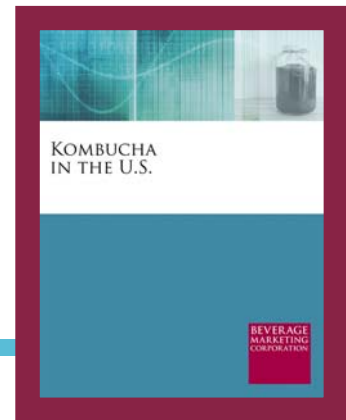


KOMBUCHA IN THE U.S.

2019 EDITION (Published March 2019. Data through 2018. Market projections through 2023.) More than 30 pages, with extensive text analysis, graphs, charts and tables



Will the swiftly growing kombucha market be sustained into the future?

Beverage Marketing Corporation considers the possibilities in its industry report entitled: *Kombucha in the U.S.* The question is an important one as this report considers a beverage type that a decade ago was not even on most people's radar. Now that kombucha has become a reliable double-digit grower, it is important to consider what can be learned here for entrepreneurs and market veterans alike.

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

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

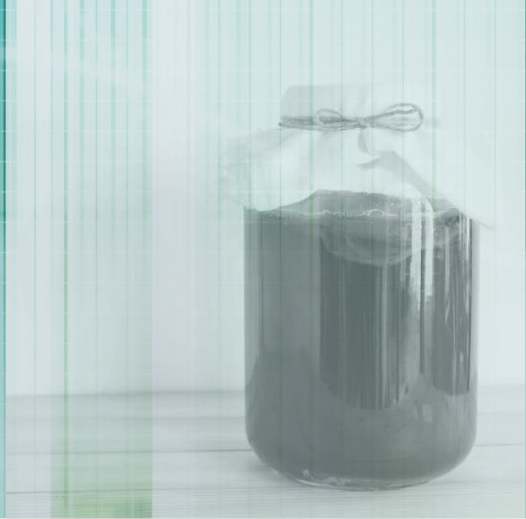
- What is kombucha and where did it originate and evolve in the U.S. market?
- Which are the leading brands? How large are they in terms of volume sold and wholesale dollar value?
- Is the market sewn up by big companies or is there room for smaller players to capture a significant percentage of market share?
- Why has the category been so successful? How does kombucha relate to the rest of the better-for-you beverage market?
- How much is the kombucha market expected to grow in the next five years? What are the growth drivers going forward?

THIS REPORT FEATURES

This report examines a unique offshoot of the RTD tea category that straddles the probiotic realm. The presentation of industry research begins with an overview of the kombucha 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. kombucha marketplace and projects market size five years into the future. In this report, readers get a thorough understanding of all facets of the kombucha market including:

- Wholesale and retail dollar sales and volume of the kombucha 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 GT's Kombucha, Health-Ade, Brew Dr. Kombucha, Live Kombucha, Humm Kombucha, Revive Kombucha, Buchi , Rise Kombucha and Mobtown
- Analysis of the prospects of the kombucha market in the next five years, with Beverage Marketing's wholesale dollar and volume category projections to 2023.



KOMBUCHA IN THE U.S.

**BEVERAGE
MARKETING
CORPORATION**

Kombucha in the U.S.

March 2019



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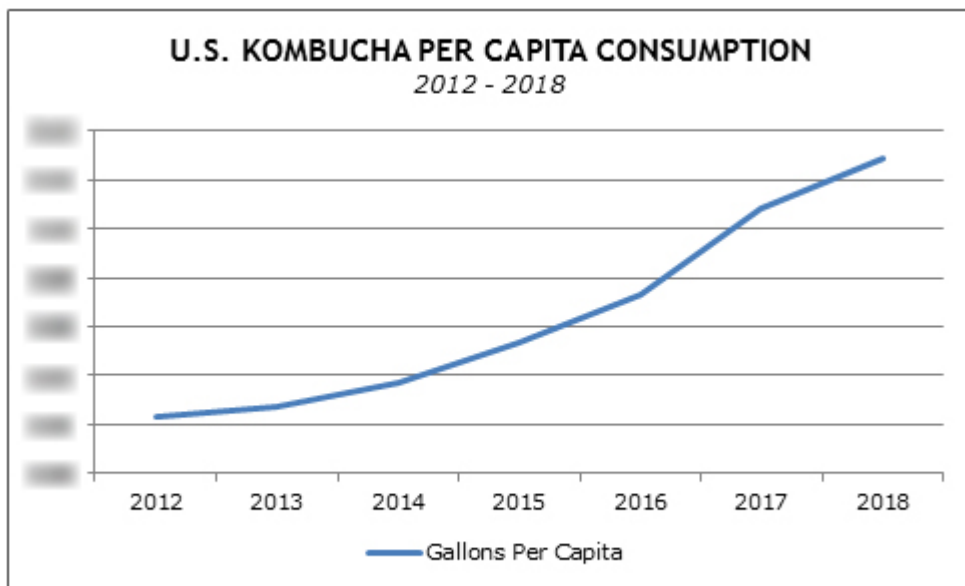
In the realm of functional drinks, kombucha is a more complex product proposition than, say, energy drinks or sports beverages, and concomitantly more difficult to explain to newcomers to the category.

- 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. There are no mushrooms in kombucha— aside from reishi or chaga mushrooms added to some flavors, of course.)
- 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.
- On the taste issue, it is worth noting that the growth of such other categories as drinking vinegars and sour craft beers suggests that the palates of American consumers are broadening. And as noted, newer entrants have succeeded in dialing down the vinegar notes in any case.
- Not surprisingly, some marketers have tried to disguise the sharp taste of kombucha 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 — and some believe, still is — most pronounced.
- One feature of the kombucha landscape has been class-action lawsuits against key players like GT's and Health-Ade alleging that they have been misleading about both their alcohol and calorie counts. The kombucha brewers' trade organization has tried to argue that conventional testing apparatus is not reliable for kombucha, with only mixed success so far.

**LEADING KOMBUCHA BRANDS
CHANGE IN WHOLESALE DOLLAR SALES
2014 – 2018**

Brand	2013/14	2014/15	2015/16	2016/17	2017/18
GT's	100%	100%	100%	100%	100%
KeVita	100%	100%	100%	100%	100%
Brew Dr. Kombucha	100%	100%	100%	100%	100%
Health-Ade	100%	100%	100%	100%	100%
Humm Kombucha	100%	100%	100%	100%	100%
High Country	100%	100%	100%	100%	100%
Reed's	100%	100%	100%	100%	100%
Kombucha Wonder Drink	100%	100%	100%	100%	100%
Carpe Diem	100%	100%	100%	100%	100%
Subtotal	100%	100%	100%	100%	100%
All Other	100%	100%	100%	100%	100%
TOTAL	100%	100%	100%	100%	100%

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation