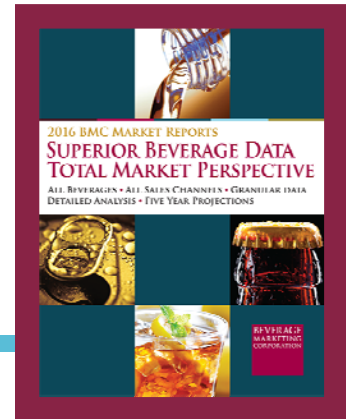


COCONUT AND PLANT WATER IN THE U.S.

2016 EDITION (Published March 2016. Data through 2015. Market projections through 2020.) More than 60 pages, with extensive text analysis, graphs, charts and tables



This year, thanks to a high level of innovation and success in the segment, Beverage Marketing Corporation has expanded its U.S. coconut water market report to include coverage of other plant water beverages such as maple water. Volume and wholesale dollar sales, coverage of top brands and discussions of key issues impacting this growing beverage market segment are included. In addition to covering the rise of this exciting sector, BMC's U.S. plant water and U.S. coconut water industry research looks at the future, discussing the evolution of this emerging market and offering BMC's exclusive five year forecasts.

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

Coconut and Plant Water in the U.S. provides in-depth analysis, shedding light on various aspects of the fledgling, but fast-growing segment. Questions answered in BMC's industry report include:

- What are the origins and attractions of the coconut water category? What are the market drivers for this emerging market sector?
- What are the dynamics underlying the new crop of non-coconut-based plant waters? To what extent have these plant waters stolen share from coconut waters?
- What are the leading brands and how have they been performing? Which brands are posting the most rapid growth?
- How has the involvement of mainstream beverage giants impacted the category, and what are smaller/newer players doing to try to differentiate themselves as the playing field shifts?
- How is the coconut and plant water category evolving to better meet consumer preferences?
- What are the likely future developments for the plant and coconut water industry?

THIS REPORT FEATURES

Coconut and Plant Water in the U.S. examines a dynamic segment of the non-alcoholic beverage business. The data and insight-rich research report begins with an overview of coconut water and plant water segment trends. It measures the category in terms of both volume and wholesale dollar sales. In presenting its U.S. coconut and plant water market research, BMC fleshes out the picture by discussing particular coconut and plant water brands, profiling the companies behind them and the innovations or novelties they achieved. After outlining this context, BMC enhances its U.S. plant and coconut water research findings with important insights, describing the key issues likely to impact and determine what's next for the coconut water and plant water segments and projects their probable size five years into the future. In this report, users get a thorough understanding of all facets of coconut and plant water market trends including:

- Wholesale and retail dollars and volume of the coconut and plant water category from 2007 through the present.
- A look at how the coconut water category evolved from ethnic markets into a mainstream staple and what the drivers are for its success to date and continuing into the future.
- An overview of the drivers behind the newer plant waters and their similarities and dissimilarities with coconut water.
- Analysis of leading players in the coconut and plant water market as well as a look at the challengers that have arisen to grab a piece of the action. Includes discussion of Vita Coco, Zico, ONE, Naked Coconut, C20, Coco Libre, Harmless Coconut, Vertical Water, DRINKmaple and others
- Historical and current wholesale dollar sales, growth and U.S. coconut and plant water market share data for Vita Coco, Zico, ONE, Naked Coconut and others.
- Discussion of why the U.S. plant water segment in general and its leading component, the U.S. coconut water market, is expected to succeed going forward, with Beverage Marketing's five-year wholesale dollar category projections through 2020.

Coconut and Plant Water in the U.S.

March 2016



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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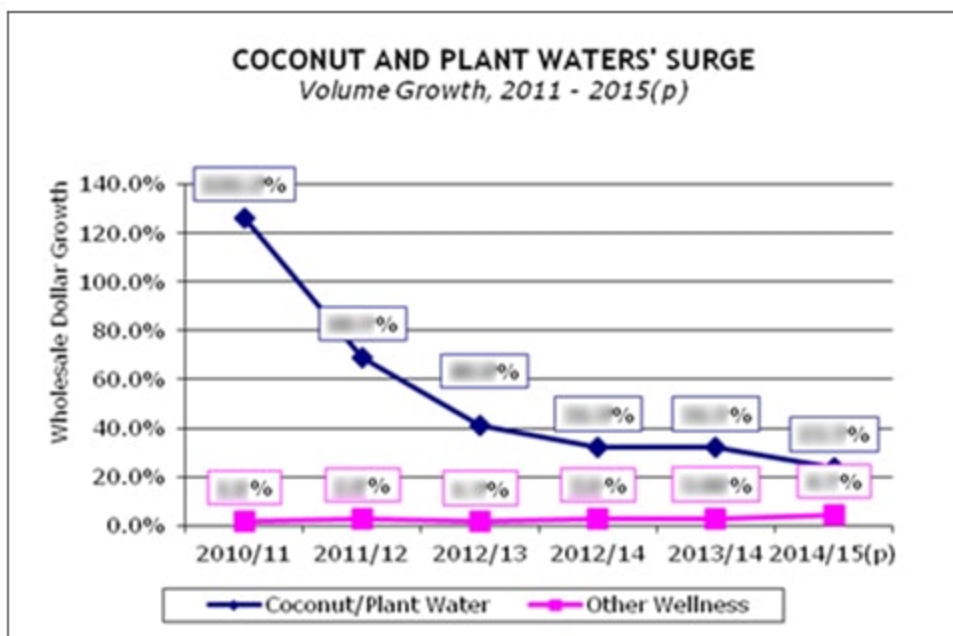
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**LEADING COCONUT AND PLANT WATER BRANDS
VOLUME GROWTH
2011 – 2015(p)**

Brand	2010/11	2011/12	2012/13	2013/14	2014/15(p)
Vita Coco	130.0%	70.0%	40.0%	30.0%	25.0%
Zico	10.0%	15.0%	20.0%	25.0%	30.0%
ONE	10.0%	15.0%	20.0%	25.0%	30.0%
Zola	-	-	10.0%	15.0%	20.0%
Naked Coconut Water	10.0%	15.0%	20.0%	25.0%	30.0%
Vertical Water	-	-	-	-	-
Happy Tree Maple Water	-	-	-	-	-
DRINKmaple	-	-	-	-	-
All Others	10.0%	15.0%	20.0%	25.0%	30.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

(p) Preliminary

Source: Beverage Marketing Corporation



(p) Preliminary

Source: Beverage Marketing Corporation

What exactly is plant water?

- The term has emerged to describe a non-homogenous subset of liquids derived from plants that also purport to have health benefits.
- The main subsegments – solely as dictated by the actual brands on the market so far – are maple water, birch water and cactus water. That is not to suggest that many other styles of plant water might not appear on the market in the future. Coconut water itself is a plant water.
- Definitional precision remains elusive. Broadly speaking, RTD tea could be construed as plant water, although one wouldn't be faulted for excluding it from such a definition given that water is added to the botanical to create the beverage rather than being extracted from the plant material itself.
- While one could argue that fruit juices are "extracted from plant material" and thus are plant waters, we will exclude most of them from discussion in this report, in order not to unnecessarily muddy the waters, so to speak.
- That being said, a couple of brands that use the cactus plant are considered in this report to be plant waters. Although utilizing the "fruit" of the plant, these waters seem to be more akin to maple sap than orange juice in part due to their unique nutrient composition and niche positioning.
- Adding to the confusion is the fact that coconut water is classified as a "juice" by the FDA, although coconuts are seeds rather than fruits.

Like other New Age beverages playing the health and wellness angle, plant water trades on purportedly beneficial properties of its main ingredient.

- The trailblazer in this space, coconut water, has been marketed as "nature's sports drink" because it contains electrolytes in a natural form. Beyond that, the communicated benefits include low sugar content as well as other functional benefits of the coconut itself, such as anti-viral, anti-microbial, and anti-fungal properties.
- Plant water is similar to coconut water in that it can be seen as a functional beverage with more of the "natural" ingredients that certain consumers crave.
- Like other non-alcoholic beverages that target the high end, plant water has mimicked coconut water in advancing a sustainability story. Various plant water brands make the panoply of claims, from "non-GMO" to "USDA Certified Organic." Other buzzwords meant to attract certain niche populations include "vegan" (somewhat superfluous for a "plant" water), "gluten-free" and even "paleo."