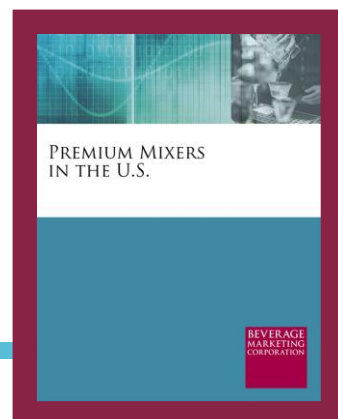


PREMIUM MIXERS IN THE U.S.

2019 EDITION (Published March 2019. Data through 2018. Market projections through 2023.) More than 30 pages, with extensive text analysis, charts and tables



Will the swiftly growing premium mixers market be sustained into the future?

Beverage Marketing Corporation considers the possibilities in its industry report entitled: *Premium Mixers in the U.S.* The question is an important one as this report considers a beverage type that a decade ago was not even on most people's radar. Now that premium mixers have become a reliable grower, it is important to consider what can be learned here for entrepreneurs and market veterans alike.

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**HAVE
QUESTIONS?**

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THE ANSWERS YOU NEED

This brief but insightful market report measures volume, wholesale dollar sales and retail dollar sales, covers top brands and discusses key issues in the premium mixers category. BMC's exclusive five-year projections are also included. Questions answered include:

- Which are the leading brands of premium mixers? Is the market sewn up by big companies or is there room for smaller players to capture a significant percentage of market share?
- Why has the category been so successful?
- How much is the premium mixers market expected to grow in the next five years? What are the growth drivers going forward?

THIS REPORT FEATURES

This report examines a unique offshoot of the premium soda market. The presentation of industry research begins with an overview of the premium mixers market. It then analyzes various brands and the companies behind them, taking note of innovations they have achieved and the marketing strategies behind them.

After outlining this context, the report describes the issues likely to determine what is next in the U.S. premium mixers marketplace and projects market size five years into the future. In this report, readers get a thorough understanding of all facets of the premium mixers market including:

- Wholesale dollar sales, retail dollar sales and volume of the premium mixers market going back to 2012, as well as projections of the same to 2023.
- Discussion of the main competitors and their likely prospects, including analysis of the strategies of the largest brands in the segment.
- Analyzes key brands and quantifies sales, offering volume and wholesale dollars for brands including Q Tonic, Fever-Tree, Distill Ventures/Seedlip, Mocktails, Ripe Craft Bar Juice, Owl's Brew, East Imperial, Frose (Kelvin Slush Co.), 18.21 Bitters, O.Vine, Be Mixed, Navy Hill, Nectar Girl and Arriba Chelada



PREMIUM MIXERS IN THE U.S.

BEVERAGE
MARKETING
CORPORATION

Premium Mixers in the U.S.

March 2019



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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On the mixer front, proponents say it has been a revolution long waiting to happen. As consumers' tastes in spirits have gravitated further upscale and an entire industry of artisanal spirits has emerged over the past 20 years, it has been recognized by mixologists, bartenders, retailers and entrepreneurs how inconsistent it is to blend a Grey Goose Vodka or Old Potrero gin with a cheap, fructose-sweetened mixer squirted from a gun or dispensed from a flimsy plastic bottle.

- That has prompted a wave of high-end mixer marketers, and the acquisition of one of them, Stirrings, by global spirits giant Diageo several years ago further highlighted the opportunities ahead and stimulated a new wave of entrepreneurship.
- A few prognosticators have put out reports projecting that the category is ripe to explode by a factor of five or even 10 in the coming years, further fueling the interest. At the Fancy Food Show in New York in summer 2018, it seems that there were elegant mixer brands on view in every aisle, some of them bitters and other non-beverage formats, but also an abundance of beverages.
- On the sparkling beverage side, some of the new entrants have come from overseas, such as London-based Fever-Tree, which was founded by Charles Rolls and Tim Warrillow in 2005 and by now has built a sizeable on-premise and specialty-grocery business in the States. There have been rumors that PepsiCo, among others, might want to add that brand to its arsenal. Its success has also prompted an influx of newer rivals such as an importer operating as East Imperial with its own extensive offering of traditional tonic waters and other mixers.
- Among the intriguing domestic players has been one, Q Brands, that for its first several years took an opposite tack from Stirrings, focusing on just a single entry, a better tonic water (the "Q" stands for quinine), rather than offering a broad range of products intended to meet a bartender's every need.
- That step-by-step approach by the company's youthful founder, Jordan Silbert, has served the company well, and it steadily increased distribution. In 2011, Q Tonic began to accede to retailers' requests to broaden the line, starting with a ginger ale SKU, and by now it has a range of flavors and packaging formats, and has pulled in significant equity capital. (See profile below.)
- With cold-pressed juices proving to be revelation among juice consumers for their freshness and the integrity of their ingredients, it might have seemed inevitable for a mixer play, given the role of fresh fruit juices in mixologists' regimens. So far, however, there has only been one company employing that fresh-tasting, natural approach to bar mixers, under the name Ripe Craft Bar Juice, enjoying what seems to be modest success.

Exhibit 7**LEADING PREMIUM MIXERS BRANDS
CHANGE IN VOLUME
2013 – 2018(p)**

Brand	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18(p)
Fever-Tree	████ %	████ %	████ %	████ %	████ %	████ %
Q Tonic	████ %	████ %	████ %	████ %	████ %	████ %
Fentimans	████ %	████ %	████ %	████ %	████ %	████ %
Jin+Ja	████ %	████ %	████ %	████ %	████ %	████ %
Llanllŷr Source	████	████	████	████	████ %	████ %
Top Note	████	████	████	████	████	████ %
Subtotal	████ %	████ %	████ %	████ %	████ %	████ %
All Other	████ %	████ %	████ %	████ %	████ %	████ %
TOTAL	████ %	████ %	████ %	████ %	████ %	████ %

(p) Preliminary

Source: Beverage Marketing Corporation