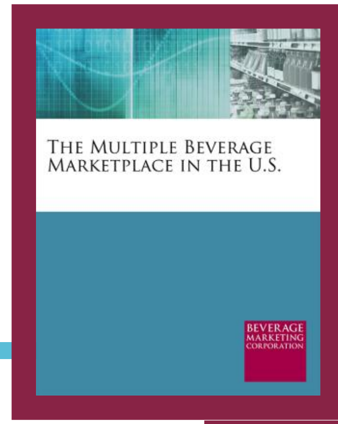
The Multiple Beverage Marketplace in the U.S.

2019 Edition (Published June 2019. Data through 2018. Market projections through 2023.) More than 75 Excel tables plus an executive summary.



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. The 2019 edition also features an executive summary highlighting developments and trends.

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BEVERAGE MARKETING CORPORATION

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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 2018? 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?

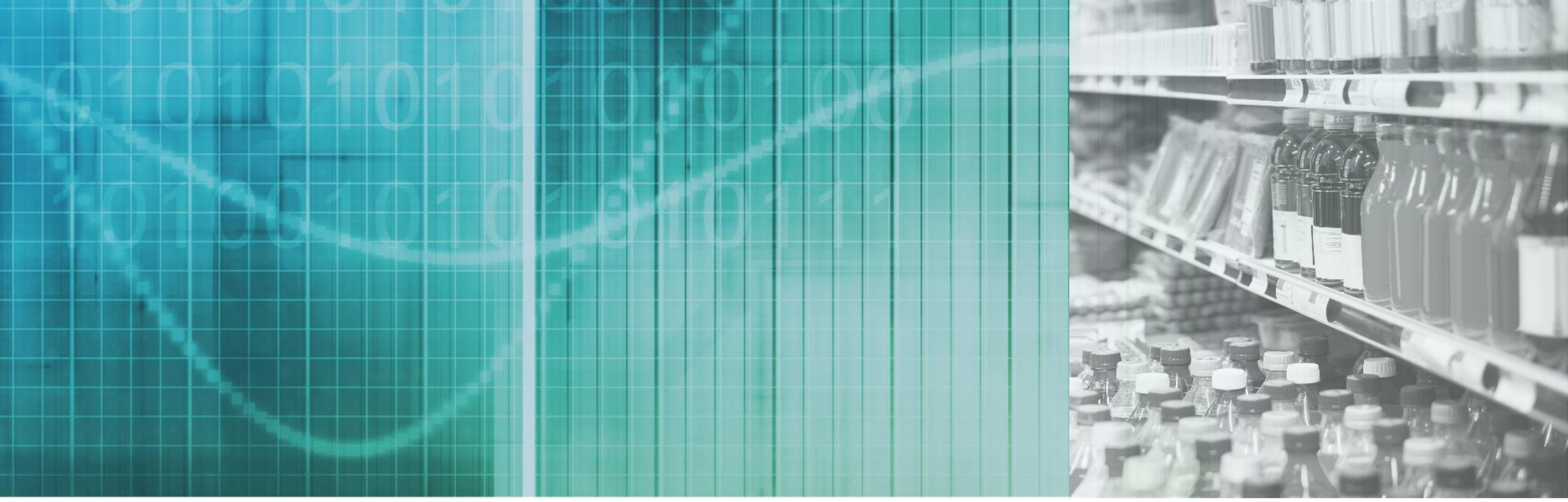
This report features

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 2023 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 2019

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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Despite lackluster performances by some large segments, others showed strength – especially bottled water and the separate but related value-added water category.

- Bottled water enlarged its lead over CSDs with volume growth of nearly [illegible]%.
- Value-added water – water with a hint of flavor or some other sort of enhancement – grew even more vigorously, though volume remained considerably smaller.
- Coffee grew (and the small but vibrant RTD sub-segment remained strong).
- Sports beverages declined in 2017 but rebounded in 2018.
- Energy drinks remained energetic in 2018.
- Distilled spirits grew again in 2018, when they once again ranked as the smallest category by volume but one of the biggest when measured in either wholesale or retail dollars, both of which grew more quickly than volume did.

In general, beverages that boasted some benefit beyond simple hydration performed well, while those perceived as unhealthful or mere empty calories struggled.

- Thus, value-added water and energy drinks handily outperformed the total beverage market due mainly to their functional properties.
- In contrast, regular CSDs lost traction. They managed sales growth in no small part to changes in package sizes. Increasingly common small units generally carry higher per-ounce pricing. A small sub-segment of premium or craft CSDs also emerged.
- Standard bottled water's growth slowed in 2018 compared to the immediately preceding years, but the category's versatility (and generally low pricing) assured its status atop the volume rankings.
- **Beverage Marketing** expects bottled water to remain the number-one beverage type by volume in the near future. By 2023, its volume could approach [illegible] gallons, which would work out to almost [illegible] gallons per person.

Exhibit 12.65

U.S. WINE MARKET

SHARE OF VOLUME BY CATEGORY
2013 – 2018

Category	2013	2014	2015	2016	2017	2018
Table Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sparkling Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fortified Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Specialty Wine*	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Vermouth	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

** Includes fruit wine, chocolate wine and sangria.*
Source: Beverage Marketing Corporation