



GT's



Handcrafting and bottling our Raw & Organic Kombucha in Los Angeles since 1995.

Vegan, Gluten-Free & Non-GMO

- GT Dave Created the Kombucha Retail Category in 1995
- World's #1 Selling Kombucha
- #1 Selling Brand of Kombucha in UK
 - Whole Foods Markets
 - Planet Organic Stores
- Inspiration for All Other Kombuchas
- Authentic, Raw, Small Batch, Highest Quality

GT's Kombucha History



Committed to our Craft

1995



Inspired by his mother's journey and founded on the belief that food can be your medicine,

2020



Driven forward by the conviction that living foods should be available to everyone



Our 25-Year History



1995

1996

1997

1997

2010 -
2011

2015

2016

2017

2018

2019

2020

Start of an
Amazing
Journey

Small Steps
Forward

The Launch of
Synergy

Natural
Channel
Expansion

Product Line
Expands
Further

20th
Anniversary

Living Kefirs
and Yogurt

Evolution
into Living
Foods

Driving
Innovation

Innovation &
Advocacy

25th
Anniversary



Laraine Dave
Endowment



Made by Nature, Not a Lab



Authentic Kombucha starts with sweetened tea

At GT's, we use organic green and black tea sourced from Japan and India.



No SCOBY, no kombucha

To the sweetened tea, we add an active SCOBY (Symbiotic Culture Of Bacteria and Yeast).



Fermentation...

Each batch of Kombucha undergoes a thirty day fermentation period. The bacteria and yeast from the SCOBY begin to feed on the sugar from the sweetened tea, this releases beneficial nutrients such as enzymes and probiotics.



Fresh pressed juice, botanicals...

At GT's we add fresh pressed juices or purees, real flowers and herbs, never concentrates or flavoring.



It's go time!

Each batch continues to develop its own unique personality, and the outcome is a naturally effervescent fermented tea. Visible strands of culture will appear as time goes on, indicating true authentic kombucha.

NOT ALL KOMBUCHA IS THE SAME



Raw Small Batch Kombucha

Mass Manufacturers

How It's Made

Cultivated with a SCOBY

Fully fermented for 30 days

Brewed in small 5-gallon batches—small enough to hug!

Unpasteurized, unprocessed, and unfiltered.

Made with vinegar concentrates or lab cultures.

0 to 7-day fermentation.

Produced in large 500+ gallon tanks.

Pasteurized, filtered, & artificially carbonated.

How It's Flavored

Crafted with 100% organic & raw, real whole ingredients.

No added sugars, no additives, nothing artificial.

Created using "flavors" and refined sugars.

Contains lactic or citric acid.

What it Offers

Naturally effervescent with tangy bite and visible culture strands.

Raw, living and active, must always be refrigerated.

Naturally occurring beneficial nutrients (developed during fermentation) including billions of living probiotics.

Diluted or watery taste with no visible culture strands.

With no living qualities, may be shelf-stable.

Oftentimes, has no probiotic count on label.



Why Consumers Love Our Brew



It's Good for You!

- Billions of living probiotics that aid digestion and support overall health and wellness



Organic, Raw, and Unfiltered

- Naturally effervescent
- Live and active culture strands



Authentic Kombucha

- Always cultured, never compromised
- Traditionally brewed in small 5-gallon batches





U.S. News, Trends, and Social Media are Catching On

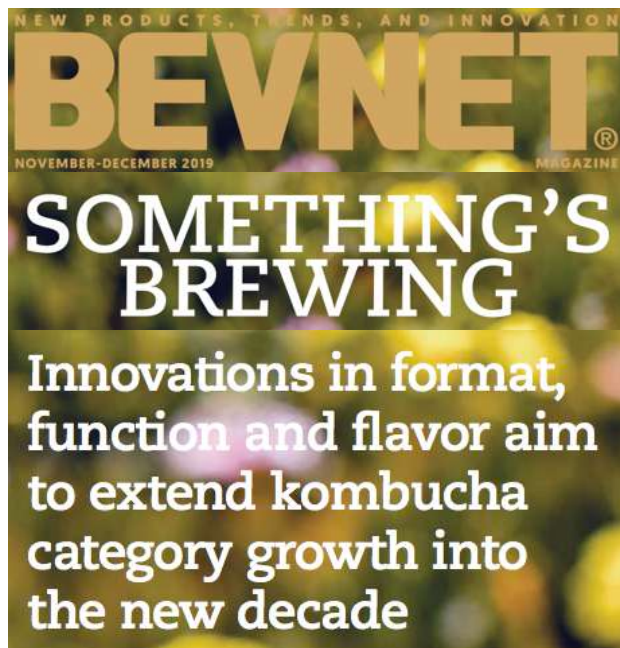
VegNews

20 VEGAN THINGS AT COSTCO WE'RE STOCKING UP ON



MarketWatch

Kombucha Tea Market Expected to Grow at a CAGR of 20.6% in the Forecast Period of 2019-2024, Reaching USD 4.6 Billion by 2024.



We Tried 12 Brands of Kombucha and There Was a Clear Favorite

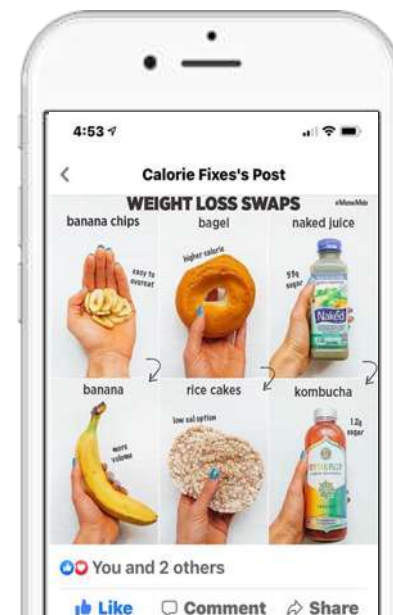
#1: The All-Around Best Kombucha: [GT's Living Food](#)

- Price: \$3.49
- Bottle size: 16.2 oz
- Sugar per bottle: 12g

GT's Living Food kombucha is, by many standards, the OG of commercial kombuchas, holding its place in the U.S. market for 22 years. GT's Living Food was the first company to bring quality kombucha, that's made with 100% pure love (literally, it's on the label), to grocery store shelves. We found that the Gingerade variety offers a well balanced level of ginger spice, acidity, and fizz. Many of the bottles that didn't make the cut had a watery-weak ginger presence and lacked sufficient carbonation. GT's delivers on all aspects of a good kombucha, and it's convenient to purchase. This brand can be found virtually anywhere that sells kombucha.



California's Favorite Fermented Drink



U.S. Kombucha Market

PREMIUM JUICE BRAND RANK

TOTAL US | CONVENTIONAL – MULO | LAST 4 WKS

Total Premium
Juice Category
Growth

+13.3%

1



2



3



4



5



Sales

\$31.8M

\$26.6M

\$22.5M

\$9.6M

\$9.5M

\$ Growth vs YA

17.6%

4.8%

14.9%

2.1%

13.8%

Market Share

21%

18%

15%

7%

6%

Sales per TDP
(total dist. point)

\$23,084

\$17,338

\$25,827

\$15,348

\$27,278

✳ GT's is the #3 premium juice brand with about 15% market share in the category.

✳ Of the top 3 brands, GT's has the highest sales per point of distribution.



KOMBUCHA BRAND RANK

TOTAL US | CONVENTIONAL – MULO | LAST 4 WKS






Sales \$ Growth vs YA Market Share Sales per TDP (total dist. point)	<div> <div>Total Kombucha Category Growth +11.3%</div> <div>1 GT's</div> <div>2 KEVITA</div> <div>3 HEALTH-ADE KOMBUCHA</div> <div>4 TOWNSEND'S BREW DR KOMBUCHA</div> <div>5 humm kombucha</div> </div>				
	\$22.5M	\$9.63M	\$5.6M	\$2.3M	\$1.6M
	14.9%	21%	12%	55.4%	0.2%
	49%	21%	12%	5%	4%
	\$25,827	\$15,348	\$20,262	\$18,536	\$11,975

- * GT's is the #1 kombucha brand, accounting for 49% of total sales in the category.
- * GT's has the highest sales per TDP of any brand in the top 5.



PREMIUM JUICE BRAND RANK

TOTAL US | CONVENTIONAL – MULO | LAST 12 WKS






<div>Total Premium Juice Category Growth +9.6%</div>	1		2		3		4		5	
	Sales	\$93.1M	\$78.8M	\$66.7M	\$30M	\$28.4M				
	\$ Growth vs YA	9.2%	2%	13.6%	13.7%	3.1%				
	Market Share	21%	18%	15%	7%	6%				
	Sales per TDP (total dist. point)	\$63,709	\$47,613	\$71,480	\$82,556	\$43,917				

- ✳ GT's is the #3 premium juice brand with about 15% market share in the category.
- ✳ Of the top 3 brands, GT's has the highest sales per point of distribution.



KOMBUCHA BRAND RANK






TOTAL US | CONVENTIONAL – MULO | LAST 12 WKS

Total Kombucha Category Growth +9.8%					
	1	2	3	4	5
					
Sales	\$66.7M	\$28.4M	\$16.9M	\$6.8M	\$4.7M
\$ Growth vs YA	13.6%	3.1%	31.6%	54.2%	3%
Market Share	49%	21%	12%	5%	3%
Sales per TDP (total dist. point)	\$71,480	\$43,917	\$53,674	\$47,306	\$32,148

- * GT's is the #1 kombucha brand, accounting for nearly 50% of sales in the category.
- * GT's has the highest sales per TDP of any brand in the top 5.

PREMIUM JUICE BRAND RANK

TOTAL US | CONVENTIONAL – MULO | LAST 52 WKS






Total Premium Juice Category Growth +3.6%	1		2		3		4		5	
	Sales	\$370M	\$325M	\$260M	\$129M	\$118M				
	\$ Growth vs YA	1.9%	4%	4%	2%	2.2%				
	Market Share	21%	18%	15%	7%	7%				
	Sales per TDP (total dist. point)	\$252,863	\$193,325	\$278,827	\$350,021	\$183,163				

- * GT's is the #3 premium juice brand with about 15% market share in the category.
- * GT's has the highest growth of any brand in the top 5.



KOMBUCHA BRAND RANK



TOTAL US | CONVENTIONAL – MULO | LAST 52 WKS

Total Kombucha Category Growth +5.1%					
	1	2	3	4	5
					
Sales	\$260M	\$118M	\$66M	\$26M	\$20M
\$ Growth vs YA	4%	2.2%	30.3%	57.6%	0.8%
Market Share	48%	22%	12%	5%	4%
Sales per TDP (total dist. point)	\$278,827	\$183,163	\$206,874	\$181,249	\$131,533

- * GT's is the #1 kombucha brand, accounting for about 48% of total sales in the category.
- * GT's has the highest sales per TDP of any brand in the top 5.



KOMBUCHA CATEGORY LATEST 4WKS

	DOLLARS VS YA		UNITS VS YA		SHARE VS YA
CATEGORY	\$61.3M	▲ +7.6%	18.0M	▲ +4.0%	N/A
	\$29.0M	▲ +11.3%	7.9M	▲ +7.6%	47.3 ▲ +1.6
KEVITA	\$12.3M	▼ -3.1%	4.2M	▼ -5.4%	20.0 ▼ -2.2
	\$7.4M	▲ +22%	1.9M	▲ +16.0%	12.0 ▲ +1.4

KOMBUCHA CATEGORY CONTINUES TO SEE STRONG GROWTH IN SUMMER MONTHS. GT'S CONTINUES TO OUTPACE THE CATEGORY.

- GT'S \$VOL +11.3%, UNIT VOL +7.6%





GT's Gingerade and Trilogy are the Best Selling Items the U.S. Kombucha Category

Gingerade and Trilogy are the #1 and #2 best selling items in the category, making up **17% of total kombucha sales!**



Global Kombucha Market



By 2021, 43% of total kombucha sales projected to come from EMEA region

Global Kombucha Market Projected to Grow 24% in Sales 2018 Through 2021

2018
Worldwide Kombucha Sales
\$1,240 MM
(US Dollars)

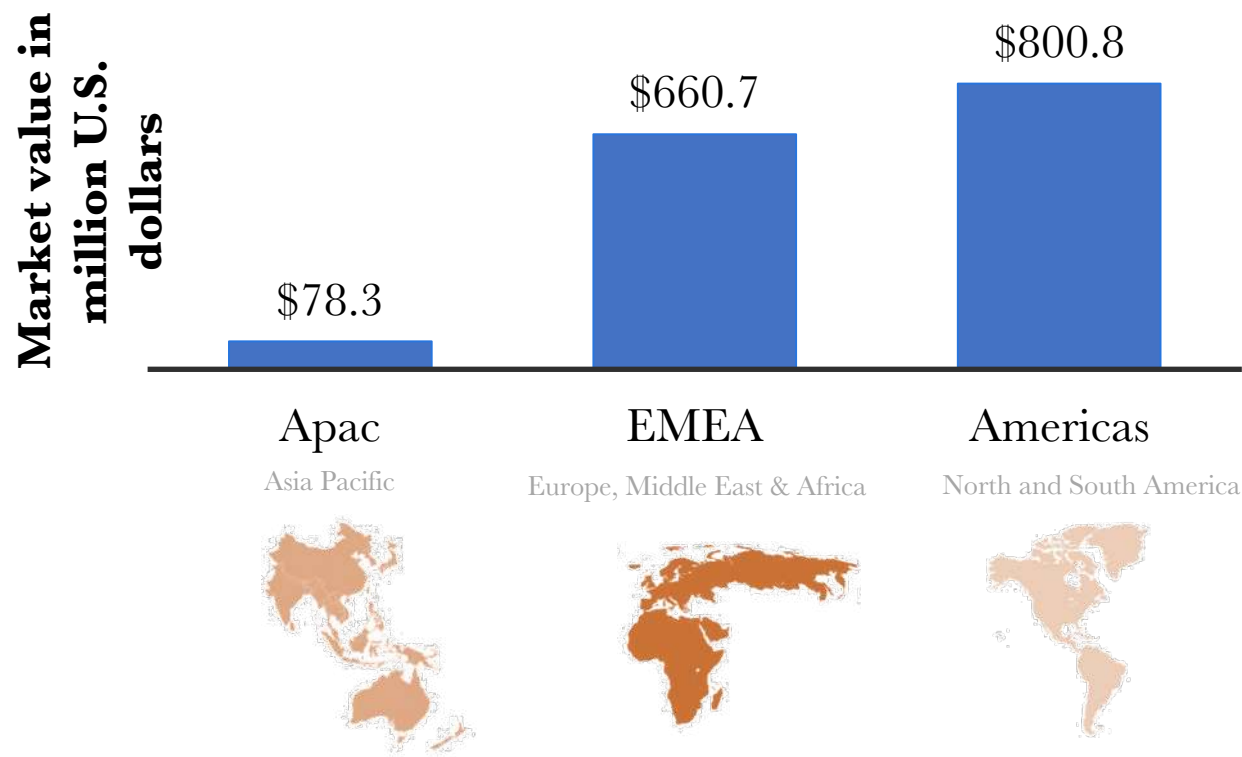


Globe
Newswire

Projected 2021 Worldwide Kombucha Sales

\$1,539.8 MM (US Dollars)

