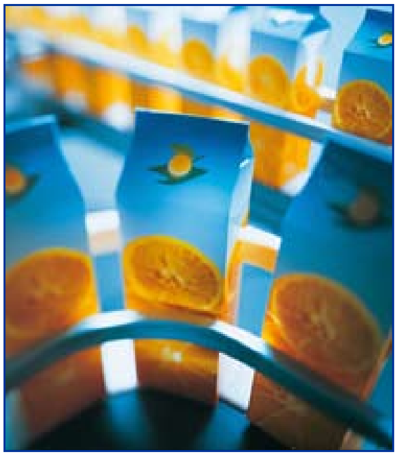

Beverage Containers

US Industry Study with Forecasts for **2017 & 2022**

Study #3076 | September 2013 | $5100 | 344 pages

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Beverage Containers

US Industry Study with Forecasts for ***2017 & 2022***

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Beverage Containers

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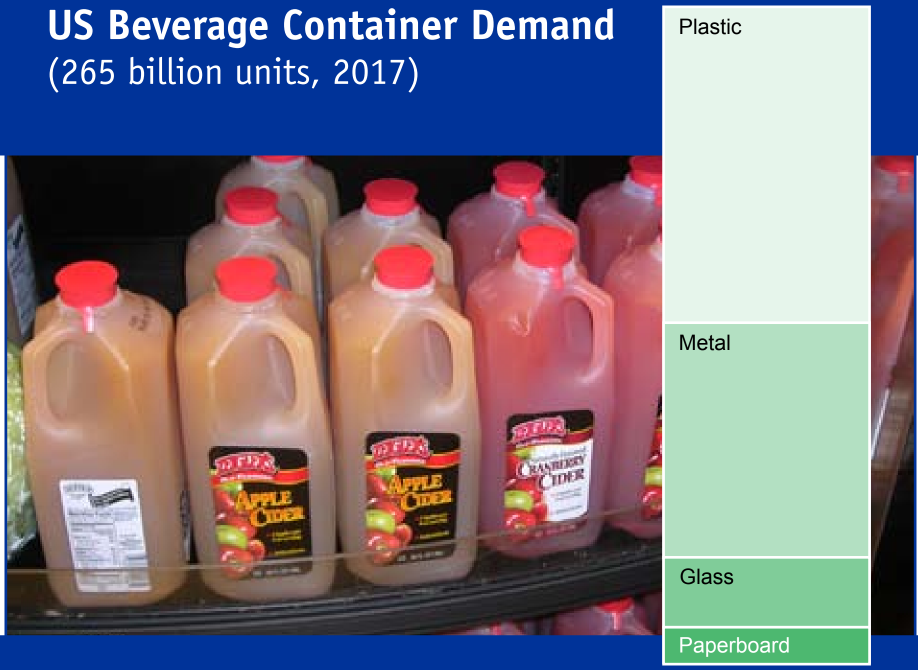
Unit gains will be driven by ongoing consumer preference for single-serving containers, increasing interest in alternatives to carbonated soft drinks, and a proliferation of new beverage products.

US demand to rise 1.7% annually through 2017

US demand for beverage containers is expected to increase 1.7 percent annually through 2017 to 265 billion units, valued at $29.1 billion. Unit gains will be driven by ongoing consumer preference for single-serving containers in many markets, increasing interest in alternatives to carbonated soft drinks, and a proliferation of new product introductions accompanied by aggressive marketing campaigns. In addition, favorable demographic trends, such as healthy gains in millennials and in the older population, will bolster demand for certain beverages (e.g., wine) and related containers.

US Beverage Container Demand
(265 billion units, 2017)



Plastic containers to remain largest, fastest-growing product segment

Plastic containers will remain both the largest and fastest growing segment, with gains supported by good prospects for polyethylene terephthalate (PET) containers in the ready-to-drink (RTD) tea, sports drinks, and other noncarbonated RTD beverage markets. Plastic containers will also benefit from solid growth in the bottled water market, although increasing maturity and environmental concerns related to the volume of PET bottles in landfills will hold back growth. In general, demand for plastic beverage containers will be aided by their light weight, resealability, shatter resistance, and portability, attributes that have made plastic containers appealing for on-the-go consumption.

