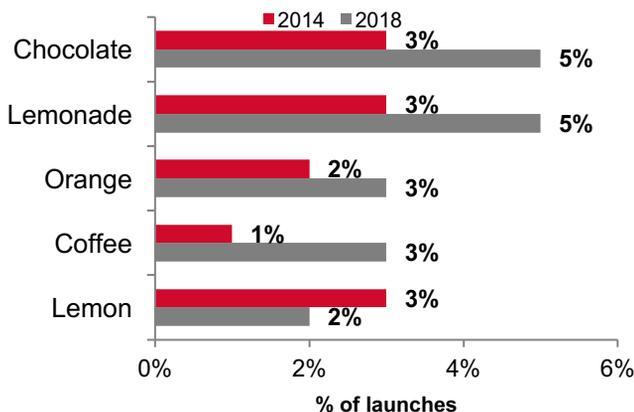


This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across new product introductions. This month's focus is: **Beverage Concentrates**

**Innovation heats up in coffee-flavored beverage concentrates & mixes**

North America: beverage concentrates & mixes NPD by top 5 flavours, 2014 vs 2018



Recent launch activity shows a number of brands are expanding their offerings in coffee-flavoured concentrates and mixes in North America.

The lucrative segment is seeing a raft of interesting format developments influenced by wider coffee shop trends.

According to NPD activity in North America, coffee is one of the top five flavor profiles in the category

**Cold-brew coffee stands out as a new format**

Cold-brew coffee continues to be popular in coffee shops and the concept is increasingly filtering through into the retail channel. Interest in cold-brew formats derives from its distinct flavor, less acidity and smoother mouthfeel and is mostly popular among Millennials. For example, 51% of US Millennials drink cold-brew formats of ready-to-drink or instant coffee at home or on-the-go. The beverage concentrate & mixes category is also seeing a rise in cold-brew coffee formats aimed at younger consumers.



*Simple Truth Organic Cold Brew Coffee Concentrate contains no preservatives and is free from GMO ingredients (US).*



*Trader Joe's Coconut Cold Brew Coffee Concentrate is said to be bold and smooth. According to the manufacturer, it is truly cold brew as it has never been heated (US).*



*Grady's Cold Brew Bean Bags are naturally sweetened with chicory and retail in a newly designed 2-oz single use pack (US).*

For more information, please contact  
Tree Top at 509-698-1435



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### Starbucks unveils at-home cold-brew pitcher packs

Starbucks Cold Brew Coffee Nariño 70 Ground Coffee Pitcher Pack is designed to make cold-brew coffee an easy process at-home. Consumers just need to add the pitcher packs to water to slow-steep in the refrigerator for 24 hours.



The product is positioned as "a simple method that brews with time instead of heat by simply adding cold water for a cold, super smooth coffee".

Starbucks Nariño 70, which is a custom coffee combining 70% Colombia Nariño and 30% African medium roast coffee beans, is ideal for the 11% of US coffee drinkers who would be interested in roasts specially made for making cold-brew coffee at home.

### Coffee cubes – an interesting take on preparing a convenient coffee smoothie



- > Comprises frozen fruit cubes with coffee, milk and dates
- > Made with coffee beans harvested, roasted and brewed at the peak of ripeness for maximum flavour
- > All natural, sweetened with dates
- > Convenient and easy to prepare by adding yogurt, kefir, milk or coconut water
- > Retail in 300g pack containing four servings.

Inbalance Coffee, Milk & Date Smoothie Cubes (Canada)

### Coffee enhancers bring convenience to the table

Consumers' growing desire for convenient products has led to a rise in liquid coffee enhancers. Signature Select's Sugar Free Caramel Coffee Enhancer is described as a low calorie enhancer that is naturally flavored and recommends one squeeze per 8-fl oz serving. The product retails in a a 1.62-fl oz bottle containing 24 servings.



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**Coffee-based cocktail mixers could extend consumption occasion of concentrates**

Newer formats of coffee-flavoured concentrates, eg cocktail mixers, could extend the consumption occasion for concentrates by making them suitable for nighttime consumption.

