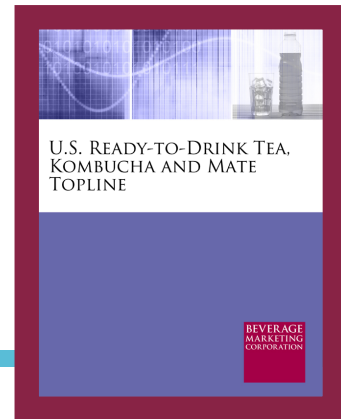


U.S. READY-TO-DRINK TEA, KOMBUCHA AND MATE TOPLINE

2022 EDITION (Published December 2022. Data through 2021, preliminary 2022 figures and forecasts through 2026.) More than 25 pages, with text analysis, graphs and charts.



The *U.S. Ready-to-Drink Tea, Kombucha and Mate Topline* report from Beverage Marketing Corporation provides a data overview of the ready-to-drink tea category with key data and five-year forecasts. Perfect for investors, entrepreneurs requiring statistics for their business plan, ad agencies preparing an account pitch or anyone who needs a birds-eye view of the ready-to-drink tea sector. Also includes an executive summary of key trends including discussion of the impact of the coronavirus pandemic.

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HAVE QUESTIONS?

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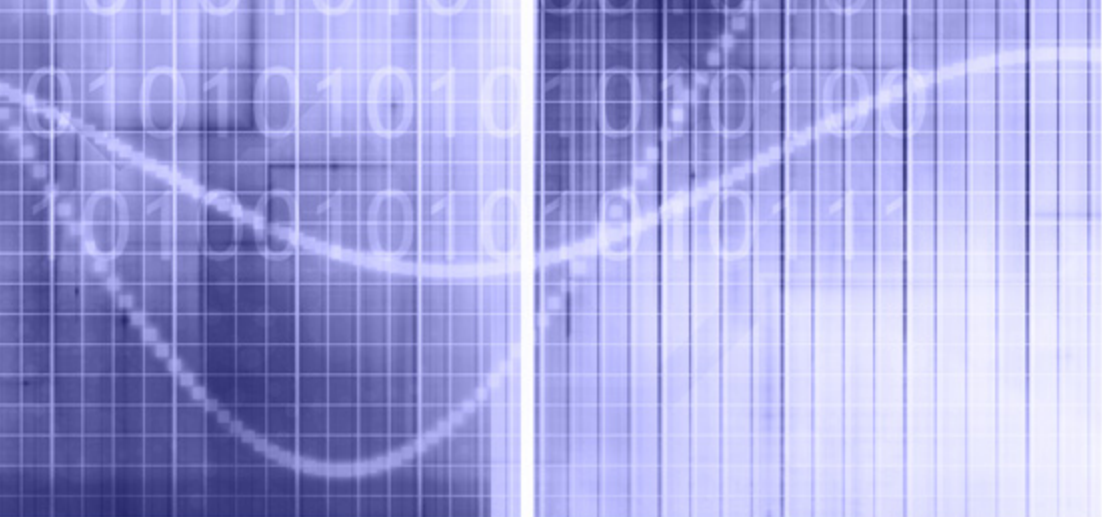
THE ANSWERS YOU NEED

U.S. Ready-to-Drink Tea, Kombucha and Mate Topline offers a data overview of the overall market. Questions answered include:

- How is tea volume divided among RTD tea, tea bags, tea mixes/powders, tea capsules and loose tea? How have these segments performed in the first half of 2022?
- How has the RTD tea market fared in terms of volume and wholesale dollar sales? What are the projections to 2026?
- Which are the leading RTD tea brands in terms of advertising expenditures?
- What are the imports of black versus green tea into the United States?

THIS REPORT FEATURES

This topline report contains key information and identifies important trends concerning the U.S. RTD tea market. It features category volume, wholesale dollar sales and per capita consumption data, overall tea market volume and five-year projections.



U.S. READY-TO-DRINK TEA, KOMBUCHA AND MATÉ TOPLINE

**BEVERAGE
MARKETING
CORPORATION**

U.S. Ready-to-Drink Tea, Kombucha and Maté Topline

December 2022

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NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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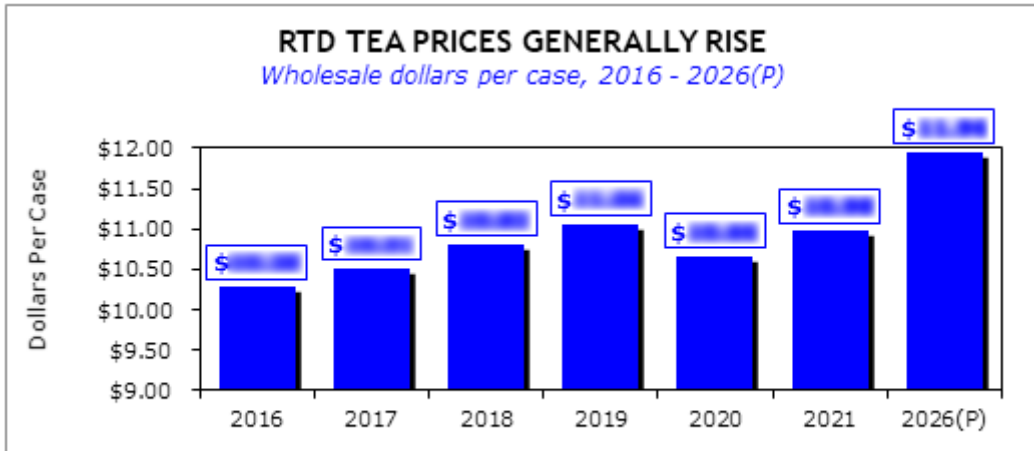
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Specialty teas such as green tea, herbal tea and chai that have provided verve to the hot tea market, have also found their way into the RTD tea segment. These so-called superpremium teas emerged in part to fill a vacuum in the existing marketplace.

- 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 3

U.S. TEA MARKET CHANGE IN CONSUMPTION BY SEGMENT 2017 – 2026(P)

Segment							CAGR
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22(p)	2021/26(P)
RTD Tea	10%	10%	10%	10%	10%	10%	10%
Tea Bags	10%	10%	10%	10%	10%	10%	10%
Iced Tea Mix	10%	10%	10%	10%	10%	10%	10%
Loose Tea	10%	10%	10%	10%	10%	10%	10%
Tea Pods	10%	10%	10%	10%	10%	10%	10%
TOTAL	10%	10%	10%	10%	10%	10%	10%

(p) Preliminary; (P) Projected

Note: Does not include institutional tea sales.

CAGR: Compound annual growth rate.

Source: Beverage Marketing Corporation