

Beverage Industry Packaging Trends



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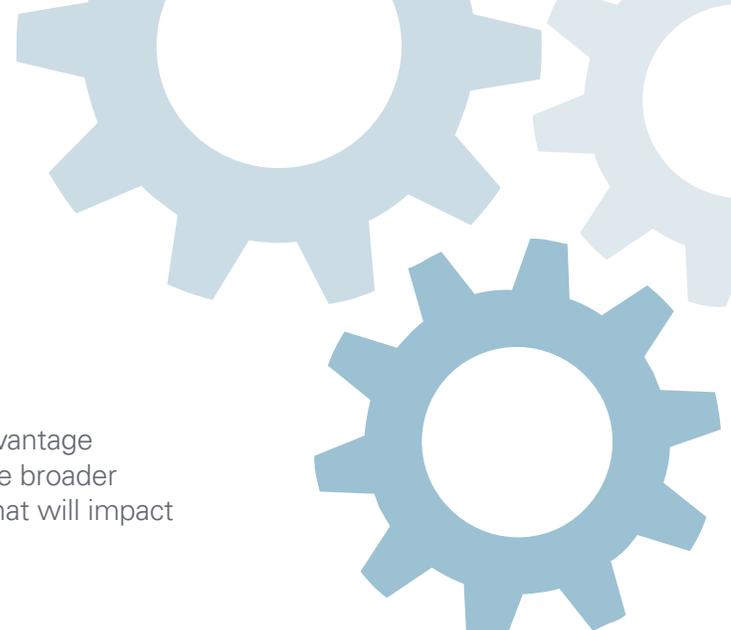
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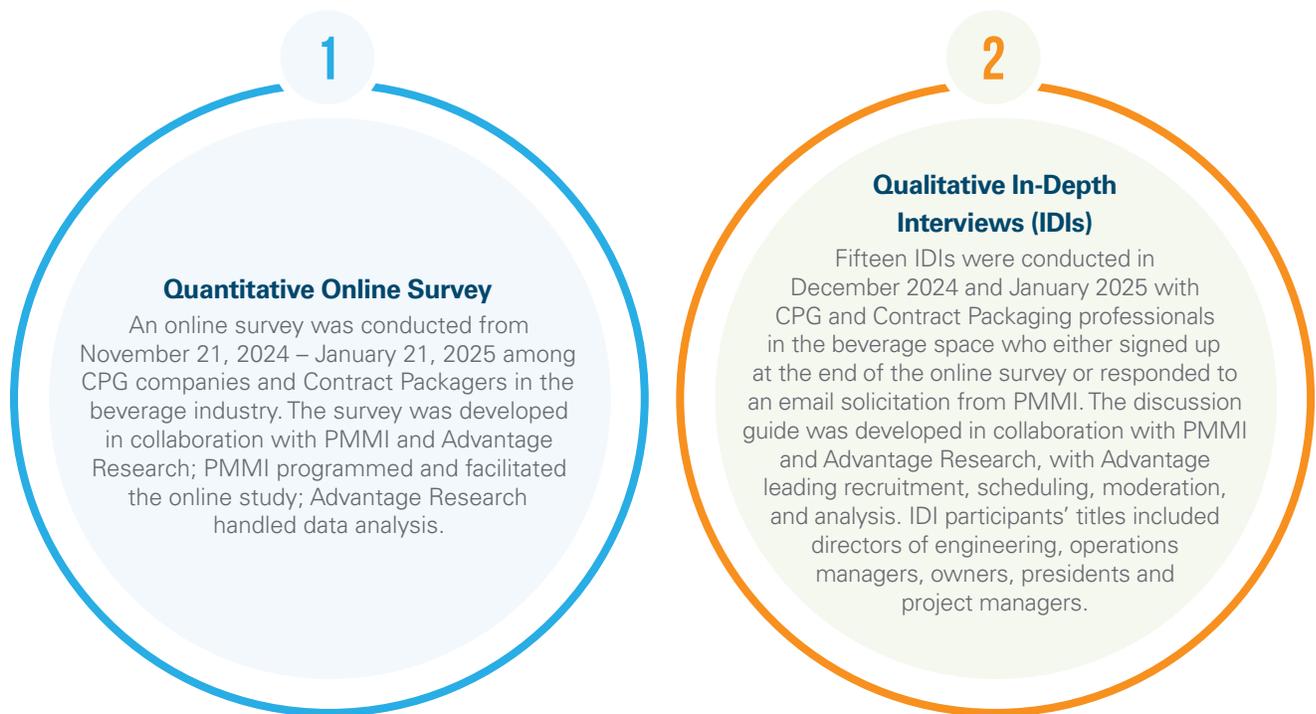
Grace Lee, Manager, Market Research, PMMI



Study Overview

PMMI conducted this research in collaboration with Advantage Research, to provide PMMI member companies and the broader industry with insights into beverage packaging trends that will impact the packaging and processing industry.

The research was conducted in two phases:



The objectives of the study included:

- Gaining an unbiased and objective understanding of the attitudes and behaviors of packaging and processing machinery decision makers within the domestic beverage market and its implications on the investment in packaging and processing equipment.
- Identifying the trends to determine if there will be an increase or decrease in the amount of packaging and processing machinery purchased for the beverage market in the next 18-36 months.
- Evaluating the major drivers affecting the domestic beverage market, such as marketing/distribution trends, consumer trends, emerging trends, etc.
- Examining the regulatory issues of the domestic beverage market.

Executive Summary

A majority of survey respondents anticipate moderate to significant increases in beverage packaging machinery investment over the next three years. Reasons for the growth include meeting consumer demand, increasing opportunities for co-packers, and improving or replacing current infrastructure.

Nine in ten facilities plan to purchase some type of beverage packaging machinery in the next three years, and IDI participants pointed to a wide range of machinery that they are looking to purchase during this period.

Cost, speed, efficiency, and flexibility of machinery are important when considering which machinery to buy. So is finding the right supplier—one who will be a true partner far beyond the initial sale. Support from suppliers is also what companies feel is currently lacking and could be enhanced.

Consumer preference drives many of the decisions made by beverage packaging companies. Consumers desire more sustainable and recyclable packaging. They also want more sizes, flavors, and types of beverages.

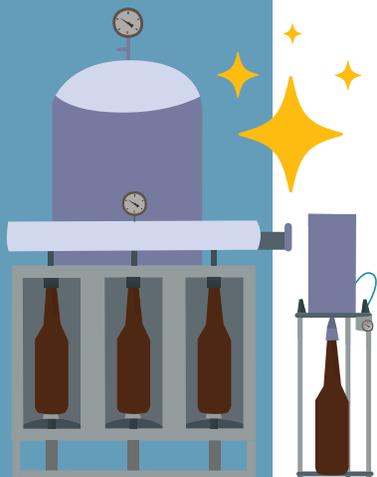
Consumers would like to see packaging move away from plastics. Rigid plastic is most commonly used today by survey respondents, but they anticipate a decrease in the next two to three years.

Brands interviewed expect to see growth due to continued interest in beverages like THC-infused drinks, mocktails and mixers, nutraceuticals, and non-sugary drinks.

Trends include appealing to customers who want ready-to-drink and single-serve, smaller-sized packaging. To continue to fulfill consumer needs, creative and unique packaging being developed today will continue to evolve and will be a focus of development in the future.

Technical integration will have the most positive impact on beverage packaging and processing operations in the coming years. Inflation, supply chain disruptions, regulatory compliance, and talent acquisition/retention challenges are expected to continue having negative impacts on this industry.

Sanitation is a priority for most interview participants. Recalls in the food and beverage industry are not something anyone wants to have happen to their company or the industry overall. Sanitation is considered a non-negotiable item. If a plant encounters a sanitation issue, they shut down without hesitation.



Growth in Beverage Packaging Equipment

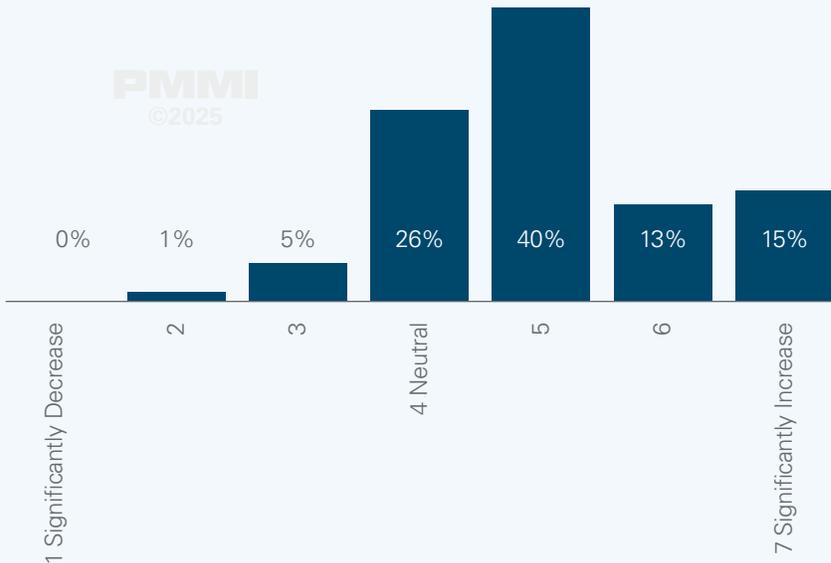
Expected change in beverages packaging equipment in the next 2-3 years

Many beverage companies anticipate modest to significant increases in machinery investment over the next three years, primarily driven by optimism surrounding company expansion plans, the introduction of new SKUs/products, and increased consumer demand.

68%

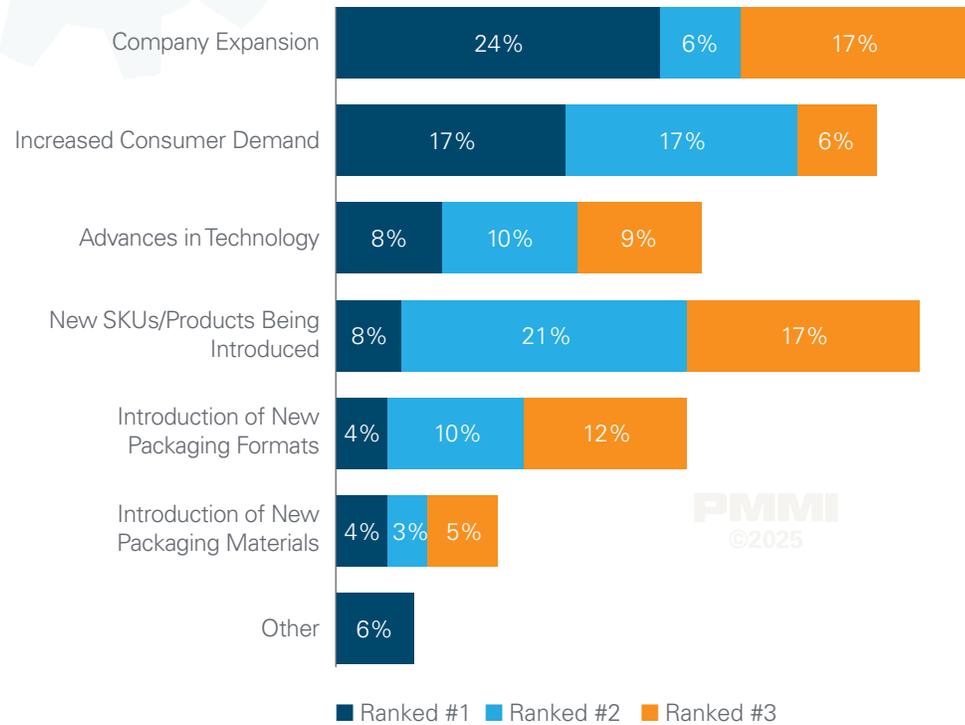
anticipate a moderate to significant increase (% choosing "5" or higher on a 7-point scale) in beverage packaging machinery investment

What do you estimate will happen with your company's beverage packaging machinery investment over the next three years?



Which of the following best describes the reasons you anticipate a moderate to significant increase in investment? Please rank your top three reasons.

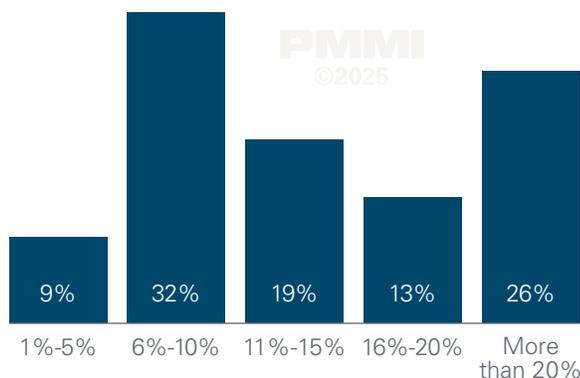
Answered by those who anticipate a moderate to significant increase (% choosing "5" or higher on a 7-point scale) in beverage packaging machinery investment



58%
Of respondents

anticipate their investment in beverage packaging machinery will exceed 10% over the next three years. This includes 26% who expect an increase of more than 20%.

By how much do you think your company's investment in beverage packaging machinery will increase in the next three years?



The expected level of investment is universal across the beverage industry, regardless of size or revenue. Nearly all IDI participants believe this trend will apply broadly rather than just a few companies.

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Everybody everywhere is buying equipment. So, I think it's across the segment of the industry. There's tremendous growth. If we go into a recession or if the tariffs come, that may change things, but right now there's still tremendous growth.

Director of Robotic Solutions and Safety, Global Beverage Company

I would suspect that my competition is having very similar reactions. I feel like the beverage industry is growing year over year and there's so much opportunity out there. If businesses like me are failing, then it's got to be something internal. It's surely not because of the economy.

President, Private Label Contractor

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Reasons behind increases in beverage packaging equipment investment

Interview participants provided their rationale for the anticipated increase in packaging machinery investment. Growing consumer demand and interest are driving the need for more diverse beverage products and packaging sizes, leading to an overall rise in the formats of beverages being packaged over the next 2-3 years. Additionally, the opportunities for co-packers to expand production are contributing to increased investment, as they seek to meet rising demand and support new brands. Finally, Beverage Manufacturers/CoPackagers will need to improve and replace infrastructure overall, to ensure they remain efficient and competitive in an evolving market.

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GROWTH IN CONSUMER DEMAND AND INTEREST

There's a lot of investment that's required to upgrade or update based on the SKUs that we're going to run. And a lot of that is due to trends that we're seeing in the market. Just because you have a can line today that can produce a 12-ounce standard can, that does not mean that can line can produce 12-ounce sleek cans, 16-ounce cans or mini cans. I see investment increasing over the next two to three years, particularly based on demand for new and innovative products that may require a different format, but also based on consumer trends.

Director of Robotic Solutions and Safety, Global Beverage Company

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OPPORTUNITIES FOR CO-PACKERS

You’ve got a lot of these small co-packers entering into the industry right now, and it’s a tough industry to get in because of the cost of entry is very high on equipment and it’s extremely complicated and costly for small guys who want to produce small volumes to get into it. We built our business on our own brand production and, coincidentally, it was a great move to help other brands out. We’re in this little niche in the co-packing industry where big co-packers don’t want to deal with new brands that are coming to market because there’s no volume there yet and that’s where we live—we will run small volume for these new brands that are coming to market.

Owner, *Beverage Manufacturer and Co-Packer*

NEED TO IMPROVE AND REPLACE INFRASTRUCTURE OVERALL

In terms of the soft drink industry, I would say fundamentally everybody has to invest. Where we are today as an industry, a lot of equipment is aging. And so, whether it’s buying semi-new equipment or used equipment, or whether it’s buying brand new equipment, from an obsolescence standpoint, I think a lot of folks find themselves in a similar situation in that some of this equipment has aged so much that the parts are no longer available. And fundamentally, in order to keep the facility or keep the line running, there’s going to have to be an investment.

Director of Engineering, *Global Beverage Company*

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Specific equipment where increased investment will occur

However, the increase in investment will not be concentrated on a single type of packaging machinery but rather spread across various equipment categories. IDI participants point to a wide range of machinery they plan to purchase over the next two to three years.

Expanding production capacity:

Some are planning to invest in entire production lines to keep up with demand and/or accommodate new product SKUs they’re developing.

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If I’m increasing volume, I’m probably going to have to increase from start to finish and analyze my line from pack-on, all the way to pack-off and everything in between.

