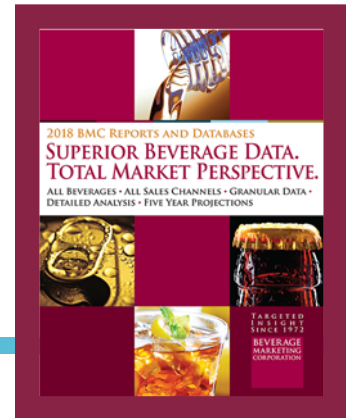


NEW AGE BEVERAGES IN THE U.S. THROUGH 2022

2018 EDITION (Published November 2018. Data through 2017. Market projections through 2022.) More than 350 pages, with extensive text analysis, graphs, charts and more than 45 tables.



This market report 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?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

BEVERAGE
MARKETING
CORPORATION

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

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 2017 and which did not?
- What are the top beverage brands and how did they perform in 2017?
- What's driving developments in the New Age beverage marketplace?
- How many gallons did U.S. residents consume in 2017, 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 15 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 New Age beverage 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 2022. 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 21 segments and subsegments.
- Regional look at the U.S. New Age beverage marketplace, with volume and growth data of eight 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, Keurig Dr Pepper, 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 2022 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.

New Age Beverages in the U.S. through 2022

November 2018



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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Kombucha has 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 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 secretive approach, many industry players estimated that Millennium Products Inc., with its G.T.'s Synergy and Organic Raw Kombucha items, has easily broken the \$ ██████ mark in annual sales. In fact, the whole market rang up \$ ██████ in wholesale dollars in 2017, on ██████ 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.

**NEW AGE BEVERAGE MARKET SEGMENTS
CHANGE IN VOLUME
2013 – 2022(P)**

Market Segments	2012/13	2013/14	2014/15	2015/16	2016/17	2017/22(P)
Retail PET Waters	10%	10%	10%	10%	10%	10%
Enhanced Water	10%	10%	10%	10%	10%	10%
Alkaline Water	10%	10%	10%	10%	10%	10%
Flavored Water	10%	10%	10%	10%	10%	10%
Essence Water	10%	10%	10%	10%	10%	10%
Subtotal S-S Water	10%	10%	10%	10%	10%	10%
RTD Tea	10%	10%	10%	10%	10%	10%
Sports Beverages	10%	10%	10%	10%	10%	10%
Sparkling Water	10%	10%	10%	10%	10%	10%
Regular S-S Fruit	10%	10%	10%	10%	10%	10%
Superpremium Juice	10%	10%	10%	10%	10%	10%
Sparkling Juice	10%	10%	10%	10%	10%	10%
Subtotal S-S Fruit	10%	10%	10%	10%	10%	10%
Energy Drinks	10%	10%	10%	10%	10%	10%
RTD Coffee	10%	10%	10%	10%	10%	10%
Vegetable/Fruit Blends	10%	10%	10%	10%	10%	10%
Premium CSD	10%	10%	10%	10%	10%	10%
Kombucha	10%	10%	10%	10%	10%	10%
Protein Drinks	10%	10%	10%	10%	10%	10%
Coconut Water	10%	10%	10%	10%	10%	10%
Shelf-Stable Dairy Drinks	10%	10%	10%	10%	10%	10%
Probiotics	10%	10%	10%	10%	10%	10%
Plant Water	10%	10%	10%	10%	10%	10%
TOTAL	10%	10%	10%	10%	10%	10%

(P) Projected

Note: 2017/22(P) change is projected five-year compound annual growth rate.

Source: Beverage Marketing Corporation

PET WATER LEADS WESTERN NEW AGE MARKET
Share of sales by segment, 2017



Source: Beverage Marketing Corporation