

PREMIUM CARBONATED SOFT DRINKS IN THE U.S.

2014 EDITION (Published December 2014. Data through 2013. Market projections through 2018.) More than 20 pages, with extensive text analysis, graphs, charts, and tables.



The *Premium Carbonated Soft Drinks in the U.S.* report explores the market for high-end and all-natural carbonated soft drinks and provides statistics on volume and sales of the leading brands.

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**HAVE
QUESTIONS?**

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THE ANSWERS YOU NEED

This report measures volume and wholesale dollar sales, covers top brands and discusses key issues in the premium CSD category. BMC's exclusive five year projections are furnished. Questions answered include:

- What distinguishes premium carbonated soft drinks from conventional CSDs?
- Who are the leading premium CSD companies and how have they been performing?
- What are the likely future developments for premium CSDs?

THIS REPORT FEATURES

Premium Carbonated Soft Drinks in the U.S. examines a niche segment of the CSD category in the U.S. The report begins with an overview of the broader CSD market and then delves into what makes premium CSDs a separately considered subsegment. It then analyzes various segments of this market in terms of the companies behind them and the innovations and novelties they have achieved. After outlining this context, the report describes the issues likely to determine what's next in the U.S. premium CSD marketplace and projects its probable size five years into the future. In this report, users get a thorough understanding of all facets of the premium CSD market including:

- Historical wholesale dollars and volume of the premium CSD market going back many years
- A comprehensive look at the leading premium CSD brands, including their positioning, marketing, distribution and product formulation
- Analysis of the challenges facing the premium CSD market in the next five years, with Beverage Marketing's wholesale dollar category and volume projections for 2018

Focus Report

Premium Carbonated Soft Drinks in the U.S.

December 2014



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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**LEADING PREMIUM SODA BRANDS
SHARE OF WHOLESALE DOLLAR SALES
2008 – 2013**

Brands	2008	2009	2010	2011	2012	2013
IBC	28.2%	28.2%	28.2%	28.1%	28.2%	28.1%
Hansen's (w/Blue Sky)	28.0%	28.1%	28.0%	28.2%	28.2%	28.2%
Reed's	8.8%	8.7%	8.1%	8.8%	8.8%	8.8%
Stewart's	8.2%	8.2%	8.2%	8.2%	8.2%	8.2%
Steaz	8.1%	8.2%	7.8%	7.9%	7.1%	8.7%
Jones Soda	28.2%	8.7%	8.7%	8.8%	8.2%	8.2%
Boylan's	8.8%	8.8%	8.7%	8.8%	8.8%	8.8%
Thomas Kemper	8.2%	8.8%	8.2%	8.1%	8.8%	8.8%
Jeff's Egg Cream	8.8%	8.8%	8.8%	8.8%	8.8%	8.8%
Clearly Canadian	1.8%	8.8%	8.2%	8.2%	--	--
Subtotal	28.2%	28.2%	28.2%	28.2%	28.2%	28.2%
All Others	28.4%	28.2%	28.2%	28.7%	28.4%	28.2%
TOTAL	28.2%	28.2%	28.2%	28.2%	28.2%	28.2%

Source: Beverage Marketing Corporation

It is possible to class premium soft drinks in several categories. One comprises longstanding regional brands that, through clever branding and playing of the heritage/authenticity card, have managed to successfully reposition themselves as contemporary improvements on mass-market CSDs. Ironically, by hewing to older styles of formulation and packaging, they have been able to position themselves as gourmet brands.

- New Jersey-based Boylan, for example, has played on uncluttered glass bottles that reprise the best aspects of older brands with classic flavors and cane-sugar formulations to enjoy steady growth radiating outward from its Northeast bulwark. The company represented the first beverage investment by Emigrant Capital, an arm of Emigrant Bank, which has since added Jolt Cola marketer Wet Planet (with poor results) and Zola Açai (which eclipsed Boylan to become the star of the portfolio).
- That said, the company was beset for several years by both operational issues and internal turmoil that added to the challenges of growing the brand. The two members of the founding Fiorina family, brothers Ron and Mark, had an acrimonious exit from the company and one fairly high-profile outside CEO – Martin Kelly, well-known in the beer world from his work at companies like North American Breweries – moved on after a couple of years of not-entirely-successful wrestling with the operational demons.
- At that point, Emigrant surprised the outside world by bringing in the 23-year-old son of Emigrant’s chairman, Steven Milstein, and drastically slashing payroll and generally adopting a very low profile. It has been clear for some time that Emigrant, disappointed in its investment, would prefer an exit, but after futile attempts to generate interest it seems to have accepted that that won’t be possible on acceptable terms until the brand is consistently growing again. To his credit, the younger Milstein has proved to be a quick study and has kept the company on a stable course. (See profile below.)
- Most parts of the country still boast small firms operating below the radar of the major players for loyal coterie of consumers, and some distributors such as Real Soda in Los Angeles have made it a point of pride to carry as many of these as they can find. Many of these companies are nimble, two-person operations: two brothers at Maine Root in Austin, Texas (profiled below); as well as husband-and-wife teams at Grown Up Soda and Fizzy Lizzy, both in New York.
- The Fizzy Lizzy team, however, threw in the towel a year ago, selling out to long-established regional soda player White Rock, which does not appear to have made much headway with a brand that plays outside its core strengths of easily affordable, widely available products.
- Indeed, it is worth noting at this point that a small trend that has unfolded in recent years is for established soda players to acquire some of these specialty brands, for a couple of key motives. For one, having them in the portfolio acts as a small hedge against the increasing criticism on health grounds of conventional sodas; even if they’re essentially irrelevant as a proportion of total sales, they provide good public relations “cover” for the big soda players.