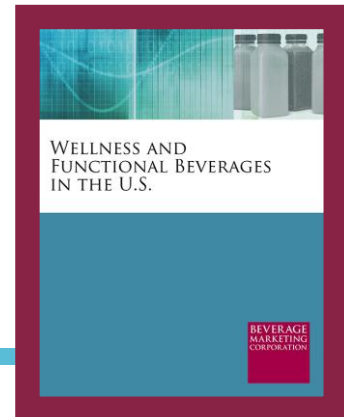


WELLNESS AND FUNCTIONAL BEVERAGES IN THE U.S.

2019 EDITION (Published December 2019. Data through 2018. Market projections through 2023.) More than 40 PowerPoint slides, with analysis and charts, as well as more than 40 exhibits in Excel format.



This market report combines BMC's wellness beverages and functional beverages industry research to provide insights into the increasingly intertwined world of healthful beverages that offer a specific functional benefit to consumers. In this study, we examine trends and issues in this multi-faceted market, covering beverages aiming to aid health, quench thirst and provide specific benefits. The report also distinguishes between the traditional and new-era wellness beverages industry, looking at the various segments and types.

This market research report also looks at protein drinks, probiotics, antioxidant beverages, hydration beverages, dietary supplements, the functional beverages market, nutrient provision/meal replacement products and beverages and supplements targeted to senior citizens.

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HAVE QUESTIONS?

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THE ANSWERS YOU NEED

Wellness and Functional Beverages in the U.S. provides in-depth market analysis, shedding light on various aspects of the segments through reliable data and discussions of what the numbers really mean. Questions answered include:

- Which segments in the United States have been growing, and which have not?
- What percentage of the U.S. beverage market can be classified as belonging to the wellness and functional category, and how has this changed in recent years?
- What are the leading companies, and how have they been performing?
- Which segment has the highest growth? Which company has leading market share?
- What are the leading consumer benefit segments of the industry?
- How has the new wave of wellness and functional beverages evolved from legacy categories?
- What are the prospects of the wellness and functional category by beverage segment through 2023?

THIS REPORT FEATURES

The Wellness and Functional Beverages report provides an overview of 16 beverage segments before giving more attention to the 11 categories deemed the "new" wellness and functional beverage category. Much more than a functional beverages market report and wellness beverages market report rolled into one, this study provides data and analysis of multiple facets of both segments and insight on the trends and consumer need states driving these increasingly intertwined industries. As expected, volume, retail dollars, wholesale dollars and per capita consumption are included.

The companies and brands that comprise the burgeoning super-category are vetted, anchoring them in the context of recent changes that have spurred growth. Advertising and demographic data of the sub-segments are documented.

Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of the combined super-category as well as multiple facets of the wellness beverages industry and functional beverages market including:

- Discussion of the need states underpinning demand for such healthy products, as well as examination of target markets and consumer benefit segments round out the research. The report gives greater perspective to its research by illustrating the increasingly strong relationship between wellness and functionality in the mainstream beverage marketplace and the consumer drivers that are fueling innovation in the segment. The report also sizes the wellness and functional market by consumer benefit segment and tracks growth and share by benefit such as hydration, weight management, etc.
- A demarcation between traditional wellness categories versus newer evolving wellness segments is provided in BMC's in-depth industry research. Focus is then placed on newer beverage types such as coconut water, energy drinks, kombucha, nutrient-enhanced drinks, meal replacement and protein drinks. In addition, key results from BMC's market research is also provided, with expanded analysis of various sub-categories provided to ensure a fuller understanding of this rapidly changing arena.

- Advertising expenditures by segment as well as wellness and functional expenditures by media outlet (including internet advertising).
- The Excel presentation shows consumer demographic profiles comparing consumers of key beverage segments.
- Five-year wholesale dollar projections for the market and its sub-segments through 2023.



WELLNESS AND FUNCTIONAL BEVERAGES IN THE U.S.

**BEVERAGE
MARKETING
CORPORATION**

Wellness & Functional Beverages in the U.S.

December 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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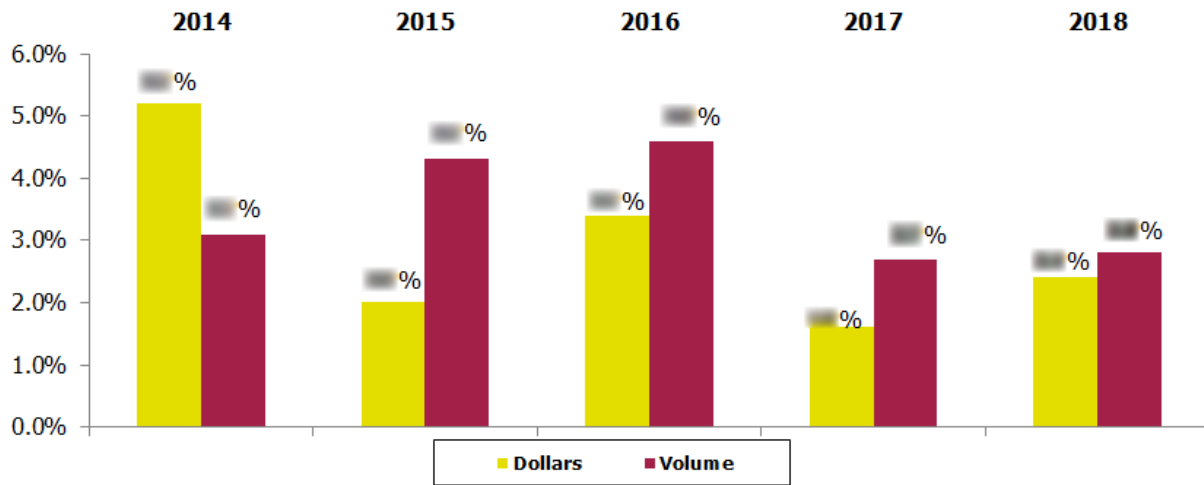
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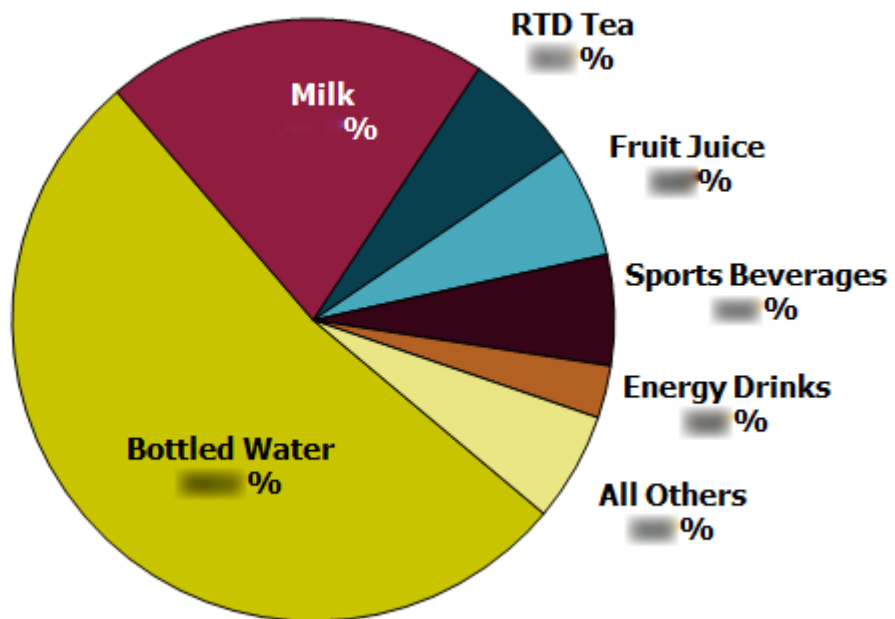
- After the great recession of the late 2000s, ready-to-drink (RTD) tea rebounded fairly strongly. However, in 2018, volume barely increased. Some of the weakness has to do with a seemingly unrelated sparkling water segment that has cannibalized an important usage occasion for RTD tea: namely, an accompaniment to meals.
- For now, much of the recent backlash against plastic has seemed to be confined to bottled water. The rationale appears to be, rightly or wrongly, that bottled water is not a “necessary” product. Regardless, RTD tea marketers aren't standing still: Snapple introduced a 16-ounce plastic bottle to replace its iconic 16-ounce glass bottle. Similarly, even though AriZona had a healthy business in glass, a majority of its volume had migrated to plastic and other materials.
- 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. Foremost among these has been Honest Tea, which along the way sold out to Coca-Cola Company. Japanese company Ito En has also targeted consumers looking for “better” products with its core line of unsweetened green teas as well as matchas.
- Yet much of the activity has been in the premium tier, where PepsiCo/Unilever's Pure Leaf and Coke's Gold Peak have become among the RTD tea leaders. Even these have slowed recently, a situation that bears watching. Also worth keeping an eye on is the re-emergence of Sweet Leaf which was fumbled by Nestlé Waters North America but has come under new ownership.

Wellness and Functional Beverage Wholesale Dollar and Volume Growth 2014 – 2018



Source: Beverage Marketing Corporation

Wellness and Functional Category Volume Shares 2018



Source: Beverage Marketing Corporation

WELLNESS AND FUNCTIONAL RTD BEVERAGE MARKET
SHARE OF WHOLESALE DOLLAR SALES (r)
2013 – 2018

Segments	2013	2014	2015	2016	2017	2018
Wellness Beverages						
Milk	█%	█%	█%	█%	█%	█%
Bottled Water	█%	█%	█%	█%	█%	█%
Fruit Juice	█%	█%	█%	█%	█%	█%
RTD Tea	█%	█%	█%	█%	█%	█%
Dairy Alternatives	█%	█%	█%	█%	█%	█%
Kombucha	█%	█%	█%	█%	█%	█%
Meal Replacement Drinks	█%	█%	█%	█%	█%	█%
Coconut Water	█%	█%	█%	█%	█%	█%
Alkaline Water	█%	█%	█%	█%	█%	█%
Flavored Water	█%	█%	█%	█%	█%	█%
Essence Water	█%	█%	█%	█%	█%	█%
Subtotal	█%	█%	█%	█%	█%	█%
Functional Beverages						
Energy Drinks	█%	█%	█%	█%	█%	█%
Sports Beverages	█%	█%	█%	█%	█%	█%
Nutrient-Enhanced Drinks*	█%	█%	█%	█%	█%	█%
Protein Drinks	█%	█%	█%	█%	█%	█%
Other Functional Beverages	█%	█%	█%	█%	█%	█%
Subtotal	█%	█%	█%	█%	█%	█%
TOTAL	█%	█%	█%	█%	█%	█%

(r) Revised

* Includes nutrient-enhanced teas, dairy drinks, fruit beverages and waters.

Source: Beverage Marketing Corporation