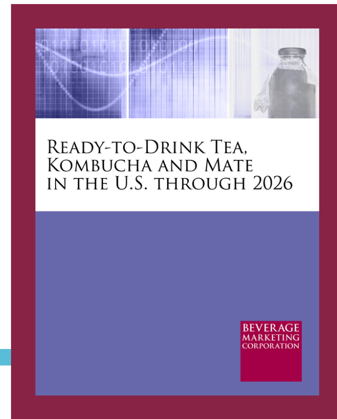
Ready-to-Drink Tea, Kombucha & Mate in the U.S. through 2026

2022 Edition (Published November 2022. Data through 2021. Market projections through 2026.) More than 240 pages, with extensive text analysis, graphs, charts and more than 90 tables.



This comprehensive ready-to-drink tea market report examines the U.S. tea market at a time when ongoing innovation added to market upheaval caused by the coronavirus pandemic make this a particularly important time to keep a close eye on the trends. This in-depth report focuses on RTD tea market trends (pre-packaged, bottled or canned tea). It provides statistics on regional markets as well as historical and current sales data for the leading companies and brands. Forecasts through 2026 are provided and impact of covid-19 is discussed.

Packaging, distribution, advertising expenditures and demographics are discussed in detail, with data to back up the insights provided. The industry research also covers kombucha, looks at refrigerated (RFG) RTD tea vs. shelf stable trends, tea types and flavors, the organic tea market and much more.

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The answers you need

Ready-to-Drink Tea, Kombucha and Mate in the U.S. through 2026 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:

- What are the latest trends behind RTD tea's performance in the U.S. market? Which brands are outperforming the market? Which are underperforming?
- How many gallons of RTD tea did U.S. residents consume in 2021 and the first half of 2022?
- Which price segment of RTD tea will grow the most to 2026?
- What is the latest news regarding organic tea?
- What are the biggest challenges to growth the RTD tea market faces in the current consumer environment?
- How has RTD tea fared in comparison with the broader New Age beverage category?
- How has the RTD tea packaging mix changed in recent years?
- What are the principal distribution channels for hot and RTD tea?

This report features

Ready-to-Drink Tea, Kombucha and Mate in the U.S. through 2026 offers an in-depth look at the category, companies and brands shaping the RTD tea market and the market drivers impacting current and anticipated growth through 2026.

It provides perspective on the segment and its many facets, providing sales and volume statistics including total-market retail dollar sales, wholesale dollar data and volume data. Through a combination of discussion backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of the RTD tea market including:

- An overview of the New Age beverage market, including dollar sales, as well as volume, per capita consumption and dollars for the various tea segments and analysis of U.S. and global tea trends. Quarterly RTD tea market growth data are also provided.
- A look at the RTD tea market by price segment, breaking out five tiers from regular and fountain through superpremium.
- 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. Coverage includes Pepsi-Lipton Tea Partnership, Coca-Cola Company, Keurig Dr Pepper, Ferolito, Vultaggio & Sons, Milo's, Purity Organic, Ito En and others.
- A look at wholesale dollar sales and case volumes for leading RTD tea brands including Arizona, Lipton, Gold Peak, Fuze, Teas' Tea, Peace Tea, Turkey Hill, Milo's and more.
- Regional consumption patterns of RTD tea volume, as well as regional breakdowns of wholesale dollar sales and regional per capita consumption.

- A look at hot-fill and cold-fill trends and volume by package type, including plastic, cans, glass and paperboard carton; includes detailed volume by package size of both shelf-stable and chilled RTD teas.

- Data detailing volume by key distribution channels totaling 100% of market volume.

- An overview of the kombucha and organic tea markets.

- Advertising expenditures of the leading RTD tea and dry tea companies and a look at category spending by media type (including Internet and Spanish-language network advertising).

- Consumer demographic profiles comparing consumers of key RTD tea brands.

- Data on green and black tea imports and exports.

- Five-year projections for the overall tea market as well as RTD tea and its sub-segments.

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BEVERAGE MARKETING CORPORATION

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November 2022

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.

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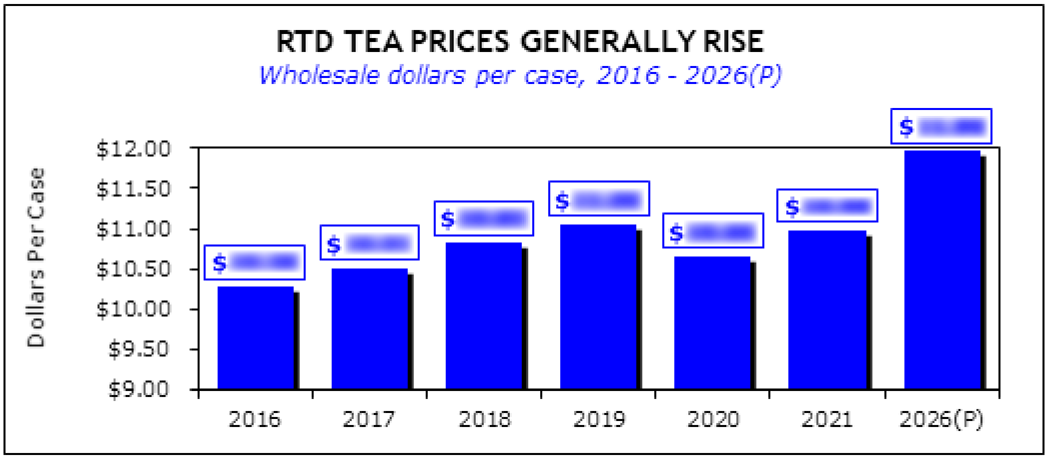
Specialty teas such as green tea, herbal tea and chai that have provided verve to the hot tea market, have also found their way into the RTD tea segment. These so-called superpremium teas emerged in part to fill a vacuum in the existing marketplace.

- Green tea has a more healthful image than black tea, a fact recognized by AriZona when it released its line of green teas, which are among the company's most successful products.
- As in other beverage segments where consolidation has taken place, new RTD tea entrants may need to find an unfulfilled niche in an attempt to differentiate themselves.
- Foremost among these, at least in the public eye, was Honest Tea, started in Bethesda, Maryland, by a financial services executive, Seth Goldman, and his business school professor Barry Nalebuff. Coca-Cola Company gained complete ownership of Honest Tea in February 2011, after previously taking a 40% stake in the company. However, in the past year, Coke has pulled the plug on Honest Tea. Goldman is trying to recreate his Honest Tea blueprint with Just Ice Tea.
- Japanese company Ito En has also targeted consumers looking for "better" products. Following the example of Honest Tea, which demonstrated that not all consumers are seeking teas that are drowned in sweetness, Ito En introduced a line of unsweetened green teas that found unexpected consumer acceptance.
- Superpremium teas appeal to consumers who might not otherwise purchase RTD tea, thus providing an increasingly significant, incremental volume increase to the segment. Even beyond their actual volume contribution, superpremium teas have improved the image of RTD tea and have helped push the larger players to make RTD products better in terms of ingredients and health bona fides.
- For example, Coca-Cola developed a premium brand styled Gold Peak, which has made inroads into the market by growing at a very brisk pace.
- Honest Tea's then-key rival in the organic realm, Austin-based Sweet Leaf Tea, struggled to find its footing under Nestlé Waters' ownership (in fact, Nestlé Waters no longer owns the brand), and PepsiCo was unable to harness the potential of Starbucks' Tazo marque (which has been sold by Starbucks to Unilever).
- Still, the superpremium RTD tea segment continued to draw interest. In 2017, Starbucks introduced a superpremium RTD tea line under the Teavana trademark — although not with long-time coffee partner, PepsiCo, but with Anheuser-Busch. The Teavana line enjoyed early success but was unexpectedly discontinued. Sweet Leaf attempted to regain its luster under new owner, Fireman Capital Partners, but Fireman Capital divested the brand to Purity Organic.



(P) Projected
Source: Beverage Marketing Corporation

Exhibit 2.23

THE NATIONAL RTD TEA MARKET

VOLUME BY PRICE SEGMENT

2016 – 2026(P)

	Millions of Cases*							
Segment	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022(P)**	**2026(P)**
Regular	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Premium	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Popular Priced	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Fountain	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Superpremium	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
TOTAL	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

(P) Projected

** 24 16-ounce equivalents.*

Source: Beverage Marketing Corporation