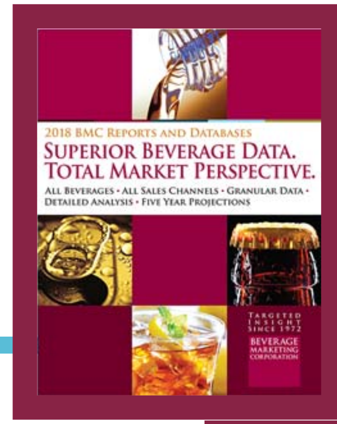
THE ON-PREMISE MIXER MARKET IN THE U.S.

2018 EDITION (Published December 2018. Data through 2017. Market projections through 2020.) 38 PowerPoint slides, with text analysis, graphs and charts



It's no surprise that a broad range of non-alcohol beverages are used as mixers for adult beverages in on-premise settings – and it isn't limited to beverages labeled as mixers. But getting your arms around the breadth and scope of that end-use market has always been a challenge. In this report, Beverage Marketing Corporation raises the bar by sizing the market and giving brand owners and marketers the information needed to grow this somewhat incidental – yet potentially sizeable – sales channel. For a handle on the size of the on-premise market for various types of mixers as well as a look at key players and the potential size of the opportunity, you won't want to miss this new BMC Report: *The On-Premise Mixer Market in the U.S.*

FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO bmcreports.com

AVAILABLE FORMAT & PRICING

Direct Download

$1,995

To learn more, to place an advance order or to inquire about additional user licenses ***call****: Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com*

INSIDE:

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

Beverage Marketing Corporation research shows that as consumers continue to trade up to premium and above-premium spirits in their cocktails, quality in all components, including mixers and other non-alcohol ingredients, has become increasingly important to both operators and consumers. To assess the current and future opportunity, this market report looks at:

- How big is the overall on-premise market for mixers?
- How big are each of the on-premise mixer segments, how fast are they growing and what does Beverage Marketing forecast for each sector?
- What are the key brands used as mixers in on-premise outlets?
- How intense is the competition in each mixer segment? What volume and market share of their particular on-premise mixer segment do each of the key players control?

This report features

It's no surprise that fruit juices - and energy drinks for that matter – are used as cocktail mixers in on-premise settings. As millennial consumers put their personalized, healthy, high quality twist on the sector, the mixer segment, like many other beverage categories, is ripe for innovation. In an evolving marketplace, truly understanding on-premise adult beverage consumption market opportunities means not only looking at alcohol beverages but at the elements that complete and personalize the mixed drink and cocktail experience: mixers. This report provides:

- An overview of on-premise alcohol beverage consumption and growth trends as a backdrop for the discussion of non-alcohol mixer market trends.
- A look at the size of the on-premise mixer market. The scope of the report is limited to on-premise use of non-alcohol beverage ingredients in mixed drinks/cocktails involving spirits, which will be referred to as "mixers" for the purposes of the report.
- An exploration of consumer drivers
- On-premise market size, growth and share for each mixer segment including:
    - Juices
    - Mixes
    - Syrups/flavorings
    - Purees
    - Tonic water/Club soda/Seltzer
    - Carbonated soft drinks
    - Energy drinks
- An all-outlet inclusive view that quantifies on-premise mixer usage across outlets including casual-dining restaurants, fine-dining restaurants, hotels and drinking establishments including taverns, pubs, lounges, nightclubs, sports bars, music/comedy clubs.
- A review of the competitive landscape within each mixer segment
- On-premise mixer volume and share for leading brands such as Red Bull, Monster, Rockstar, Full Throttle, Amp, Island Oasis, Finest Call, Daily's, Lyon's Maui, Mr & Mrs. T, Minute Maid, Ocean Spray, Dole, Florida's Natural, Tropicana, Monin, DaVinci, Torani, Finest Cal, Fee Brothers, Schweppes, Canada Dry, Q Tonic, FeverTree, Coca-Cola Classic, Diet Coke, Pepsi, Sprite and Canada Dry

Please note: Premixed cocktails or ready-to-drink cocktails are specifically excluded from the scope of this report.

The On-Premise Mixer Market in the U.S.

December 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.

Table of Contents

TABLE OF CONTENTS

I. Introduction, Objective & Methodology

II. On-Premise Mixer Market

III. Mixer Categories and Trends

IV. Outlook and Future

On-premise mixer category share

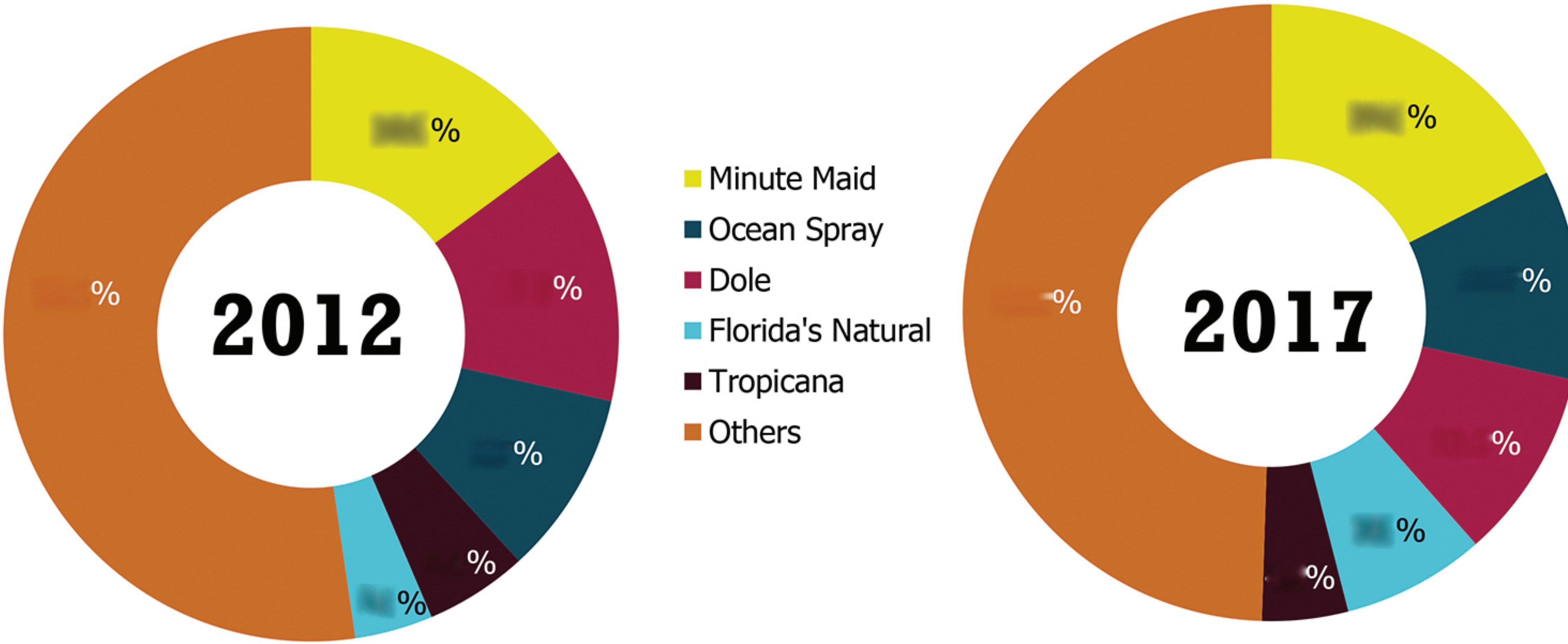
- All mixer categories are on a growth trend in 2018 with the exception of creams and purees
- The fastest-growing categories in 2018 are projected to be carbonated soft drinks, juices, energy drinks and syrups/flavorings
- Syrups/flavorings declined in 2017, but are expected to rebound this year while conversely purees grew in 2017 and are projected to decline in 2018

On-Premise Mixer Category Share, 2015-2018*
000s of gallons

	2015	2016	2017	% Change	2018*	% Change
Mixes**	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%
Juices	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%
Carbonated soft drinks	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%
Tonic waters/seltzer/club soda	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%
Syrups/flavorings	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%
Energy drinks	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%
Creams	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%
Purees	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%
Others	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%
Total on-premise mixers	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]	[redacted]%

*Projection
** Includes frozen and ready-to-use
Source: Beverage Marketing Corporation

Leading Brands' Share of Juice Mixer Volume 2012 & 2017



BEVERAGE MARKETING CORPORATION

Source: Beverage Marketing Corporation

Fierce competition

- The five leading brands account for at least [redacted]% of volume of all mixer categories with the exception of juice, where the top brands generate less than [redacted]% of volume.

- Leading juice, carbonated soft drink (CSD), tonic water/seltzer/club soda and energy-drink brands have strong presences and brand recognition both at retail and in restaurants and bars, and are supported by considerable consumer marketing initiatives. Some brands benefit from multi-year beverage contracts with operators, and many provide promotional support to on-premise partners that yields visibility via menu placement, branded signage and other point-of-sale programs.

- Leading brands and suppliers in other mixer categories are more specifically focused on the on-premise channel, in some cases targeting both bar and culinary professionals as their products have cross-utilization opportunities. These suppliers focus their marketing efforts on the trade, and some suppliers provide promotional dollars to operator partners. Several syrup/flavoring leaders are also utilized in the coffee limited-service segment, which provides them some consumer brand recognition.

- Recently, smaller brands in the mix, syrup and tonic water/club soda categories have emerged, garnering consumer and trade attention, although their volumes remain small.

BEVERAGE MARKETING CORPORATION