

ORGANIC BEVERAGES IN THE U.S.

2014 EDITION (Published September 2014. Data through 2013. Market projections through 2018.) More than 135 pages, with extensive text analysis, graphs, charts and more than 30 tables.

This report provides background information about the burgeoning, increasingly mainstream organic industry with consideration of current and ongoing trends and issues. It explores the growing subset of beverages made with ingredients produced according to organic principles and standards. It also breaks the organic beverage industry down, providing current and historical data for ten beverage categories. Additionally, it contains Beverage Marketing's volume, per capita consumption and compound annual growth projections by category through 2018.

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

- How have organic beverages fared in today's economic climate?
- What major trends and issues most affect the U.S. organic beverage market?
- Which beverage type claims the largest shares of total U.S. organic beverage volume, and which are growing the fastest?
- How large is the market for organic beverages likely to become in the near future?

THIS REPORT FEATURES

Organic Beverages in the U.S. explores the growing subset of beverages in multiple categories made with ingredients produced according to organic principles and standards. It features:

- Background information on the burgeoning organic industry with consideration of current and ongoing trends and issues
- A break out of the organic beverage industry by volume for 10 beverage categories and includes per capita consumption figures
- Concise descriptions of each organic beverage type, touching on category-specific concerns and looking at the activities of the leading companies and brands within each particular sectors. Companies and brands discussed include Guayaki, Sun Opta, Westsoy, Organic Valley and others.
- Scrutiny of the historical and current organic markets for beer, carbonated soft drink (CSDs), coffee, distilled spirits, energy drinks, fruit beverages, milk, soymilk, tea and wine, providing volume and growth statistics
- Volume, per capita consumption and compound annual growth projections for each beverage category and analysis of the forces determining the organic beverage market's future through 2018

Organic Beverages in the U.S.

2014 Edition
September 2014



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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Organic ingredients and related practices put down roots in the brewpub segment. In the Pacific Northwest, Roots Organic Brewing Company declared itself Oregon's first all-organic brewery.

- The company, founded in 2005, operated a brewhouse in southeast Portland where it made and served organic ales as well as lunch and dinner.
- It initiated the annual North American Organic Brewers Festival, an event that draws local and regional producers of certified organic beers – such as Deschutes Brewery, Hopworks Urban Brewery (HUB), Laurelwood Brewery and Lucky Labrador – as well as brewers from around the country and the world, including the United Kingdom's Samuel Smith and Germany's Pinkus Mueller. Citing an economy not conducive to on-premise eating and drinking, Roots shut its doors in July 2010 (though planned to continue staging the beer festival).
- For its part, in addition to brewing organic beers (about 3,000 barrels' worth annually), HUB operates what it calls its Eco-Brewpub, constructed of recovered and recycled material put together according to sustainable building principles. Recaptured heat from the pizza kitchen heats the water for brewing. Old bicycle frames decorate the bar, and a bike-repair stand was put next to the front door. In 2011, the outfit opened another spot in Portland (this time showcasing new, locally made bike frames above the bar.)
- Lucky Lab entered the organic realm with Organic Golden Ale, and applies environment-friendly principles by using solar power to make its beer. While Roots went under, Lucky Lab opened a fourth public house in Portland. It also changed the single organic beer among its list of offerings to one called No Rity Pale Ale.
- Further north, in Seattle, Washington, beer-makers like Elliot Bay Brewery Pub use organic barley for their beers' malt base.

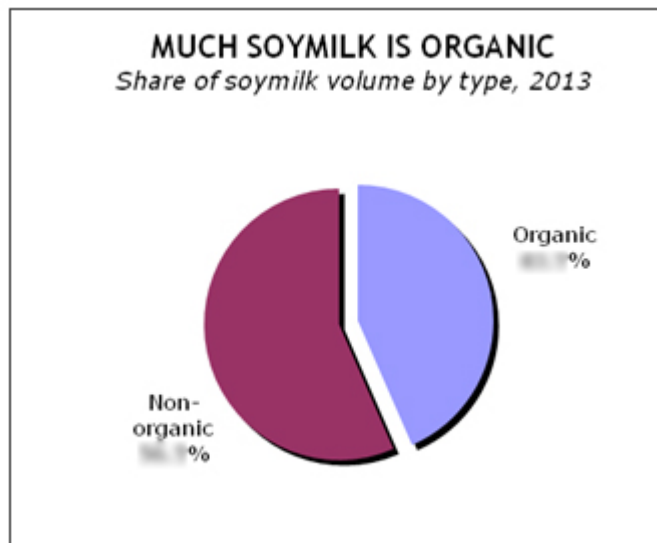
Organic beer brewed in other countries also enters the U.S. market.

- Lammsbräu, for instance, crafts beer in accordance not only with Germany's Reinheitsgebot – Bavaria's purity law of 1516 – but also with the USDA's organic standards. Indeed, the company calls itself the first certified organic brewery in Europe and one of the few to make only organic beer. Its commitment to sustainable practices extends to the use of solar and thermal energy, recycled water and packaging material, and vegetable oil for fuel in delivery trucks.
- Varieties made available in the United States as of 2014 were Lammsbräu Organic Pilsner, Lammsbräu Organic Dunkel and gluten-free Lammsbräu Organic Pure Lager.
- Samuel Smith of Tadcaster, North Yorkshire, brews several organic beers, including a pale ale and a lager as well as fruit beers in flavors such as apricot, cherry and raspberry. It also makes organic cider.

**U.S. ORGANIC BEVERAGE MARKET
SHARE OF VOLUME BY CATEGORY
2008 – 2013**

Categories	2008	2009	2010	2011	2012	2013
Coffee	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Milk	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Tea	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Soy	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Fruit Beverages	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Carbonated Soft Drinks	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Wine	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Beer	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Energy Drinks	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Distilled Spirits	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
TOTAL	1000.0%	1000.0%	1000.0%	1000.0%	1000.0%	1000.0%

Source: Beverage Marketing Corporation



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