U.S. BEVERAGE RETAIL SALES CHANNEL ANALYSIS

2013 EDITION (Published September 2013. Data through 2012. Market projections through 2017.) More than 100 pages, with extensive text analysis, graphs, charts and more than 50 tables

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This report examines the methods and avenues of U.S. beverage distribution. It provides an overview of the entire liquid refreshment beverage (LRB) market and discusses the latest distribution-related trends. The report also delves into the individual sales channels, offering statistics and insight on channel volume by beverage type as well as Beverage Marketing's volume and growth projections for each LRB beverage group and analysis of the forces determining each channel's future with respect to LRBs. *New For 2013:* Includes data for Independent retail establishments.

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BEVERAGE MARKETING CORPORATION

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The answers you need

U.S. Beverage Retail Sales Channel Analysis provides market analysis on various aspects of beverage retailing through reliable data and discussions of what the numbers really mean. Questions answered include:

- Which beverage categories grew the fastest in supermarkets during 2012, and which moved the quickest in drug stores?
- What trends drive developments in nontraditional retail channels?
- How does channel blurring affect the distribution of beverages in the U.S.?
- How did energy drinks perform in mass merchandisers (including Walmart)?
- What's next for the U.S. liquid refreshment beverage (LRB) marketplace through 2017?

This report features

U.S. Beverage Retail Sales Channel Analysis provides a comprehensive overview of non-alcohol liquid refreshment beverage sales through various sales channels. It offers data and discussion related to the LRB market, as well as discussion of distribution channel-specific issues and analysis of the route to market for various beverage segments. Various modes of distribution used in the U.S. market are analyzed and the latest related trends and developments are discussed. Statistics and insight are provided on the individual distribution channels including historical and current sales channel volume by beverage type for a broad range of LRB beverage categories including carbonated soft drinks, fluid milk, RTD Tea, Sports Beverages, fruit juices, fruit drinks, bulk water, energy drinks and RTD coffee. Finally, the report contains Beverage Marketing's volume and growth projections by beverage segment and retail sales channel. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of beverage retailing channels including:

- Volume and retail sales figures for the major beverage categories and an overview of the U.S. retail beverage market
- Discussion of beverage distribution methods and the issues shaping the marketplace
- Analysis of issues and volume data by beverage category through each sales channel including supermarkets, foodservice, mass merchandisers, convenience/gas, vending, drug, independent and other retail establishments. Also includes discussions of club/dollar stores, internet and non-traditional channels
- Profiles of the leading retailers in each sales channel looking at how Wal-Mart, Costco, 7-11, Starbucks, Trader Joe's, Safeway, Tesco, Sunoco and others are seeking to maximize their beverage sales through their approach to category and brand mix as well as through unique merchandising programs
- Overview of independent and other retailing channels such as limited-assortment stores, natural foods stores (such as Whole Foods) and Internet retailers
- Exclusive five-year volume projections for each sales channel and growth projections for each of the major beverage categories through 2017

U.S. Beverage Retail Sales Channel Analysis

2013 Edition

September 2013

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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All commodity volume weighted distribution, more commonly known as ACV, is the most common form of measuring the success of distribution.

- It is a measure used by SymphonyIRI Group (SIG), as well as Nielsen, to measure the percentage of stores within a given time frame that carry a particular product.
- Typically, ACV is weighted based on the total sales volume of individual stores.
- While ACV is not a perfect tool, it serves as a guide to determine how widespread distribution is of a particular product.
- ACV does have some shortcomings. For example, it does not measure how widespread distribution is in unaudited channels. Furthermore, product volume is increasingly migrating to these unmeasured channels, of which there are many.
- Another drawback is that a product sale must occur before a product is considered distributed in a particular outlet. For example, a brand could conceivably have 100% actual consumer availability but would have 0% ACV if no sales have been scanned.
- Despite these drawbacks, ACV remains the most cost-effective measure of beverage distribution.

Direct-store delivery (DSD) distribution – which is used primarily by soft drink bottlers and beer wholesalers – is universally considered to be the best distribution method.

- DSD is comprehensive in that it has the capability to service all retail channel types. In particular, it is particularly effective at servicing smaller outlets that can be overlooked in other distribution methods.
- DSD is effective at properly merchandising products. It serves to reduce out-of-stocks, manage point-of-sale materials for promotions, and rotate product to reduce out-of-date products.
- It is, however, the most labor-intensive of the distribution options and, thus, it is also the most expensive.

Exhibit 3.31

U.S. SUPERMARKET CHANNEL
SHARE OF VOLUME BY CATEGORY
2007 – 2012

Category	2007	2008	2009	2010	2011	2012
Carbonated Soft Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fluid Milk	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
PET Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fruit Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fruit Juices	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Bulk Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sports Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Energy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

Source: Beverage Marketing Corporation

Exhibit 5.38

U.S. MASS MERCHANDISER CHANNEL*
CHANGE IN VOLUME BY CATEGORY
2008 – 2012

Category	2007/08	2008/09	2009/10	2010/11	2011/12
Carbonated Soft Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
PET Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fluid Milk	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fruit Juices	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fruit Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sports Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Bulk Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Energy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

** Includes Wal-Mart*

Source: Beverage Marketing Corporation