President, *Private Label Contractor*

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Enhancing efficiency: Others are focused on improving equipment efficiency to reduce bottlenecks and minimize downtime.

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How do you make equipment easy, simple, and functional? Because the goal, again, is uptime. We want to keep the equipment running, we don't want it to slow down, but inevitably things break.

Director of Engineering,
Global Beverage Company

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Increasing flexibility and reducing packaging material: Some companies are looking to purchase machinery that allows for greater flexibility and reduced packaging waste.

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We've been really pressured to be able to reduce the amount of packaging on that type of line. We went from having something that was packaged with a little cardboard tray on the bottom, and we've worked to eliminate that and to reduce and lower the cost of that. So far, our customers really like that.

Director of Engineering, *Beverage Manufacturer and Co-Packer*

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How increased investment will impact the current level of production

Not surprisingly, a majority of beverage packaging machinery companies use multiple types of packaging and processing equipment in their facilities. The most commonly used equipment, found in at least three out of four companies, include:



86%

Coding, Labeling,
Printing, and Reading



83%

Filling, Capping and
Closing



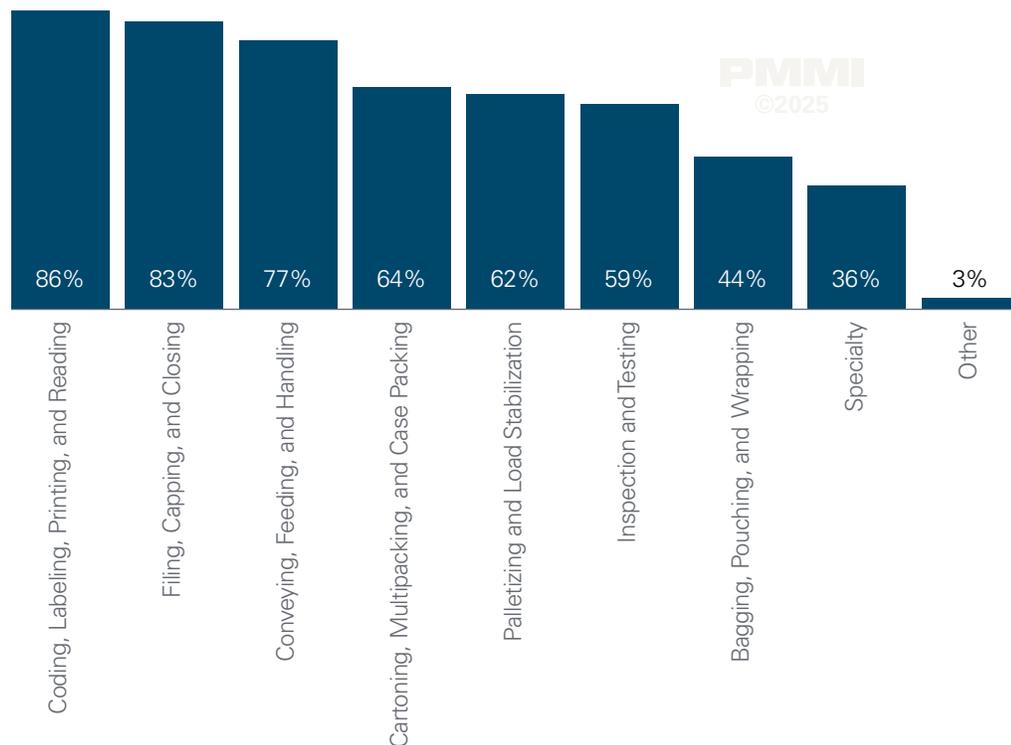
77%

Conveying, Feeding,
and Handling

On the other hand, equipment types that are less commonly used include bagging, pouching, wrapping equipment (44%) and specialty equipment (36%).

Which of the following types of beverage packaging machinery do you currently have in production?

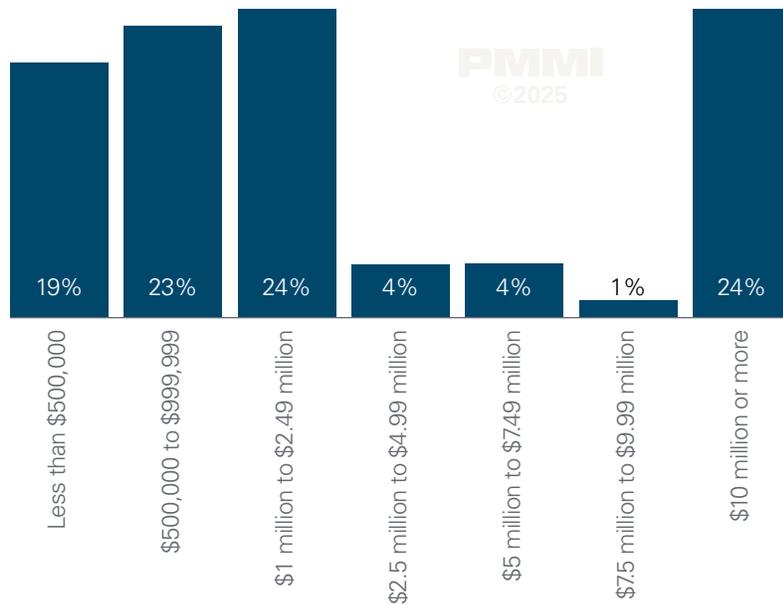
Select all that apply



The responding beverage companies fall mainly into two broad groups when it comes to capital expenditures on packaging and processing machinery over the past three years.

- More than half (66%) of responding companies spent less than \$2.5 million
- 24% reported capital expenditures of \$10 million or more
- Only a few companies (9%) fell into the mid-range investment category, spending between \$2.5 million and \$9.99 million

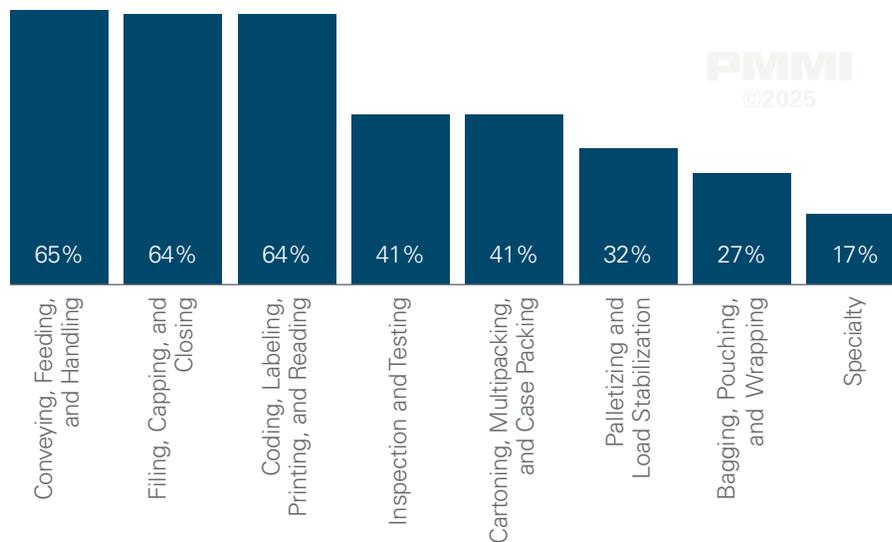
Approximately what was your facility's total capital expenditure on the beverage packaging/processing machinery that you purchased during the past three years?



Over half of beverage packaging companies say they have purchased conveying, filling, and/or coding machinery in the past three years.

Which of these types of beverage packaging machinery has your facility purchased in the past three years?

