

# PET Bottles - 2015 to 2019

## Section I:

### Introduction

- A. Study purpose
- B. Key definitions
  - 1. PET bottles
  - 2. Geography
- C. Study organization
- D. Geographic regions
- E. Study methodology
- F. Conventions

## Section II:

### Executive Summary

- A. Technology
  - 1. Environmental response
  - 2. Economics
- B. Economic and environmental impact
  - 1. Economic results
    - Figure 1 – Economic Comparison – Manufacturing Cost
  - 2. Environmental results
    - Figure 2 – Environmental Comparison – GHG Releases
    - Figure 3 – Environmental Comparison PET Only – GHG Releases
- C. Market analysis – drivers and trends
  - 1. Macroeconomic environment
  - 2. Environmental improvement
  - 3. Economic impact
- D. Market analysis – statistics and projections
  - 1. PET bottle volume segmented by end-use category
    - Figure 4 – Global PET Bottle Volume by End-use Category
  - 2. PET Bottle value segmented by end-use category
    - Figure 5 – Global PET Bottle Value Segmented by End-use Category
  - 3. PET bottle volume segmented by end-use
    - Figure 6 – Global PET Bottle Consumption - End-use
  - 4. PET bottle growth segmented by end-use
    - Figure 7 – Global PET Bottle Growth Rates
  - 5. PET bottle volume segmented by geographic region

- Figure 8 – Global PET Bottle Volume by Geographic Region
- 6. PET bottle volume segmented by barrier vs. non-barrier
  - Figure 9 – Global PET Bottle Volume by Barrier vs. Non-barrier
- 7. PET bottle volume segmented by renewable content
  - Figure 10 – Global PET Bottle Volume by Renewable Content

### Section III:

#### Technology

##### A. PET bottle design

- 1. Raw materials
  - Table 1 – Global PET Bottle Resin Producers
  - Figure 11 – Dasani Water Bottle - 30% Renewably Sourced PET Resin
  - Figure 12 – HyGuard Closure Design
- 2. Bottle weight reduction
- 3. Structures
- 4. Shape
  - Figure 13 – Wall Design – Water Bottle and CSD
  - Figure 14 – Sidel’s StarLite PET Bottle Base and Wall Design
  - Figure 15 – PET Bottle Bottom Design
  - Figure 16 – Sidel’s Non-petaloid Base PET Bottle
  - Figure 17 – Fiji Water Bottle - Square Footprint Design
- 5. PET bottle producers
  - Table 2 – 2014 PET Bottle Producer Sales Equivalents
  - Table 3 – 2014 PET Preform Producer Sales Equivalents

##### B. Bottle manufacture

- 1. Injection molding the preform
  - Figure 18 – Preform Injection Molding Machine
  - Figure 19 – 72 Cavity Mold for Preform Manufacturing
- 2. Injection-compression and compression molding the preform
- 3. Stretch blow molding
  - Figure 20 – Stretch Blow Molding Machine
  - Figure 21 – Stretch Blow Mold
- 4. Hybrid machine
- 5. Continuous extrusion blow molding
- 6. Continuous extrusion blow molding – wheel process
- 7. Jar molding
  - Figure 22 – Use of a Moil for a PET Jar
- 8. Equipment suppliers
  - Table 4 – PET Bottle Equipment Suppliers
- 9. Barrier coating process
  - Figure 23 – SiOx PET Bottle Vacuum Coating Process

Figure 24 – SiO<sub>x</sub> PET Bottle Coating of Individual PET Bottles

- C. PET bottle filling
  - 1. Hot filling
    - Figure 25 – Wall Design – Hot Fill
    - Figure 26 – PET Bottle Base Design
  - 2. Heat processing after packaging
  - 3. Form/fill/seal process

Section IV:

