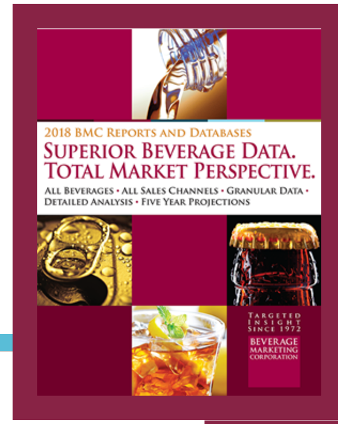
The Multiple Beverage Marketplace in the U.S.: Excel Data Set

2018 Edition (Published June 2018. Data through 2017. Market projections through 2022.) More than 75 Excel tables.



If you need the big picture, this U.S. multiple beverage industry overview is for you. This comprehensive data-driven market research report covers the entire U.S. commercial beverage industry and includes statistics on retail and wholesale sales as well as volume, growth, per capita consumption and share of stomach across eleven U.S. alcohol and non-alcohol beverage types.

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The answers you need

BMC's market research report on beverages in the United States provides a birds eye view of the American market for eleven beverage categories including beer, bottled water, carbonated soft drinks, coffee, distilled spirits, energy drinks, fruit beverages, milk, sports beverages, tea and wine. It offers key statistics and also contains Beverage Marketing Corporation's exclusive projections for each category. The report provides an all-channel-inclusive picture, capturing 100% of volume, wholesale and retail dollars for each beverage sector it covers. If you need cross-category perspective, you won't want to miss the wealth of information contained in this industry report. Get answers to questions including:

- How did the main beverage categories perform in the U.S. market in 2017? What share of stomach do they hold?
- How does each category's volume, growth and market share compare to their respective wholesale dollar sales and retail dollar sales results?
- How do various categories stack up in an all-sales-channel-inclusive, cross-category comparison?
- How have the different groups' market shares shifted over time? Which categories have exhibited consistent share erosion? Which categories are gaining share?
- How are these categories projected to grow over the next five years?

This report features

Highlights of *The Multiple Beverage Marketplace in the U.S.* include:

- An overview of development in the major categories, including a bird's eye view of the industry as a whole.
- Market statistics for eleven beverage categories: beer, bottled water, carbonated soft drinks, coffee (including break-out for ready-to-drink), distilled spirits, energy drinks, fruit beverages, milk, sports beverages, tea (including break-out for ready-to-drink) and wine. Also includes data for value added water.
- A breakdown of the industry by both volume, producers' sales and retail sales by beverage category, providing historical and current data, each beverage category's market share as well as growth trends.
- Per capita consumption figures.
- Bottled water data by segment including domestic non-sparkling retail premium PET, retail 1 - 2.5 gallon, direct delivery bulk, sparkling waters and others.
- A look at share of market held by tea bags vs. RTD tea, iced tea mix and loose tea as well as volume and growth statistics for each segment.
- Distilled spirits supplier sales, wholesale sales and retail sales by segment including vodka, rum, cordials and liqueurs, rum, straight whiskey, tequila, Canadian whiskey, Scotch, brandy & cognac, gin, blended whiskey, prepared cocktails and Irish whiskey.
- Consumption statistics for a broad range of adult beverages.

- U.S. wine market data by segment including historical and current consumption for subcategories including domestic and imported table wine, domestic and imported champagne/sparkling wine, and domestic and imported vermouth/aperitif, plus a look at trends for domestic vs. imported wine consumption.

- Growth forecasts through 2022 are a key component of this report, allowing you to compare growth potential across beverage industry segments. Included are Beverage Marketing's five-year projections for volume, sales, market shares, per capita consumption and compound annual growth projections for each beverage group and analysis of the forces determining each category's future.

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June 2018

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 1.2

U.S. BEVERAGE MARKET
SHARE OF VOLUME BY CATEGORY (r)
2012 – 2017

Categories	2012	2013	2014	2015	2016	2017
Bottled Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Carbonated Soft Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Beer	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Milk	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fruit Beverages*	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sports Beverages	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Energy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Value-Added Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Distilled Spirits	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
All Others**	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

(r) Revised
** Includes liquid fruit juice and fruit drinks; excludes powdered fruit drinks and vegetable juices.*
*** Includes vegetable juices, powders and miscellaneous others.*
Source: Beverage Marketing Corporation; Adams Beverage Group; Distilled Spirits Council of the United States; Florida Department of Citrus; International Dairy Foods Association; U.S. Tea Association

Exhibit 3.19

U.S. BOTTLED WATER MARKET

CHANGE IN VOLUME BY SEGMENT
1977 – 2017

	Domestic Non-Sparkling							
Year	Retail Premium PET	Retail 1 - 2.5 Gallon	Direct Delivery /Bulk*	Vending	Total	Domestic Sparkling	Imports (All Types)	Total
1976/77	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1977/78	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1978/79	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1979/80	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1980/81	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1981/82	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1982/83	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1983/84	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1984/85	[illegible]%	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1985/86	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1986/87	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1987/88	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1988/89	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1989/90	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1990/91	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1991/92	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1992/93	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1993/94	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1994/95	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1995/96	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1996/97	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1997/98	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1998/99	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
1999/00	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2000/01	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2001/02	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2002/03	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2003/04	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2004/05	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2005/06	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2006/07	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2007/08	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2008/09	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2009/10	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2010/11	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2011/12	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2012/13	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2013/14	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2014/15	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2015/16	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
2016/17	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

** Includes home and commercial delivered bulk waters, plus retail bulk (vended plastic and can packaged) waters.*
Source: Beverage Marketing Corporation

Exhibit 11.61

U.S. TEA MARKET
CHANGE IN CONSUMPTION BY SEGMENT
2013 – 2017

Segments	**2012/13**	**2013/14**	**2014/15**	**2015/16**	**2016/17**
RTD Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Tea Bags	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Iced Tea Mix	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Tea Pods	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Loose Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]**%**	[illegible]**%**	[illegible]**%**	[illegible]**%**	[illegible]**%**

Note: Does not include institutional tea sales.
Source: Beverage Marketing Corporation