Kombucha Trends & Market Insights

Specially Prepared for KombuchaKon 2022

March 31, 2022

For 20 years, our mission has been to increase the accessibility of better-for-you products that help consumers live healthier lives.

We carry out our mission by providing information, insight, and a common language for the industry with which to understand and analyze consumer, retail, and broad marketplace dynamics.

SPINS is Unique in **Three Key Ways**

Retail Coverage

SPINS securely aggregates POS data into channels that offer an encompassing view of sales while not exposing stores.

Product Intelligence

SPINS gathers key data on individual items by UPC and overlays our exclusive attributes to identify underlying trends and shopper motivations.

Applications & Insights

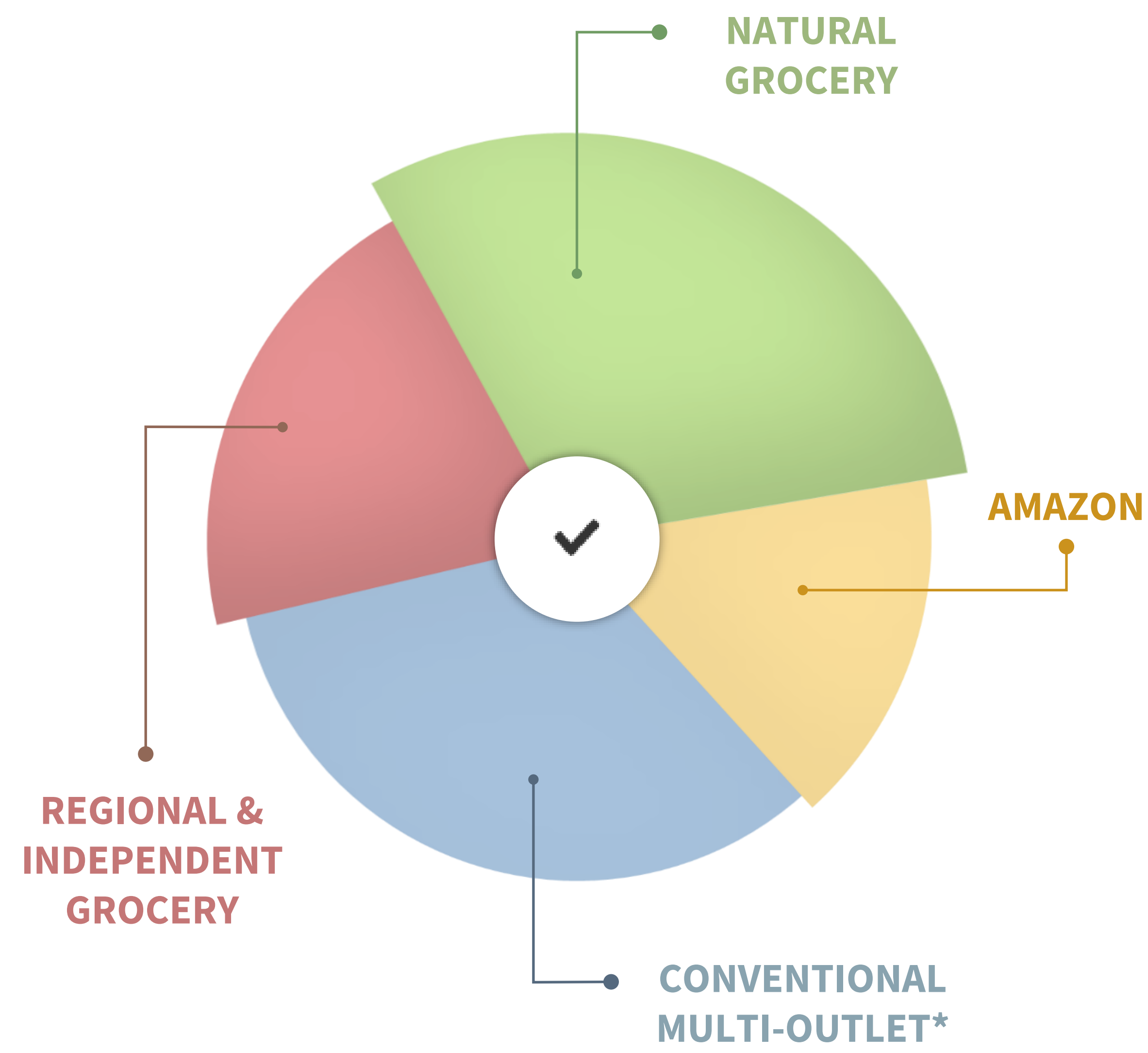
SPINS delivers on-demand insights through intuitive applications and deep industry acumen.

Available in SPINS

Conventional	Package & Product	Solutions / Tools

Exclusive to SPINS

Retail Coverage	Product Intelligence	Applications & Insights
Neighborhood Pet	Certification; Ingredient	Business Intelligence Tools
Regional & Independent Grocery	Label Claim; Nutrition Panel	Category Management Tools
Natural Enhanced	Positioning	Growth Consulting



Align natural, conventional, and Amazon sales and market share data into an omnichannel view to **identify growth drivers**, **eliminate blind spots**, and **benchmark against known**, **emerging**, or **digitally native competitors**.

**powered by IRI Worldwide*

Omnichannel, the SPINS Way.

SPINS Omni-Intelligence Channel Data

Natural Grocery

- Proprietary to SPINS
- Represents over $30B in total ACV
- Encompasses 50+ key accounts with over 1,900 stores
- Incubator for innovation and high product standards that define the industry

KEY ACCOUNTS INCLUDE

Regional & Independent Grocery

- Proprietary to SPINS
- Represents over $160B in total ACV
- Encompasses 60+ key accounts with over 11,000 stores
- Community-minded retailers with focus on key marketplace trends and differentiated product assortment

KEY ACCOUNTS INCLUDE

Conventional Multi-Outlet*

- Partnership with IRI Worldwide
- Represents over $65B in UPC-coded Natural Sales Volume (AVC)
- Encompasses 80+ retail accounts spanning Grocery, Drug, Mass, Dollar, Military, and Club retailers with over 108,000 stores

KEY PARTNERS INCLUDE

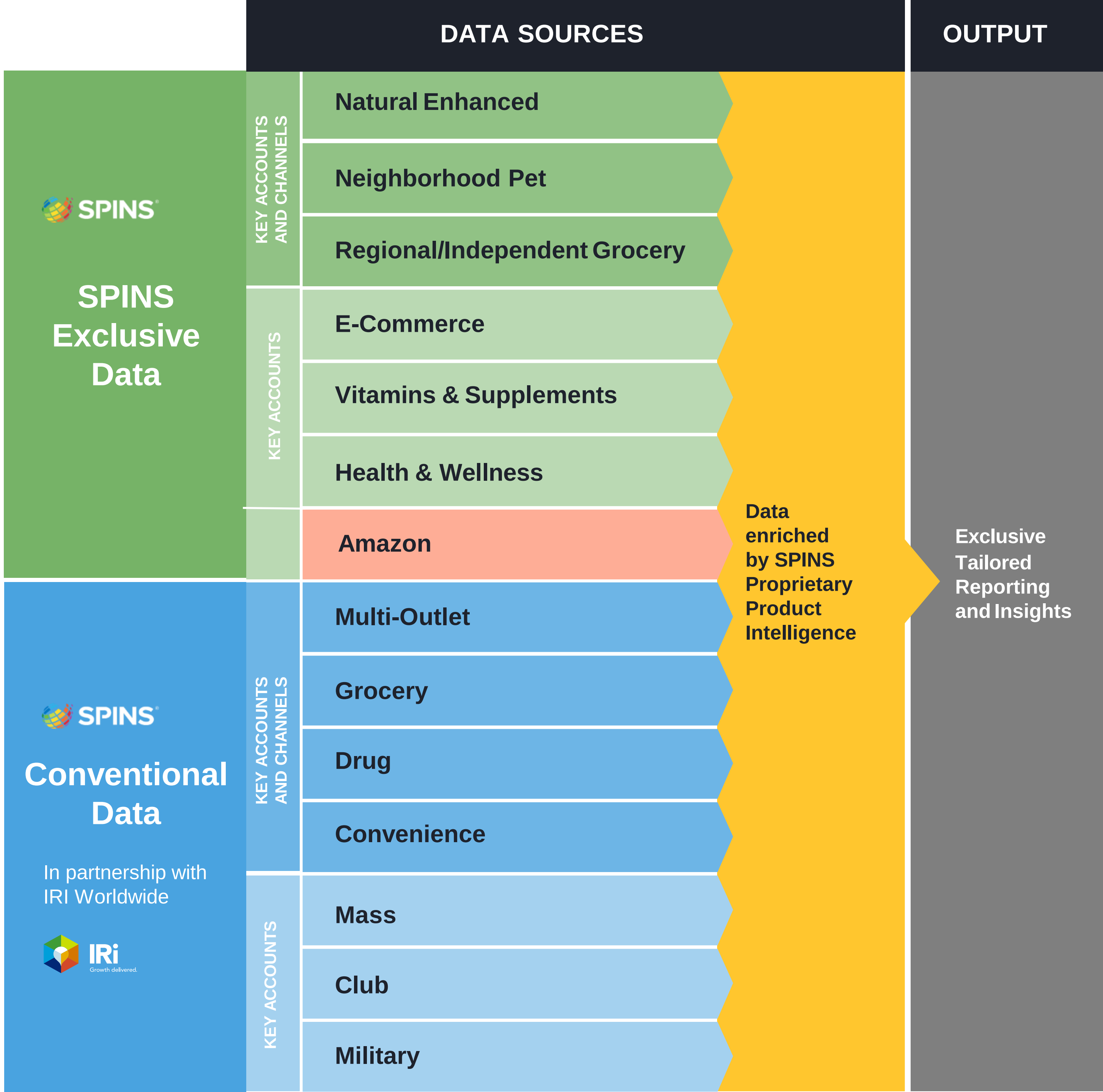
Amazon

- Market insights powered by ClearCut Analytics technologies
- Real-time Amazon sales data and product attribute insights for an infinite shelf-size of products spanning Vitamins & Supplements, Beverages, Personal Care, Beauty/Body Care, and Snacks

SPINS RETAIL LANDSCAPE

SPINS' View of the Omnichannel Marketplace

All SPINS channels are enhanced through the overlay of our proprietary Product Intelligence that creates an exclusive output of reporting and insights tailored to each customer.



SPINS Product Intelligence
Converts Label Information Into **Shopper Insights**

We combine nutritional and industry expertise with data science to create actionable attributes that identify shopper motivations, target new opportunities, and enable more impactful communication with shoppers.

PRODUCT FACTS, CLAIMS & MARKETING

NUTRITION FACT PANEL

INGRE DIENT STATEMENT

BRAND POSITIONING
SHOPPER CENTRIC DIETS
CERTIFICATIONS

Generate

3 Million Total UPCs Coded × **384** Product Attributes

1 Billion+
Total Data Points

Spanning

100+ Categories

Thousands Product Types, Flavors, Positioning, and Functional Ingredients

Activate

NUTRITION
- Total Calories
- Protein

ALLERGENS & SENSITIVITIES
- Lactose Ingredients
- Peanut Allergen

CLEAN LABEL
- Artificial Flavors
- Parabens

SUSTAINABILITY & WELLNESS
- Labeled Organic
- Probiotics

DIETS
- Plant Based Diet
- KETO Diet

PRODUCT FACTS
- Packaging
- Product Type

SPINS®

UNLOCKING INSIGHTS WITH PRODUCT INTELLIGENCE

The product landscape has changed;

Legacy brands are being unseated by new entrants

SPINS BRAND POSITIONING HIGHLIGHTS THE STRENGTH OF NATURAL PRODUCTS

1.4% Total Industry Growth

Natural Positioned Products	Specialty Positioned Products	Conventional Positioned Products
+3.9% Dollar Growth	**+3.6%** Dollar Growth	**+0.6%** Dollar Growth
Brands that are often known for their dedication to clean ingredient profiles and holistic social and environmental ideals of the Natural Products Industry	Brands that feature unique taste profiles, are international or imported, are marketed as premium or artisanal, and often designed for the 'foodie' consumer	Brands that are longtime stalwarts of common Food, Drug, & Mass retail outlets and geared to the average, mainstream consumer
Nature's Path Organic, KIND, Garden of Eatin'	Fiber One, Mariani Premium, Cape Cod Potato Chips	Honey Nut Cheerios, Nutri Grain Soft Baked, Doritos

Health & Wellness (HWI)

SPINS: Natural Enhanced Channel & Conventional Multi-Outlet (powered by IRI); 52 Weeks Ending 1-26-2022

Top Line Channel Sales and Positioning Group

Natural Enhanced	Regional & Independent Grocery	Conventional Multi Outlet (MULO)
-3.2% Total Channel Sales	**-3.3%** Total Channel Sales	**+1.2%** Total Channel Sales
-3.3% Natural Products	**-1.4%** Natural Products	**+4.3%** Natural Products
+0.5% Specialty & Wellness Products	**+1.6%** Specialty & Wellness Products	**+7.1%** Specialty & Wellness Products

Certification Overview

NON GMO Project VERIFIED

-0.3% | $38B

7% share of food categories
(Grocery, Refrigerated, Frozen, Produce)

↑ 7% Bread & Baked Goods

↑ 14% Refrigerated Creams & Creamers

USDA ORGANIC

+1% | $16B

3% share of food categories
(Grocery, Refrigerated, Frozen, Produce)

↑ 14% Baby & Toddler Food

↑ 11% RF Juice & Functional Beverages

CERTIFIED P PALEO

+11% | 0.5B

0.1% share of food categories
(Grocery, Refrigerated, Frozen, Produce)

↑ 39% Meat/Poultry/Seafood

↑ 21% Condiments, Dressings, and Marinades

SPINS: Natural Enhanced Channel & Conventional Multi-Outlet (powered by IRI); 52 Weeks Ending 1-26-2022

PRODUCT INTELLIGENCE

Using NFP to Find Trending Ingredients

MUSHROOMS

Total: $22.2M +49% vs. LY

Coffee: +50%

Juice/Functional Bev: +30%

Jerky/Meat Snacks: +204%

RF Creamer: +312%

MCT

Total: $156M +35% vs. LY

RTD Coffee/Tea: +43%

Frozen Desserts: +195%

Wellness Bars: +78%

Juice/Functional Bev: +50%

COLLAGEN

Total: $19.4M +26% vs. LY

Wellness Bars -38%
(Bulletproof, Primal Kitchen declines)

RTD Coffee/Tea: +171%

Hot Cereals: +35%

Cookies/Snack Bars: +174%

SPINS: Natural Enhanced Channel & Conventional Multi-Outlet (powered by IRI); 52 Weeks Ending 1-26-2022

THE EVOLVING RETAIL LANDSCAPE

Top $ Growth Categories Across Channels

NATURAL CHANNEL

Top Growth Categories	$ Growth ($MM)	% $ Change
PRODUCE	$134.7	8.8%
REFRIGERATED ENTREES	$58.2	17.2%
OTHER MISCELLANEOUS ITEMS	$25.6	6.8%
SHELF STABLE CANDY	$25.0	6.7%
SHELF STABLE WATER	$20.3	6.2%
SHELF STABLE COOKIES & SNACK BARS	$17.6	7.9%
REFRIGERATED JUICES & FUNCTIONAL BEVERAGES	$15.1	3.9%
SHELF STABLE FUNCTIONAL BEVERAGES	$13.6	25.1%
SHELF STABLE SODA & CARBONATED BEVERAGES	$13.3	8.2%
SHELF STABLE TEA & COFFEE RTD	$9.6	10.6%
WELLNESS BARS & GELS	$6.8	4.1%
SHELF STABLE JERKY & MEAT SNACKS	$6.3	12.5%
BABY & TODDLER FOOD	$4.8	15.7%
PERFORMANCE NUTRITION	$4.6	14.7%
SHELF STABLE NUTS & TRAIL MIX & DRIED FRUIT	$4.5	1.6%

REGIONAL GROCERY CHANNEL

Top Growth Categories	$ Growth ($MM)	% $ Change
OTHER MISCELLANEOUS ITEMS	$479.1	11.1%
REFRIGERATED ENTREES	$255.9	17.8%
PRODUCE	$189.0	3.7%
SHELF STABLE SODA & CARBONATED BEVERAGES	$133.3	4.7%
SHELF STABLE CANDY	$127.2	8.2%
SHELF STABLE FUNCTIONAL BEVERAGES	$113.3	14.3%
PET FOOD	$35.8	4.1%
FROZEN APPETIZERS & SNACKS	$32.1	3.9%
REFRIGERATED TEA & COFFEE RTD	$31.0	12.4%
PROTEIN SUPPLEMENTS & MEAL REPLACEMENTS	$30.5	14.2%
SHELF STABLE JERKY & MEAT SNACKS	$26.2	19.2%
PET TREATS	$24.0	8.0%
SHELF STABLE WATER	$22.6	1.4%
INTERNAL MEDICINES	$21.3	3.1%
SHELF STABLE JUICES	$20.4	2.3%

MULO CHANNEL

Top Growth Categories	$ Growth ($MM)	% $ Change
SHELF STABLE CANDY	$2,093.4	9.6%
SHELF STABLE SODA & CARBONATED BEVERAGES	$1,950.6	8.3%
PRODUCE	$1,924.8	5.6%
REFRIGERATED ENTREES	$1,782.6	18.0%
INTERNAL MEDICINES	$1,668.1	9.2%
SHELF STABLE FUNCTIONAL BEVERAGES	$1,660.8	19.0%
SHELF STABLE WATER	$1,477.2	9.5%
SHELF STABLE CHIPS & PRETZELS & SNACKS	$1,208.7	4.8%
PET FOOD	$926.5	6.7%
PERSONAL HEALTH SUPPLIES & ACCESSORIES	$848.8	12.6%
COSMETICS & BEAUTY PRODUCTS	$787.7	10.5%
PROTEIN SUPPLEMENTS & MEAL REPLACEMENTS	$603.9	15.2%
SHELF STABLE COOKIES & SNACK BARS	$531.4	4.1%
BREAD & BAKED GOODS	$510.4	1.6%
PET TREATS	$446.7	9.3%

Source: SPINSscan Natural Enhanced (proprietary), Regional and Independent Grocery Channel, Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 1/26/2022. UPC coded items only.

Top $ Growth Categories Across Channels, *within HWI*

NATURAL CHANNEL

Top HWI Growth Categories	$ Growth ($MM)	% $ Change
REFRIGERATED ENTREES	$56.9	22.9%
SHELF STABLE WATER	$25.8	10.6%
REFRIGERATED JUICES & FUNCTIONAL BEVERAGES	$21.3	6.7%
SHELF STABLE CANDY	$20.2	7.1%
SHELF STABLE COOKIES & SNACK BARS	$17.8	10.3%
SHELF STABLE FUNCTIONAL BEVERAGES	$13.6	25.1%
SHELF STABLE SODA & CARBONATED BEVERAGES	$12.0	11.4%
SHELF STABLE TEA & COFFEE RTD	$11.5	14.2%
BREAD & BAKED GOODS	$9.3	1.7%
PRODUCE	$8.9	1.4%
SHELF STABLE NUTS & TRAIL MIX & DRIED FRUIT	$8.7	5.0%
WELLNESS BARS & GELS	$6.8	4.1%
SHELF STABLE JERKY & MEAT SNACKS	$5.8	13.2%
BABY & TODDLER FOOD	$4.9	16.5%
SHELF STABLE CHIPS & PRETZELS & SNACKS	$4.8	1.1%

REGIONAL GROCERY CHANNEL

Top HWI Growth Categories	$ Growth ($MM)	% $ Change
REFRIGERATED ENTREES	$177.5	31.0%
SHELF STABLE FUNCTIONAL BEVERAGES	$113.2	14.3%
PRODUCE	$48.8	5.1%
SHELF STABLE CANDY	$36.7	13.1%
SHELF STABLE WATER	$34.8	5.6%
PROTEIN SUPPLEMENTS & MEAL REPLACEMENTS	$30.5	14.2%
REFRIGERATED JUICES & FUNCTIONAL BEVERAGES	$26.7	8.9%
WELLNESS BARS & GELS	$19.5	10.1%
REFRIGERATED TEA & COFFEE RTD	$18.8	27.9%
REFRIGERATED CREAMS & CREAMERS	$18.8	13.6%
REFRIGERATED YOGURT & PLANT BASED YOGURT	$17.0	2.7%
SHELF STABLE TEA & COFFEE RTD	$14.6	6.1%
BREAD & BAKED GOODS	$13.4	2.0%
PET FOOD	$13.0	6.2%
PET TREATS	$11.6	15.5%

MULO CHANNEL

Top HWI Growth Categories	$ Growth ($MM)	% $ Change
SHELF STABLE FUNCTIONAL BEVERAGES	$1,660.0	19.0%
REFRIGERATED ENTREES	$937.4	32.4%
SHELF STABLE WATER	$718.4	15.3%
PROTEIN SUPPLEMENTS & MEAL REPLACEMENTS	$603.9	15.2%
SHELF STABLE CANDY	$511.9	19.1%
SHELF STABLE CHIPS & PRETZELS & SNACKS	$454.9	9.0%
CONDITION SPECIFIC SUPPLEMENT FORMULAS	$368.4	10.6%
WELLNESS BARS & GELS	$309.3	11.7%
REFRIGERATED JUICES & FUNCTIONAL BEVERAGES	$256.3	12.2%
REFRIGERATED YOGURT & PLANT BASED YOGURT	$247.6	6.0%
PET FOOD	$232.2	10.6%
FROZEN DESSERTS	$201.0	5.4%
SHELF STABLE COOKIES & SNACK BARS	$200.0	11.0%
BREAD & BAKED GOODS	$186.6	4.7%
PERFORMANCE NUTRITION	$184.0	40.5%

Source: SPINSscan Natural Enhanced (proprietary), Regional and Independent Grocery Channel, Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 1/26/2022. UPC coded items only.

Top 15 REFRIGERATED Product Subcategories Across Channels

NATURAL CHANNEL: -1.9%

Top Subcategories	$ Sales ($MM)	% $ Change
RF MILK	$269.9	-7.0%
RF EGGS	$260.5	-11.0%
RF YOGURT	$254.8	-5.2%
RF CHEESE	$222.6	1.0%
RF SUSHI	$194.8	20.9%
RF JUICE & JUICE DRINKS & OTHER FUNCTIONAL BEV	$169.3	17.6%
RF KOMBUCHA & FERMENTED BEVERAGES	$144.2	-5.5%
RF BUTTER	$109.6	-17.1%
RF CHEESE SHREDDED & GRATED	$108.3	-8.9%
RF CHEESE SLICED & SNACK	$106.3	-4.0%
RF DAIRY CREAMS & CREAMERS	$104.2	-5.8%
RF ENTREES	$99.9	7.2%
RF PLANT BASED YOGURT	$73.2	6.8%
RF HUMMUS	$70.9	-5.2%
RF JUICE ORANGE	$70.6	-6.9%

REGIONAL GROCERY CHANNEL: -2.9

Top Subcategories	$ Sales ($MM)	% $ Change
RF MILK	$1,628.9	-7.1%
RF CHEESE SHREDDED & GRATED	$958.1	-9.5%
RF YOGURT	$942.7	-2.0%
RF CHEESE SLICED & SNACK	$829.7	-4.7%
RF CHEESE	$780.3	-4.8%
RF EGGS	$745.6	-11.8%
RF ENTREES	$522.0	7.0%
RF JUICE & JUICE DRINKS & OTHER FUNCTIONAL BEV	$519.8	7.8%
RF BUTTER	$493.9	-19.2%
RF SUSHI	$445.7	40.3%
RF JUICE ORANGE	$434.5	-10.9%
RF DAIRY CREAMS & CREAMERS	$417.0	-3.8%
RF CREAM CHEESE & OTHER CHEESE SPREAD	$411.3	-2.0%
RF NON DAIRY CREAMS & CREAMERS	$347.4	-5.1%
RF SANDWICHES & WRAPS & SNACK KITS	$333.2	12.2%

MULO CHANNEL: +1.1%

Top Subcategories	$ Sales ($MM)	% $ Change
RF MILK	$13,003.6	-1.9%
RF CHEESE SHREDDED & GRATED	$7,287.2	-5.3%
RF YOGURT	$6,672.8	1.8%
RF CHEESE SLICED & SNACK	$6,220.5	-0.9%
RF EGGS	$6,193.6	-3.7%
RF CHEESE	$4,817.4	-4.2%
RF JUICE & JUICE DRINKS & OTHER FUNCTIONAL BEV	$3,876.4	10.5%
RF ENTREES	$3,583.7	5.5%
RF SANDWICHES & WRAPS & SNACK KITS	$3,386.0	19.2%
RF BUTTER	$3,381.9	-12.5%
RF JUICE ORANGE	$3,217.1	-4.7%
RF DAIRY CREAMS & CREAMERS	$2,968.8	-0.8%
RF CREAM CHEESE & OTHER CHEESE SPREAD	$2,751.6	-1.0%
RF NON DAIRY CREAMS & CREAMERS	$2,237.1	-0.6%
RF SUSHI	$2,164.7	40.7%

Source: SPINSscan Natural Enhanced (proprietary), Regional and Independent Grocery Channel, Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 1/26/2022. UPC coded items only.