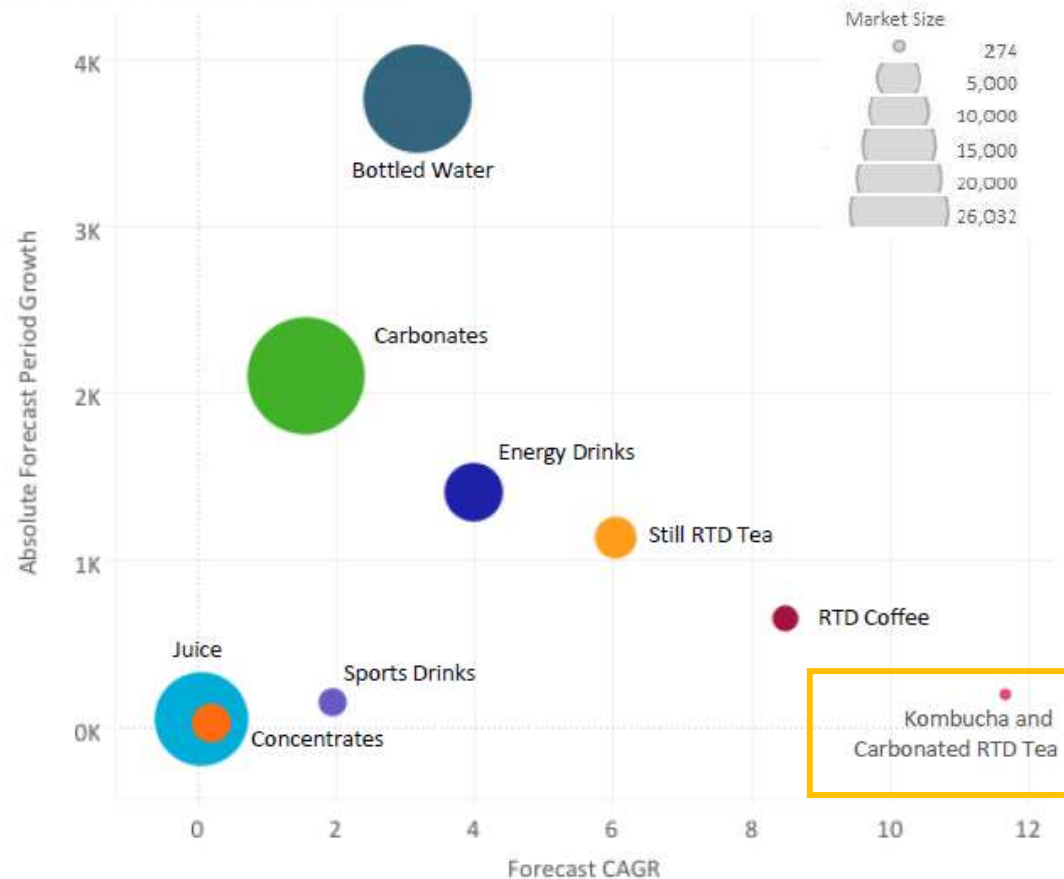
TechNavio



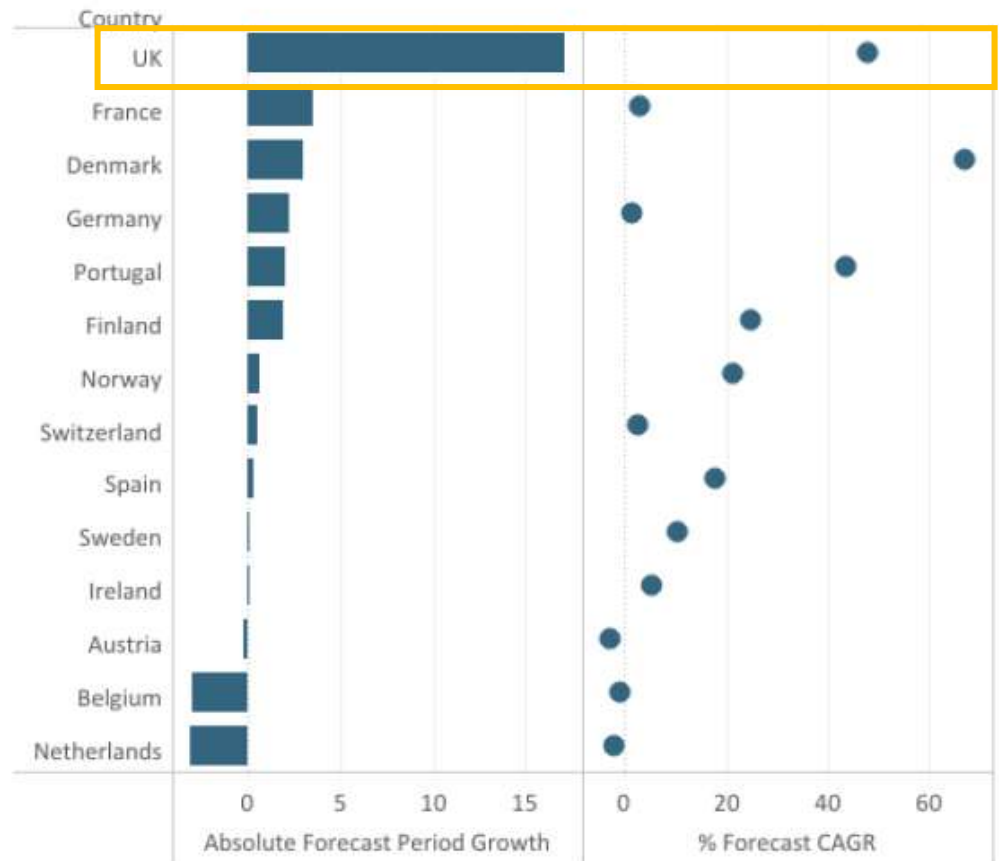


Kombucha is projected to grow at 12% CAGR over the next 5 years, out-pacing all other beverage categories – UK will see the highest growth in Western Europe

Contextualising Kombucha and Carbonated RTD Tea in Western Europe
2019-2024 Forecast CAGR, USD million



Kombucha & Carbonated RTD Tea: Breakdown Forecast Growth
2019-2024, Off-trade Volumes



Offerings & In-Store


[illegible]

Living Food for the Living Body™

**Always Cultured,
Never Compromised**

The bottle in your hand has my name as a symbol of my trust. You have my word: KOMBUCHA is the most authentic Kombucha you can buy. I only request for constant of Eastern tradition, and using herbivore living cultures passed down by my family since 1799, this sacred offering is lovingly handcrafted with goodness you can see, taste, and feel. For an nature intended.

— G.T.S. Founder



KOMBUCHA™
organic & raw

Nutrition Information

Serving Size	Total	% Daily Value
Energy 2.54 kJ (610 kcal)	100%	2%
Total Fat	0.0 g	0%
Total Cholesterol	0.0 g	0%
Total Protein	0.0 g	0%

Where is KOMBUCHA?

Kombucha is a 100% natural & handcrafted product. The KOMBUCHA ingredients are sourced from the finest organic ingredients available. The KOMBUCHA is brewed in a clean, hygienic environment. The KOMBUCHA is brewed in a clean, hygienic environment. The KOMBUCHA is brewed in a clean, hygienic environment.

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ORIGINAL™

DO NOT SHAKE

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Made with 100% pure love

**rebalance · awaken · rethink · rekindle · redefine · rediscover
electrolytes · polyphenols · aminos
reimagine · revive · repurpose · reinvent · reclaim · recapture**

**restart · regain
enzymes
rebirth · renew**

Raw · Vegan · Unpasteurized

16 fl oz

Live Cultures

473 mL

7 22430 00012

100% pure love

RAW-ORG-001

NON-EL. ALC. CULTURE

100% pure love

THANK YOU!