For example, Williams-Sonoma's Irish Coffee Toddy Cozy Cocktail Mixer is made with coffee and brown sugar and is a handcrafted classic that can be mixed with whiskey, bourbon or rum and topped with a luxurious layer of fresh cream.



**North American brands take inspiration from on-trade premises by bringing the cocktail experience into the home**

Raising consumers' quality perceptions of beverage concentrates is key to encouraging higher consumption levels. In order to achieve this, some brands have looked to bring on-trade experiences at-home.

Modern Gourmet Food's Mojito and Hard Lemonade Mason Jar Dispensers launched in the US are a prime example. They retail in a 2.25-qt pack, which includes a 1 gallon dispenser with mojito mix or hard lemonade and only require the addition of rum or vodka.



*Modern Gourmet Foods Hard Lemonade Mason Jar Dispenser just requires the addition of vodka and retails in a 2.25-qt. pack which includes a 1 gallon dispenser and hard lemonade mix, and is enough to make 18 hard lemonades.*



*Lt. Blender's Piña Colada in a Bag All Natural Piña Colada is said to be "the easiest way to make fresh, delicious cocktails at-home. No blender, no long shopping list, no PhD in mixology required".*

*The all-natural cocktail mixes are made by adding the appropriate spirit, replacing the cap, shaking and freezing to be enjoyed.*

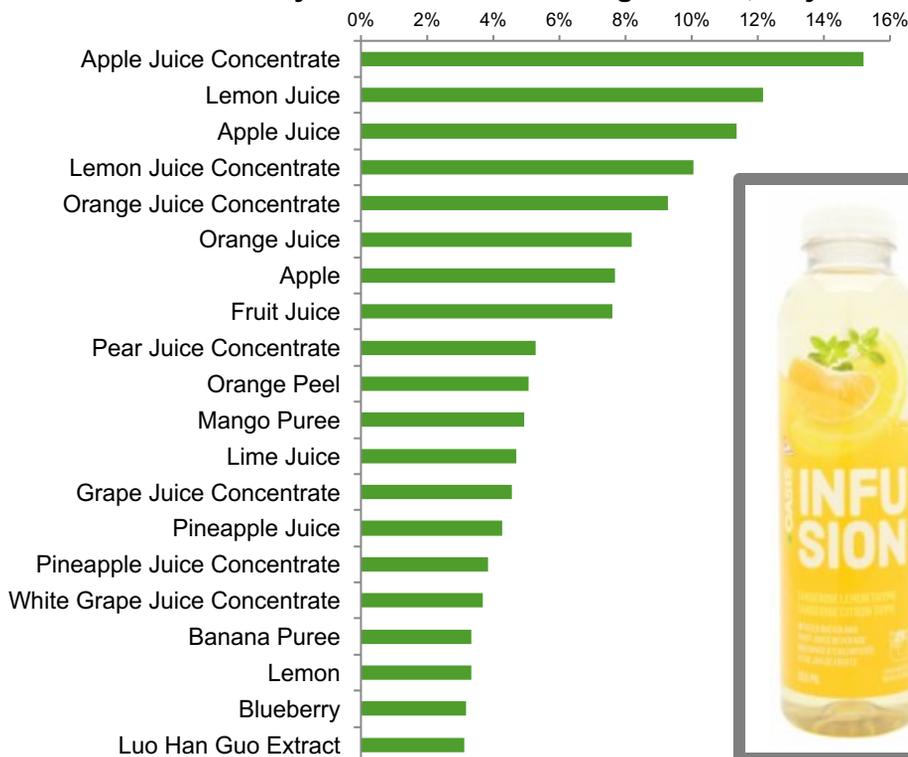
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among drink products launched in North America.

### Most Active & Top Growing Fruit Ingredients

% of North America drink products with fruit listed as an ingredient, by 20 most active fruit ingredients, July 2017-June 2018



**Lassonde Oasis Infusion Tangerine, Lemon and Thyme Infused Water & Fruit Juice Beverage** is a pasteurised cold-infused product that retails in a 355ml recyclable pack.

