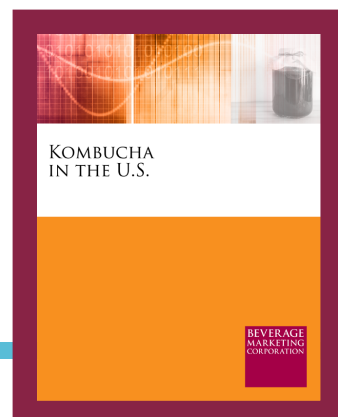


# KOMBUCHA IN THE U.S.

**2020 EDITION** (Published April 2020. Data through 2019.  
Market projections through 2024.) More than 40 pages, with  
extensive text analysis, graphs, charts and tables



**W**ill the recently-slipping kombucha market regain its former momentum?

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 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. Discussion of the upheaval resulting from the Covid-19 crisis. 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, Mobtown and several others.
- ... Analysis of the prospects of the kombucha market in the next five years, with Beverage Marketing's wholesale dollar and volume category projections to 2024.



# KOMBUCHA IN THE U.S.

BEVERAGE  
MARKETING  
CORPORATION

# Kombucha in the U.S.

April 2020

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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.

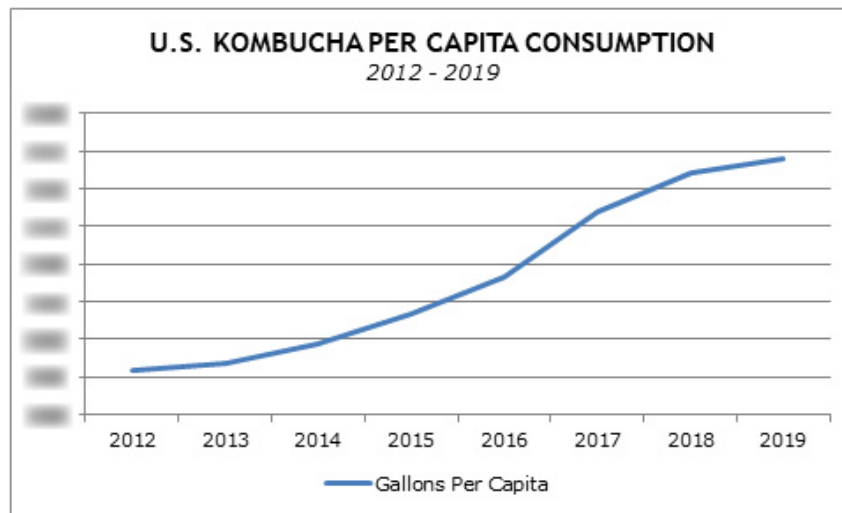
- ... It has been called a mushroom tea, for instance, but a more accurate description is that it is a sweetened tea to which a kombucha culture has been added. The kombucha culture consists of a symbiotic colony of bacteria and yeasts or SCOBY. (The culture resembles a pancake or mushroom; hence the 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 that is challenging to a palate trained on sugary soft drinks. Indeed, kombucha production is not dissimilar to that of vinegar, and we treat drinking vinegars that are also having a vogue as a part of this category.
- ... 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.
- ... 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.
- ... 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.
- ... As a final note, we should note that there are a burgeoning number of kombucha players operating in the alcohol space, which is outside the realm of this report. Many, like Anheuser-Busch's Kombrewcha or Los Angeles' Kombucha Dog, are low-alcohol, but Boochcraft and others have done well with booches in the 5–7% range.

Exhibit 9

**LEADING KOMBUCHA BRANDS**  
**CHANGE IN WHOLESALE DOLLAR SALES**  
**2015 – 2019**

Brand	2014/15	2015/16	2016/17	2017/18	2018/19
GT's	100%	100%	100%	100%	100%
KeVita	100%	100%	100%	100%	100%
Health-Ade	100%	100%	100%	100%	100%
Brew Dr. Kombucha	100%	100%	100%	100%	100%
Humm Kombucha	100%	100%	100%	100%	100%
<b>Subtotal</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Private Label	100%	100%	100%	100%	100%
All Other	100%	100%	100%	100%	100%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation