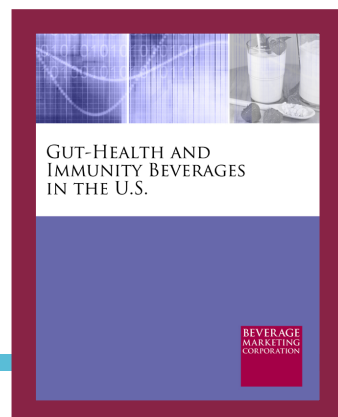


GUT-HEALTH & IMMUNITY BEVERAGES IN THE U.S.

2022 EDITION (Published March 2022. Data through 2021. Market projections through 2026.) More than 25 pages, with extensive text analysis, graphs, charts and tables



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The probiotic segment continues to grow, though at a decelerated pace than it has enjoyed in earlier years. Will innovation delivering expanded functionality through broader gut-health and immunity benefits combined with broader based consumer acceptance result in a return to double-digit gains?

Beverage Marketing Corporation considers the possibilities in its revamped industry report entitled: *Gut-Health and Immunity Beverages in the U.S.* The question is a particularly important one as this report analyzes a beverage type (probiotics) that is relatively new and bridges the gap between food and beverages. Its success is one that has — and will — inspire continued innovation within the category as well as for other fledgling segments. Already, new entrants have stretched the boundaries of the category definition beyond its traditional yogurt beverage roots. (Not to mention, stretching the category to include prebiotics; thus the new emphasis on “gut-health.”) Although gut-health beverages have become steady growers, entrepreneurs and market veterans alike can glean key insights on future innovation, market trends and consumer drivers. Impact of the coronavirus pandemic is also discussed.

While difficult to quantify, the qualitative aspects of immunity beverages are also discussed since they are closely related to gut-health.

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HAVE QUESTIONS?

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

BEVERAGE
MARKETING
CORPORATION

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 brief but insightful market report measures the commercial market for RTD gut-health/probiotic beverages, providing volume, retail and wholesale dollar sales, covers top brands and discusses key issues in the probiotic beverage segment. BMC's exclusive five-year projections are also included. Questions answered include:

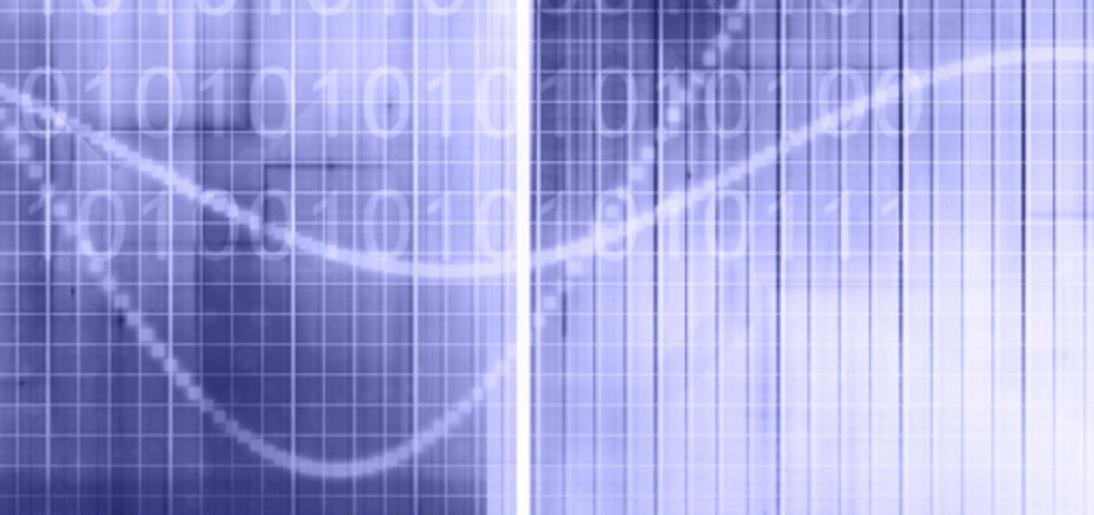
- What are probiotics, prebiotics and symbiotics and how did they evolve in the U.S. from food to quasi-beverages?
- Which are the leading brands? How large are they in terms of volume sold and wholesale dollar value?
- How consolidated is the RTD probiotic beverage market? In other words, how difficult is it for a large strategic to capture a significant percentage of market share?
- Why has the category been successful? How does it relate to the rest of the better-for-you beverage market?
- How much is the RTD gut-health beverage market expected to grow in the next five years? What are the growth drivers and headwinds going forward? What has been the impact of the Covid-19 pandemic on this emerging sector?

THIS REPORT FEATURES

This report examines an evolution of gut-health from yogurt to RTD drinks that utilize probiotics and prebiotics. The presentation of industry research begins with an overview of the RTD probiotic market. It then analyzes various brands and the companies behind them, taking note of innovations they have achieved and the marketing strategies behind them.

After outlining this context, the report describes the issues likely to determine what is next in the U.S. RTD probiotic beverage marketplace and projects market size five years into the future. In this report, readers get a thorough understanding of all facets of the probiotic beverage market including:

- Wholesale and retail dollar sales and volume of the RTD probiotic beverage market going back to 2012.
- Discussion of the main competitors and their likely prospects, including analysis of the strategies of the largest brands in the segment.
- Volume and value data (gallonage and wholesale dollar sales) for key brands including Lifeway Kefir, Olipop, Suja, Yakult, GoodBelly, Hellowater Obi Probiotic Soda, Farmhouse Culture and Living Apothecary.
- Analysis of the prospects of the RTD gut-health beverage market in the next five years, with Beverage Marketing's wholesale dollar and volume category projections to 2026.



GUT-HEALTH AND IMMUNITY BEVERAGES IN THE U.S.

**BEVERAGE
MARKETING
CORPORATION**

Gut-Health & Immunity Beverages in the U.S.

March 2022

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

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Following the success of such products in Europe and Japan, major companies have created a market for “gut health” in the U.S. over the past decade. While there have been several “pure plays” in that realm, beverage marketers from other categories have been rushing to add probiotics and prebiotics to their own offerings to ride this wave — aided in part by an easy-to-include probiotic ingredient called BC-30 offered by Ganeden, which has racked up hundreds of users by now. The rich probiotic content is a key attribute promoted by marketers of the fast-growing kombucha category, but brands involved in cold-pressed juice, tea and soda are among others that have added a probiotic lift to their lines seeking differentiation and premiumization.

- And over the past two years we have seen a race of both kombucha producers and independent startups to offer canned sparklers that mimic the drinking experience of La Croix but with a probiotic or prebiotic lift. Olipop, based in the Bay Area, has garnered the greatest visibility so far but newcomers like Poppi and Culture Pop, as well as a brand called Huzzah that was conjured up by LA Libations for the Molson Coors beer distribution network, are coming on the scene, even as established kombucha marketers like Health-Ade, Brew Dr. and Rowdy Kombucha offer the convenience of cans, a light drinking experience like La Croix, and a more approachable positioning and more affordable price point than their core kombuchas.
- Gut-health products are classified as probiotic, prebiotic or symbiotic. According to Iowa State University, a probiotic is a “product containing live microorganisms in sufficient numbers to alter the microflora in a compartment of the body (stomach, intestine, or other) and thereby exert a beneficial health effect.” It states that a prebiotic is “a product containing a non-digestible food ingredient that produces health benefits by selectively stimulating the growth or activity of one or more bacteria in the colon.” Likewise, symbiotics are products containing both a probiotic and prebiotic “that selectively stimulate growth of bacteria in the large intestine.”
- Thus, so-called probiotics, which are found mostly in yogurts and other cultured dairy products in the U.S., are “friendly” bacteria that are said to aid in digestion. These friendly bacteria populate the gut and help to counteract disease. Bacteria-infused products are also touted as an antidote to the side effects caused by antibiotics. Some claim that probiotics play a role in counteracting colon cancer, high cholesterol, high blood pressure and even yeast infections, but skeptics state there is a lack of scientific consensus in this regard. Lately, prebiotic entries have also been coming on strong.

Exhibit 7

LEADING PROBIOTIC BEVERAGE BRANDS
CHANGE IN VOLUME
2016 – 2021

Brand	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Lifeway Kefir	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
Suja	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
Yakult	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
GoodBelly	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
Hellowater	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
Olipop	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
Obi Probiotic Soda	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
Farmhouse Culture	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
Living Apothecary	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
Subtotal	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
All Others	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %
TOTAL	██████ %	██████ %	██████ %	██████ %	██████ %	██████ %

Source: Beverage Marketing Corporation