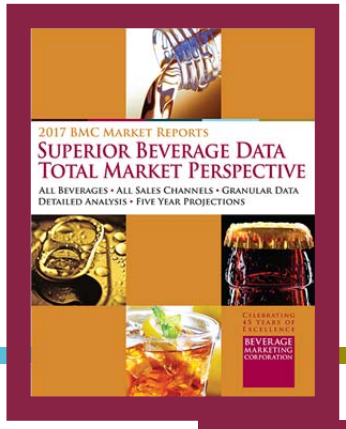
The Next Wave of Emerging and Niche Beverages

2017 Edition (Published December 2017. Data through 2016.)
More than 400 pages, with extensive text analysis.



This report, formerly named *Up-and-Coming Beverage Categories and Companies in the U.S.*, scrutinizes the always-changing marketplace by identifying and quantifying emerging non-alcoholic beverage categories, discussing companies of growing significance and describing what could be the next big thing. It also provides an overview of defining trends spurring development of the new categories and looks at the fast-growing liquid refreshment beverage companies, discussing their performance and indicating what makes them noteworthy.

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

Beverage Marketing Corporation
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

The answers you need

This report provides in-depth analysis of industry innovation and its impact on the beverage landscape in the form of new categories and brands. It also provides an overview of defining trends spurring developments in new categories and looks at the fast-growing liquid refreshment beverage companies. It discusses their performance and indicates what makes them noteworthy. Questions answered include:

- What new categories are enlivening the U.S. beverage market?
- How big are these emerging sectors and why are they worthy of being on your radar?
- What trends characterize the various up-and-coming beverage types entering the marketplace?
- Which companies enjoy the backing of industry veterans and strong financial resources, and which do not?
- Which beverage companies and brands show the most promise for success in the competitive U.S. marketplace?
- Which companies could become takeover targets in the near future?

This report features

Get a comprehensive overview of 18 fledgling beverage segments, some of which are poised to become the next big thing. For added market perspective, the entrepreneurial brands that comprise the burgeoning beverage categories are anchored in the context of more-established beverage market.

To provide context to the research findings, the report discusses factors that have led to the development of new beverage segments despite the relative maturity of the packaged beverage market as a whole. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of key facets of emerging beverage markets including:

- Analysis of industry trends and quantification of emerging non-alcoholic beverage categories and sub-segments.
- Discussion of the types of companies driving innovation – from the traditional large beverage companies to entrepreneurs.
- Insight from our up and coming market research analysts' on the factors driving innovation into new beverage types.
- Analysis of niche and emerging segments including high-end water, premium sodas, cap-activated beverages, super-premium ready-to-drink teas, coconut water, essence waters, kombucha, cleanses, ready-to-drink protein drinks, functional beverages, probiotics, healthy energy drinks, premium kids' beverages, ready-to-drink coffee and more.
- Discussion of companies with distinctive brands in each nascent and new segment. Companies/brands covered include: Aloe Gloe, Aquahydrate, Argo Tea, Arizona, Balance Water, BodyArmor, Bulletproof Coffee, Califia Farms, Calypso Lemonade, Celsius, Cheribundi, Core Water, Essentia, FRS, G.T.'s, GoodBelly, Guayaki, Harmless Harvest, Health-Ade, High Brew, Hint Water, Humm Kombucha, Inko's, Karma Wellness Water, KonaRed, La Croix, Lifeway, Mamma Chia, MatchaBar, Mountain Valley, Neuro, Peet's, Q Tonic, Reed's, Rockstar, Sambazon, Sparkling ICE, Steaz, Stumptown Coffee Roasters, Suja, Vita Coco, Xyience, Zevia, Zola Açaí and more.
- Our up and coming beverage companies market research analysts' take on the brands to watch in the various non-alcohol sectors and what they are doing to differentiate themselves as well as discussion of the strengths of various emerging brands and categories and the challenges they'll face going forward.

The Next Wave of Emerging and Niche Beverages

December 2017

RESEARCH • DATA • CONSULTING

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TEXT SAMPLE 1

Talk about a complete revolution in consumers' purchasing habits is likely premature at this point. After all, some of the fastest-growing brands on the landscape over the past decade are far from offering any kind of claim to being a healthier option: Talking Rain's Sparkling ICE (viewed by many in the business as diet soda cunningly disguised as bottled water); the sugar bomb that is Calypso Lemonade, and of course the leading energy drinks. These success stories seem to fight what consumers tell pollsters they are seeking these days in terms of healthy ingredients and the like.

- It seems, at least in a few cases, it is enough to offer a good-tasting, approachably priced and zero-calorie drink to capture the consumers who are in play now that they are moving away from more conventional choices like diet soft drinks. (That seems to account for much of the appeal of Bai, with its claim of being only five calories per serving.)
- In fact, if there is a secret sauce behind the explosive growth of Talking Rain, it may be simply that, in terms of formulation, it is really nothing more than a traditional diet soft drink — thoroughly disguised by its straight-walled plastic bottle and its positioning as a flavored spring water.
- To go back to the giant CSD category, it is no secret that consumers are turning away from them in droves (although it must be emphasized that the fast-growing energy drink segment really comprises CSDs in another guise.) In the past couple of years, however, a full-fledged sugar panic seems to have taken hold among many consumers, who are suddenly scrutinizing ingredient labels for sugar content and sometimes turning away even from healthier-positioned brands like craft sodas and cold-pressed juices after discovering the high levels of sugar they often contain. That has prompted a rethinking by many of those brands of their recipes — in extreme cases, it has led to a brand like fruit-based Sprindrift fleeing the category entirely and reinventing itself as an unsweetened sparkling water.
- In other cases, boutique soda makers have accelerated their addition of zero-calorie extensions: the new management team at Reed's Inc. has essentially forced founder Chris Reed to finally get zero-calorie Reed's and Virgil's sodas to market, and the eponymous founder of Bruce Cost Ginger Ale is out of the company in part because he refused to allow his name to be attached to any stevia-sweetened zero-calorie offerings. Cold-pressed juice makers are downsizing their packages, partly to get the calorie count down and partly to get the price down.

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TEXT SAMPLE 2

An impact of the superfruit mania of the past decade and a half has been entrepreneurs' continued ransacking of the natural world — often plants growing in tropical climes — for new miracle ingredients to put at the core of their beverages.

- An analysis by Google of search histories indicated that consumers have a fascination these days with ingredients like matcha green tea, ginger, chamomile and turmeric: all at the heart of multiple beverage platforms under brand names like Matchabar, Jin-Ja, Cham Tea and Temple Turmeric.
- The coffee bean and its surrounding fruit have both taken prominent roles in several brands, as have chia seeds and cayenne peppers. Mushroom-based beverages are coming into vogue. The success of coconut water has prompted a surge of beverage launches built around other plant-based waters, from aloe to maple water to cactus water, although not with any unquestioned successes so far. (Indeed, coconut water itself seems to be plateauing, even as more promotional pricing and retailers' private-label brands move the category back in the direction of commodity status.)
- A few entrepreneurs are seeking to raise the profile of domestically grown plants with the same nutritional payload as more familiar ones sourced overseas: a domestic variant of tea called yaupon in a bottled line called Asi, Midwest-grown aronia berries in a lemonade called Poppilu.

Another issue that pre-occupies many people in the innovation realm is what has been dubbed "functional fatigue" among some consumers.

- The thought is that, with things like jobs and healthcare coverage to worry about, many consumers may be less inclined these days to devote much time to deciphering the ingredients and claims behind the latest miracle beverages, with the result that functional brands may be a harder sell than in the immediate past.
- Many consumers, particularly affluent ones, also seem to be disenchanted with highly engineered foods and beverages, preferring shorter and recognizable ingredient lists to those that resemble a chemistry experiment. The HPP juice players are among those who have effectively played on this sentiment by arraying their core ingredients in large font right on the front panel of their bottles. Brands like Bolthouse Farms (now owned by Campbell Soup) brag about never having more than five or six ingredients in their recipes.

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