Ingredients on pack: *infusion (water, orange peel, lemon peel, rosehips, tangerine, lemon verbena, thyme leaves), fruit juice concentrates (concentrated apple juice, concentrated lemon juice), natural flavour*

% of North America drink products with fruit listed as an ingredient, by 10 top growing fruit ingredients, July 2016-June 2018

Emerging Fruit Ingredients	% change:	
	Jun 2016 - May 2017	Jun 2017 - May 2018
Acerola Puree	669%	0.6%
Acai	252%	0.7%
Acerola Extract	230%	0.4%
Goji Berry	186%	0.6%
Date	186%	0.6%
Blackcurrant Juice Concentrate	175%	0.5%
Orange	159%	1.6%
Luo Han Guo Extract	105%	2.3%
Pineapple	103%	2.0%
Raisins	98%	0.5%

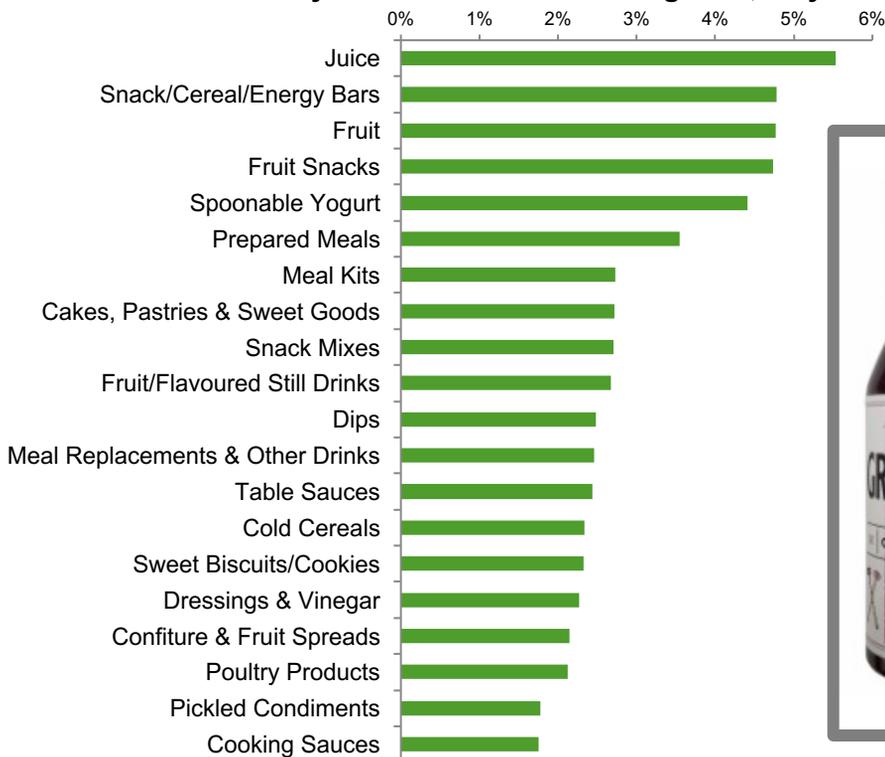
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This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen among food/drink products launched in North America.

### Most Active & Top Growing Categories with Fruit Ingredients

% of North America food & drink products with fruit listed as an ingredient, by 20 most active sub-categories, July 2017-June 2018



**Lidl Grenadine Cocktail Mix** is said to be made using quality selected ingredients. The product retails in a 12.7-fl. oz. pack bearing the Facebook, Twitter and Instagram logos.

Ingredients on pack: *sugar, water, pomegranate juice concentrate, citric acid, purple carrot extract (color), natural flavors, potassium sorbate, sodium benzoate (preservative)*

% of North America food & drink products with fruit listed as an ingredient, by 10 top growing sub-categories, July 2016-June 2018

Emerging Sub-categories with Fruit Ingredients	% change:		Total Sample
	Jun 2016 - May 2017	Jun 2017 - May 2018	
Flavored Milk	323%	0.1%	
Baby Cereals	281%	0.2%	
Butter	217%	0.0%	
Fortified & Other Wines	217%	0.0%	
Beverage Mixes	191%	0.2%	
Baby Fruit Products, Desserts & Yogurts	166%	1.0%	
Instant Noodles	147%	0.1%	
Rice	138%	0.1%	
Other Sauces & Seasonings	133%	0.3%	
Medicated Confectionery	133%	0.1%	

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