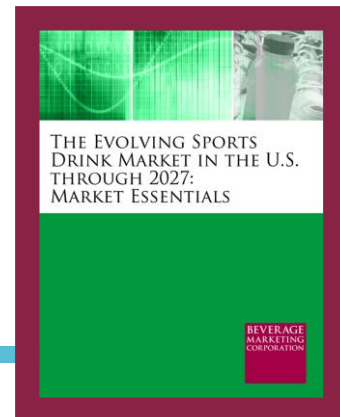


THE EVOLVING SPORTS DRINK MARKET IN THE U.S. THROUGH 2027: MARKET ESSENTIALS

2023 EDITION (Published November 2023. Data through 2022, preliminary 2023 figures and forecasts through 2027.) More than 50 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



Market shifts continue. Get a comprehensive view of the market for U.S. sports beverages and the changing dynamics in the sector. This report includes industry data by geographic region, pricing, consumer demographics, advertising, quarterly growth, distribution channels and packaging, and low-calorie options. It provides statistics for key brands including all-sales-channel-inclusive sales results, market share and growth.

This market report also offers projections and provides users with the data needed to identify opportunities, benchmark their progress and set goals for the future.

The report presents the data in Excel spreadsheets, which it supplements with a concise executive summary highlighting key developments including the covid-19 pandemic as well as a detailed discussion of the leading sports beverage companies.

New for 2023: *The Evolving Sports Drink Market in the U.S.*, as its name suggests, also delves into some of the newer brands that have emerged as a result of the success of BodyArmor in recent years.

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INSIDE:

REPORT OVERVIEW

A brief discussion of key features of this report. **2**

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. **6**

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. **11**



**HAVE
QUESTIONS?**

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THE ANSWERS YOU NEED

This report provides in-depth data, shedding light on various aspects of the market through reliable total market data. Questions answered in this industry research report include:

- How many gallons of sports drinks did U.S. residents consume in 2022 and the first half of 2023?
- How did the packaging mix change in 2022?
- Which distribution channel grew the fastest in 2022? Which sales channels will gain share through 2027?
- What proportion of sports drinks are low-calorie?
- Is the protein drink segment growing? If so, by how much?
- What market share will sports powders and low-calorie sports beverages command by 2027?
- Which distribution channels will gain importance in 2027?

THIS SPORTS BEVERAGES RESEARCH REPORT FEATURES

The report offers an in-depth look at the category, companies and brands shaping the U.S. sports beverage market and looks at historical, current and anticipated segment growth through 2027. It provides perspective on the segment and its many facets, providing sales and volume statistics including total market retail dollar sales, wholesale dollar data and volume data. Through Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of the market including:

- Historical, current and projected market statistics with the granularity necessary to put trends in context and identify pockets of opportunity.
- Regional perspective on the marketplace in the U.S., highlighting volume and growth pattern variations from region to region.
- Company and brand sales volume data. Coverage includes PepsiCo (Gatorade and Gatorade Zero), Coca-Cola (Powerade, Powerade Zero and BodyArmor), Prime Hydration, Electrolit, G2, Kill Cliff, All Sport and Capri Sun Sport. Plus private label
- Analysis of regular vs. reduced calorie sports drink market trends.
- A look at sports beverages by flavor through 2027.
- Data detailing sales by key on- and off-premise distribution channels totaling 100% of market volume.
- Volume and share data by package size historically, currently and five years into the future.
- Advertising expenditures of the leading companies and a look at category spending by media type (including internet advertising).
- Consumer demographic profiles comparing consumers of key brands.
- Perspective on the protein drink market.
- Five-year projections for the sports drink market and its sub-segments.



THE EVOLVING SPORTS DRINK MARKET IN THE U.S. THROUGH 2027: MARKET ESSENTIALS

BEVERAGE
MARKETING
CORPORATION

The Evolving Sports Drink Market in the U.S. through 2027: Market Essentials

November 2023



RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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Contents

Table of Contents

TABLE OF CONTENTS

Executive Summary

| | |
|--|-----------|
| Introduction, Objective & Methodology | 3 |
| Introduction | 4 |
| Objective and Scope | 5 |
| Methodology | 5 |
| Sports Drink Category Definitions | 6 |
| The U.S. Sports Beverage Market | 7 |
| Sports Drinks Share of U.S. Multiple Beverage Market Volume 2017 versus 2022 | 8 |
| Beverage Category Volume Trends 2022 | 9 |
| Volume Share of Multiple Beverage Market by Category 2022 | 9 |
| Sports Drink Wholesale Dollar and Volume Growth 2017 – 2023 | 10 |
| Sports Drink Growth Trend by Segment 2017 – 2022 | 11 |
| Sports Drink Per Capita Consumption 1992 – 2022 | 12 |
| Sports Drink Regional Wholesale Dollar Shares 2022 | 13 |
| Sports Beverage Categories and Trends | 14 |
| Issues and Trends | 15 |
| Leading Sports Drink Brands by Volume 2022 | 16 |
| Leading Sports Drink Brands’ Share of Volume 2017 and 2022 | 17 |
| Sports Drink Flavors by Volume 2022 | 18 |
| Sports Drink Volume by Flavors 2017 and 2022 | 19 |
| Regular and Diet Sports Drink Volume 2022 | 20 |
| Share of Sports Drink Volume: Regular vs. Diet 2017 and 2022 | 21 |
| Sports Drink Distribution Channels by Volume 2022 | 22 |
| Share of Sports Drink Volume by Distribution Channel 2017 and 2022 | 23 |
| Sports Drink Volume by Packaging Types and Sizes 2022 | 24 |
| Share of Sports Drink Volume by Packaging Type and Size 2017 and 2022 | 25 |
| Protein Drink Wholesale Dollars 2017 – 2022 | 26 |
| Outlook and Future | 27 |
| Projected Sports Drink Wholesale Dollar and Volume Compound Annual Growth 2012 – 2027 | 28 |
| Projected Regular and Diet Sports Drink Volume Shares 2022 and 2027 | 29 |
| Projected Sports Drink Volume by Flavor 2022 and 2027 | 30 |
| Sports Drink Distribution Channels by Volume and Share 2022 – 2027 | 31 |
| Projected Sports Drink Volume Share by Distribution Channel 2022 and 2027 | 32 |
| Sports Drink Volume by Packaging Type and Size 2022 – 2027 | 33 |
| Projected Share of Sports Drink Volume by Packaging Type and Size 2022 and 2027 | 34 |
| Protein Drink Wholesale Dollars 2017 – 2027 | 35 |

TABLE OF CONTENTS

TABLE OF CONTENTS ----- i

Profile

Leading Sports Beverage Companies and Their Brands

PepsiCo, Inc. - Gatorade

- Overview ----- 1
- Marketing ----- 2
- Distribution ----- 29

Coca-Cola Company

- Powerade – Overview ----- 32
- Powerade – Marketing ----- 32
- Powerade – Distribution ----- 37
- BodyArmor – Overview ----- 37
- BodyArmor – Marketing ----- 39

Other Sports Drink Brands

- **Prime Hydration** ----- 44
- **Electrolit** ----- 45
- **Biolyte** ----- 46

Exhibit

1. SPORTS BEVERAGE MARKET

- 1.1 New Age Beverage Market Segments Estimated Wholesale Dollar Sales 2017 – 2027
- 1.2 New Age Beverage Market Segments Share of Wholesale Dollar Sales 2017 – 2027
- 1.3 New Age Beverage Market Segments Change in Wholesale Dollar Sales 2018 – 2027
- 1.4 New Age Beverage Market Segments Estimated Retail Dollar Sales 2017 – 2027
- 1.5 New Age Beverage Market Segments Share of Retail Dollar Sales 2017 – 2027
- 1.6 New Age Beverage Market Segments Change in Retail Dollar Sales 2018 – 2027
- 1.7 New Age Beverage Market Segments Estimated Volume 2017 – 2027
- 1.8 New Age Beverage Market Segments Share of Volume 2017 – 2027
- 1.9 New Age Beverage Market Segments Change in Volume 2018 – 2027
- 1.10 Global Sports Beverage Market Estimated Wholesale Dollar Sales, Gallonage and Growth 2002 – 2027
- 1.11 U.S. Sports Beverage Market Wholesale Dollar Sales and Volume 1985 – 2027
- 1.12 U.S. Sports Beverage Market Dollar Sales and Volume Growth 1986 – 2027
- 1.13 U.S. Sports Beverage Market Per Capita Consumption 1985 – 2027
- 1.14 U.S. Sports Beverage Market Compound Annual Growth 1990 – 2027
- 1.15 U.S. Sports Beverage Market Retail Dollar Sales and Growth 2000 – 2027
- 1.16 U.S. Sports Beverage Market Volume and Growth by Quarter 2022 – 2023

TABLE OF CONTENTS

Exhibit

1. SPORTS BEVERAGE MARKET (cont'd)

- 1.17 U.S. Sports Beverage Market Wholesale Dollars and Growth by Quarter 2022 – 2023
- 1.18 U.S. Sports Beverage Market Quarterly Volume Shares in Measured Channels 2003 – 2022

2. SPORTS BEVERAGE REGIONAL MARKETS

- 2.19 Regional Sports Beverage Markets Wholesale Dollar Sales 1986 – 2027
- 2.20 Regional Sports Beverage Markets Share of Wholesale Dollar Sales 1986 – 2027
- 2.21 Regional Sports Beverage Markets Change in Wholesale Dollar Sales 1987 – 2027
- 2.22 Regional Sports Beverage Markets Estimated Volume 1986 – 2027
- 2.23 Regional Sports Beverage Markets Share of Volume 1986 – 2027
- 2.24 Regional Sports Beverage Markets Change in Volume 1987 – 2027

3. REDUCED CALORIE AND REGULAR SPORTS BEVERAGES

- 3.25 Sports Beverage Market Volume by Calorie Count 2017 – 2027
- 3.26 Sports Beverage Market Share of Volume by Calorie Count 2017 – 2027
- 3.27 Sports Beverage Market Change in Volume by Calorie Count 2018 – 2027
- 3.28 Sports Beverage Market Wholesale Dollars by Calorie Count 2017 – 2027
- 3.29 Sports Beverage Market Share of Wholesale Dollars by Calorie Count 2017 – 2027
- 3.30 Sports Beverage Market Change in Wholesale Dollars by Calorie Count 2018 – 2027

4. SPORTS BEVERAGE FLAVORS

- 4.31 Sports Beverage Flavors Estimated Volume by Flavor 2017 – 2027
- 4.32 Sports Beverage Flavors Share of Volume by Flavor 2017 – 2027
- 4.33 Sports Beverage Flavors Change in Volume by Flavor 2018 – 2027

5. SPORTS BEVERAGE SEGMENTS AND DISTRIBUTION CHANNELS

- 5.34 Sports Beverage Segments Wholesale Dollar Sales 1986 – 2027
- 5.35 Sports Beverage Segments Share of Wholesale Dollar Sales 1986 – 2027
- 5.36 Sports Beverage Segments Change in Wholesale Dollar Sales 1987 – 2027
- 5.37 Sports Beverage Distribution Channels Wholesale Dollar Sales 1986 – 2027
- 5.38 Sports Beverage Distribution Channels Share of Wholesale Dollar Sales 1986 – 2027
- 5.39 Sports Beverage Distribution Channels Change in Wholesale Dollar Sales 1987 – 2027
- 5.40 Sports Beverages Estimated Volume by Distribution Channel 2017 – 2027
- 5.41 Sports Beverages Share of Volume by Distribution Channel 2017 – 2027
- 5.42 Sports Beverages Change in Volume by Distribution Channel 2018 – 2027

6. SPORTS BEVERAGE PACKAGING

- 6.43 Sports Beverage Packaging Volume by Size and Type 2017 – 2027
- 6.44 Sports Beverage Packaging Share of Volume by Size and Type 2017 – 2027
- 6.45 Sports Beverage Packaging Change in Volume by Size and Type 2018 – 2027

TABLE OF CONTENTS

Exhibit

7. LEADING SPORTS BEVERAGE COMPANIES AND THEIR BRANDS

- 7.46 Leading Sports Beverage Brands Estimated Wholesale Dollar Sales 2017 – 2022
- 7.47 Leading Sports Beverage Brands Share of Wholesale Dollar Sales 2017 – 2022
- 7.48 Leading Sports Beverage Brands Change in Wholesale Dollar Sales 2018 – 2022
- 7.49 Leading Sports Beverage Brands Estimated Volume 2017 – 2022
- 7.50 Leading Sports Beverage Brands Share of Volume 2017 – 2022
- 7.51 Leading Sports Beverage Brands Change in Volume 2018 – 2022

8. SPORTS BEVERAGE ADVERTISING EXPENDITURES

- 8.52 Leading Sports Beverage Brands Estimated Advertising Expenditures 2017 – 2022
- 8.53 Leading Sports Beverage Brands Share of Advertising Expenditures 2017 – 2022
- 8.54 Leading Sports Beverage Brands Change in Advertising Expenditures 2018 – 2022
- 8.55 Sports Beverage Advertising Expenditures by Media 2017 – 2022
- 8.56 Sports Beverage Share of Advertising Expenditures by Media 2017 – 2022
- 8.57 Sports Beverage Change in Advertising Expenditures by Media 2018 – 2022

