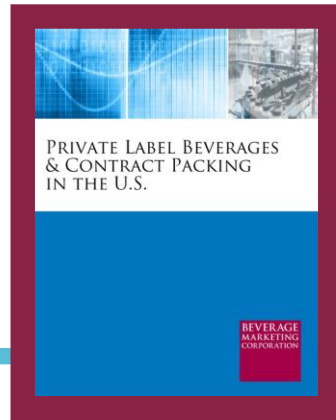
Private Label Beverages and Contract Packing in the U.S.

2024 Edition (To be published October 2024. Data through 2023.)
More than 500 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 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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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. 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 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.

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

BEVERAGE MARKETING CORPORATION

NOTE: The 2024 edition of this report has not yet been published. The dates on tables of contents/exhibits and sample data reflect information from last year's edition of this report.

The 2024 edition you receive will have updated data through 2023 and projections through 2028 where applicable.

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

October 2023

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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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.
- Nevertheless, the primary reason consumers reach for private label CSDs remains price. The leading private label CSD supplier — Refresco — has worked to improve efficiencies in its operations to be able to retain the pricing advantage to make private labels desirable to some consumers.

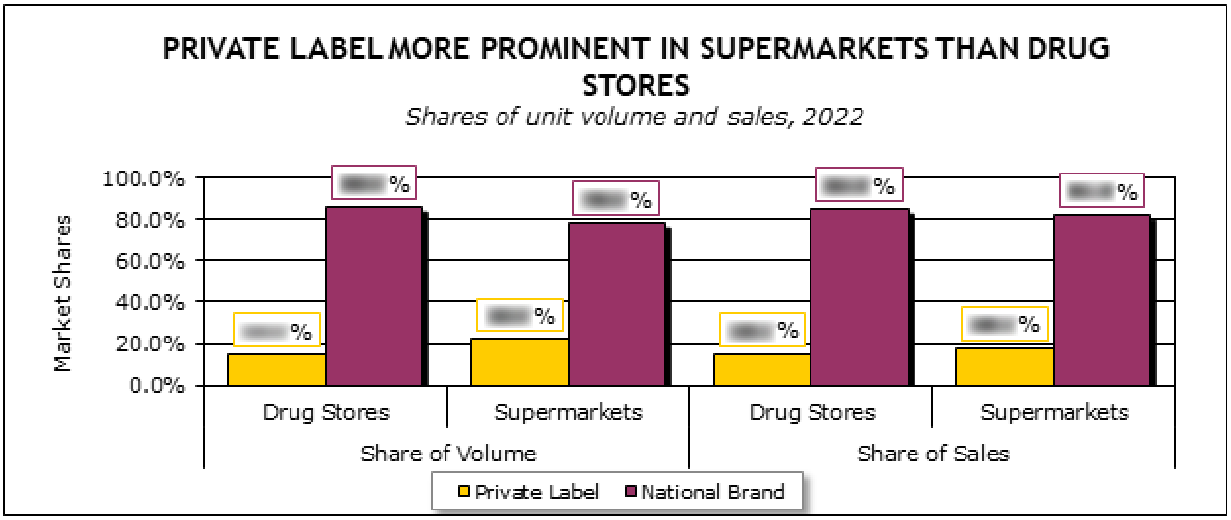
Exhibit 2.13

U.S. CARBONATED SOFT DRINK MARKET
NATIONAL BRANDS VS. PRIVATE LABEL GROWTH
1994 – 2022

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]%

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

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation