The Futures Report: What's Ahead for Beverages

2014 Edition (Published December 2014. Data through 2013. Market projections through 2018.) More than 100 pages, with extensive text analysis, graphs, charts and tables.

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Beverage Marketing's *The Futures Report: What's Ahead for Beverages* looks at what's ahead for a broad range of beverage categories and break-outs for key sub-categories. It includes full-year 2013 volume and wholesale dollar sales data for each beverage type, projections through 2018 and analysis of what's driving developments. Data includes both volume and wholesale dollars for all major beverage categories as well as key segments within categories.

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Inside:

Have Questions? Contact Charlene Harvey: 212-688-7640 x 1962 charvey@beveragemarketing.com

Beverage Marketing Corporation
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

The answers you need

This report offers a comprehensive outlook for the U.S. beverage marketplace, covering all key beverage categories and addressing their respective futures. It provides reliable detailed data and sheds light on various aspects of the market through analysis of the key market drivers likely to have the greatest impact on category performance in the near-term future. Performance forecast data by beverage sector is accompanied by discussion of what the numbers really mean.

The Futures Report: What's Ahead for Beverages provides detailed 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 categories are likely to have the greatest growth in the future? How will share of stomach shift among the various beverage categories?
- What are key drivers in the market that are mostly likely to impact growth trends?
- What product categories are likely to see the greatest innovation?
- What role will pricing have on the various beverage categories?
- How is the economy likely to impact consumer purchase decisions?
- How is the consumer evolving and how is this likely to impact his and her consumption decisions?

This report features

The Futures Report: What's Ahead for Beverages offers an analysis of what lies ahead for the U.S. beverage market. The report will focus on category and sub-category performance through 2018 and the factors behind the projected performance.

- Current volume and wholesale dollar data for categories and sub-categories of all the major beverage categories including beer, bottled water, carbonated soft drinks, distilled spirits, energy drinks, fruit beverages, milk and dairy alternatives, ready-to-drink (RTD) coffee, tea, RTD tea, tea bags, iced tea mix, loose tea and tea pods, sports beverages, coconut water and other emerging beverage segments and wine.
- Projections through 2018 in both volume and wholesale dollars
- Analysis of the factors impacting the future performance of the categories and sub-categories

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December 2014

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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Exhibit 3.22

THE PROJECTED U.S. BOTTLED WATER MARKET
SHARE OF VOLUME BY SEGMENT
2000 – 2018(P)

	Domestic Non-Sparkling							
Year	Retail Premium PET	Retail 1 - 2.5 Gallon	Direct Delivery/ Bulk*	Vending	Total	Domestic Sparkling	Imports (All)	Total
2000	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2001	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2002	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2003	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2004	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2005	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2006	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2007	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2008	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2009	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2010	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2011	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2012	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2013	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2014(P)	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2015(P)	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2016(P)	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2017(P)	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2018(P)	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

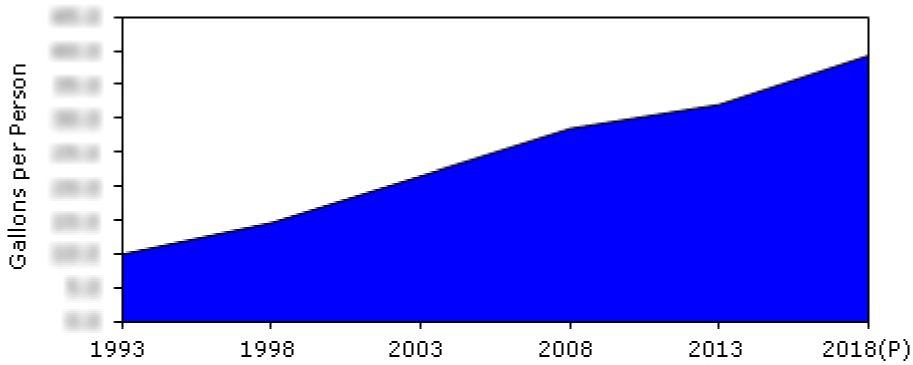
(P) Projected

** Includes home and commercial delivered bulk waters, plus retail bulk (vended plastic and can packaged) waters.*

Source: Beverage Marketing Corporation

AVERAGE BOTTLED WATER INTAKE INCREASING

Projected per capita consumption, 1993 - 2018(P)



(P) Projected

Source: Beverage Marketing Corporation

Although it has become commonplace to cite an interest in healthy products as motivation for consumer behavior (even as Americans scale ever greater highs in obesity), the low-carbohydrate diet fad did have a determinative impact on the non-alcoholic (as well as alcoholic) beverage industry in the first years of the 2000s, while a more general concern about calories and sugar affected the marketplace in subsequent years. While weight may be an oft-cited concern, other aspects of health and wellness also inform recent developments in the non-alcoholic beverage market.

- As juice makers and tea makers tried to concoct products to please consumers not satisfied with the nutritional benefits already associated with such products, CSD companies sought to reengineer their sweet drinks.
- A key element in this initiative was the removal of sugar. To make low-carb fruit juices, beverage makers removed some juices' naturally occurring sugars and replaced them with artificial sweeteners.
- Although CSD makers are at a disadvantage when it comes to health-related trends, the leading companies did respond to perceived consumer interest by devising reduced-carb products in 2004 and new and/or reformulated diet SKUs in 2005. While mid-calorie CSDs did not catch on, diets remained a crucial component of the category. In 2009, CSD companies also introduced products with newly approved no-calorie sweeteners like stevia. In 2010 and 2011, they revised the idea of reduced-carb and –calorie offerings like Dr Pepper Ten and Pepsi Next. More "Ten" iterations of Dr Pepper Snapple Group brands appeared subsequently.
- CSDs made moves to cultivate the healthier side of things by introducing all-natural and vitamin- and mineral-enhanced sodas. Part of this initiative involved moving away from high fructose corn syrup (HFCS) in favor of natural sugar.

The healthfulness of its ingredients was one issue that did not disrupt bottled water's once seemingly unstoppable ascent. Instead, bottled water temporarily stalled because of aforementioned economic factors as well as issues of consumer perceptions.

- Despite having warmed to the category sufficiently to make it bigger than any other besides CSDs, consumers might have decided the convenience of bottled water was a luxury they could do without during troubled times.
- Additionally, concerns about the environmental impact of packaging water and shipping it, sometimes great distances, gave some consumers pause.
- Even so, bottled water's performances in 2010 and 2011 clearly showed that consumers have not abandoned the category, which 2012 and 2013 confirmed.