Metal beverage containers, the second largest beverage container type in unit terms, will register slow growth through 2017 as a result of declining soft drink production and meager increases in beer production. However, gains will be helped by robust expansion of the energy and specialty drink market and product innovations such as vented and shaped cans. In addition, inroads by cans in the craft beer market will support demand, as will healthy increases for aluminum bottles, which continue to benefit from their upscale appearance and ability to provide product differentiation in markets such as beer.

Glass beverage container demand is forecast to post modest gains, supported by the entrenched position of bottles in wine packaging and solid growth in RTD tea. Demographic trends, particularly above average growth in millennials and the baby boomer population (key consumers of wine), will also bolster glass container demand despite increased competition from other container types. Paperboard container demand will decline as a result of further supplantation of gabletop cartons by plastic bottles, especially in the milk and fruit beverage markets. However, good prospects are anticipated for paperboard containers in markets such as soymilks and other nondairy milk alternatives, wine, and sports beverages.

Beverage Containers

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Sample Text, Table & Chart

TABLE V-1

PLASTIC BEVERAGE CONTAINER DEMAND BY TYPE

SAMPLE TABLE

Item	2002	2007	2012	2017	2022
Packaged Beverage Production (bil gal)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% in plastic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Beverages Packaged in Plastic (bil gal)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
ounces/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Plastic Beverage Containers (bil units)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Bottles	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other:					
Pouches	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cans & Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% plastic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total Beverage Containers (bil units)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
cents/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Plastic Beverage Containers (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Source:The Freedonia Group, Inc.

GLASS BOTTLES

SAMPLE TEXT

Alcoholic -- Demand for glass bottles used for distille
packaging will ... through 2017 to
units, with gai ... aphic trends as t
boomer popula ... s for cocktails a
distilled spirits ... on, younger cons
becoming more ... inks, which have
upscale image ... mitless range of
combinations. ... end of premiumiz
benefit glass bottles, as many high end brands are typically p
glass. In volume terms, glass accounted for 59 percent of dis
gallonage in 2012 but trailed plastic containers in unit terms
the proliferation of single-serving plastic bottles.

Glass bottles have historically been the container of cho
distilled spirits industry because of their high quality image, long shelf life, and ease of customization. Glass maintains a significant share of 750-milliliter and one-liter sizes and is also widely used in mini liquor bottles served on airlines. However, plastic bottles (mainly PET) are making inroads in a wide array of sizes due to such advantages as lighter weight and resistance to shattering. For example, in May 2010 McCormick Distilling began transitioning from glass bottles to multilayer high density polyethylene bottles for its TEQUILA ROSE flavored cream liqueur and tequila as a result of plastic's resistance to breakage and lower material and inventory costs.

Over the last decade, premium distilled spirits offerings
larly super-premium products -- have increased their share o
in both volume and value terms. This trend is expected to co
through 2017 and will support demand for glass bottles, as m
mium brands tend to favor glass for its upscale appearance.
producers continue to develop new products to serve the pre
tion of the distilled spirits market. For example, in Septemb

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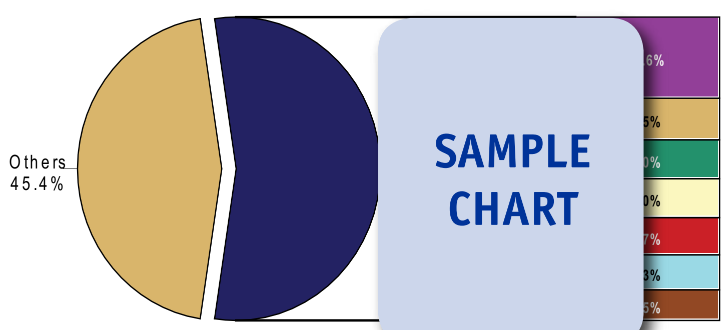
CHART IX-1

US BEVERAGE CONTAINER MARKET SHARE
($24.5 billion, 2012)



Beverage Containers

US Industry Study with Forecasts for ***2017 & 2022***

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Sample Profile, Table & Forecast

TABLE III-2

NONALCOHOLIC BEVERAGE PRODUCTION BY TYPE
(million gallons)

Item	2002	2007	2012	2017	2022
Resident Population (mil persons)					
gallons per capita					
Nonalcoholic Beverage Consumption					
- net imports					
Nonalcoholic Beverage Production					
Carbonated Soft Drinks					
Bottled Water					
Milk					
Fruit Beverages					
Sports Beverages					
RTD Tea					
Other RTD Beverages					
% packaged					
Packaged Nonalcoholic Beverage Prdn					

SAMPLE TABLE

Source:The Freedonia Group, Inc.

