Wine Packaging

US Industry Study with Forecasts for 2019 & 2024

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Growth will be supported by continued favorable gains in domestic wine consumption and production, and by changing alcoholic beverage preferences of younger consumers in favor of wine.

US demand to rise 4.4% annually through 2019

Demand for wine packaging in the US is projected to increase 4.4 percent annually to $3.0 billion in 2019. Growth will be supported by continued favorable gains in domestic wine consumption and production. In addition, advances will be spurred by increasing disposable personal incomes and changing alcoholic beverage preferences occurring with younger consumers. These changes include the preference for wine over beer among millennials and a larger share of millennials consuming wine on a daily basis than that in other age groups. Opportunities for related packaging will benefit from its key role in marketing since it is the packaging that creates an initial impression of the wine and also has the ability to enhance the perception of the wine's quality.

Alternative wine packaging to outpace glass bottles

Glass bottles, the long-time traditional wine container, will continue to dominate the container mix in value and volume terms. However, competition is increasing from a growing variety of alternative package formats and sizes offering greater economy or convenience. The fastest gains for containers will be outside the dominant 750-milliliter size, including both smaller- and larger-sized offerings. While most of these alternative containers have not captured substantial volume, they have become more prominent in recent years and are valued by smaller wineries seeking to make their products stand out on retail shelves that typically feature a sea of glass bottles and boxed wines. Robust advances will occur for single-serving container options such as plastic bottles, aseptic cartons, aluminum cans, and cups and goblets as these containers boast the advantage of enabling wine to be taken to or sold in places that typically prohibit glass containers. Bag-in-box packaging will experience above average growth due to its lower cost per unit of volume and greater adoption of the format for 1.5- and 3-liter premium offerings, thereby changing the image of “boxed wine” as being inferior in quality to bottled wines.

Closures to benefit from a widening array of types

Wine closure opportunities will be driven by rising packaged wine production, with changes in the container mix necessitating a widening array of closure types. This trend will fuel strong opportunities for aluminum and plastic screw caps and plastic dispensing closures. Though continuing to face intensified competition from alternative closures, cork demand will be sustained by the entrenched position of glass bottles in the wine industry and the cost-competitiveness and improved performance of technical corks. Cork demand will also benefit from the stronger cultural preference for corks in the US than in other countries.

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Wine Packaging
US Industry Study with Forecasts for 2019 & 2024

Sample Text, Table & Chart

OTHER WINE PACKAGING

Boxes & Carriers

Demand for boxes and carriers for wine packaging is projected to climb 5.6% per year to $50 million in 2019. Growth will be fueled by factors, including 187-ml wine bottles. Included here are set-up boxes, which are all-lidded, preassembled, non-collapsible boxes. These boxes serve as gift boxes and are typically covered by more aesthetically appealing printed paper. These boxes are generally in sizes that hold one, two, or three wine bottles. Corrugated boxes are widely used for the shipping of 9-liter cases for 750-ml wine bottles, but are excluded from the scope of this study.

Paperboard carriers and folding cartons serve as secondary packaging for multipacks of single-serving wine containers. For example, paperboard carriers are widely used to unitize retail 4-packs of 187-ml wine bottles. The punch-out handles offer convenience for carrying the bottles and the carriers contain ample surface area for quality graphics, thereby adding to the shelf appeal of the wine in these containers. Carriers are used with plastic and glass packages of 187-ml bottles. Folding cartons are used as secondary packaging for 4-packs of wine packaged in aluminum cans and aseptic cartons and offer similar benefits to those of carriers, such as carrying convenience and good aesthetics.

Continuing rapid gains for plastic 187-ml bottles and other single-serving wine containers will bode well for related paperboard carrier and folding carton demand. Opportunities for these smaller containers will be aided by advantages of portability, convenience, and shatter resistance, with the latter enabling them to be sold in or taken to sites that prohibit glass bottles due to concerns about breakage. Tallened paperboard carriers and wood boxes also have a niche presence in packaging of wine. Leading suppliers of paperboard beverage containers include [Company Name].

### Table IV-3

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wine Container Demand (mil $)</td>
<td>910</td>
<td>1239</td>
<td>1580</td>
<td>1945</td>
<td>2420</td>
</tr>
<tr>
<td>% bag-in-box</td>
<td>12.0</td>
<td>14.2</td>
<td>16.6</td>
<td>18.8</td>
<td>20.9</td>
</tr>
<tr>
<td>Wine Bag-in-Box Demand (mil $)</td>
<td>109</td>
<td>176</td>
<td>262</td>
<td>365</td>
<td>505</td>
</tr>
<tr>
<td>5-liter</td>
<td>86</td>
<td>99</td>
<td>129</td>
<td>151</td>
<td>174</td>
</tr>
<tr>
<td>3-liter</td>
<td>8</td>
<td>43</td>
<td>85</td>
<td>138</td>
<td>216</td>
</tr>
<tr>
<td>4-liter</td>
<td>11</td>
<td>22</td>
<td>25</td>
<td>33</td>
<td>45</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>12</td>
<td>23</td>
<td>43</td>
<td>70</td>
</tr>
<tr>
<td>$/unit</td>
<td>1.11</td>
<td>1.23</td>
<td>1.34</td>
<td>1.42</td>
<td>1.53</td>
</tr>
<tr>
<td>Wine Bag-in-Box Demand (mil units)</td>
<td>98</td>
<td>143</td>
<td>196</td>
<td>257</td>
<td>331</td>
</tr>
<tr>
<td>5-liter</td>
<td>72</td>
<td>69</td>
<td>79</td>
<td>84</td>
<td>88</td>
</tr>
<tr>
<td>3-liter</td>
<td>10</td>
<td>43</td>
<td>75</td>
<td>110</td>
<td>155</td>
</tr>
<tr>
<td>4-liter</td>
<td>11</td>
<td>18</td>
<td>18</td>
<td>22</td>
<td>27</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
<td>13</td>
<td>24</td>
<td>41</td>
<td>61</td>
</tr>
</tbody>
</table>

Source: The Freedonia Group, Inc.

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Snyder Industries Incorporated
6940 O Street, Suite 100
Lincoln, NE 68510
402-467-5221
http://www.snydernet.com

Annual Sales: $160 million (estimated)
Employment: 770 (estimated)

Key Products: stainless steel portable containers, plastic bulk barrels, bulk bins, totes, and double-wall insulated bins

Snyder Industries specializes in the manufacture of plastic and steel bulk storage, processing, and transportation tank systems. The Company also provides custom rotational molding design and engineering services for large durable plastic products. Snyder Industries is owned by Leonard Green & Partners LP (Los Angeles, California), a private equity group.

The Company is active in the US wine packaging industry through the Bonar Plastics division (West Chicago, Illinois), which produces various wine packaging via its WINE MASTER product line. Specific products from the division include WINETAINER stainless steel portable containers, MONSTERCOMBO bulk bins, BULK BARREL plastic bulk barrels, VERSA-TOTES totes, and double-wall insulated bins.

The Bonar Plastics division’s WINETAINER stainless steel portable containers have lifting and stacking lugs, sloped bottoms, and are available in capacities from 130 to 790 gallons. These containers also feature food-grade interior weld finishes, thermowells for temperature monitoring, and dimpled heat transfer surfaces to facilitate targeted cooling.

TABLE V-1
WINE CLOSURE DEMAND BY TYPE
(million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Wine Packaging Demand % closures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wine Closure Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Natural Corks</td>
<td>242</td>
<td>295</td>
<td>383</td>
<td>485</td>
<td>615</td>
</tr>
<tr>
<td>Synthetic Corks</td>
<td>35</td>
<td>75</td>
<td>80</td>
<td>85</td>
<td>90</td>
</tr>
<tr>
<td>Aluminum Screw Caps</td>
<td>10</td>
<td>40</td>
<td>60</td>
<td>95</td>
<td>140</td>
</tr>
<tr>
<td>Other Closures</td>
<td>17</td>
<td>30</td>
<td>48</td>
<td>75</td>
<td>115</td>
</tr>
<tr>
<td>cents/unit</td>
<td>9.6</td>
<td>10.5</td>
<td>11.1</td>
<td>11.6</td>
<td>12.3</td>
</tr>
<tr>
<td>Wine Closure Demand (mil units)</td>
<td>2520</td>
<td>2798</td>
<td>3465</td>
<td>4165</td>
<td>4990</td>
</tr>
</tbody>
</table>

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World Corrugated Boxes
This study analyzes the world corrugated box industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by raw material (e.g., containerboard, adhesives, inks, waxes), market (e.g., food and beverage, nonfood nondurables), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3333.......... November 2015 .......... $6400

Active & Intelligent Packaging
US demand for active and intelligent packaging is forecast to grow 7.3 percent annually to $4.0 billion in 2019. Intelligent packaging such as time-temperature monitors and smartphone-enabled interactive labels and tags will be the fastest growing segment, increasing at a double-digit annual rate. This study analyzes the $2.8 billion US active and intelligent packaging industry, with forecasts for 2019 and 2024 by product and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#3333.......... October 2015 .......... $5300

Converted Flexible Packaging
US demand for converted flexible packaging will rise 3.3 percent annually to $20.7 billion in 2019. Pouches will experience above average gains, benefiting from the increased prevalence of value-added features. The nonfood packaging market will slightly outpace the dominant food packaging segment. This study analyzes the $17.5 billion US converted flexible packaging industry, with forecasts for 2019 and 2024 by material, product, and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

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

Beverage Containers
US beverage container demand will rise 1.9 percent yearly to 263 billion units in 2019, valued at $31.5 billion. Plastic will remain the dominant and fastest growing material, supported by increased consumption of bottled water, which will become the leading beverage container market by 2019. However, growth in plastic bottles will slow due to environmental concerns. This study analyzes the 258 billion unit US beverage container industry, with forecasts for 2019 and 2024 by material and market. The study also evaluates company market share and profiles industry players.

#3297.......... June 2015 .......... $5300

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

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