INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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Beverage Containers

US Industry Study with Forecasts for **2019 & 2024**

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The Freedonia Group

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Beverage Containers

US Industry Study with Forecasts for *2019 & 2024*

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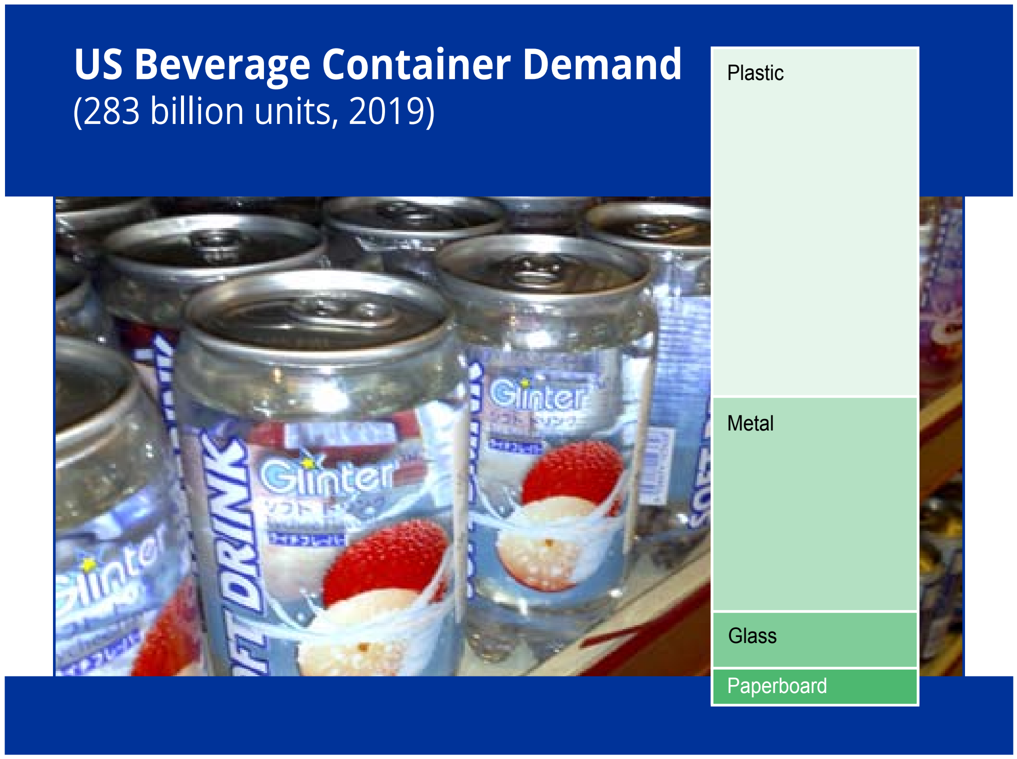
Beverage Containers

US Industry Study with Forecasts for ***2019 & 2024***

Proliferation of package sizes, new product introductions, and increased consumption of healthier beverages such as bottled water, ready-to-drink (RTD) tea, and nondairy milk alternatives will drive increases.

US demand to rise 1.9% annually through 2019

US demand for beverage containers is expected to increase 1.9 percent per year to 283 billion units in 2019, valued at $31.5 billion. Proliferation of different package sizes, new product introductions, and increased consumption of healthier beverages such as bottled water, ready-to-drink (RTD) tea, and nondairy milk alternatives will drive increases despite weakness in critical markets such as carbonated soft drinks and beer. Plastic bottles and metal cans will continue to dominate demand, with over 80 percent of the total. However, faster growth is expected in newer formats such as aluminum bottles, bag-in-box products, aseptic cartons, and pouches.



Plastic containers to remain dominant

Plastic containers will remain both the largest and fastest growing product segment, with gains supported by increased consumption in the primary outlet for plastic bottles, bottled water, which will become the leading market for beverage containers by 2019. However, going forward growth will slow somewhat as environmental concerns lead some consumers to favor filtered tap water or to use reusable bottles for on-the-go consumption. While the market for plastic bottles in carbonated soft drinks, milk, and juice is essentially mature, plastic is expected to gain ground in other uses including RTD tea, RTD coffee, and larger size alcoholic beverages. Plastic pouches will also continue to see increased use outside of juice drinks with new introductions in sports drinks, wine, and flavored alcoholic beverages taking advantage of the convenience and low cost of this package format.

Metal containers face both threats & opportunities

Metal containers are the second most prevalent package type within the beverage container industry, but demand for cans is expected to show only minimal growth through 2019 due to continued weakness in carbonated soft drinks and beer, the two key markets for aluminum cans. In addition, the increased use of metal cans as a packaging option for craft beers has been offset by a trend toward packaging in larger cans. However, the growing popularity of smaller cans in the carbonated soft drink market, as well as increased can use in growing markets such as wine and sparkling beverages, will help metal cans maintain a sizable market share as producers take advantage of their light weight and recyclability. Aluminum bottles will also provide opportunities for growth as improved manufacturing processes lower costs and beverage companies look for packages which provide shelf appeal and differentiation.

Sample Text, Table & Chart

TABLE VII-1

GLASS BEVERAGE CONTAINER DEMAND BY MARKET
(billion units)

Item	2004	2009	2014	2019	2024
Packaged Beverage Production (bil gal)					
% in glass					
Beverages Packaged in Glass (mil gal)					
ounces/unit					
Glass Beverage Container Demand					
Beer					
Wine					
Other					
% glass					
Total Beverage Container Demand					
cents/unit					
Glass Beverage Containers (mil $)					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

PLASTIC CONTAINERS

Sports Beverages -- Demand for plastic sports bever... percent annually through 2019 to ... s principally consist of PET bottle... ngs due to their shatter resistance ... o easier to drink from while movi... d the inclusion of push-pull caps. ... ng for sports beverages, demand f... d for the sports beverages market.

SAMPLE TEXT

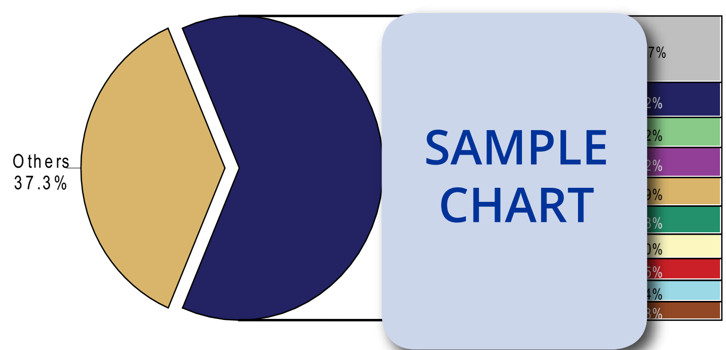
Many PET sports drink bottles are designed to allow eas... by athletes, often employing a contoured shape and recessed ... Hot-fill technology advances, available since the 1980s, have ... manufacture of PET bottles capable of withstanding the high... tures used in sports beverage packaging. These bottles often ... els that can flex in reaction to the vacuum distortion that occurs during the hot-filling process. However, in recent years, container companies have developed panel-less alternatives, such as Amcor Rigid Plastics' POWERFLEX bottles.

PET sports drink bottle demand may face competition from stand-up pouches and other containers which are smaller and easier to carry in bulk. PepsiCo, the leading US sports drink company, began packaging its GATORADE PRIME gel-like sports drink in a four-ounce stand-up pouch in early 2010. Pouch advantages include greater squeezability than bottles (which can be important in the case of gel-like sports drinks), lighter weight, and a better environmental profile, since pouches occupy less space in landfills. However, pouches still have few uses ... market.

Producers of PET bottles for sports drinks include Amc... Plastics, Graham Packaging, and Plastipak Packaging. For e... Amcor Rigid Plastics is a key supplier of PET bottles for Pe...