9. DEMOGRAPHICS OF THE SPORTS BEVERAGE CONSUMER

- 9.58 Demographics of the Sports Beverage Consumer 2022
- 9.59 Demographics of the Gatorade Consumer 2022
- 9.60 Demographics of the Powerade Consumer 2022

10. THE RTD PROTEIN DRINK MARKET

- 10.61 RTD Protein Drink and Meal Replacement Market Estimated Volume by Segment 2017 – 2027
- 10.62 RTD Protein Drink and Meal Replacement Market Share of Volume by Segment 2017 – 2027
- 10.63 RTD Protein Drink and Meal Replacement Market Change in Volume by Segment 2018 – 2027
- 10.64 RTD Protein Drink and Meal Replacement Market Estimated Wholesale Dollars by Segment 2017 – 2027
- 10.65 RTD Protein Drink and Meal Replacement Market Share of Wholesale Dollars by Segment 2017 – 2027
- 10.66 RTD Protein Drink and Meal Replacement Market Change in Wholesale Dollars by Segment 2018 – 2027
- 10.67 Leading RTD Protein Drink and Meal Replacement Brands Estimated Volume 2017 – 2022
- 10.68 Leading RTD Protein Drink and Meal Replacement Brands Share of Volume 2017 – 2022
- 10.69 Leading RTD Protein Drink and Meal Replacement Brands Change in Volume 2018 – 2022

TABLE OF CONTENTS

Exhibit

10. THE RTD PROTEIN DRINK MARKET (cont'd)

- 10.70 Leading RTD Protein Drink and Meal Replacement Brands Estimated Wholesale Dollars
2017 – 2022
- 10.71 Leading RTD Protein Drink and Meal Replacement Brands Share of Wholesale Dollars
2017 – 2022
- 10.72 Leading RTD Protein Drink and Meal Replacement Brands Change in Wholesale Dollars
2018 – 2022

The Gatorlytes powder product that contains elevated amounts of sodium and potassium. In 2022, PepsiCo released a Gatorlyte Rapid Rehydration RTD line, catching the emerging rise of a “rapid hydration” subsegment in the sports drink market.

- Packaged in 20-ounce bottles, Gatorlyte Rapid Rehydration initially came in Cherry Lime, Mixed Berry, Orange, Strawberry Kiwi and Watermelon flavors. In 2023, Lime Cucumber was added, along with two Gatorlyte Zero varieties — Lemon-Lime and Strawberry Kiwi.
- Each 20-ounce bottle contains 490 milligrams of sodium, 120 milligrams of calcium, 350 milligrams of potassium, 105 milligrams of magnesium and 1,040 milligrams of chloride.
- More recently, it bowed Gatorlyte Powder in 3.1-ounce packages containing six packets. The new product is different from the G Endurance Gatorlytes in terms of electrolyte composition and serving size.

In early 2023, PepsiCo rolled out an energy drink called Fast Twitch whose labels announce it is “from the makers of Gatorade”.

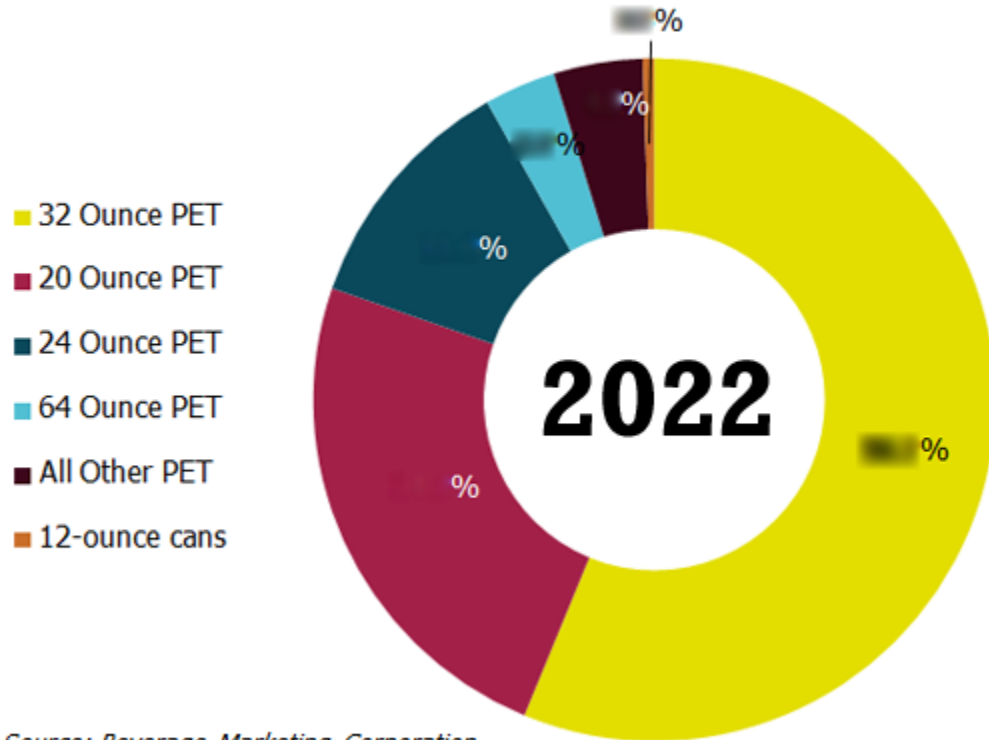
- The zero-sugar (5 calorie) line is packaged in 12-ounce bottles in Cool Blue, Glacier Freeze, Orange, Strawberry Lemonade, Strawberry Watermelon and Tropical Mango flavors. It contains 200 milligrams of caffeine, as well as electrolytes and vitamins B₆ and B₁₂. Fast Twitch was made available in 12-packs for \$23.99 and singles of 12-ounce bottles for \$2.79.
- Fast Twitch Pre-Workout Supplement is powders packaged in 16.2-ounce canisters, in Fruit Punch and Grape.

**REGIONAL SPORTS BEVERAGE MARKETS
SHARE OF VOLUME
1986 – 2027(P)**

| Year | Midwest | Northeast | South | West | TOTAL |
|-------------|----------------|------------------|--------------|-------------|--------------|
| 1986 | ███% | ███% | ███% | ███% | ███% |
| 1987 | ███% | ███% | ███% | ███% | ███% |
| 1988 | ███% | ███% | ███% | ███% | ███% |
| 1989 | ███% | ███% | ███% | ███% | ███% |
| 1990 | ███% | ███% | ███% | ███% | ███% |
| 1991 | ███% | ███% | ███% | ███% | ███% |
| 1992 | ███% | ███% | ███% | ███% | ███% |
| 1993 | ███% | ███% | ███% | ███% | ███% |
| 1994 | ███% | ███% | ███% | ███% | ███% |
| 1995 | ███% | ███% | ███% | ███% | ███% |
| 1996 | ███% | ███% | ███% | ███% | ███% |
| 1997 | ███% | ███% | ███% | ███% | ███% |
| 1998 | ███% | ███% | ███% | ███% | ███% |
| 1999 | ███% | ███% | ███% | ███% | ███% |
| 2000 | ███% | ███% | ███% | ███% | ███% |
| 2001 | ███% | ███% | ███% | ███% | ███% |
| 2002 | ███% | ███% | ███% | ███% | ███% |
| 2003 | ███% | ███% | ███% | ███% | ███% |
| 2004 | ███% | ███% | ███% | ███% | ███% |
| 2005 | ███% | ███% | ███% | ███% | ███% |
| 2006 | ███% | ███% | ███% | ███% | ███% |
| 2007 | ███% | ███% | ███% | ███% | ███% |
| 2008 | ███% | ███% | ███% | ███% | ███% |
| 2009 | ███% | ███% | ███% | ███% | ███% |
| 2010 | ███% | ███% | ███% | ███% | ███% |
| 2011 | ███% | ███% | ███% | ███% | ███% |
| 2012 | ███% | ███% | ███% | ███% | ███% |
| 2013 | ███% | ███% | ███% | ███% | ███% |
| 2014 | ███% | ███% | ███% | ███% | ███% |
| 2015 | ███% | ███% | ███% | ███% | ███% |
| 2016 | ███% | ███% | ███% | ███% | ███% |
| 2017 | ███% | ███% | ███% | ███% | ███% |
| 2018 | ███% | ███% | ███% | ███% | ███% |
| 2019 | ███% | ███% | ███% | ███% | ███% |
| 2020 | ███% | ███% | ███% | ███% | ███% |
| 2021 | ███% | ███% | ███% | ███% | ███% |
| 2022 | ███% | ███% | ███% | ███% | ███% |
| 2023(p) | ███% | ███% | ███% | ███% | ███% |
| 2027(P) | ███% | ███% | ███% | ███% | ███% |

(p) Preliminary; (P) Projected
 Source: Beverage Marketing Corporation

Share of Sports Drink Volume by Packaging Type and Size 2022



Source: Beverage Marketing Corporation