COMPANY PROFILES

Berry Plastics Corporation
101 Oakley Street
Evansville, IN 47710
812-424-
http://w

Sales: $
North A (FY 2012)
Employ

Key Pro vinyl chloride
bottles

SAMPLE PROFILE

Berry Plastics is a leading manufacturer of rigid and flexible plastic packaging and consumer products. The Company operates through four segments: Rigid Open Top, Rigid Closed Top, Flexible Packaging, and Engineered Materials. The Company is owned by Berry Plastics Group Incorporated (Evansville, Indiana), which is in turn majority owned by Apollo Management LP (Purchase, New York). In October 2012, Berry Plastics Group completed an initial public offering.

The Company participates in the US beverage container industry through the Rigid Closed Top segment, which had FY 2012 sales of $1.4 billion. The segment produces a wide range of plastic containers and closures for beverage and other applications. Among the segment's products are bottles made from such resins as polyethylene terephthalate (PET) and polyvinyl chloride (PVC).

PET bottles from Berry Plastics Corporation include oval, flask oval, mini round and square, and longneck round designs for liquor packaging applications. For example, oval and flask oval bottles are available in 200, 375, and 750 milliliter (mL) capacities, while mini

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STUDY COVERAGE

This Freedonia study, ***Beverage Containers***, offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for beverage container demand in the US by product, material and market. The study also examines key market environment factors, discusses the US industry structur, evaluates company market share and profiles 34 US industry participants.

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Other Studies

World Food Containers

World demand for food containers is forecast to rise 4.5 percent annually to $139 billion in 2017. While the US remains by far the world's largest user of food containers, the most significant growth will occur in India and China. Bags and pouches will remain the largest category based on their light weight, portability and convenience. This study analyzes the $111.4 billion world food container industry, with forecasts for 2017 and 2022 by product, market, world region, and for 22 countries. The study also evaluates company market share and profiles industry players.

#3124 .... February 2014 .... $6100

Pouches

Demand for pouches in the US is projected to increase 4.6 percent per year to $9.4 billion in 2018. Stand-up pouches will remain a major growth segment while flat pouches will remain dominant. Nonfood markets will outpace the dominant food and beverages segment, driven by expanded consumer product and medical and pharmaceutical applications. This study analyzes the $7.5 billion US pouches industry, with forecasts for 2018 and 2023 by type, feature, market and production method. The study also evaluates company market share and profiles industry players.

#3157 .... April 2014 .... $5200

Foodservice Disposables

US demand for foodservice disposables is forecast to climb 3.6 percent per year to $19.7 billion in 2017. Packaging products such as containers and lids and domes will achieve the fastest gains and will remain the largest category. Eating and drinking places will remain the dominant market while the retail and vending segment will grow the fastest. This study analyzes the $16.5 billion US foodservice disposables industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3081 .... September 2013 .... $5300

World Cups & Lids

World cup and lid demand will rise 5.0 percent per year to $25.9 billion in 2017. The fastest gains will occur in developing regions, while demand in developed areas will be supported by the increasing use of costlier biodegradable and compostable products. Food and beverage packaging will be the fastest growing market. This study analyzes the $20.3 billion world cup and lid industry, with forecasts for 2017 and 2022 by product, material, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry competitors.

#3012 .... June 2013 .... $6100

World Caps & Closures

World demand for caps and closures is projected to rise 5.3 percent per year to $46 billion in 2016, led by developing regions. Beverages will remain the dominant market, while opportunities in the food market will benefit from dispensing and other value-added closures such as non-drip flip top pourer caps. This study analyzes the $35.8 billion world cap and closure industry, with forecasts for 2016 and 2021 by material, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.

#2986 .... February 2013 .... $6300

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