10

Fermented Product
Categories

64

Fermented Product
Product Types

+3.5%

All Food/Beverage Growth

+2.1%

Natural Food/Beverage Growth (NPI)

+3.3%

Fermented Products Growth

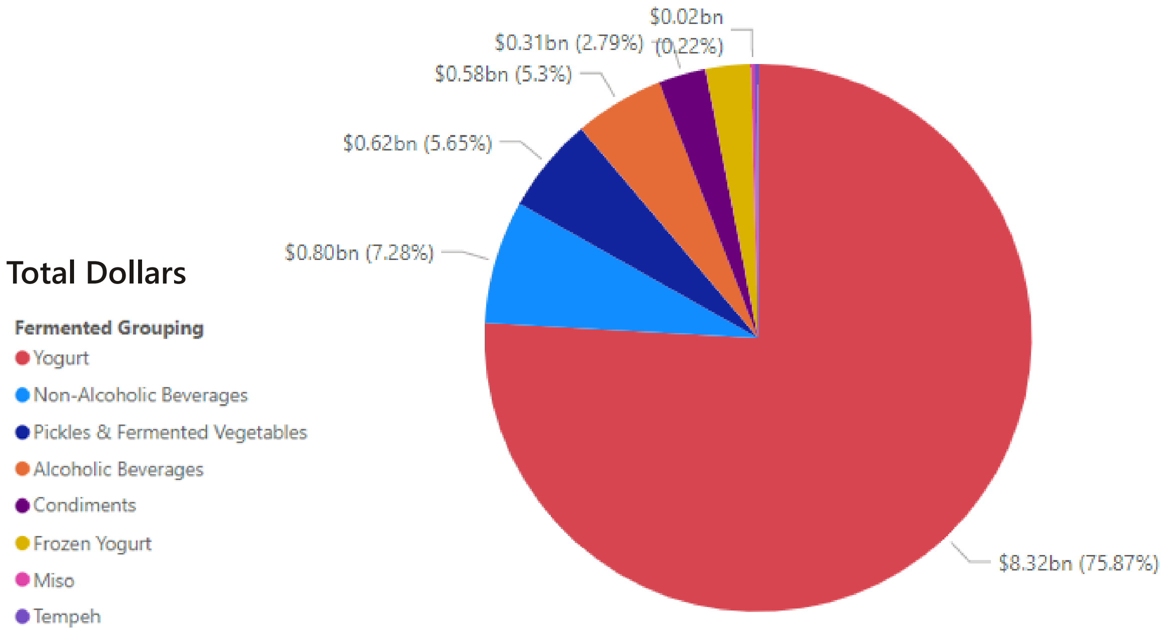
The Opportunity for Growth in Fermented Foods

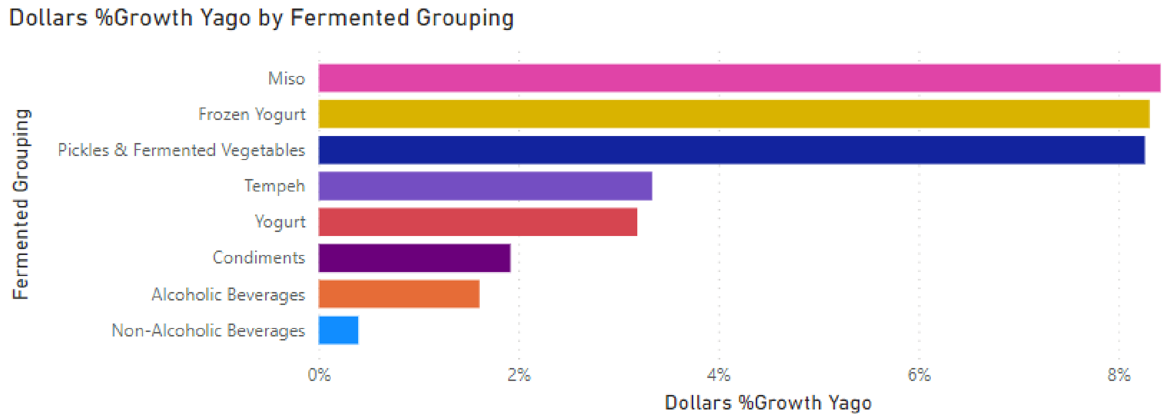
As differentiated taste and the perceived benefits of fermented foods continue to build momentum, there is a massive opportunity for high growth segments to scale.

Source: SPINS Natural Enhanced Channel and MultiOutlet Channel (powered by IRI), 52 week data ending 10/3/21