Economics and Environmental

- A. Case 1: Economics – standard PET water bottle
  - 1. General assumptions
  - 2. Bottle assumptions
  - 3. Economic results
    - Table 5 – Case 1: Manufacturing Cost – Standard PET Water Bottle
- B. Case 2: Economics – renewably sourced PET water bottle
  - 1. General assumptions
  - 2. Bottle assumptions
  - 3. Economic results
    - Table 6 – Case 2: Manufacturing Cost – Renewable PET Water Bottle
- C. Case 3: Economics – lightweight PET water bottle
  - 1. General assumptions
  - 2. Bottle assumptions
  - 3. Economic results
    - Table 7 – Case 3: Manufacturing Cost – Lightweight PET Water Bottle
- D. Case 4: Economics – ultra-lightweight PET water bottle
  - 1. General assumptions
  - 2. Bottle assumptions
  - 3. Economic results
    - Table 8 – Case 4: Manufacturing Cost – Ultra-lightweight PET Bottle
- E. Case 5: Economics – glass water bottle
  - 1. General assumptions
  - 2. Bottle assumptions
  - 3. Economic results
    - Table 9 – Case 5: Manufacturing Cost – Glass Water Bottle
- F. Case 6: Comparison of Cases 1 through 5
  - 1. Material cost
  - 2. Converting cost
  - 3. Total cost
- G. Case 7: Environmental – standard PET water bottle

1. Energy
  - Table 10 – Case 7: Standard PET Water Bottle – Energy Results
2. Greenhouse gas releases
  - Table 11 – Case 7: Standard PET Water Bottle – GHG Releases
- H. Case 8: Environmental – renewably sourced PET water bottle
  1. Energy
    - Table 12 – Case 8: Renewably Sourced PET Bottle – Energy Results
  2. Greenhouse gas releases
    - Table 13 – Case 8: Renewable PET Water Bottle – GHG Releases
- I. Case 9: Environmental – lightweight PET water bottle
  1. Energy
    - Table 14 – Case 9: Lightweight PET Water Bottle – Energy Results
  2. Greenhouse gas releases
    - Table 15 – Case 9: Lightweight PET Water Bottle – GHG Releases
- J. Case 10: Environmental – ultra-lightweight PET water bottle
  1. Energy
    - Table 16 – Case 10: Ultra-lightweight PET Bottle – Energy Results
  2. Greenhouse gas releases
    - Table 17 – Case 10: Ultra-lightweight PET Bottle – GHG Releases
- K. Case 11: Environmental – glass water bottle
  1. Energy
    - Table 18 – Case 11: Glass Water Bottle – Energy Results
  2. Greenhouse gas releases
    - Table 19 – Case 11: Glass Water Bottle – GHG Releases
- L. Case 12: Comparison of Cases 7 through 11
  1. Energy consumption
  2. Greenhouse gas releases

## Section V:

### Market

- A. Drivers and trends
  1. Demand determinants
  2. Macroeconomic environment
    - Table 20 – Comparison – Macroeconomics and PET Bottle Revenue
    - Table 21 – Comparison by Geographic Region
  3. Environmental
  4. Economic
  5. Product concentrations
  6. Merchant versus captive preform manufacturing
  7. Shelf appeal

8. Consumer trends
  - Table 22 – PET Bottle Weight vs. Product Volume – Water
9. Government regulations
10. Industry consolidation
- B. Global PET bottle volume by end-use category
  - Table 23 – Global PET Bottle Volume by End-use Category
- C. Global PET bottle value by end-use category
  - Table 24 – Global PET Bottle Value by End-use Category
- D. Global beverage PET bottle volume by end-use
  - Table 25 – Global PET Bottle Volume – Beverage
    1. Beer
      - Table 26 – Global PET Bottle Volume – Beer
    2. Carbonated soft drinks
      - Table 27 – Global PET Bottle Volume – Carbonated Soft Drinks
    3. Juice beverages
      - Table 28 – Global PET Bottle Volume – Juice Beverages
    4. Milk and dairy drinks
      - Table 29 – Global PET Bottle Volume – Milk and Dairy Drinks
    5. Ready-to-drink tea
      - Table 30 – Global PET Bottle Volume – RTD Tea
    6. Sports drinks
      - Table 31 – Global PET Bottle Volume – Sports Drinks
    7. Water
      - Table 32 – Global PET Bottle Volume – Water
    8. Wine and spirits
      - Table 33 – Global PET Bottle Volume – Wine and Spirits
    9. Other beverages
      - Table 34 – Global PET Bottle Volume – Other Beverages
- E. Global non-beverage PET bottle volume by end-use
  - Table 35 – Global PET Bottle Volume – Non-beverage
    1. Condiments, sauces, and dressings
      - Table 36 – Global PET Bottle Volume – Condiments
    2. Household chemicals
      - Table 37 – Global PET Bottle Volume – Household Chemicals
    3. Nuts and trail mix
      - Table 38 – Global PET Bottle Volume – Nuts and Trail Mix
    4. Over-the-counter (OTC) pharmaceuticals
      - Table 39 – Global PET Bottle Volume – OTC Pharmaceuticals
    5. Personal care
      - Table 40 – Global PET Bottle Volume – Personal Care
    6. Other non-beverages
      - Table 41 – Global PET Bottle Volume – Non-beverage Other

