

GOING RAW: LIVE BEVERAGES

2014 EDITION (Published February 2014. Data through 2013. Market projections through 2018.) More than 35 pages, with extensive text, graphs, charts and tables

Going Raw: Live Beverages examines the emerging market for “live” products. It covers kombucha as well as juices produced with high pressure processing (HPP). It discusses leading brands in these segments and puts them in the context of growing demand for functional beverages and items made without chemical preservatives or artificial additives.

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**HAVE
QUESTIONS?**

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THE ANSWERS YOU NEED

This report measures volume, wholesale and retail dollar sales, covers top brands and discusses key issues. Includes BMC's exclusive five year projections. Questions answered include:

- What is high-pressure pascalization (HPP) and what's driving consumer interest in beverages treated with this process and other "live" beverages?
- What are the leading kombucha brands in the United States, and how have they been performing?
- How is the market for live beverages likely to develop in the future?

THIS REPORT FEATURES

Going Raw: Live Beverages profiles two new segments in the non-alcoholic beverage business that are displaying fantastic growth. The report - part of Beverage Marketing's ongoing *Focus Report* series - begins with an overview of what live beverages are and why their viability was even considered. It measures each principal category in terms of wholesale dollar sales and charts growth patterns. The report also provides statistics on the leading HPP juice and kombucha brands. The main companies are profiled, with discussion of the innovations they have achieved. The report goes on to demonstrate that the market is likely to explode in the next five years, but also demarcates potential pitfalls befalling both HPP beverages and kombucha. In this report, users get a thorough understanding of all facets of the live beverage market including:

- Wholesale dollars sales of the HPP beverage market starting in 2010 as well as wholesale and retail dollars and volume of the kombucha market going back to 2007
- A look at how these niche sectors evolved because of a perceived quality gap in the categories from which they emerged, giving marketers a key lesson on innovation in response to consumer perceptions
- Detailed profiles and analysis of the leading companies within the live beverage market, including their wholesale dollar sales as well as a glimpse at up-and-comers that may be emerging
- Discussion of the issues facing the market in the next five years, with Beverage Marketing's wholesale dollar category projections for 2018

Focus Report

Going Raw: Live Beverages

February 2014



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 the realm of functional drinks, kombucha is a more complex product proposition than, say, energy drinks or sports beverages, and concomitantly more difficult to explain to newcomers to the category.

- It has been called a mushroom tea, for instance, 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 that vinegary taste (indeed kombucha production is not dissimilar to that of vinegar) that is challenging to a palate trained on sugary soft drinks.
- Not surprisingly, some marketers have tried to disguise the sharp taste with fruit flavors. Being that it is fermented, kombucha that is not pasteurized can be expected to contain a small amount of alcohol, generally within the 0.5% limit for non-alcoholic beverages. The tradeoff in using fruit juice to soften the flavor profile of kombucha is that the juice is prone to continue fermenting in the bottle, yielding the higher alcohol content. It was GT's Enlightened subline of juice-flavored kombuchas where the alcohol issue was most serious.

Kombucha contains various substances that are purportedly beneficial to health.

- According to Japanese research, the polysaccharides in kombucha may help in combating cancer.
- As with energy drinks, kombucha contains various B vitamins, as well as lactic acid and acetic acid. These acids are said to help the gut by raising the pH and attacking pathogens.
- Other organic acids produced by the kombucha culture are glucuronic acid, citric acid, oxalic acid, malic acid and gluconic acid. Glucuronic acid is said to help the liver detoxify petroleum pollutants that are consumed by the modern human. (Other research claims that kombucha does not contain much glucuronic acid, but that it does contain glucaric acid, which prevents disruption of the glucuronic acid mechanisms of the body.)

Health attributes attributed to kombucha include detoxification and immunity-enhancing properties.

- A whole host of disorders are said to be helped by kombucha consumption, with the caveat that some of these claims have not been subject to rigorous scientific scrutiny.
- According to anecdotal evidence, kombucha detoxifies heavy metals, combats acne, keeps Candida (yeast) in check and treats irritable bowel syndrome, among other benefits.

**THE KOMBUCHA MARKET
GROWTH
2008 – 2013(p)**

| Year | Annual Growth Rate | | |
|------------|--------------------|----------------|---------|
| | Wholesale Dollars | Retail Dollars | Gallons |
| 2007/08 | 10000% | 10000% | 10000% |
| 2008/09 | 10000% | 10000% | 10000% |
| 2009/10 | 10000% | 10000% | 10000% |
| 2010/11 | 10000% | 10000% | 10000% |
| 2011/12 | 10000% | 10000% | 10000% |
| 2012/13(p) | 10000% | 10000% | 10000% |

(p) Preliminary

Source: Beverage Marketing Corporation