World Wine Packaging

Industry Study with Forecasts for 2020 & 2025

Study #3406 | July 2016 | $6300

Changes in wine consumption reshape packaging market

Global wine production and consumption levels have not changed very dramatically in recent years, nor are they expected to in the coming years. This does not mean that little is happening in the wine packaging market. Changes in consumption patterns are reshaping the wine market, and the packaging industry around it. While consumption in many of the traditional winemaking countries is declining, it is on the upswing in the US and other countries in the Western Hemisphere, as well as in Asia.

Glass faces competition

Glass bottles, mainly in the familiar 750-milliliter size, remain the dominant packaging format for wine. However, the near-monopolistic grip that glass bottles once had has been loosened by bag-in-box containers, aseptic cartons, and several other package types. While these formats are generally not ideal for wine that will be aged for an extended period, they are suitable for wines intended for consumption not long after they are bottled -- and such wines account for most of the world's wine.

Bulk packaging buoys global trade

Trade has been an important component of the global wine industry for centuries, and several of the world's largest wine producing countries have long produced far more wine than their domestic markets can consume, while a number of significant wine consuming nations rely on imports. In recent years, a growing share of the global wine trade is shipped in bulk. Advances in bulk packaging technology have enabled shipping of vast quantities of wine. This saves a considerable amount in shipping costs, particularly for wine that will eventually appear in stores in heavy, breakable glass bottles.

"Wine experience" a major factor

Beyond objective performance criteria, glass bottles still enjoy a degree of prestige that alternative packaging generally cannot match, particularly in terms of the mythological "wine experience," which inevitably includes images of a traditional wine bottle with a cork closure, a capsule, and elegant labeling. However, many traditional wine producing countries have moved away from this archetype and increased their use of bag-in-box, plastic bottles, and other alternatives. Although glass bottles are still used to package most wine in most countries, metal screw caps and synthetic stoppers have established an appreciable market presence. In a broad sense, there is a correlation between the cost of wine and the value of the materials used to package it, but there are no absolutes and factors like environmental consideration and "tradition equity" can vary from one country to another.

Study coverage

This study analyzes the world wine packaging market. It presents historical data (2005, 2010, 2015) plus forecasts (2020, 2025) for supply and demand by wine packaging type (containers, closures, labels, capsules, wire hoods, bulk packaging) and wine container type (glass bottles, bag-in box, aseptic cartons, plastic bottles, other) in five regions and 25 countries. The study also considers market environment factors, assesses industry structure, analyzes company market share and profiles industry participants worldwide.

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Industry Study with historical data for 2005, 2010 & 2015 plus forecasts for 2020 & 2025

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EUROPE

Spain: Wine Packaging Demand

Demand for wine packaging in Spain is projected grow less than bill in 2020. The g por will limit dem e sl of Spanish wir th c wines, or bottl d co sumed.

SAMPLE TEXT

While ove wly transition awa ell f products used mainly in conjunction with glass bottles such as capsules, cork stoppers, and labels. Two exce are wire hoods, as sparkling wines will continue to be aged in glass bottles; and screw caps, which are increa their presence mainly at the expense of cork stoppers.

Because Spain is one of the largest wine producing countries, it is unsurprising that many leading suppliers are active there. Companies active in the wine packaging market in Spain include Corticeira Amorim, Owens-Illinois, Multi-Color, Tecnocap and Global Closure Systems (GCS). Corticeira Amorim is active through three subsidiaries: Trefinos, Francisco Oller, and Agglotap. Multi-Color competes via its Collotype Espana subsidiary. Owens-Illinois has two production facilities in Spain.

TABLE V-7

CANADA: WINE SUPPLY & DEMAND
(million liters)

Item	2005	2010	2015	2020	2025
Resident Population (mil persons)					
liters/capita					
Wine Consumption					
net exports					
stock change & other uses					
Wine Production					
Still					
Sparkling					
net bulk imports					
Packaged Wine Production					

SAMPLE TABLE

Source: The Freedonia Group

TABLE V-8

CANADA: WINE PACKAGING DEMAND BY TYPE
(million dollars)

Item	2010	2015	2020	2025	2035
Packaged Wine Production					
$ packaging/liter					
Wine Packaging Demand					
Containers					
Closures					
Labels					
Capsules					
Bulk Packaging					
Wire Hoods					
% Canada					
North America Wine Packaging Demand					

SAMPLE TABLE

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Pouches

Demand for pouches in the US will grow 4.4 percent annually through 2020 to $10.1 billion. Growth will be driven by the introduction of pouch packaging into new markets and the integration of high value features, such as resealable closures and spouts, in more mature markets. Stand-up pouches will remain the fastest growing type. This study analyzes the $8.2 billion US pouch market, with forecasts for 2020 and 2025 by product type, feature, market, and production method. The study also evaluates company market share and profiles industry players.

#3383............. February 2016 .... $5400

World Corrugated Boxes

World demand for corrugated boxes is expected to increase 3.7 percent annually through 2019, to 260 billion square meters. Gains will be driven by strong growth in e-commerce and a sustainability advantage over plastic containers. The Asia/Pacific region will account for the largest share of net growth. This study analyzes the 217 billion square meter world corrugated box industry, with forecasts for 2019 and 2024 by raw material and market for six world regions and 27 major countries. The study also evaluates company market share and profiles industry players.

#3339............ November 2015 .... $6400

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

Beverage Containers

US beverage container demand will rise 1.9 percent yearly to 283 billion units in 2019, valued at $31.5 billion. Plastic will remain the dominant and fastest growing material, aided 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. The study analyzes the 258 billion unit US beverage container industry, with forecasts for 2019 and 2024 by material and market. The study also details company market share and profiles industry competitors.

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

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

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