- F. Global volume by geographic region
  - Table 42 – Global PET Bottle Volume by Geographic Region
- G. Global value by geographic region
  - Table 43 – Global PET Bottle Value by Geographic Region
- H. Asian PET bottle volume
  - 1. Asian beverage PET bottle volume
    - Table 44 – Asian Beverage PET Bottle Volume
  - 2. Asian non-beverage PET bottle volume
  - 3. Asian PET bottle volume
    - Table 46 – Asian PET Bottle Volume Summary
    - Table 45 – Asian Non-beverage PET Bottle Volume
- I. Chinese PET bottle volume
  - 1. Chinese beverage PET bottle volume
    - Table 47 – Chinese Beverage PET Bottle Volume
  - 2. Chinese non-beverage PET bottle volume
    - Table 48 – Chinese Non-beverage PET Bottle Volume
  - 3. Chinese PET bottle volume
    - Table 49 – Chinese PET Bottle Volume Summary
- J. European PET bottle volume
  - 1. European beverage PET bottle volume
    - Table 50 – European Beverage PET Bottle Volume
  - 2. European non-beverage PET bottle volume
    - Table 51 – European Non-beverage PET Bottle Volume
  - 3. European PET bottle volume
    - Table 52 – European PET Bottle Volume Summary
- K. Japanese PET bottle volume
  - 1. Japanese beverage PET bottle volume
    - Table 53 – Japanese Beverage PET Bottle Volume
  - 2. Japanese non-beverage PET bottle volume
    - Table 54 – Japanese Non-beverage PET Bottle Volume
  - 3. Japanese PET bottle volume
    - Table 55 – Japanese PET Bottle Volume Summary
- L. North American PET bottle volume
  - 1. North American beverage PET bottle volume
    - Table 56 – North American Beverage PET Bottle Volume
  - 2. North American non-beverage PET bottle volume
    - Table 57 – North American Non-beverage PET Bottle Volume
  - 3. North American PET bottle volume
    - Table 58 – North American PET Bottle Volume Summary
- M. Rest of world PET bottle volume
  - 1. ROW beverage PET bottle volume

- Table 59 – ROW Beverage PET Bottle Volume
- 2. ROW non-beverage PET bottle volume
  - Table 60 – ROW Non-beverage PET Bottle Volume
- 3. ROW PET bottle volume
  - Table 61 – ROW PET Bottle Volume Summary
- N. Global value by end-use
  - 1. Global beverage PET bottle value
    - Table 62 – Beverage PET Bottle Value by End-use
  - 2. Global non-beverage PET bottle value
    - Table 63 – Non-beverage PET Bottle Value by End-use
- O. PET bottle volume segmented by barrier vs. non-barrier
  - Table 64 – PET Bottle Volume by Barrier vs. Non-barrier
- P. PET bottle volume segmented by layer configuration
  - Table 65 – PET Bottle Volume by Layer Configuration
- Q. PET bottle volume segmented by coated vs. non-coated
  - Table 66 – PET Bottle Volume by Coated vs. Uncoated
- R. PET bottle volume segmented by oxygen scavenger content
  - Table 67 – PET Bottle Volume by Oxygen Scavenger Content
- S. PET bottle volume segmented by package type
  - Table 68 – PET Bottle Volume segmented by Package Type
- T. PET bottle volume segmented by renewable content
  - Table 69 – PET Bottle Volume Segmented by Renewable Content
- U. PET bottle volume segmented by recycled resin content
  - Table 70 – PET Bottle Volume Segmented by Recycled Resin

Section VI:

Producer Profiles

Section VII:

Equipment Profiles

Section VIII:

Glossary