CHART IX-1

US BEVERAGE CONTAINER MARKET SHARE
($26.4 billion, 2014)



Beverage Containers

US Industry Study with Forecasts for ***2019 & 2024***

Sample Profile & Table, & Study Coverage

TABLE III-2

NONALCOHOLIC BEVERAGE CONTAINER DEMAND BY MARKET (billion units)

Item	2004	2009	2014	2019	2024
Pkgd Nonalcoholic Beverage Prdn (mil gal)					
ounces/container					
Nonalcoholic Beverage Container Demand					
Carbonated Soft Drinks					
Bottled Water					
Fruit Beverages					
Milk					
Sports Beverages					
RTD Tea					
Enhanced Water					
Other RTD Beverages					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

COMPANY PROFILES

Consolidated Container Company LLC
3101 Towercreek Parkway, Suite 300
Atlanta, GA 3
678-742-4600
http://www.cc

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Consolidated Container Company (CCC) is one of the largest US manufacturers of plastic containers. The Company is owned by Bain Capital LLC (Boston, Massachusetts), a private investment firm.

The Company competes in the US beverage container industry via the production of stock and custom plastic containers made from such resins as high density polyethylene (HDPE), polyethylene terephthalate (PET), and polypropylene. These containers are offered in an extensive range of sizes and configurations, including single- and multi-serving styles. Among other end uses, CCC makes plastic containers used to package juice, dairy liquids, ready-to-drink teas, and water.

CCC carries out production activities at US facilities in Arizona, Arkansas (2), California (8), Connecticut, Florida (3), Georgia (3), Illinois (3), Indiana, Kansas, Louisiana, Maine, Maryland, Minnesota, Massachusetts (2), Mississippi, New Hampshire, New Jersey (2), New York (2), North Carolina (2), Ohio, Pennsylvania (9), Tennessee, Texas (3), Utah, and Washington (2). The Company's presence in the US also includes an engineering, design, and development center in Atlanta, Georgia.

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STUDY COVERAGE

This Freedonia study, ***Beverage Containers***, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by market and container material. The study also considers market environment factors, details the industry structure, evaluates company market share and profiles 34 US industry competitors.

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Related Studies

Active & Intelligent Packaging

This study analyzes the US active and intelligent packaging industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., gas scavengers, corrosion control packaging, desiccants, susceptor packaging, color indicator packaging, time-temperature indicators) and market (e.g., food, beverages, pharmaceuticals, primary metals, motor vehicles, electronics). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3338..............October 2015.................$5300

Converted Flexible Packaging

This study analyzes the US converted flexible packaging industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material, product (e.g., bags, pouches), food packaging market (e.g., meat, baked goods, snack food, produce, candy and confections, frozen food, dairy products, pet food) and nonfood packaging market (e.g., pharmaceuticals, medical products, paper and textile products). The study also considers market environment factors, evaluates company market share and profiles industry players.

#3333..............October 2015.................$5500

Wine Packaging

Demand for wine packaging in the US will increase 4.4 percent annually to $3.0 billion in 2019. Glass bottles will remain dominant but will face increasing competition from alternative formats and sizes, such as single-serving plastic bottles, aseptic cartons, aluminum cans, and cups and goblets, as well as bag-in-box packaging. This study analyzes the $2.4 billion US wine packaging industry, with forecasts for 2019 and 2024 by container, closure, accessory and bulk packaging type. The study also evaluates company market share and profiles industry competitors.

#3308................August 2015..................$5300

World Cups & Lids

Global cup and lid demand will rise 5.2 percent annually to $30.2 billion in 2019. The important foodservice market will see faster-than-average growth as Western-style fast food restaurants and coffee shops become more prevalent. Central and South America and the Asia/Pacific region will be the fastest growing markets. This study analyzes the $23.4 billion world cup and lid industry, with forecasts for 2019 and 2024 by product and market for six world regions and 18 major countries. The study also evaluates company market share and profiles industry competitors.

#3283..................July 2015....................$6400

World Caps & Closures

World cap and closure demand will rise 5.6 percent yearly to $58 billion in 2019. The Asia/Pacific and Africa/Mideast markets will grow the fastest, while North America will remain a leading outlet. The beverage market will be driven by bottled water. In wine bottles, the shift toward metal screw caps and plastic stoppers will continue. This study analyzes the $44.3 billion world cap and closure industry, with forecasts for 2019 and 2024 by material, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3259.................April 2015...................$6500

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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