



Industry Trends

Beverage



BATORY FOODS®

Ingredients in Motion®

Hard seltzer sales skyrocket amid rising consumer health concerns



Consumer Demand for Health & Wellness Permeates All Food & Beverage Categories

Sugar is the Most Checked for Item When Consumers Read Ingredient Labels

Hard Seltzer Sales Exceed \$1B +200% vs PY

“Hard Seltzers have positioned themselves as the nexus of convenience and health”

Clean labels and transparency giving way to sugar/carb focus to meet consumer holistic health goals

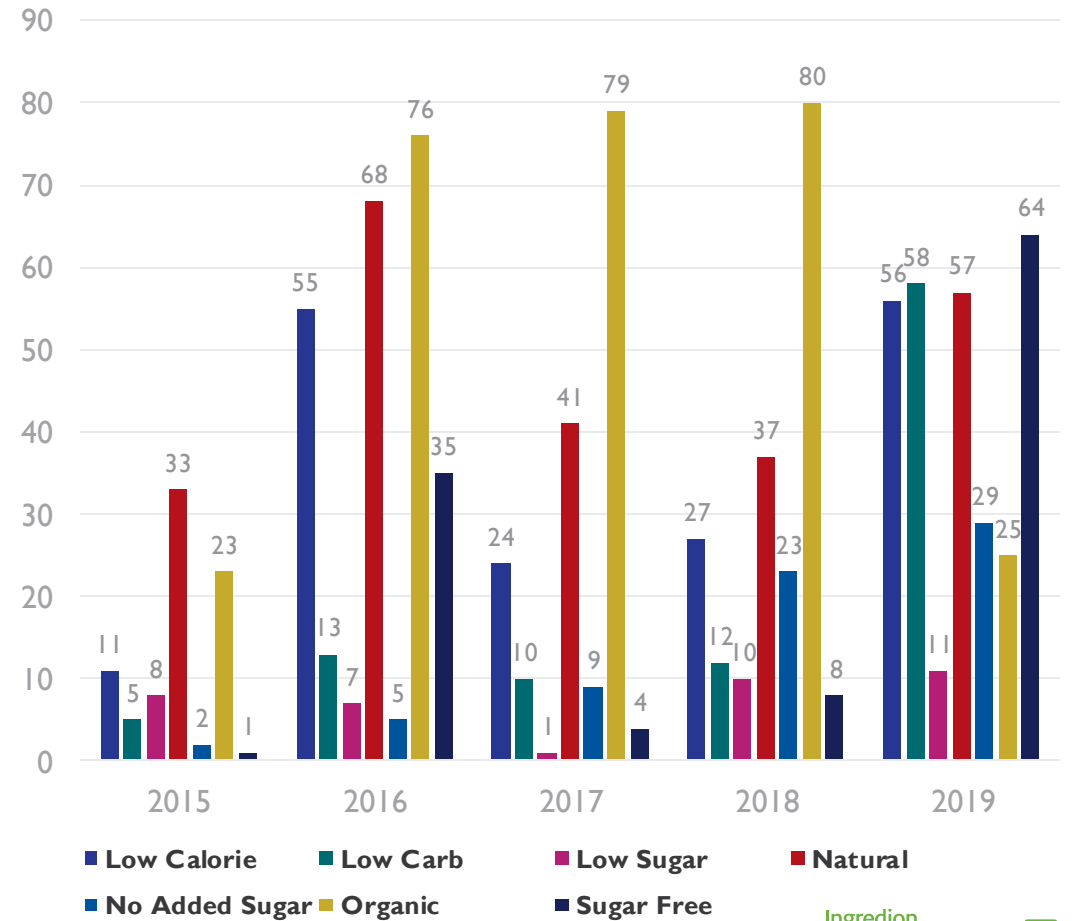


Down a combined -4.3% in 2019



Transparency and Clean Label Focus Shifting to Sugar Free Focus

Select Health Claims New Products (Beer, Cider, Flavored AD)



Sources: Euromonitor; Innova

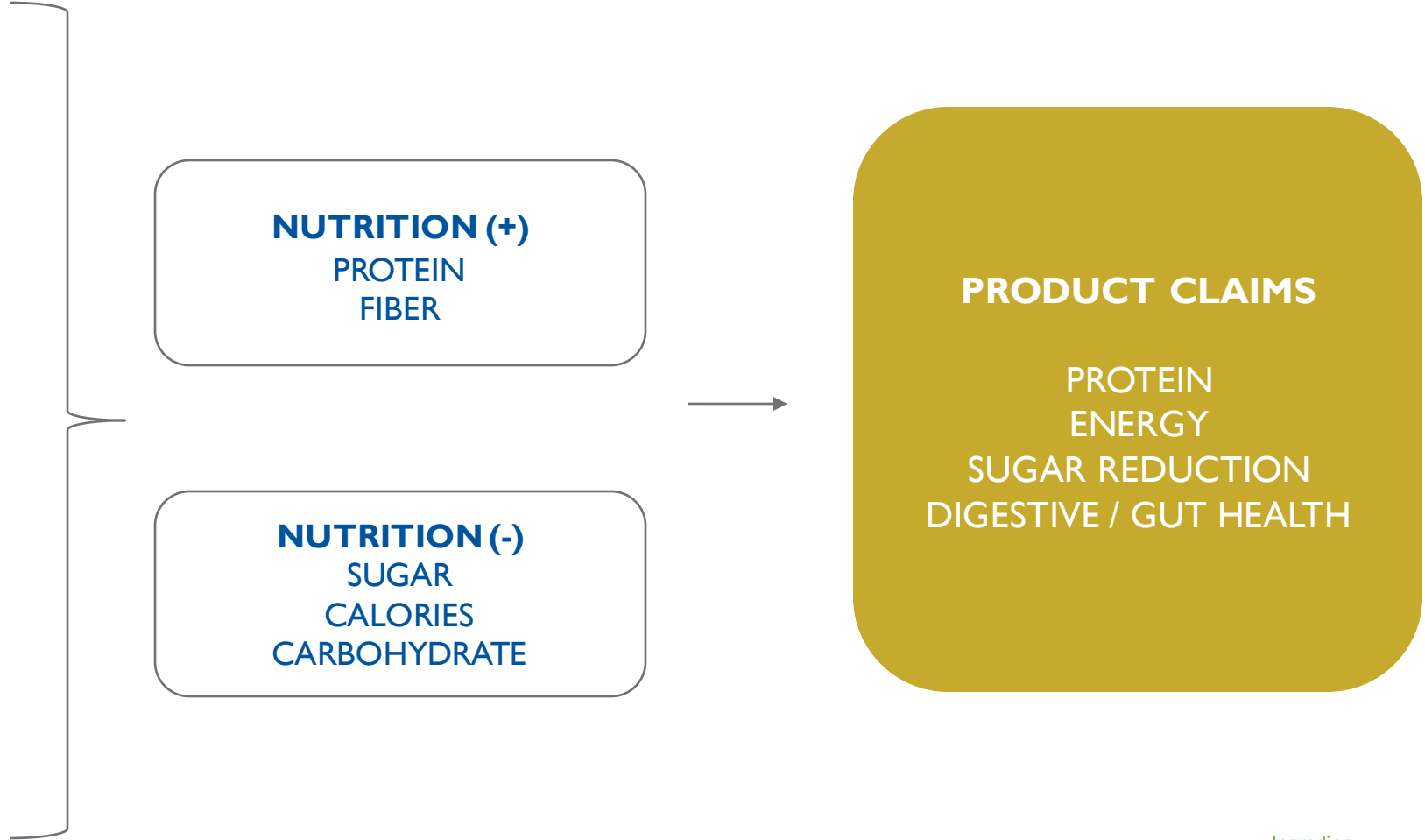
Sports nutrition is driven by consumers' health goals



SPORT DRINKS
\$7B 2019 Market Sales
3% CAGR (2016-2019)



WEIGHT MANAGEMENT
\$4B 2019 Market Sales
2% CAGR (2016-2019)



Sugar and calorie claims essential in unlocking growth segments within Energy Drink Category

- As **performance**, **natural**, and **health-focused** trends begin to emerge, brands realign with consumer demand to capture new market share
- New entrants capitalizing on these trends intensify the competition



Sugar Free energy drinks has lifted the entire category

Regular Energy Drinks 2015-2019 CAGR	Sugar Free Energy Drinks 2015-2019 CAGR
4.8%	14.2%