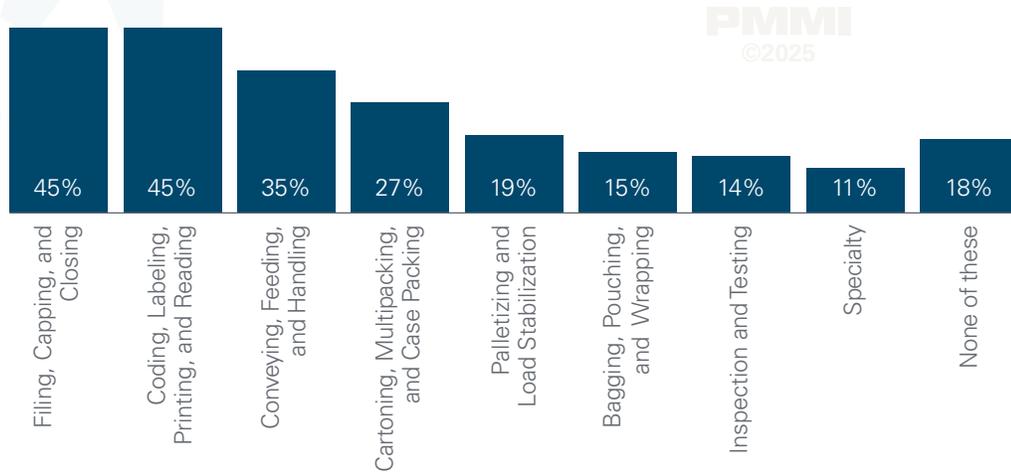
Select all that apply



The most purchased equipment types are also the ones that were most often purchased to replace existing equipment. Fewer than 20% of companies surveyed are not replacing any equipment.

Which of these types of machinery were purchased to replace existing machines that you had?

Select all that apply



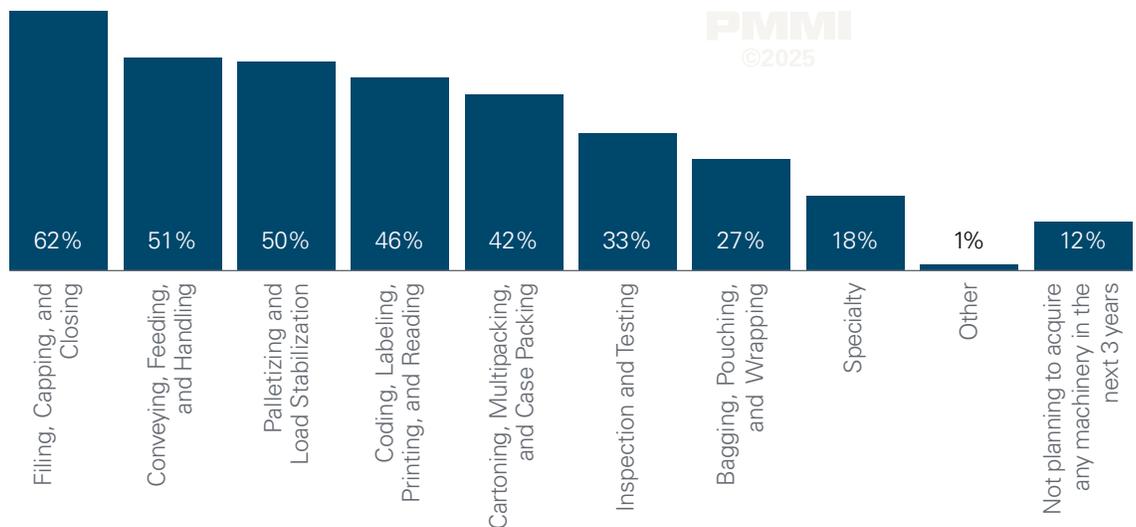
NEARLY
90%

of surveyed companies plan to purchase some type of beverage packaging machinery in the next three years.

Filling equipment is the most commonly planned purchase, followed by conveying, feeding, handling equipment, as well as palletizing and load stabilization equipment. Interestingly, one in eight manufacturers have no plans to acquire any equipment in the next three years.

Which of these types of beverage packaging machinery does your facility plan to purchase in the next three years?

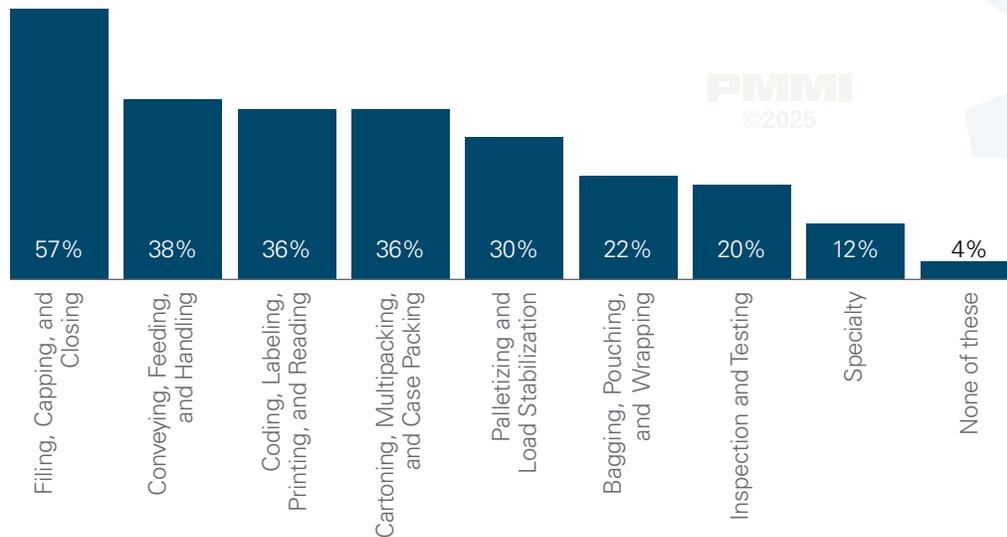
Select all that apply



Filling equipment will also most often be purchased to replace existing equipment. In contrast, facilities are most likely to add new palletizing equipment, with 20% of facilities planning to add it to their operations for the first time.¹

Which of these types will you purchase to replace existing machines that you have?

Select all that apply



In summary, compared to other equipment types, filling, conveying, and coding equipment form the core of the beverage processing and packaging industry. These three types of equipment are:

- Most likely to be in production
- Most frequently have been purchased in the last three years
- Most likely to be purchased in the next three years
- Most likely did or will replace existing equipment

Considerations when buying new machinery

Perhaps not surprisingly, cost is the primary factor when determining which beverage packaging machinery to purchase. This includes the overall price of the machinery, parts, and maintenance. Speed, efficiency, and flexibility are also critical considerations, as manufacturers need to pack a large volume and variety of products to meet the rising demands of consumers and retailers.

Equally important is finding the right supplier—one who will partner with them far beyond the initial sale. Post-sale service and support play a crucial role in the decision-making process when selecting a supplier.

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I’m also looking for a good partner, someone that I can create a good relationship, hopefully a long-term relationship with.

President, Private Label Contractor

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¹Given that 50% will be buying palletizing equipment in the next three years and 30% report they will be buying that equipment as a replacement, the remaining 20% would necessarily be buying the equipment as additional machinery for their operation.

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Support is big. It's important that they have domestic based technicians and repair people. Having a domestic parts center warehouse that we can get parts from is important. And being able to support the machine because regardless of how fancy or expensive the machine is, there are going to be things that need to be supported.

Director of Operations, *Beverage Company*

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Needs, expectations, or services that are not being met or could be enhanced by OEMs currently

Unfortunately, what beverage packaging companies need most from suppliers is often lacking. Although customer support and service are what research participants most want in a supplier, it's currently what is most lacking and could be enhanced by OEMs in the future. In-person and remote support is important, and participants want to feel as though they have a relationship with OEMs that's reliable and consistent for as long as the machine is functioning.

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You definitely don't want to feel like you're on your own with heavy machinery. You want to feel like that relationship continues with that customer service and maybe even set up some sort of long-term program where they're coming out every six months or once a year to check up or to service those sorts of things.

President, *Private Label Contractor*

We always want more support, more education, more ideas around what the future holds for new equipment. We constantly strive for that—daily, weekly support inside of our plants. Some of our big machine users will actually have a person in our plant on call 24/7. These machines are very complex.

Manager of Packaging, *Global Beverage Company*

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Affordability is another need that was mentioned by smaller businesses in the beverage industry, with most finding it hard to invest on a smaller scale. They feel this is a significant barrier to entry.

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Small beverage businesses are not being served. Plain and simple. When I started in 2019, there was nothing in existence that I could buy on a small scale to help me scale to the next level. You either go big or you go home. I had to beg, borrow, and steal to try to figure out how I was going to do what I was going to do.

