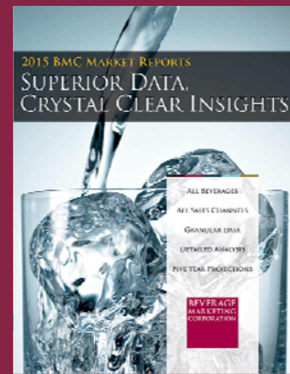
U.S. NEW AGE BEVERAGES THROUGH 2019

2015 EDITION (Published December 2015. Data through 2014. Market projections through 2019.) More than 350 pages, with extensive text analysis, graphs, charts and more than 45 tables.



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Offering insight on a broad array of beverages that share similar attributes and consumer perceptions and compete for shelf space and consumer loyalty, this report from Beverage Marketing Corporation examines ready-to-drink tea and coffee, sports beverages, energy drinks, single-serve-fruit beverages, kombucha and all the various New Age segments. It provides data on the segments' volume and sales and discusses leading companies and their strategies.

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INSIDE:

HAVE QUESTIONS?

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The answers you need

U.S. New Age Beverages through 2019 provides in-depth data and market analysis, shedding light on various aspects of the market through reliable data and discussions of what the numbers really mean. Questions answered include:

- Which segments of the diverse U.S. New Age beverage market grew in 2014, and which did not?
- What are the top New Age beverage brands and how did they perform in 2014?
- What's driving developments in the New Age beverage marketplace?
- How many gallons of New Age beverages did U.S. residents consume in 2014, and how is that likely to change in the next few years?
- What are the leading sales channels for New Age beverages?
- Which categories are poised for strong growth in the future?

This report features

U.S. New Age Beverages through 2019 delves into 12 non-alcoholic beverage categories that populate the domestic landscape. It offers volume, retail dollars, wholesale dollars and per capita consumption are offered, as well as a look at the protean market by region and distribution channel. The report naturally provides an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth through 2019. Advertising and demographic data are also provided. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of the New Age beverage market including:

- An overview of the diverse New Age beverage market, anchoring it in history as well as providing insight into current trends propelling the market
- A detailed break-out of trends in the various New Age segments and sub-segments providing data including gallonage, wholesale dollar sales, wholesale prices per case and more for 19 New Age segments and subsegments
- Regional look at the U.S. New Age beverage marketplace, with volume and growth data of seven New Age segments over the past five years, and projections five years in the future
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales volume data. Profiles the New Age beverage activities of companies such as Coca-Cola Company, Dr Pepper Snapple, Ferolito, Vultaggio & Sons, Monster Beverage Corporation, PepsiCo, Nestlé Waters North America (NWNA), Red Bull and others. Includes brand data for Gatorade, G2, Glacéau, Arizona, Lipton, Rockstar, Frappuccino, V8 Splash, SoBe, Odwalla and many more
- Data detailing volume by distribution channels totaling 100% of market volume
- Advertising expenditures of the leading New Age beverage companies and segments and a look at spending by media type (including Internet and Spanish-language advertising)
- Consumer demographic profiles comparing consumers of key New Age beverage brands and segments
- Five-year volume, wholesale dollar and retail dollar sales projections through 2019 for the New Age beverage market and its sub-segments including single serve waters (breaks out retail PET water, enhanced water, flavored water, essence water), energy drinks, nutrient-enhanced fruit drinks, superpremium juice, regular single-serve fruit beverages, regular RTD teas, nutrient-enhanced teas, sports beverages, sparkling water, RTD Coffee, vegetable/fruit juice blends, kombucha, coconut water, premium soda and shelf-stable dairy drinks.

U.S. New Age Beverages through 2019

December 2015

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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There are unmistakable signs that kombucha has evolved from being a specialty item among an extreme subsegment of foodies on the West Coast to a segment of broad interest even transcending the natural-foods channel. Although there are a handful of pasteurized-kombucha players, the segment is dominated by so-called "raw," unfiltered kombucha that must be kept refrigerated and otherwise handled carefully.

- What exactly is kombucha? It has been called a mushroom tea, but a more accurate description is that it is a sweetened tea to which a kombucha culture has been added. The kombucha culture consists of a symbiosis of bacteria and yeasts. (The culture resembles a pancake or mushroom; hence the term mushroom tea.)
- The brew is allowed to ferment, which produces a vinegary taste (indeed kombucha production is not dissimilar to that of vinegar) that is challenging to a palate trained on sugary soft drinks. Health attributes attributed to kombucha include detoxification and immune-enhancing properties, which may explain why the segment had grown to more than $[redacted] million by year-end 2014.
- Although the company maintains a secretive approach, many industry players estimated that Millennium Products Inc., with its G.T.'s Synergy and Organic Raw Kombucha items, has easily broken the $[redacted] million mark in annual sales.
- Being that it is fermented, commercial kombucha should contain up to 0.5% alcohol by volume (ABV). However, in early 2010, investigators from the Maine government conducted tests of unpasteurized, or raw, kombucha in a Portland-area Whole Foods Market and found many that surpassed the 0.5% ABV limit for non-alcoholic drinks. It referred the case to the U.S. Treasury's Alcohol and Tobacco Tax and Trade Bureau (TTB), which underwent its own investigation.
- In light of the governmental concerns, in June 2010, Whole Foods Market declared that it would pull raw kombucha off its shelves and asked all raw kombucha suppliers to submit third-party verification that their products do not exceed the 0.5% limit. Whole Foods' principal distributor United Natural Foods, Inc. (UNFI) and raw kombucha manufacturers like Millennium Products agreed to a voluntary recall of their products pending such third-party verification.
- Several companies chose to reformulate their kombucha to minimize the risk of alcohol fermentation and products started to return to store shelves in the summer and fall.

Exhibit 2.12

NEW AGE BEVERAGE MARKET SEGMENTS
CHANGE IN VOLUME
2010 – 2019(P)

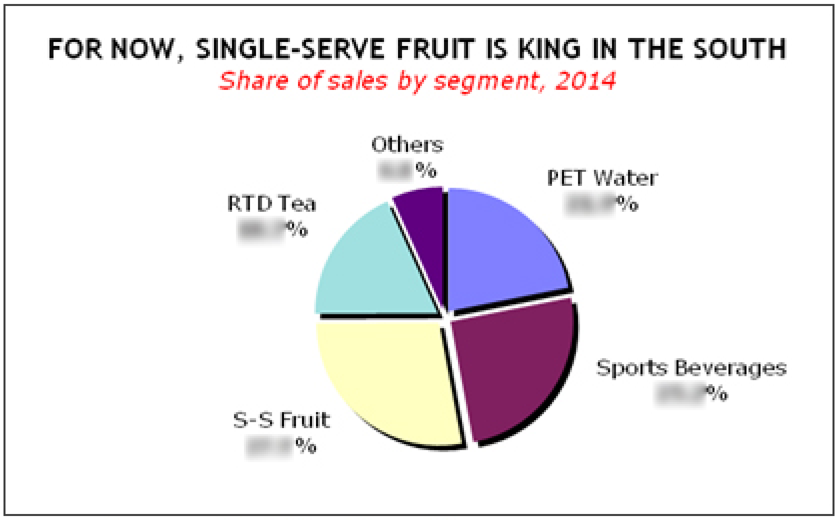
Market Segments	2009/10	2010/11	2011/12	2012/13	2013/14	2014/19(P)
Premium CSD	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sparkling Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sports Beverages	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Retail PET Waters	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Enhanced Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Flavored Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Essence Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal S-S Water	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Regular RTD Teas*	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Nutrient-Enhanced Teas	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal RTD Tea	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Nutrient-Enhanced Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Superpremium	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sparkling Juice	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Regular S-S Fruit Bevs	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal S-S Fruit	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Shelf-Stable Dairy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Coconut Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Kombucha	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Veg/Fruit Juice Blends	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Energy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

Note: 2014/19(P) change is projected five-year compound annual growth rate.

** Includes mate.*

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation