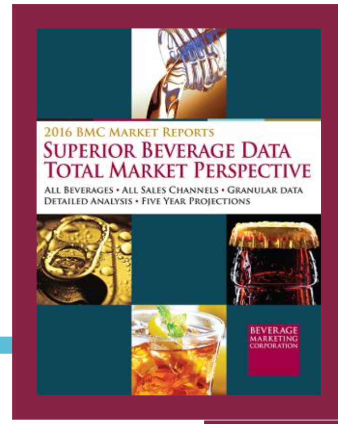
U.S. Fruit Beverages Through 2021

2016 Edition (Published June 2017. Data through 2016. Market projections through 2021.) More than 425 pages, with extensive text analysis, graphs, charts and more than 175 tables



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Against a backdrop of topline global trends, this report from Beverage Marketing Corporation provides in-depth coverage of the U.S. fruit beverage market and its key sub-segments including juices, juice blends, fruit drinks, refrigerated, shelf stable, concentrates and organic, trends by brand, flavors and packaging. It also breaks out nectars and super-premium juice, from-concentrate and not-from-concentrate juice. The report also addresses key issues impacting the category and discusses emerging sub-sectors such as light/low-calorie juices and drinks. Five-year U.S. market forecasts are provided.

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The answers you need

This year's edition includes five-year forecasts on a broader range of topics, making it an even better tool for spotting trends and opportunities in the fruit beverages industry and determining where to focus future resources for maximum success. Questions answered in this in-depth market report include:

- Which companies and brands in the United States experienced growth in 2016 and which did not?
- How do the past, current and future shelf stable trends stack up vs. chilled trends?
- How much fruit juice is consumed per capita in the United States, how has this changed in recent years, and what trends are behind these developments?
- How the various market segments performed in 2016, and how are they like to develop over the next five years?
- How do from concentrate trends (FC) differ from not-from-concentrate (NFC) trends and what will each market look like in 2021?
- Which nations ship the most fruit juices to the U.S. and where are the leading destinations for U.S. juice?
- Which flavors of fruit beverages are growing the fastest? How will flavor by flavor market share trends shift over the next five years? How will fruit drink flavor trends differ from pure fruit juice trends?
- Which segment of the market is expected to perform better through 2021 – juices or drinks?

This report features

The report surveys the landscape of this stalwart beverage category, with volume, retail dollar, wholesale dollar and per capita consumption figures. In this extensive body of industry research, get an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth through 2021.

All aspects of the market are considered, including segmentation by package size, distribution channels, flavor and processing method. Powdered and organic statistics are included along with advertising and demographic data. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of all facets of the market including:

- Historical and current statistics and BMC's exclusive projections on multiple facets of the market, as well as insight into current trends and market drivers.
- A regional look at the U.S. marketplace, with past, current and future volume and growth of fruit juice and fruit drinks are broken out for ready comparison.
- 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 and volume data. Coverage includes PepsiCo/Tropicana Products, Coca-Cola/Minute Maid, Ocean Spray, Dr Pepper Snapple, Florida's Natural Growers, Welch's, Brynwood Partners (Juicy Juice and Sunny Delight), The Kraft Heinz Company, Tree Top and Apple & Eve.
- Data and discussions detailing trends in shelf-stable, from-concentrate and not-from-concentrate juices, frozen concentrate and chilled, ready-to-serve fruit beverages, nectars and super-premium juice through 2021.
- An analysis of fruit juice and drink volume by flavor and container type through 2021.

- Statistics of imported and exported fruit juices by flavor and country of origin and country of destination.

- Advertising expenditures of the leading companies and a look at category spending by media type (including internet advertising).

- Consumer demographic profiles comparing consumers of key brands.

- An overview of the powdered and organic fruit beverages segments and the key players.

- Five-year projections for the fruit beverage market including sub-segments, flavor trends, packaging, regional trends, expectations by sales channel and more.

U.S. Fruit Beverages through 2021

June 2017

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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In addition to superfruits and diet fruit beverages, fruit beverage marketers have explored other avenues to increase sales.

- Ocean Spray and Apple & Eve market products in the sparkling fruit drink/juice segment, but others such as Welch's and Nestlé's Juicy Juice did not see enough sales to continue their sparkling juice drinks. Even Apple & Eve's sparkling juice, Fizz Ed, struggled, but the company acquired the sparking fruit drink brand, The Switch.
- PepsiCo entered the category when it acquired Izze in 2006. Because Izze was an established brand already, and since it operates at arm-length from PepsiCo, its long-term success seems more assured than the others' ancillary entries. In fact, PepsiCo is pleased enough with the brand to introduce new sublines for the brand.
- Tea-lemonade blends (i.e., half-and-half or "Arnold Palmer") have had a successful history, but these are generally classified as teas rather than fruit beverages. Juice companies that have attempted to add tea to their juices have been less successful.
- Fruit beverage marketers have also taken note of the success of Campbell's V8 brand, which includes 100% vegetable juices, vegetable/fruit drink blends and vegetable/fruit juice blends. PepsiCo's Naked Juice has a Veggies line that has undergone expansion, while Dr Pepper Snapple's Mott's has come out with both a fruit and vegetable juice blend (Mott's Medleys) and a 100% vegetable juice line. (An earlier 100% vegetable juice line, Mott's Garden Blend, did not last.) However, Ocean Spray's Fruit & Veggie Juice line proved short-lived. Apple & Eve markets Fruitables vegetable/fruit drink blend.
- Campbell Soup Company itself has married two trends by introducing a sparkling fruit/vegetable line in slim cans.

As discussed in further detail in this report, a few other items are worthy of note.

- PepsiCo's Naked Juice has skyrocketed ahead of Coca-Cola Odwalla in the better-for-you fruit beverage segment. However, in the past few years, Odwalla has staged a comeback – finally abandoning an ill-advised attempt to reduce its main package from 15.2- to 12-ounces. Although Odwalla's double-digit rise in 2014 seemed to impact Naked's usually robust growth, the latter has done an admirable job branching out into other segments such as coconut water and vegetable juices. Although a test of oat-based drinks did not succeed, it has released a nutmilk line and resumed brisker growth in 2015. In 2016, however, Odwalla declined while Naked grew.

Exhibit 4.44

CHILLED, READY-TO-SERVE JUICE FLAVORS

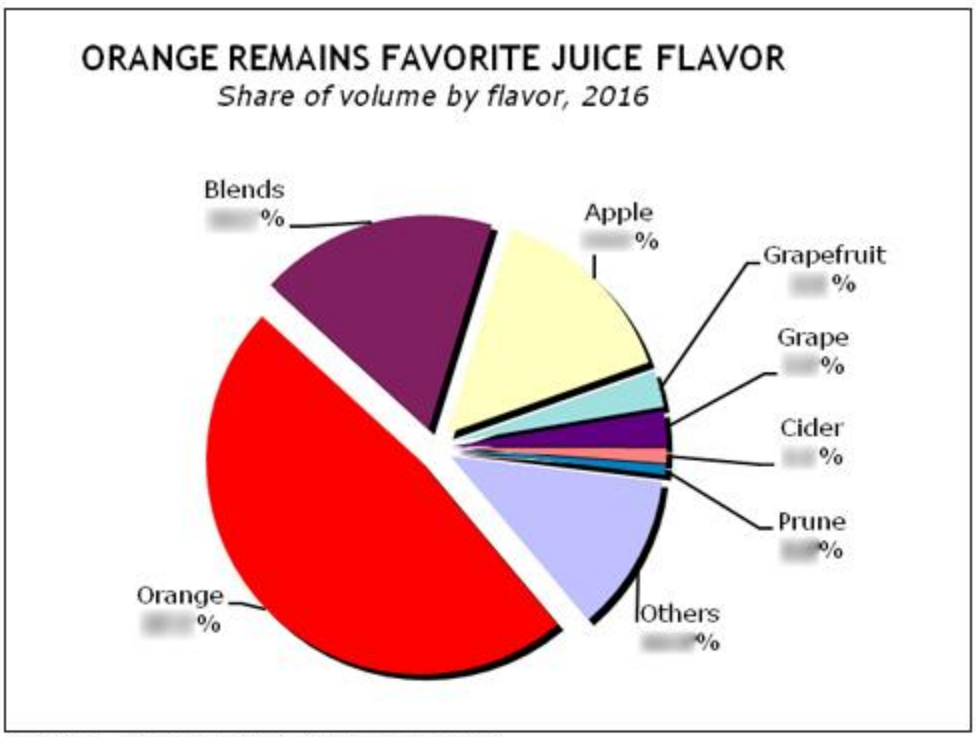
SHARE OF VOLUME

2011 – 2021(P)

Flavor	2011	2012	2013	2014	2015	2016	2021(P)
Orange	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Blends	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Grapefruit	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Apple	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Cider	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Grape	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Other	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

(P) Projected

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation