



CRFA Show 2008:

Key Trends in the North American Beverages Market

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Key Terms

Better-for-you beverages: Premium products that offer better-for-you aspects, such as having actively reduced fat, sugar or salt content, while maintaining taste and texture.

Functional beverages: Beverages that are primarily consumed for their specific health benefits and nutrients (e.g. beverages fortified with vitamins, herbs or nutraceuticals).

Kosher beverages: Beverages prepared according to Jewish dietary law.

Natural beverages: Beverages containing unprocessed or minimally processed ingredients that remain very close to their complete, original state.

Nutraceuticals: Any substance added to beverages to provide medicinal and/or health benefits.

Organic beverages: Beverages produced from ingredients made without chemical fertilizers, synthetic pesticides, hormones, irradiation and genetic engineering.

Overview

The North American hot and soft drink market is rapidly changing from its traditional portfolio of hot tea, coffee, sugary sodas, bottled water and juice offerings. As consumers become increasingly health conscious and lead busier lifestyles, they are demanding more out of the beverages they consume and are purchasing different hot and soft drink varieties to meet their needs. A surge in snacking, and beverage and breakfast pairings across North America is also underpinning growth in almost all sub-segments. Demand for better-for-you, organic and fortified beverages, as well as those made from premium ingredients has risen greatly.

According to Datamonitor, the American hot and soft drink markets were worth an estimated US\$9.1 billion and US\$110.4 billion in 2007, and are projected to see 3.5% and 5.1% growth respectively by 2010. Consumer demand for healthy beverages is expected to drive future growth and product innovation in the sector.

Beverage manufacturers are responding with product line extensions across all sub-sectors that incorporate healthfulness, portability and innovativeness. In fact, the beverages market has seen so many unique product developments in recent years that once well-defined hot and soft drink market sub-sectors are becoming increasingly blurred as hybrid beverages continue to enter the marketplace.

Agriculture and Agri-Food Canada (AAFC) representatives attended the 2008 Canadian Restaurant and Foodservices Association (CRFA) Show (formerly The Canadian/International Food & Beverage Show) which proved to be an excellent

reflection of current developments in the North American beverages industry. From interviewing companies and gathering a wide variety of product information, AAFC has identified key trends and innovative products present at the trade show, as well as emerging developments in the industry.

Current Industry Trends

Four major trends, i.e. consumer demand for 1) healthier, 2) more exotic, and 3) “greener” products, as well as 4) increased consumption levels, are currently impacting all segments of the North American beverages market in several ways. Canadian food and beverage producers and exporters should note that these developments are shaping how beverages are being produced, packaged, and marketed throughout North America.

Healthier beverage products have become extremely popular with North American consumers in recent years. This growth has been bolstered by healthy eating messages from governments stressing the importance of reducing salt, sugar and fat intake to maintain a healthy lifestyle. Moreover, fear of obesity and heart disease is intensifying from both a public and governmental perspective.

Consumers are also leading busier lifestyles, and with less time to prepare meals and snacks, convenient and portable, yet nutritious, beverage solutions have become a necessity. North Americans are also seeking more out of the products they consume, and better-for-you and functional beverages are increasingly meeting these needs, particularly from morning to mid-day. Market research firm, NPD Group, has found that food and beverage products bearing a better-for-you health claim are most frequently consumed by Americans at breakfast (i.e. 27% of eating or drinking occasions), as a morning snack (26%) or afternoon snack (18%), or at lunch (17%). This demand for nutritious and convenient beverage choices is driving manufacturers to continue developing new, innovative products that meet consumer needs throughout the day.

Alongside demand for healthier beverage choices is that for exotic flavour and ingredient offerings. Increased travel and immigration levels have had a positive impact on demand for exotic flavour and beverage experiences. This is illustrated firsthand through the vast number of beverages in the marketplace that contain exotic superfruit (e.g. açai, gogi berries, pomegranate), or have an Asian or South American tea or infusion influence (e.g. green, chai, macha, maté). Further product developments and hybrid products, combining exotic ingredients with popular North American beverages, are expected as consumers continue to seek foreign flavours at home.

The green trend is having a significant impact on the North American food and beverage industry; manufacturers are increasingly turning to greener packaging options as consumers are demanding biodegradable, recycled, reusable and minimal packaging solutions. Popular environmentally friendly options in the packaging industry include corn-derived PLA polymer, an alternative to traditional plastic bottle packaging; PET (polyethylene terephthalate) plastic bottles which can be produced from recycled materials; recyclable aseptic packaging, a paper product used for soup, sauce and some beverage products; and glass, which is 100% recyclable and contains many natural substances. Packaging concerns are especially impacting the

bottled water segment, with free, clean tap water viewed as a more environmentally responsible alternative by many consumers. For additional information on the “greening” of the North American retail grocery industry, please consult the Going Green: The Future of the Retail Food Industry report on the Agri-Food Trade Service (ATS) Web site at http://www.ats.agr.gc.ca/us/4351_e.htm.

Lastly, and perhaps more importantly, NPD Group recently coined beverages as “the new snack”. With American consumers snacking more than ever, and a variety of innovative beverages in the marketplace targeting specific consumer needs and activity levels, several beverage segments have found their way into the top-10

Top-10 Growing Snack Foods in the United States	
Rank	Product
1	Specialty coffee
2	Hamburgers
3	Bottled water
4	Breakfast sandwiches
5	Iced tea
6	Breaded chicken sandwiches
7	Brewed coffee
8	Hot tea
9	Cakes
10	Shakes, malts and floats

*Source NPD Group, 2008

growing snack food grouping. According to NPD Group, six beverage segments, including specialty coffee, bottled water, iced tea, brewed coffee, hot tea, and shakes, malts and floats, currently rank in the top-10 growing snack food categories in the United States.

The research firm also noted that although Americans snack throughout the day, morning snacks are the most popular, particularly between 9:00 a.m. and 11:00 a.m., followed by afternoon occasions from 2:00 p.m. to 4:00 p.m., and evening grazing between 7:00 p.m. and 10:00 p.m., suggesting optimal times for foodservice beverage sales. Americans were also identified as large snack consumers when driving in their vehicles, especially with the growing popularity of take-away meals and drive-thru foodservice outlets. In fact, NPD Group identified breakfast sandwiches as the top growing breakfast food in the United States since 2004, and consumers are very likely to pair such meals with a beverage (especially coffee, tea or juice). This trend is underpinning growth across all beverage categories, and has driven manufacturers to roll-out portable packaging solutions compatible with vehicle consoles.

American consumers are also purchasing more beverages, and even consuming them as snacks at foodservice establishments; the United States restaurant industry served over 46.8 billion beverages in 2007, a 7% increase over 2003 levels. Furthermore, in 2007, NPD Group found that non-traditional beverages (i.e. iced tea, bottled water, hot tea, smoothies and juice) drove growth of restaurant beverage servings over 2006 consumption levels.

These four key trends are driving product line expansions and packaging innovations across all segments of the North American beverages industry. The impact of and opportunities stemming from these market developments are explored throughout the following sections.

Tea

Hot Tea

The growing popularity of hot tea across North American retail grocery and foodservice markets greatly reflects current consumer demand for healthy, high-quality and innovative or exotic beverages. According to Datamonitor, the hot tea

segment accounted for more than US\$2.4 billion or 26% of the American hot drink market in 2006, and is forecast to reach US\$2.7 billion by 2011, a 13% increase. Hot tea products were widespread throughout the CRFA Show, and a particular focus on high-quality, premium blends; organic and fair trade certified products; and fusion, green, chai and “single region” tea was noted. AAFC researchers also noted a large hot tea presence and similar trends at other major food and beverage trade shows over the past year, including The Canadian/International Food & Beverage Show 2007, SIAL Montreal 2007 and 2008, and Grocery Showcase West 2008.

Growth in this segment can be attributed largely to the health benefits associated with tea consumption. Consumers are attracted to the antioxidant-rich, weight loss and cardiovascular boosting properties of tea, as well as its assistance in slowing the ageing process, which manufacturers have been quick to notice. Tetley Canada is currently promoting tea’s heart-healthy benefits to health conscious consumers through the promotional taglines “feel good with every cup”, “naturally rich in antioxidants” and “helps maintain cardiovascular health”. Manufacturers are increasingly blending green tea with traditional flavours and adding fusion tea to their product lines that incorporate green tea and popular “superfruit” pomegranate, blueberries and açai. Tetley Canada’s Earl Grey Green Tea and Mango Passionfruit Açai Green Tea; and Stash Tea’s Premium Fusion Breakfast Green & Black Tea and Pomegranate Raspberry Green Tea are recent examples.

Novel marketing tactics are also increasing interest in tea consumption among younger, non-traditional target markets. Tea blends with unique names, such as Golden Monkey, Crimes of Passion, Dragon Pearls, and Gunpowder Green, are being targeted toward younger consumers to revive the once perceived “old-fashioned” beverage. As of 2006, more than 50% of young, Canadian tea drinkers regularly consumed green or herbal tea. Tea’s popularity is also rising along with the number of tea houses and cafés across North America where consumers can purchase tea and brewing accessories, and attend tastings and courses, much like those for wine connoisseurs. In fact, hot tea has become so popular in the Canadian marketplace that George Brown College, in partnership with the Tea Council of Canada, now offers a tea appreciation certificate program for individuals wanting to become educated tea professionals.

Consumer demand for innovative beverages is also driving growth in exotic flavours and premium tea offerings, a trend that has positioned pu-erh, macha, souchong, oolong and chai tea alongside mainstream North American flavours. As a result, the North American tea industry has evolved much like the wine market: companies are sourcing tea from all corners of the world to bring consumers authentic and unique blends; and are promoting estate-grown tea from specific geographic regions using traditional growing methods. Organic and fair trade certified tea has also become synonymous with quality, as consumers increasingly look for blends made using sustainable production methods. In keeping with premium blends, high-quality packaging innovations have emerged, such as pyramid tea bags and handmade tea pouches that allow more room for whole leaf tea to circulate while steeping, creating better aroma and flavour.

Ready-To-Drink (RTD) Tea

RTD tea (i.e. bottled, consumer-ready cold tea beverages, made popular in North America by brands such as Snapple, Nestea and Lipton) remained popular at this year’s show. Many large-scale manufacturers and smaller, more specialized

producers offered diversified product lines of innovative and Asian-inspired, tea-infused beverages at the event.

Tetley Canada, new to the RTD tea segment, launched its line of real brewed iced tea in single serve 473 ml and value size 1.89 L formats. The product line caters to current consumer demand for healthy and convenient tea offerings with Iced Green Tea, Iced Green Tea and Pomegranate, Iced Black Tea and Mediterranean Lemon, and Ice White Tea and Blueberry flavours.

Also building on the current popularity of green tea and superfruit is Healthy Beverage Company's Steaz Green Tea Soda, an organic, sparkling green tea marketed as a healthy, carbonated soft drink. The low-calorie, low-sugar alternative to traditional sugary soft drinks was promoted at the show in an assortment of flavours including a Blueberry Pomegranate variety.

The Canadian foodservice industry also introduced some innovative twists to the portable, RTD tea category, with the Tea Shop 168 Group having featured its new entries to the segment at the show. The company's Green Tea and Aloe Vera, and Honey Green Tea beverages uniquely combine the health benefits of aloe vera and honey (both relatively new ingredients to the RTD tea segment) with those of green tea in convenient packaging for health conscious, on-the-go consumers. Additional healthy ingredient and tea pairings are likely to enter the RTD tea segment as consumers continue to look for extra nutritional benefits from their beverages.

The widespread popularity of green tea products has also driven traditional sugary soft drink manufacturers to develop product line extensions that incorporate the healthy beverage. Canada Dry recently launched its innovative twist to an old favourite with sparkling Green Tea Ginger Ale, a beverage enhanced with 200 mg of the antioxidant benefits of green tea and 100% of daily vitamin C needs.

According to Datamonitor, the American RTD tea segment was valued at approximately US\$1.8 billion in 2007, and is projected to increase almost 19% to total US\$2.1 billion by 2010. RTD tea products make up roughly 75% of all sales in the American RTD tea and coffee segment.

Matcha Tea

Matcha, a powdered green tea known for its powerful health-boosting properties, was a popular product at the trade show with many exhibitors showcasing a variety of matcha-based beverages. Built from the success of regular green tea in the North American marketplace, matcha has begun to emerge as a popular new ingredient in lattes, iced tea, smoothies, alcoholic cocktails, ice cream, gelato and chocolate. Continued growth for matcha is expected with companies aggressively promoting its health benefits over those of other beverages, e.g. 70 times the antioxidant content of orange juice — one of the highest levels of any food; 10 times the nutrients of regular steeped green tea; and natural caffeine that provides energy for several hours.

Marketing Trends

In addition to the above mentioned marketing trends, Canadian tea exporters should note that promoting tea's existing health attributes may set one's product apart from the competition's. Consumers are in high demand of healthy beverages, and manufacturers are responding with a plethora of marketing claims that typically

promote already and/or naturally existing health attributes to capitalize on current sector trends. Such product positioning may prove a key to success in the current market, as consumers continue to look for products with such selling features.

Similarly, consumers are seeking beverages with additional functional qualities (one of the most popular being an energy boost), and the tea segment has been quick to add this attribute to its promotional strategies. Much like matcha is marketed for its energy-enhancing properties, tea manufacturers are now marketing tea in general as providing a natural, lasting energy boost, in an effort to capture some of the growth the energy drink segment currently enjoys. Celestial Seasonings, for example, has re-introduced its Fast Lane Tea, a high-energy tea that contains eleuthero (i.e. an energy-boosting herb similar to ginseng) which provides 115 mg of natural caffeine per 8 oz serving without the coffee jitters. Touted as the "original energy drink", Celestial Seasonings also markets the antioxidant properties of its Fast Lane Tea to appeal to consumer demand for healthier offerings.

Bottled Water

In recent years, the bottled water industry has enjoyed impressive growth due to consumers' increased health concerns and willingness to pay more for premium products. However, current economic conditions, such as the weak U.S. economy, dampened housing and labour markets, and higher fuel and grocery prices, may impact the segment's future performance. A growing number of environmentally-conscious consumers concerned with the carbon footprint of plastic bottles may also drive manufacturers to find more eco-friendly packaging options, and change their consumption habits (e.g. switching to free tap water at home). This green issue has picked up speed in several U.S. cities where a five- or 10-cent tax on bottled water, or ban has been implemented to limit the impact plastic bottles have on the environment and encourage consumers to drink city tap water.

Despite these segment developments, bottled water sales have maintained their top position in the United States beverages market, surpassing those of colas, juices and coffee in 2007. According to Datamonitor, bottled water sales in the United States reached US\$15.5 billion in 2007, and are expected to reach US\$17.6 billion by 2011, a 13% increase. Nielsen data also found that branded products saw the most growth followed by vitamin-enhanced water and flavoured water offerings in 2007. Functional water with health claims represented 78% of bottled water dollar sales in 2007, while flavoured water products saw 28% growth the same year, far surpassing that of any other beverage segment. Americans remain an important target market for Canadian exporters consuming an average 27 gallons of bottled water per capita annually, a value quickly approaching the European average of 32 gallons.

Supermarkets account for the majority of bottled water purchases, having accounted for over 50% of sales in 2007. The following cities saw the highest bottled water purchases per dry grocery order in 2007, well above the nation's average of 3.1%: Las Vegas (5.1%); Los Angeles (4.7%); San Diego (4.5%); Miami (4.5%); San Francisco (4.1%); Tampa (4.1%); New York (4.1%); Boston (4%); Washington; D.C. (3.8%); and Phoenix (3.6).

Bottled water innovations showcased at this year's trade event included premium varieties advertising origins from glaciers, springs and exotic islands, as well as

flavoured and functional still and carbonated options. A large presence of bottled water in premium packaging, similar to wine bottles, was also noted at the show. Similar trends were also identified at SIAL Montreal 2007 and 2008, signifying that manufacturers are responding to consumer demand for more premium beverage choices; a development that has been particularly gaining speed in the foodservice industry.

Functional Water

Functional and energy water also had an increased presence at the trade show. As consumer demand for better-for-you and vitamin-enhanced food and beverages increases, a variety of functional water beverages have entered the marketplace targeting different consumer needs.

VH₂O promoted its Vitamin Water line of natural beverages that meet consumers' different functionality needs. Vitamin Water's five flavours (i.e. Fruit Punch, Orange, Pom Grape, Dragon Fruit and Tropical Citrus) help build inner strength, provide daily nutrients, fight fatigue, replenish nutrients in the body, and provide an energy boost, respectively.

The BUZZWATER Company featured its innovative addition to the bottled water/energy drink segment with its BUZZWATER beverage, i.e. natural spring water enhanced with organic caffeine and 76 minerals and electrolytes. BUZZWATER is available in 100 mg and 200 mg caffeine varieties, is calorie-, fat-, preservative- and sugar-free, and contains no artificial flavours. The product targets consumers looking for an alternative to often poor-tasting traditional energy drinks; BUZZWATER tastes like water but contains all of the attributes of an energy drink.

Add-To-Water Beverages

The popularity of green tea and pomegranate flavourings has also impacted the add-to-water segment. Add-to-water flavouring packages, which allow consumers to add flavour crystals to bottled water, have been increasing in popularity as they are convenient and easy-to-use. While the product segment is not new, companies continue to roll-out new flavour additions to their product lines. Kraft's new Crystal Light Singles Cherry Pomegranate and Lipton's To Go Green Tea with Mandarin & Mango flavour packages cater to consumer demand for healthy green tea and superfruit beverages. These low- and/or no-calorie and sugar-free powdered drink mix flavours are well-positioned to continue to boost sales in the portable beverages category. Datamonitor reports that the American powdered drink concentrates segment was valued at an estimated US\$16.8 million in 2007, and should see 8% growth through to 2010 to total US\$18.2 million.

Fruit-Based Beverages

Built upon the longstanding consumer perception of juice being a "good-for-you" beverage, the juice segment has seen significant growth to date that is being bolstered further by consumer demand for healthier beverage offerings. Datamonitor research measured the American juice segment at roughly US\$20 billion in 2007. The market is projected to grow over 4% to reach US\$20.9 billion by 2010, driven by growth in 100% fruit juice beverages. The current popularity of products containing superfruit and antioxidant-rich fruit, such as pomegranate and blueberries, are especially driving sales of fruit-based beverages. Manufacturers have also rolled-out

low-calorie, low-sugar, probiotic, fortified, natural and organic additions to their product lines in response to consumer demand for lighter, diet options and those with less sugar content. Product lines specifically targeting the health needs of children and adults have also emerged in the segment, e.g. juices containing 100% to 120% of daily vitamin C and beta carotene needs, and multiple servings of fresh fruit and vegetables in a single serving).

Dominion Citrus' Fresh Fix natural fruit beverages were promoted at the show as a unique fruit-based beverage that can help adults consume more of their daily fresh fruit and vegetables servings without the hassle of washing and peeling. Fresh Fix beverages combine the health benefits of up to 13 different fruit (including superfruit blueberries, cranberries and pomegranate) in eight flavours, and are sold in 250 ml single serving and 946 ml value sizes.

Nothing But Nature's KIJU organic, 100% fruit juice, popular with children and adults alike, was also featured at the event. KIJU offers 100% of daily vitamin C needs in a single serving, and its four flavours (Apple, Mango Orange, Lemonade and Grape Apple) are available in 250 ml juice box-style packaging. KIJU caters to current consumer demand for healthier, chemical- and preservative-free beverages, and is marketed toward healthy, on-the-go families.

Current trends impacting the fruit-based beverage segment include rising ingredient costs, due to crop shortages, and high fuel and transportation prices. These market challenges have led some manufacturers to turn to less expensive substitutes, such as producing beverages with less than 100% fruit juice, so that added costs are not passed on to consumers. Nonetheless, high quality and healthful juice beverages remain increasingly popular with consumers. Refrigerated juice and drink sales in American supermarkets totalled US\$3.7 billion by October 2007, a 3.9% increase in dollar sales but a 10.4% decrease in unit sales from 2006, indicating that consumers are purchasing more premium-priced juice products.

Soy Beverages

Due to widespread availability in major grocery retailers and healthy product line extensions and innovations, soy beverages have achieved significant sales growth in recent years. Soy beverage consumption in the United States more than doubled between 2002 and 2007, and the segment saw 12% growth in 2006 alone. Much of the segment's growth can be attributed to the health benefits of soy, and manufacturers' introduction of fortified, functional and better-for-you products, a direct response to consumer demand for nutritious offerings. Product line extensions gaining popularity with mainstream consumers include beverages enhanced with calcium, omega-3, vitamins and fibre, as well as lactose-, cholesterol- and trans fat-free options. Seasonal, exotic and premium flavour extensions have also helped the industry maintain growth; Vitasoy's Holly Nog, Peppermint and Banana flavours, and Silk's Chai, Mocha and Pumpkin Spice soy beverages are recent examples.

Soya World promoted its So Nice line of organic, fortified soy beverages at the show, including its Original, Vanilla, Chocolate, Mocha, Unsweetened, Natural, Original Delight, Vanilla Bliss, and Chocolate Passion flavours. Its latest addition, an exotic Vanilla Chai, was also promoted. So Nice beverages are fortified with calcium,

vitamins, minerals and riboflavin, and are available in 250 ml, 946 ml and 1.89 L formats that cater to consumers' health and consumption needs.

Industry experts also point to packaging innovations as being key to future growth within the soy beverage segment. Manufacturers continue to introduce innovative packaging solutions to meet consumers' needs. Eco-friendly, shelf-stable packaging, and convenient, single serving or portion-controlled sizes are all becoming influential factors in consumer purchasing decisions.

Energy Drinks

The US\$1.28 billion North American energy drink market is considered to be one of the hottest beverage segments since bottled water. Having quickly grown from US\$200 million in 2003, the energy drink segment now accounts for an estimated 5% of the non-alcoholic beverage market in North America. Energy drinks have truly become a "morning through night" product providing consumers with a morning "pick-me-up", midday boost, or a way to keep the day going into the wee hours of the night through distribution in bars and nightclubs.

Although energy drinks with high caffeine and little nutritional content have traditionally dominated the segment, innovative product variations have recently entered the market that cater to the needs of more health conscious consumers. Products containing natural, organic and fair trade ingredients; added vitamins and minerals; green tea; yerba maté; fruit juice; superfruit açai and pomegranate; and natural caffeine can now be found in the North American energy drink market, much like in other beverage segments. Better-for-you formulations (advertised as energy water or sugar- and gluten-free; suitable for vegetarian, diabetic and kosher diets; or offering a sustained, natural energy boost) are also entering the segment to capitalize on current consumer demand for healthier food and beverage choices.

For additional market and innovative product information, please visit The Energy Drink Segment in North America (http://www.ats.agr.gc.ca/us/4387_e.htm) and The Canadian Energy Drink Market (http://www.ats.agr.gc.ca/canada/4469_e.htm) reports on the Agri-Food Trade Service Web Site.

Conclusion

Major trends identified at the CRFA Show provide the Canadian food and beverage industry with an overview of product developments and marketing focuses taking place in the North American marketplace. Due to increased consumer demand for healthier, more convenient or portable, exotic, and "greener" beverage choices, growth in the market segments highlighted in this report is likely to continue through the foreseeable future. These trends have also placed many new interesting and challenging pressures on manufacturers (e.g. sustainable and organic production practices, functional ingredient additions, greener packaging solutions), in addition to those of traditional production and marketing channels. Canadian food and beverage companies, in particular those involved in exporting and importing products, should be aware of such trends and product innovations currently impacting the industry, as they often identify the future direction of the food and beverage market and major trends to take place.

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Product: Vitamin Water

Key Resources

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