Market is led by **Yogurt Products.**

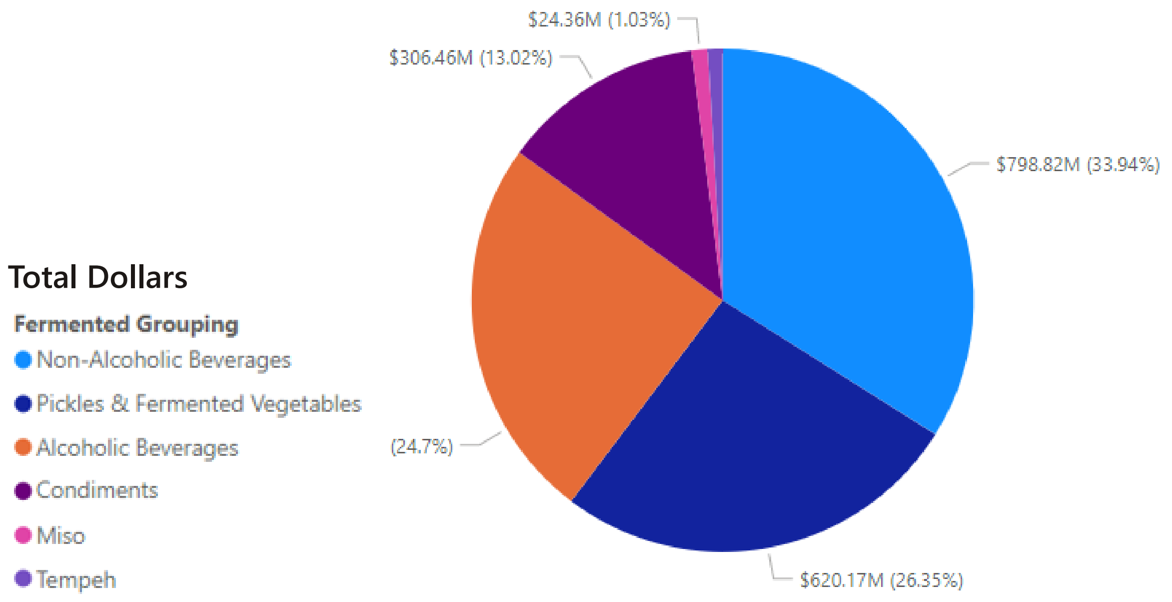
Many emerging segments are driving strong growth.

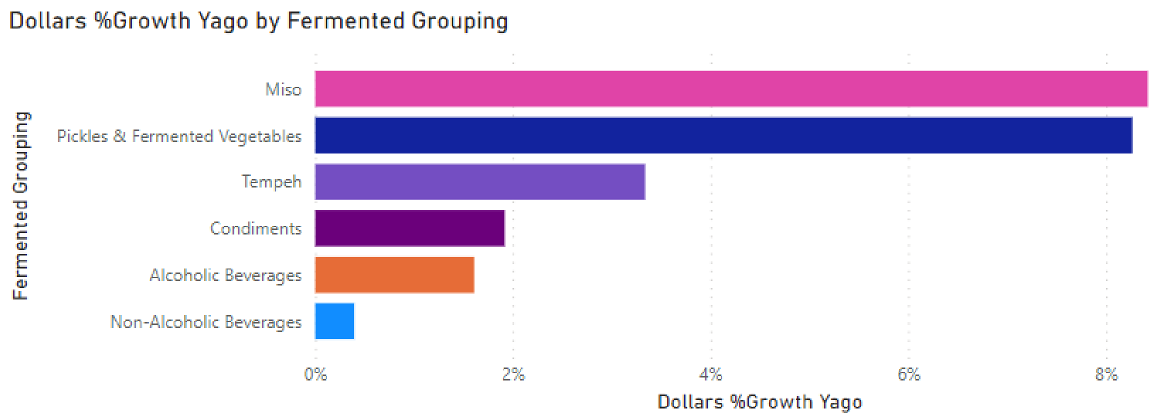




Source: SPINSscan Natural Enhanced (proprietary), Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 10/3/2021. UPC coded items only.

Excluding Yogurt, the landscape is led by **Non-Alcoholic Beverages, Alcoholic Beverages**, and **Pickles & Fermented Vegetables.**





RF KOMBUCHA & FERMENTED BEVERAGES

NATURAL ENHANCED		REGIONAL		MULO		CONVENIENCE	
$ Sales ($MM)	% $ Change	$ Sales ($MM)	% $ Change	$ Sales ($MM)	% $ Change	$ Sales ($MM)	% $ Change
$144.2	-4.1%	$91.5	-0.4%	$619.2	+3.4%	$34.0	+4.0%

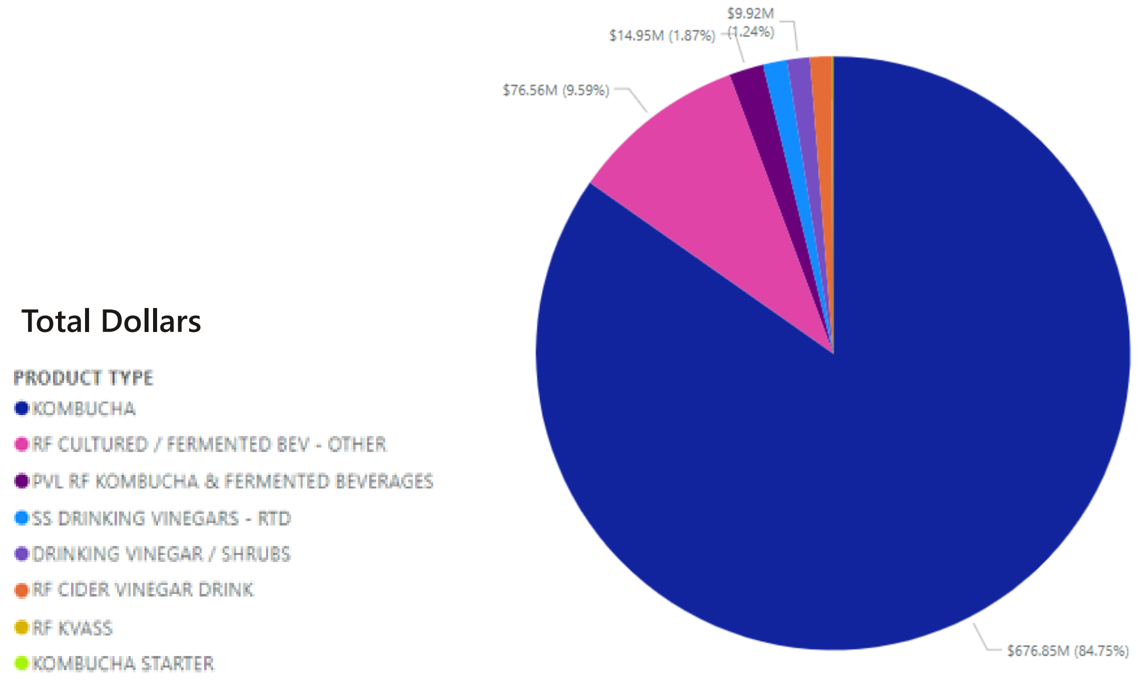
Over the last 52 weeks, we continue to see growth in Kombucha & Fermented Beverages in Conventional and Convenience Retail Outlets

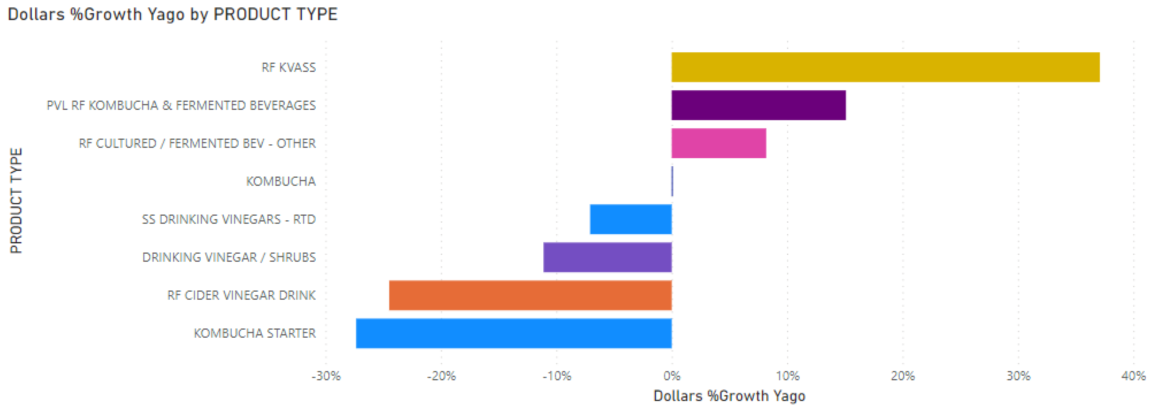
PRODUCT TYPE - KOMBUCHA

NATURAL ENHANCED	REGIONAL	MULO	CONVENIENCE
% $ Change	% $ Change	% $ Change	% $ Change
-5%	-2%	+3%	+2%

SPINS Natural Enhanced Channel and MULO, powered by IRI | 52 Weeks Ending 1-23-2022

Kombucha the is largest and one of few growth segments in Non-Alcoholic Beverages





Source: SPINSscan Natural Enhanced (proprietary), Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 10/3/2021. UPC coded items only.

Top % Growth Brands

NATURAL CHANNEL

Top Growth Categories	% $ Change
GT KOMBUCHA	-10.6%
HEALTH ADE	1.2%
KEVITA	-11.6%
BREW DR KOMBUCHA	0.0%
WILD TONIC	14.8%
HUMM KOMBUCHA	36.5%
ROWDY MERMAID	18.4%
LIVE KOMBUCHA	3.8%
BETTER BOOCH	108.3%
PRIVATE LABEL ORGANIC	-26.4%

MULO CHANNEL

Top Growth Categories	% $ Change
GT KOMBUCHA	-1.1%
KEVITA	-4.1%
HEALTH ADE	24.1%
BREW DR KOMBUCHA	3.4%
HUMM KOMBUCHA	16.2%
PRIVATE LABEL ORGANIC	24.0%
CHOBANI	264.7%
LIVE KOMBUCHA	22.1%
AQUA VITEA	23.4%
BIG EASY BUCHA	-14.0%

SPINS

Source: SPINSscan Natural Enhanced (proprietary), Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 10/3/2021. UPC coded items only.

Attribute Trends

Flavors

Pineapple:+61%
Root Beer: +28%
Mint: +11%
Mango: +20%

Apple: -5%
Ginger: -16%
Pomegranate: -3%
Cranberry: -10%

Organic

LABELED ORGANIC 1-69%: -4%

LABELED ORGANIC 70-94%: +20%

LABELED ORGANIC 95-99%: +1%

LABELED ORGANIC 100%: +25%

Sugars

<1g sugar: +26%

2g – 9g sugar: +25%

10g – 15g sugar: -2%

15g+: -2%

SPINS Natural Enhanced Channel and SPINS Conventional Multi Outlet (powered by IRI) | 52 Weeks Ending 1-26-2022

BRAND SPOTLIGHT

Biotic & De La Calle!

Biotic Highlights

- Probiotic
- Cold Pressed
- Raw & Fermented
- Organic Ingredients
- No Added Sugar

De La Calle! Highlights

- Probiotic & Fermented
- Organic Ingredients
- Heritage Inspired – introducing new flavor profiles to the Beverage aisle

Source: SPINSscan Natural Enhanced (proprietary), Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 10/3/2021. UPC coded items only.

FLAVORED MALT BEVERAGES - HARD KOMBUCHA

NATURAL ENHANCED		REGIONAL		MULO		CONVENIENCE	
$ Sales ($MM)	% $ Change	$ Sales ($MM)	% $ Change	$ Sales ($MM)	% $ Change	$ Sales ($MM)	% $ Change
$18.7	+16.6%	$18.1	+31.4%	$33.2	+31.6	$7.7	+24%

PRODUCT TYPE – HARD KOMBUCHA

LAST 24 WEEKS

	SALES GROWTH	GROWING ITEMS (Sales)	GROWING ITEMS (Distribution)	GROWING ITEMS (Velocity)
	Dollars % Change vs YAGO	% Products Selling - Dollars	% Products Selling – Max % ACV	% Products Selling – Dollars SPM
NATURAL ENHANCED	+2.1%	+46%	+53.6%	+42.9%
MULO	+9.8%	+45.5%	+39.7%	+42.4%

6 out of the top 10 brands in the Flavored Malt Beverages Category in Natural Retail are Hard Kombucha

Source: SPINSscan Natural Enhanced (proprietary), Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 10/3/2021. UPC coded items only.

Flavored Malt Beverages & Other |+3%

Top % Growth Brands

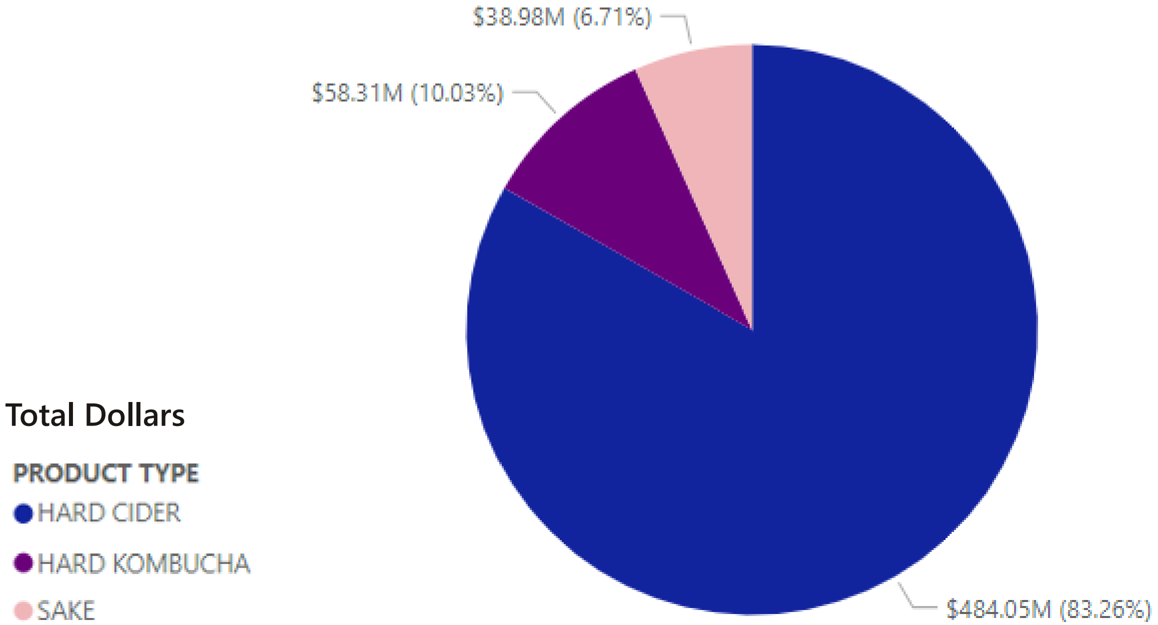
NATURAL CHANNEL

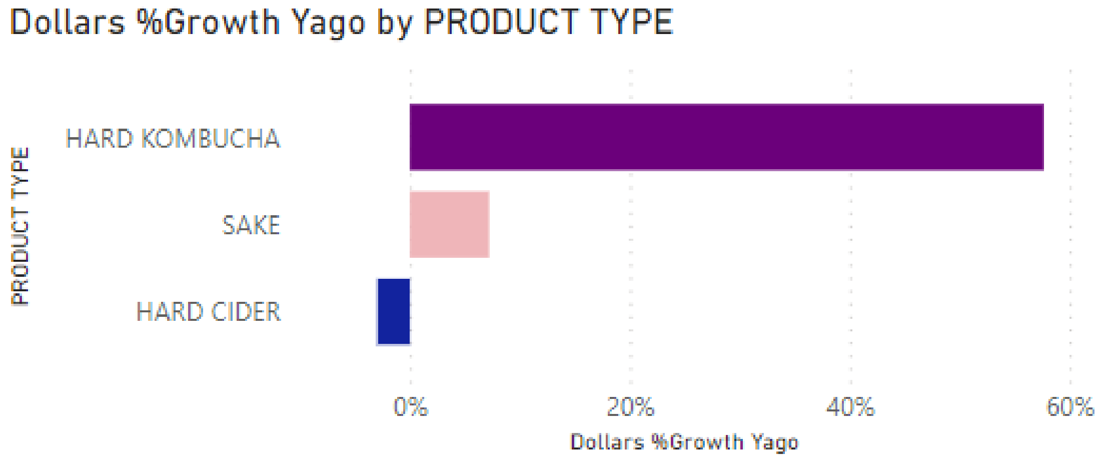
Top Growth Categories	% $ Change
WHITE CLAW	-28.9%
TRULY SPIKED & SPARKLING	-19.0%
BOOCHCRAFT	8.6%
FLYING EMBERS	55.8%
JUNE SHINE	32.1%
TOPO CHICO	-
KYLA HARD KOMBUCHA	20.8%
STRAINGE BEAST	138.3%
NOVA EASY KOMBUCHA	5.3%
SAN JUAN SELTZER	-1.7%

MULO CHANNEL

Top Growth Categories	% $ Change
WHITE CLAW	-15.6%
TRULY SPIKED & SPARKLING	8.1%
MIKES HARD	-4.5%
SMIRNOFF ICE	-3.5%
BUD LIGHT	-5.5%
SEAGRAMS ESCAPES	2.7%
TWISTED TEA	26.2%
VIZZY	63.8%
CORONA HARD SELTZER	-24.5%
MICHELOB ULTRA	681.7%

Hard Cider has the largest share of Alcoholic Beverages, but Hard Kombucha is driving growth





Source: SPINSscan Natural Enhanced (proprietary), Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 10/3/2021. UPC coded items only.

BRAND SPOTLIGHT

Jiant

Brand Highlights

- Hard Kombucha
- Probiotic Ingredients
- Green Tea Based
- Organic Content

Probiotic Ingredients:

- Total Growth: +3.0%
- Growth in Fermented Alcoholic Bev: +16.0%

Source: SPINSscan Natural Enhanced (proprietary), Conventional Multi Outlet/ (powered by IRI), 52 weeks ending 10/3/2021. UPC coded items only.

Innovation Trends

New Innovation Entering the Market

HEALTH-FOCUS LABEL CLAIMS

NEW PRODUCT FORMS & PORTABLE PRODUCT TYPES

Looking for more insights?

Caroline Davidson

Director, Channel Partnerships

(M) 615.545.6869

cdavidson@spins.com

SPINS Brand Positioning Highlights Strong Performance for Natural and Specialty Positioned Products within Conventional Retailers

	Natural Enhanced Retail Channel		Conventional MULO Retail Channel		Regional Independent Grocery Channel		Combined Retail Channels (SNE + MULO)	
	$ Sales (in B)	$ % Chg	$ Sales (in B)	$ % Chg	$ Sales (in B)	$ % Chg	$ Sales (in B)	$ % Chg
Natural Positioned Products	$9.9	-2.9%	$69.9	5.1%	$8.7	-1.1%	$79.8	3.5%
Specialty Positioned Products	$3.5	-1.6%	$113.4	3.7%	$15.5	-1.9%	$116.9	2.9%
Conventional Positioned Products	$2.9	-3.0%	$592.6	0.6%	$58.2	-3.6%	$595.5	0.2%
TOTAL UNIVERSE	$16.3	-2.6%	$775.9	1.4%	$82.4	-3.0%	$792.2	0.9%

SPINS

Source: SPINSscan Natural Enhanced (proprietary), Regional Independent Grocery (proprietary) Conventional Multi Outlet/ (powered by IRI),
52 weeks ending 1/26/2022. UPC coded items only.