Owner/Founder, *Beverage Company*

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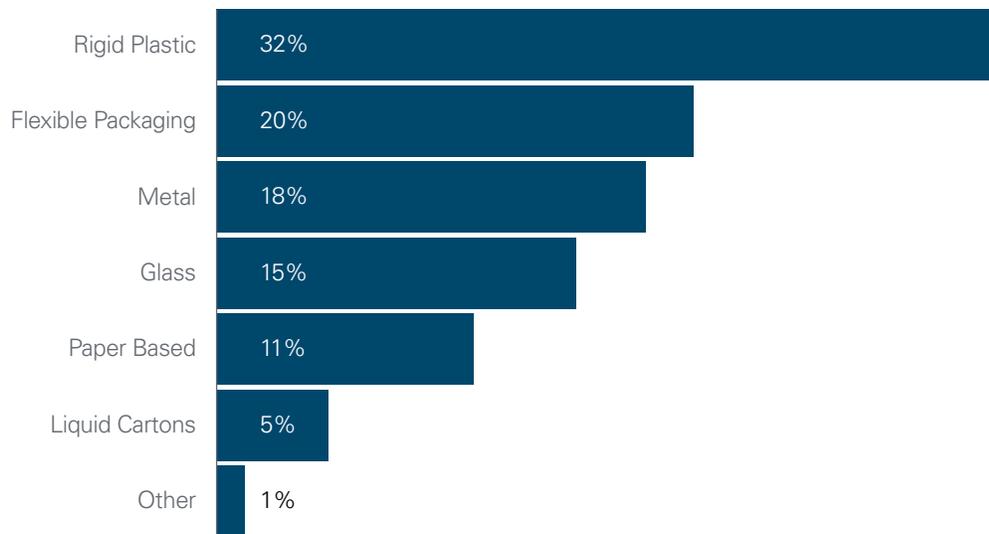
Consumer Preference

Sustainability/recycling

Overall, consumer preference drives many of the decisions made by beverage packaging companies. Consumers desire more sustainable and recyclable packaging while also demanding a greater variety of sizes, flavors, and beverage types. However, current packaging does not always align with consumer expectations. Consumers would like to see packaging move away from plastics, but rigid plastic is the most common beverage packaging material used today, according to those who participated in this survey. Although less common, flexible packaging, metal, and glass are the next most frequently used materials.



Approximately what percentage of the beverages your facility produces are packaged in each of the following pack types?



Survey respondents anticipate a decrease in the use of glass and rigid plastic packaging over the next 2-3 years, while all other packaging types are expected to increase.



Factors driving changes in how beverages are packaged

Interview participants identified several factors driving changes in how beverages are packaged and processed. One of the most significant influences today is the growing emphasis on sustainability and recyclability from both customers and consumers.

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I think there's a higher focus on sustainability, but also growing cost of raw materials as people start doing the conversions of the trays versus no trays or pads just in the plastic. A lot of that's going to be driven by what the consumer wants, but also the cost to deliver.

Sr. Engineering Design Manager, Beverage Company

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The desire for sustainability is not going away anytime soon either. Both consumers and companies continue to prioritize recyclable materials and seek alternatives to single-use plastics, exploring new materials and production methods for beverage containers.

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I think the wheels already turning insofar as recyclability and sustainability. I think that a lot of companies that manufacture the package material itself are on board for that, and so there should be a lot coming out to make improvements. Recyclable, compostable materials I see as a big area.

Director of Engineering, Beverage Manufacturer and Co-Packer

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Choice of size, flavor, type

Additionally, beverage companies are adapting to consumer demand by offering a wider variety of sizes, flavors, and beverage types. As a result, companies are working to develop more flexible and creative packaging solutions to enhance consumer interest and drive sales growth.

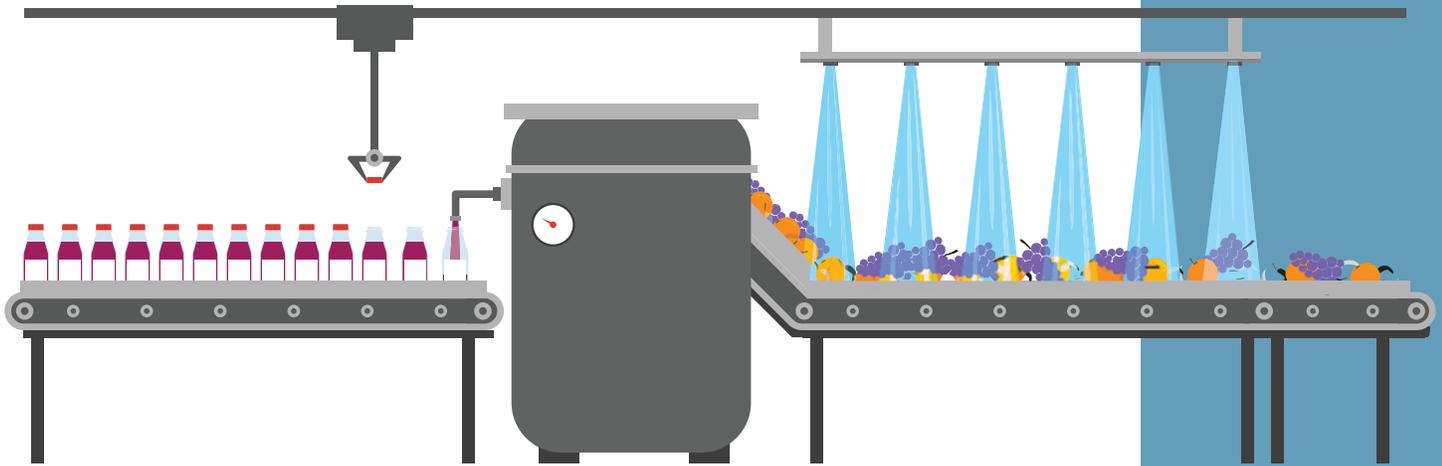
Research participants also believe this will be a trend in the future. Consumers will look for an even greater variety of drinks and flavors. It's no longer just beer, wine, soda, and water. Rather, new flavors and types of beverages are proliferating. In addition, consumers will continue to demand more size and format options, driving an increase in new SKUs each year.

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Different sizes for different categories will continue to grow. We see more sizes rather than less sizes. The traditional 12 ounce can for beverages is being replaced by different other sizes. Specific packages for club chains are a big issue. Paper packaging continues to grow.

Manager of Packaging, Global Beverage Company

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Single fruit, super fruit, antioxidant type drinks were a huge trend for quite a few years, and that trend has kind gone away. What we are producing more of now appears to be much more complex type formulas, blends, mixes involving 10+ different ingredients. There’s obviously a big focus on vitamins and minerals and those types of drinks—a lot of the drinks where instead of putting it in your refrigerator for 30 days, they are ready-to-drink type of drinks where you drink the entire thing in one sitting or in one day.

President, *Private Label Contractor*

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As a result of these trends, beverage packaging formats are changing and evolving. For IDI participants and survey respondents alike, a major focus for enhancing sustainability will be the development of packaging that will allow them to eliminate plastic. However, eliminating plastic presents challenges in cost and maintaining product quality.

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I keep seeing sustainable packages as being something that’s definitely more prevalent. I would go so far as to say that if we could provide a sustainable package for all of our customers and all the products that we make, they would be so happy. Some of them can’t just switch over because of the need to maintain the freshness of their product and sustainable means aren’t there for all type of products.

Director of Engineering, *Beverage Manufacturer and Co-Packer*

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Outlook for the Beverage Industry Overall

Optimism and growth in the overall beverage industry

Understandably, participants' expectations for beverage packaging and processing machinery investment is tied to the optimism they have for the overall beverage industry. The increased investment participants report they will make in beverage packaging machinery is the natural result of the belief in overall growth the beverage industry will experience over the next two to three years. This belief is nicely summarized by an interview participant, who stated:

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I look at our future and I would say right now our problem is how big do we want to be?

Owner, Beverage Manufacturer and Co-Packer

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Despite potential declines in certain beverage categories (e.g., sodas, seltzers, and kombuchas), nearly all participants anticipate overall growth driven by increasing consumer interest in THC beverages, mocktails and mixers, nutraceuticals, and non-sugary options. Ready-to-drink beverages continue to perform strongly in the marketplace.

”

There's still plenty of opportunity in the beverage industry and that it's been growing year after year. People are still highly interested in either supplemental type drinks or ready to serve drinks. And one of our most popular are these mocktail drinks that we make. It's a great example of how there's still a lot of opportunity in the beverage industry. It's still growing, definitely.

President, Private Label Contractor

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Trends, technologies, or innovations in packaging of beverages

When the conversation with participants turned to new trends, technologies, and innovations in beverage packaging, they emphasized the need to appeal to customers seeking ready-to-drink and single-serve, smaller-sized packaging. To continue to fulfill consumer needs, creative and unique packaging solutions being developed today will continue to evolve and remain a key focus for future development.

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I’m seeing some change happening to the containers themselves. For example, they’re starting to do custom packaging for water or for alcohol where there are actually two separate vessels that are connected. And you have, for example, a margarita where the mix is in the bottom and the alcohol is in the top and you twist it, and it mixes together.

Owner, *Beverage Manufacturer and Co-Packer*

Boxed wine is kind of coming back now. Individual servings, in a Capri Sun package but it’s a ready-to-drink cocktail in a package. That is a trend that I’ve started to see more. And the tall skinny cans. It’s kind of the bougie thing right now.

Owner/Founder, *Beverage Company*

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Change, improvements or innovations in beverage processing and packaging machinery

To meet evolving packaging demands, participants seek to optimize machinery use by leveraging digital insights and diagnostics for faster, more efficient production. Downtime directly impacts revenue, making technology-driven troubleshooting a top priority.



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Federal regulation for climate change and everything else. If, and I don’t think this would be the case, but if overnight we had to go completely to a PET package based on some kind of federal law, it would completely derail our entire operation.

VP, *Cannabis Beverage Company*

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In addition to impending regulation, consumers want to support recycling and therefore expect companies to provide recyclable products. However, some participants are calling out societal and infrastructural limitations that impede the successful end-of-life management of the products they are expected to provide.

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People don't like plastic. And yet as a society we're not very good at recycling. We don't understand it, and the systems are not in place to manage all of this stuff. And we need to find streams for plastic that give it a better chance of becoming another package again or something of value. I think we as a society in the U.S. create an enormous amount of waste and we sort of accept it, and yet it's not a good thing. And so that's partly what keeps me up at night.

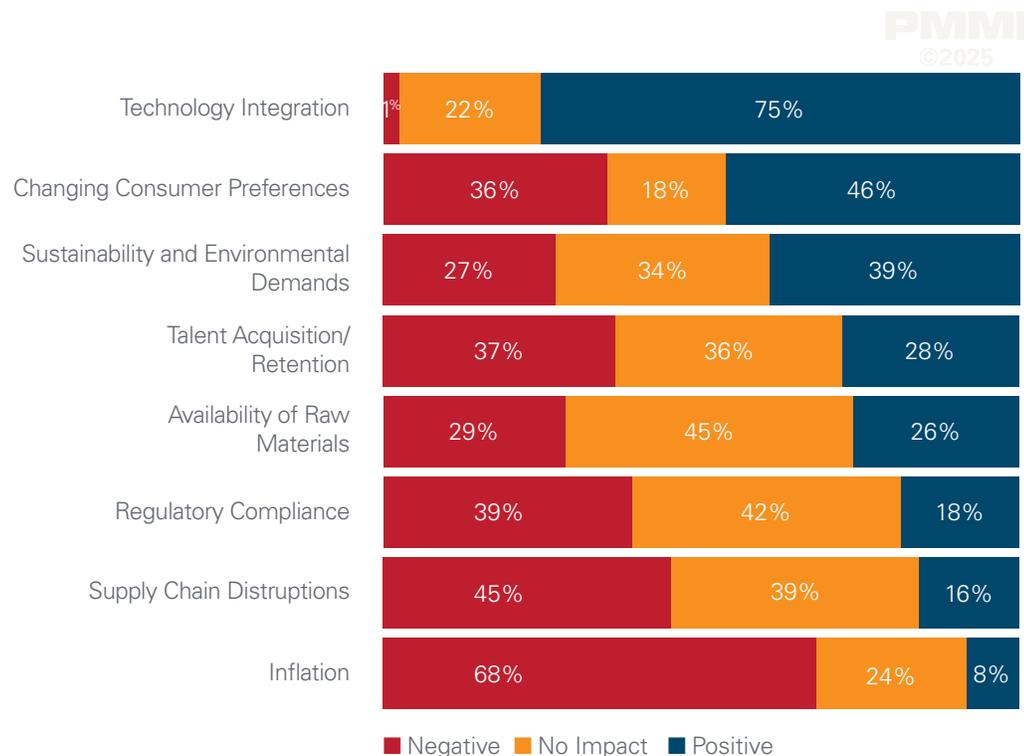
Director of Robotic Solutions and Safety, Global Beverage Company

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Influencing factors

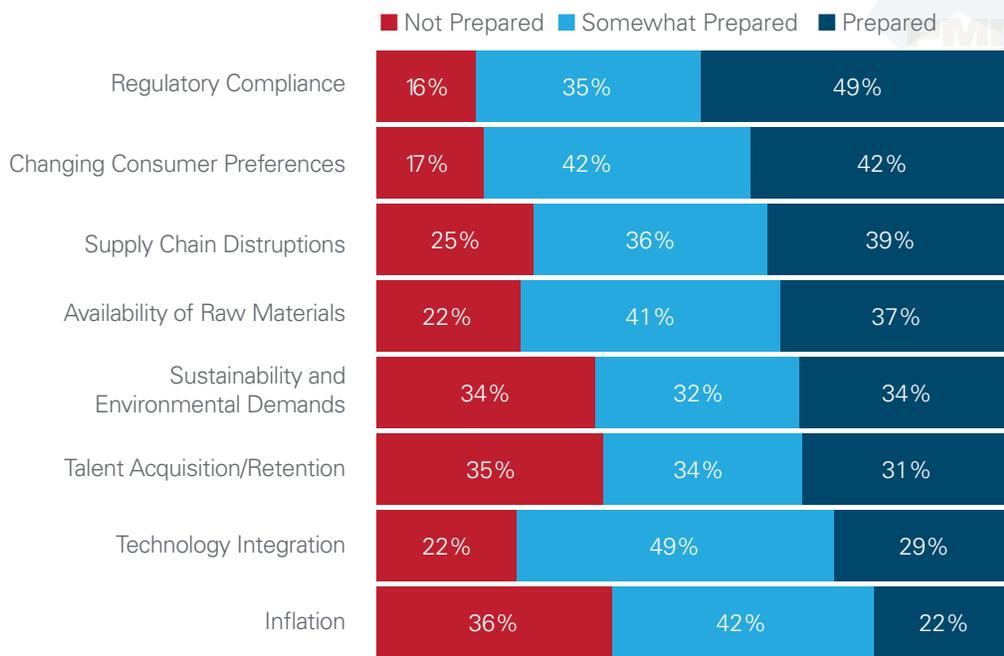
Technology integration will have the most positive impact on beverage packaging and processing operations in the coming years. Inflation will continue to be a concern for the majority. Supply chain disruptions, regulatory compliance, and talent acquisition challenges will also continue to have some negative impacts.

Looking ahead to the next 2-3 years, how do you anticipate the following aspects will impact your beverage packaging and processing operations?



Unfortunately, beverage packaging and processing companies are not entirely confident in their preparedness to address the coming challenges in the industry. Overall, at least 15% feel unprepared for each of the aspects rated. Most notably, more than one in three feel unprepared to address talent acquisition/retention and sustainability demands.

How prepared do you think your organization is to address each of the following in the next 2-3 years?



Participants expressed frustration over workforce challenges, citing difficulty in retaining employees and a declining interest in labor. Given this fluid workforce, they are exploring how equipment can fill talent gaps and enhance efficiency. This also ties into their broader efforts to integrate technology into operations.



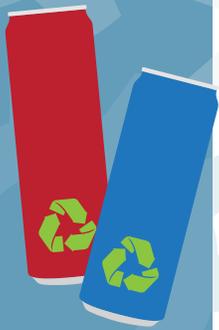
The industry's got to make the equipment smarter and assume that there's going to be a new person operating equipment. We don't have long-term employees, so they've got to make the equipment smarter. We have to assume that somebody new that doesn't have much experience is going to be running the equipment every day or could come on because they're replacing somebody who's sick or they left. The equipment's got to be smarter to run on itself and more intuitive to the operator and have built in tutorials.

Project Manager, Co-Manufacturer

If I can make it easier for our users, (meaning that they don't need to have a higher skill level), I'll definitely try to purchase equipment based on that. "Hey, push a button for job number A, B, C" is a lot easier than teaching somebody to go around and learn how they have to move up components of the machine and adjust them.

