

# U.S. NEW AGE BEVERAGES THROUGH 2021

2017 EDITION (Published November 2017. Data through 2016. Market projections through 2021.) More than 350 pages, with extensive text analysis, graphs, charts and more than 45 tables.

This market report from Beverage Marketing Corporation offers insight on a broad array of beverages that share similar attributes and consumer perceptions and often compete for shelf space and consumer loyalty. It examines ready-to-drink tea and coffee, sports beverages, energy drinks, single-serve-fruit beverages, kombucha and all the various New Age segments. The study also provides data on volume and sales plus discusses leading companies and their strategies.

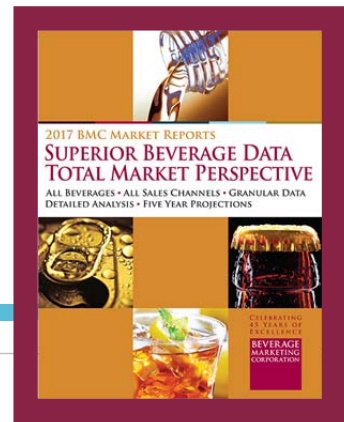
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HAVE  
QUESTIONS?

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## THE ANSWERS YOU NEED

The U.S. New Age Beverages report provides in-depth data and market analysis, shedding light on various aspects of the market through reliable data and discussions of what the numbers really mean. Questions answered include:

- Which segments of the diverse U.S. New Age beverage market grew in 2016 and which did not?
- What are the top beverage brands and how did they perform in 2016?
- What's driving developments in the New Age beverage marketplace?
- How many gallons did U.S. residents consume in 2016, and how is that likely to change in the next few years?
- What are the leading sales channels for New Age beverages?
- Which categories are poised for strong growth in the future?

## THIS REPORT FEATURES

This comprehensive report investigates 12 non-alcoholic beverage categories that populate the domestic landscape. It offers volume, retail dollars, wholesale dollars and per capita consumption, as well as a look at the protein market by region and distribution channel.

The report provides an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth through 2021. Advertising and demographic data are also provided. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of all facets of this beverage market including:

- An overview of the diverse New Age beverage market, anchoring it in history as well as providing insight into current trends propelling the market.
- A detailed break-out of trends in the various segments and sub-segments providing data including gallonage, wholesale dollar sales, wholesale prices per case and more for 19 segments and subsegments.
- Regional look at the U.S. New Age beverage marketplace, with volume and growth data of seven segments over the past five years, and projections five years in the future.
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales volume data & statistics. Profiles the wellness beverage activities of companies such as Coca-Cola Company, Dr. Pepper Snapple, Ferolito, Vultaggio & Sons, Monster Beverage Corporation, PepsiCo, Nestlé Waters North America (NWNA), Red Bull and others. Includes brand data for Gatorade, GT's, Glacéau, Arizona, Lipton, Rockstar, Frappuccino, Gold Peak, Odwalla and many more.
- Data detailing volume by distribution channels totaling 100% of market volume.
- Advertising expenditures of the leading companies and segments and a look at spending by media type (including Internet and Spanish-language advertising).
- Consumer demographic profiles comparing consumers of key brands and segments.
- Five-year volume, wholesale dollar and retail dollar sales forecast through 2021 for the New Age beverage market and its sub-segments. Including single serve waters (breaks out retail PET water, enhanced water, alkaline water, flavored water, essence water), energy drinks, nutrient-enhanced fruit drinks, super-premium juice, regular single-serve fruit beverages, probiotics, protein drinks, RTD coffee, RTD tea, sports beverages, sparkling water, vegetable/fruit juice blends, kombucha, coconut water, plant water, premium soda and shelf-stable dairy drinks.

