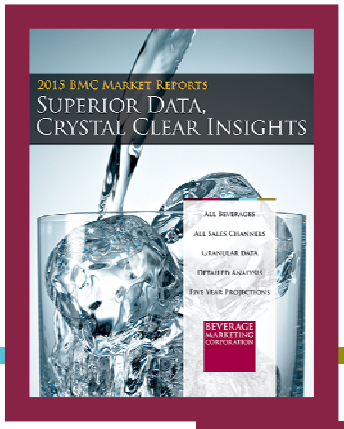
U.S. Single-Serve Fruit Beverages through 2019

2015 Edition (Published November 2015. Data through 2014. Market projections through 2019.) More than 150 pages, with extensive text analysis, graphs, charts and more than 40 tables.



This report from Beverage Marketing Corporation examines the single-serve fruit beverage market in the context of the New Age beverage marketplace. It looks at current issues and provides in-depth discussion of the leading companies' distribution and marketing strategies and supplies data on volume and sales of their brands. It covers regions, quarterly category growth, packaging (including aseptic and gable-top), advertising expenditure breakouts for 18 media types, demographics and projections through 2019.

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The answers you need

U.S. Single-Serve Fruit Beverages through 2019 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:

- How did the single-serve fruit beverage market fare in 2014?
- Which segment of the single-serve fruit beverage market has grown the fastest?
- What is the preferred package type for single-serve fruit beverages?
- What are the top single-serve fruit beverage brands in the United States?
- Which distribution channel saw the greatest growth in single-serve fruit beverage volume in 2014
- Which segment of the single-serve fruit beverage market is expected to grow the fastest to 2019?

This report features

U.S. Single-Serve Fruit Beverages through 2019 surveys the landscape of this stalwart beverage category, with volume, retail dollar, wholesale dollar and per capita consumption figures. The report provides an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth through 2019. All aspects of the fruit beverage market are considered, including segmentation by package size, distribution channels, flavor and processing method. Powdered and organic single-serve fruit beverages are also considered along with advertising and demographic data. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of the single-serve fruit beverage market including:

- Review of the total U.S. fruit beverage market and its juice and drink segments; and overview of the principal New Age segments, including single-serve fruit beverages, sales and trends in each segment
- Discussion of developments in the U.S. retail single-serve fruit beverage market and overview of the U.S. single-serve fruit beverage market in dollar and case sales and in terms of per capita consumption
- Detailed regional data on single-serve fruit beverage wholesale dollar sales
- A comprehensive look at single-serve fruit beverage distribution channel trends
- Data on single-serve fruit beverage packaging and analysis of packaging trends
- Discussion of key single-serve fruit beverage brand sales and the current marketing strategies of the leading companies in the category. Coverage includes Dr Pepper Snapple, Coca-Cola Company, Kraft Foods, Ocean Spray, PepsiCo, Sunny Delight Beverages, POM Wonderful and Welch's
- Examines and quantifies the superpremium juice market with emphasis on the superfruit sub-category, companies and brands including Sambazon, Zola and Cheribundi
- A review of ad campaigns and expenditures for single-serve fruit beverages by media type as well as the demographic profile of single-serve fruit beverage consumers

- Volume of gable-top and aseptic fruit beverages that comprise the larger universe of fruit beverages enjoyed in a single serving

- Projections of the future single-serve fruit beverage market, and a discussion of trends that will drive category growth for the next five years through 2019

U.S. Single-Serve Fruit Beverages through 2019

November 2015

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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One reason behind the long-term growth in single-serve fruit beverage consumption is its ability to meet the convenience demands of time-starved consumers. Other forces include a desire for freshness and a closely related belief that what a person eats/drinks has a significant bearing on health and well being.

- Juices are viewed as more nutritious than fruit drinks and superpremium juices promote themselves as even more healthful, while sparkling juice is viewed as a healthier option than carbonated soft drinks.
- The addition of nutraceutical enhancements such as vitamins, minerals (like calcium) or herbs is seen as restoring nutrients lost in processing and, in some cases, adding benefits not normally found in fruit.
- Products relying on hot filling tend to be viewed as superior in quality to preservative-laden cold-fill brands.

Another driver behind the growth of the single-serve fruit beverage market is the evolution of the plastic bottle.

- Plastic is much lighter than glass and much less fragile, making it easier to distribute, more suitable for vending and more portable for the customer.
- More than a decade ago, a number of large single-serve fruit beverage marketers, including Coca-Cola, Veryfine and Ocean Spray, switched to plastic bottles.
- As developments in heat resistance and barrier properties advance, plastic bottles have become suitable even for the hot-filled beverages previously found only in glass.

The single-serve fruit beverage story begins with the introduction of Snapple in 1972, and its subsequent development as an underground sensation. Since then, Snapple has seen a number of powerful competitors enter the market.

- Consolidation and a growing presence of mega beverage companies characterize the fruit beverage market in general and the single-serve fruit beverage segment in particular. All three major carbonated soft drink (CSD) purveyors gained a more substantial single-serve fruit beverage presence in the new millennium.
- In 2000, Snapple itself (along with Mistic) was acquired by Dr Pepper Snapple (DPS) from Triarc Companies. DPS added Nantucket Nectars in 2002.
- In 2001, Coca-Cola acquired fresh packaged juice leader, Odwalla. Also in 2001, Coke debuted shelf-stable, cold-fill Minute Maid Lemonade and Fruit Punch in 20-ounce plastic bottles and 12-ounce cans.
- In 2001, Pepsi acquired SoBe, which joined Tropicana and Dole in its portfolio.
- In 2003, Pepsi and Coke began de-emphasizing brands such as Lipton Brisk Lemonade, FruitWorks and Fruitopia in order to introduce products under their core Tropicana and Minute Maid trademarks – although Pepsi re-introduced fruit drinks under the Lipton Brisk trademark a few years ago.
- As Coke continued to develop Odwalla, Pepsi jumped into the superpremium space with its acquisition of Naked Juice in 2007.

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Exhibit 4.24

U.S. SINGLE-SERVE FRUIT BEVERAGE MARKET
SHARE OF VOLUME BY DISTRIBUTION CHANNEL
2009 – 2019(P)

Distribution Channels	2009	2010	2011	2012	2013	2014	2019(P)
OFF-PREMISE							
Convenience Stores	%	%	%	%	%	%	%
Supermarkets	%	%	%	%	%	%	%
Mass Merchandisers	%	%	%	%	%	%	%
Drug Stores	%	%	%	%	%	%	%
All Other*	%	%	%	%	%	%	%
Subtotal	%	%	%	%	%	%	%
ON-PREMISE							
Foodservice	%	%	%	%	%	%	%
Vending	%	%	%	%	%	%	%
All Other**	%	%	%	%	%	%	%
Subtotal	%	%	%	%	%	%	%
TOTAL CHANNELS	%	%	%	%	%	%	%

(P) Projected

** Includes club stores, dollar stores, health-food stores, military and online retailers.*

*** Includes schools, "mom & pop" stores, airlines, stadiums, etc.*

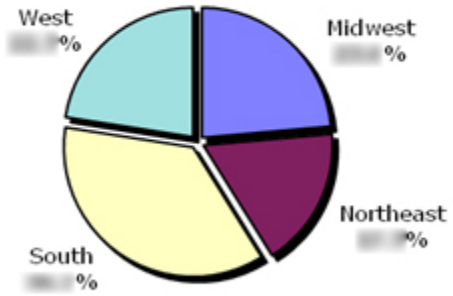
Note: Mass merchandisers includes Wal-Mart.

Source: Beverage Marketing Corporation

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LARGEST SINGLE-SERVE FRUIT BEVERAGE MARKETS: THE SOUTH AND THE MIDWEST

(Share of wholesale dollars by region, 2014)



Source: Beverage Marketing Corporation

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