Director of Engineering, Beverage Manufacturer and Co-Packer





Participants face a key challenge with sustainability and environmental demands—customers expect sustainability but often lack awareness of its impact on packaging operations. They do not often understand the complexities of production or the effort required. While minor cost increases may go unnoticed, significant price jumps force difficult decisions, creating a delicate balance for companies. However, those proactively addressing sustainability have implemented changes they believe are driving innovation within their businesses. Talent acquisition and inflation are also things participants feel less prepared to address. However, they did not elaborate perhaps because they feel external forces are at play which they have little control over.



How the big retailers—Amazon and Walmart—influence decisions and drive changes in the beverage industry

Research participants are split about how major retailers like Amazon and Walmart influence their decisions and drive changes in the beverage industry. Many participants said these retailers had no influence on their companies, in part because they personally prefer not to work with organizations, such as these. Others are direct sellers and still others are simply too small for Amazon or Walmart to have any influence on their operations.

Some participants acknowledge that Amazon and Walmart significantly influence their business, particularly in SKUs and packaging requirements. To meet these retailers' standards, they must adjust their operations, despite the challenges. However, they comply due to the substantial sales volume these giants represent.

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Their packaging requirement is a little different. Requirements are made to reduce the amount packaging materials used, as well as making it friendly for the people that open them in the store to stock the shelves—so they don't get hurt and it's easy for them. So, they have different requirements than a lot of large companies, but they almost mandate things—they have special case designs, and they use trays a lot. We have to get along with them. That's a challenge for us, but we do it.

Project Manager, Co-Manufacturer

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Things happening in the U.S. and internationally that affect the beverage packaging and processing industry

Consensus was non-existent among interview participants concerning U.S. regulations either in place or being talked about. A few mentioned state specific challenges they were having. For example, California is very focused on single-use plastics not being recyclable while Michigan is highly regulated in the cannabis market. A few participants believe the tariffs being proposed by the new presidential administration might affect their business. Overall, no single regulation emerged as greatly affecting the overall industry at this point in time.

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Import tariffs would hurt. A lot of our raw materials are imported. Some of our other packaging materials are imported, although not all of them. So, depending on what tariffs, what segments got hit by tariffs, definitely that would affect us...getting hit with a percentage tariff would really hurt margins.

Director of Operations, Beverage Company

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When asked about what's happening internationally that might change how beverages are packaged and sold to other countries, again, no consistent themes emerged. Tariffs were mentioned by a few. Other countries, like France and Canada, have regulations when it comes to plastics and Styrofoam, and that can sometimes pose an extra layer of work. Still, others mention challenges with importing raw materials, while others said they had no interaction or experience with foreign countries as it related to their business.



Sanitation

Sanitation is of the utmost priority for most IDI participants and is always top of mind. Recalls in the food and beverage industry are not something anyone wants to have happen to their company or the industry overall. As a result, sanitation is considered a non-negotiable item. If a plant encounters a sanitation issue, they shut down without hesitation.

Participants have made sure to have the systems and processes in place to keep their plants clean and sanitized. It's a cost of doing business—everything must be clean and sanitized. That said, companies would appreciate additional help from manufacturers, most often stating a desire for machines and parts that are more easily cleaned. Providing manuals on effective machine sanitation would also be of interest.

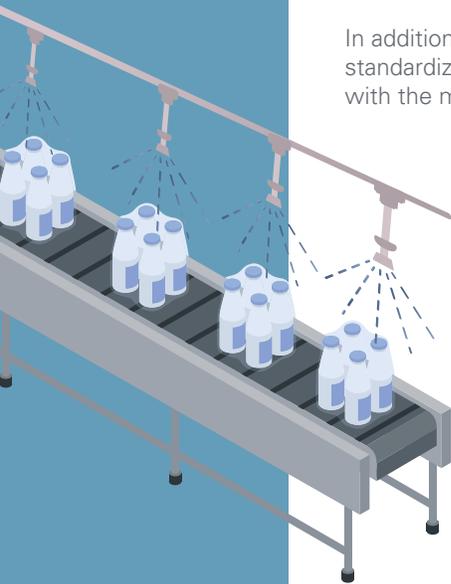
”

We have systems and programs—how we take a new line, inspect it, and qualify it. If it's an aseptic line, we bring in a notified body to help make sure that we're doing it correctly. We're very good about developing those programs and working with state agencies to get approval. We have a very robust cleaning and sanitation program. We work with big companies, primarily Ecolab, to help us do as good a job as we can do. Food safety, the health of our consumer and providing good products, it's what we do.

Director of Robotic Solutions and Safety, Global Beverage Company

“

In addition, a few participants believe it would make sanitation easier if machinery was standardized or if the government could provide a recommended list of sanitation items to use with the machinery.



”

Standardization of machineries in general would make sanitation easier for us, to the extent that we can cross communicate between sites. We can replicate a template that's working for one site to the other sites. We can implement those sanitization techniques for those machines. If it's standardized sanitization in machines, we know how to clean those, so we can train with people who are already trained and experienced in it.

Sr. Manager of Maintenance and Engineering, Alcohol Beverage Company

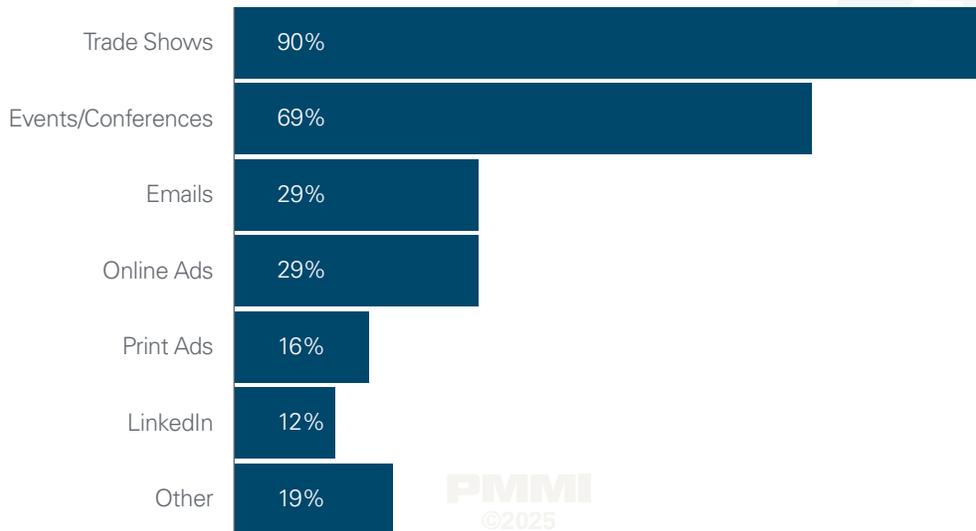
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Appendix

Trade shows, and events/conferences are where beverage companies look for information to help them select new equipment.

Where will you go for information to assist you in selecting which machinery to purchase?

Select all that apply

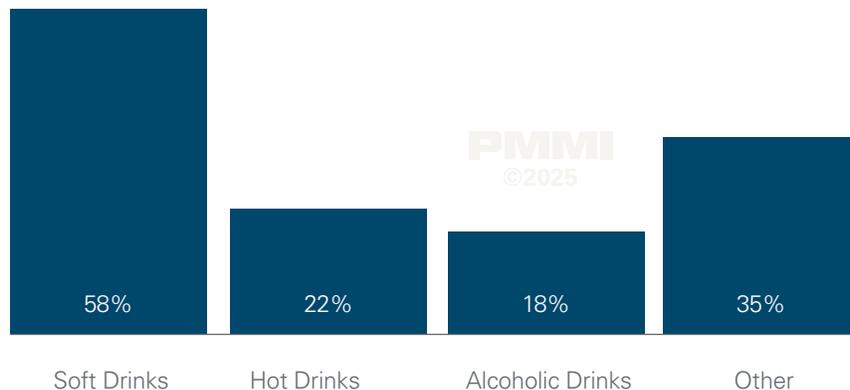


Survey Respondent Profile

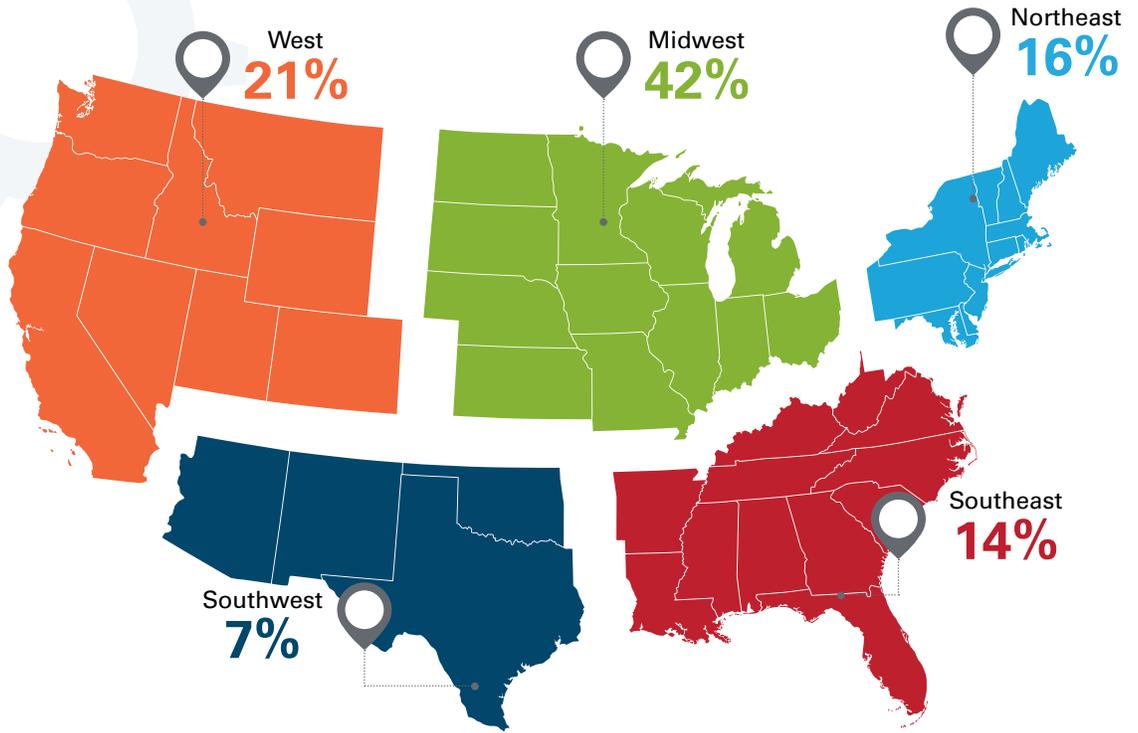
A total of 78 respondents participated in the survey. 63% of respondents were CPG/End Users and 37% were Contract Packagers. Anyone who wasn't one of these two options did not qualify to take the survey. Over half of responding companies process and package soft drinks; around one in five process and package hot drinks and alcoholic drinks.

Which of the following beverages does your facility process and package?

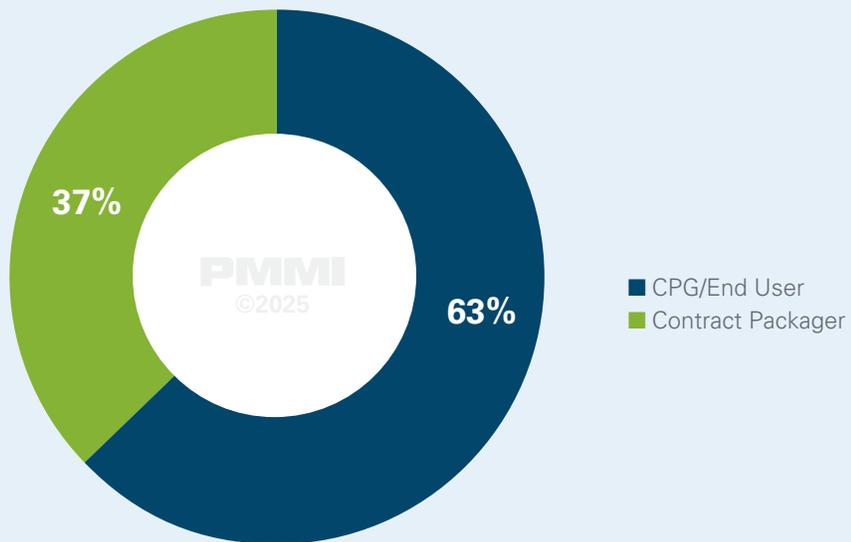
Select all that apply



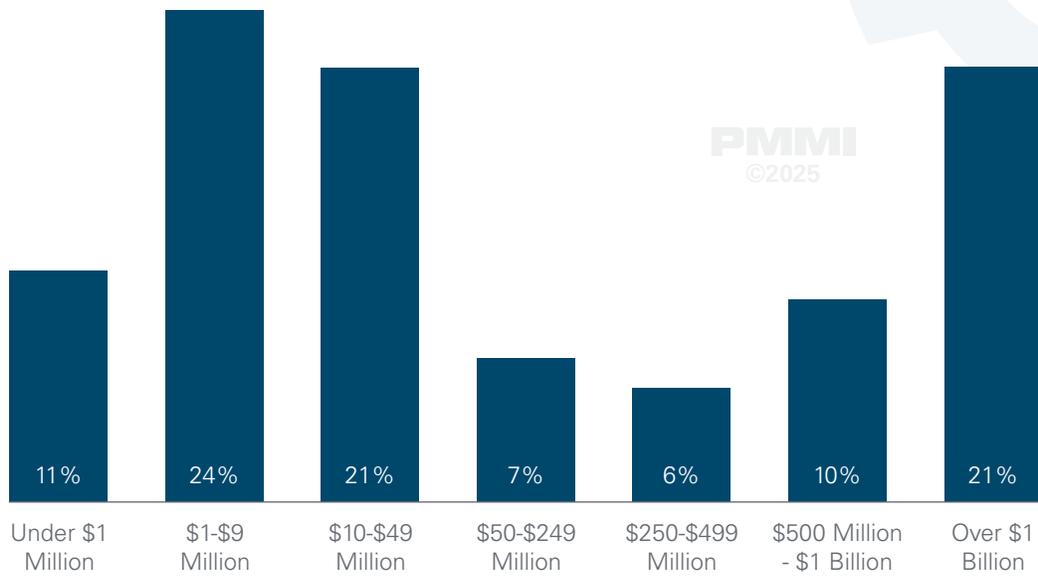
BY REGION



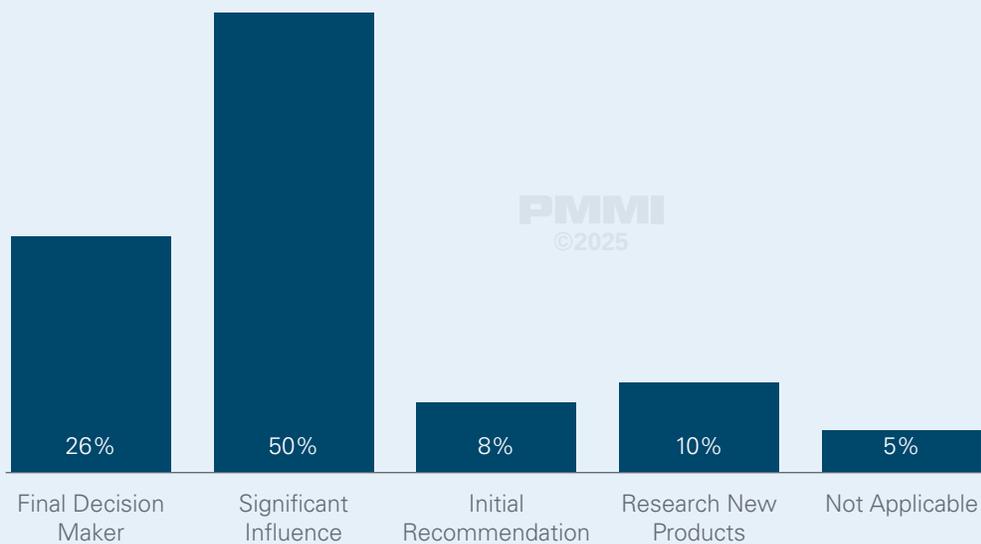
Which of the following best describes your company?



BY ANNUAL REVENUE



BY BUYING DECISION INFLUENCE





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