# U.S. New Age Beverages through 2021

November 2017

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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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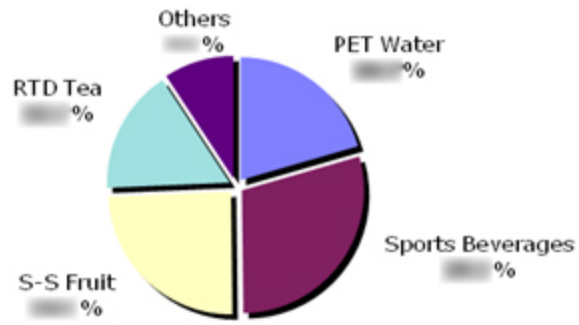
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Kombucha evolved from being a specialty item among an extreme subsegment of foodies on the West Coast to a segment of broad interest even transcending the natural-foods channel. Although there are a handful of pasteurized-kombucha players, the segment is dominated by so-called “raw,” unfiltered kombucha that must be kept refrigerated and otherwise handled carefully.

- What exactly is kombucha? 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.)
- 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.
- Although the company maintains a sheltered approach, many industry players estimated that Millennium Products Inc., with its G.T.’s Synergy and Organic Raw Kombucha items, has more than \$350 million in annual sales, despite the category’s upheavals in 2010. In fact, the whole market rang up \$534.5 million in wholesale dollars in 2016, on 23.7 million gallons.
- Being that it is fermented, commercial kombucha should contain up to 0.5% alcohol by volume (ABV). However, in early 2010, investigators from the Maine government conducted tests of unpasteurized, or raw, kombucha in a Portland-area Whole Foods Market and found many that surpassed the 0.5% ABV limit for non-alcoholic drinks. It referred the case to the U.S. Treasury’s Alcohol and Tobacco Tax and Trade Bureau (TTB), which underwent its own investigation.
- In light of the governmental concerns, in June 2010, Whole Foods Market declared that it would pull raw kombucha off its shelves and asked all raw kombucha suppliers to submit third-party verification that their products do not exceed the 0.5% limit.
- Whole Foods’ principal distributor United Natural Foods, Inc. (UNFI) and raw kombucha manufacturers like Millennium Products agreed to a voluntary recall of their products pending such third-party verification.
- Several companies chose to reformulate their kombucha to minimize the risk of alcohol fermentation and products started to return to store shelves in the summer and fall.

**SPORTS BEVERAGES ARE TOPS IN THE SOUTH**

*Share of sales by segment, 2016*



*Source: Beverage Marketing Corporation*

**NEW AGE BEVERAGE MARKET SEGMENTS**  
**CHANGE IN VOLUME**  
**2012 – 2021(P)**

<b>Market Segments</b>	<b>2011/12</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15</b>	<b>2015/16</b>	<b>2016/21(P)</b>
Retail PET Waters	100%	100%	100%	100%	100%	100%
Enhanced Water	100%	100%	100%	100%	100%	100%
Flavored Water	100%	100%	100%	100%	100%	100%
Alkaline Water	100%	100%	100%	100%	100%	100%
Essence Water	100%	100%	100%	100%	100%	100%
<b>Subtotal S-S Water</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
RTD Tea	100%	100%	100%	100%	100%	100%
Sports Beverages	100%	100%	100%	100%	100%	100%
Sparkling Water	100%	100%	100%	100%	100%	100%
Regular S-S Fruit	100%	100%	100%	100%	100%	100%
Superpremium Juice	100%	100%	100%	100%	100%	100%
Sparkling Juice	100%	100%	100%	100%	100%	100%
<b>Subtotal S-S Fruit</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Energy Drinks	100%	100%	100%	100%	100%	100%
RTD Coffee	100%	100%	100%	100%	100%	100%
Veg/Fruit Juice Blends	100%	100%	100%	100%	100%	100%
Premium CSD	100%	100%	100%	100%	100%	100%
Kombucha	100%	100%	100%	100%	100%	100%
Protein Drinks	100%	100%	100%	100%	100%	100%
Coconut Water	100%	100%	100%	100%	100%	100%
Shelf-Stable Dairy Drinks	100%	100%	100%	100%	100%	100%
Probiotics	100%	100%	100%	100%	100%	100%
Plant Water	100%	100%	100%	100%	100%	100%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

(P) Projected

Note: 2016/21(P) change is projected five-year compound annual growth rate.

Source: Beverage Marketing Corporation