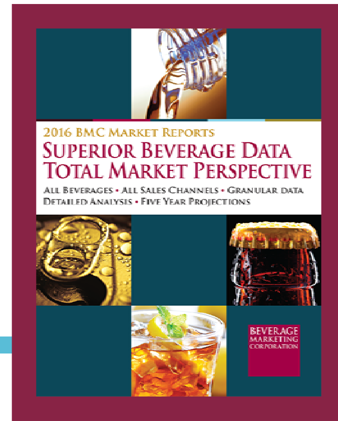
U.S. ENERGY DRINKS THROUGH 2020

2016 EDITION (Published October 2016. Data through 2015. Market projections through 2020.) More than 150 pages, with extensive text analysis, graphs, charts and more than 40 tables



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Get the facts and find out what is next for this dynamic segment where new players strive to grow and hope to take market share from the industry leaders. This research report profiles companies and brands and examines trends and issues impacting energy drinks and energy shots. It covers regional markets, quarterly growth, packaging, distribution, demographics and advertising breakouts for 18 media types, a broadened scope of market forecasts, expanded discussion of small energy drink companies, and more.

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The answers you need

U.S. Energy Drinks through 2020 provides in-depth data and analysis, shedding light on various aspects of the market through reliable data and discussions of what the numbers really mean. Questions answered in this in-depth research study include:

- What amount of energy drinks does the typical U.S. consumer drink in a year, and how has that changed?
- What are the latest developments in the packaging mix for energy drinks?
- Which regions have the strongest markets?
- What percentage of volume is full- versus low-calorie?
- How have brand rankings changed recently?
- Who are the smaller players and what are they doing to differentiate themselves?
- What are the growth prospects for the energy drink category?
- What is happening in the energy shot and healthy energy (including organic) sub-segments?
- What slice of the U.S. market share will slim cans command by 2020? How will that compare with the share held by 16-ounce (and larger)?
- How can I contact the leading energy drink and energy shot companies and succinctly ascertain what products they market in this segment?

This report features

This comprehensive report offers an in-depth look at the category, companies and brands shaping the market and the forces impacting current and anticipated growth through 2020. This industry report provides sales and volume statistics including total market retail dollar sales, wholesale dollar data and volume data. It also shares statistics and discussion of the energy shot market, as well as an overview of the fledgling market for healthier energy drink options.

Through a combination of discussion backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of all facets of the market including:

- Historical, current and projected market statistics, plus authoritative analysis to provide insight and put trends in context.
- Regional perspective on the U.S. marketplace, highlighting volume and growth pattern variations from region to region through 2020.
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales volume data and market shares. Coverage includes Red Bull, Monster Beverage (including Monster, NOS and Full Throttle), Rockstar, PepsiCo (Amp and Kickstart), National Beverage (Rip It), HiBall and others.
- Analysis of regular vs. reduced calorie energy drink trends.
- Data detailing sales by key on- and off-premise distribution channels totaling 100% of market volume.
- A detailed analysis of packaging, analyzing volume and share by package size.
- Advertising expenditures of the leading energy drink and energy shot companies and a look at category spending by media type (including Internet and Hispanic-targeted advertising).

- Consumer demographic profiles comparing consumers of key brands.
- Perspective on the energy shot market and healthy energy segment and players, and how they affect the mainstream energy drink market.
- Five-year projections for the market and its packaging mix through 2020.
- A directory of the leading energy drink companies in the U.S.

U.S. Energy Drinks through 2020

October 2016

BEVERAGE MARKETING CORPORATION

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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Starting about four years ago, regulatory concerns started to increase – although the industry appears to have weathered the storm for now.

- As energy drinks have burgeoned, there has been increased scrutiny by lawmakers who have seen moves to banish or limit brands like Red Bull in overseas markets like France and Ireland.
- Although most energy drinks do not carry more caffeine than, say, a grande-size Starbucks, their unorthodox marketing methods and targeting of younger consumers have made them a lightning rod for some consumer groups.
- It hasn't helped that some brands have gone out with extreme versions of the drink, or that marketers of conventional energy drinks like Monster and Rockstar have pushed the limits by moving to 24-ounce cans (not all of them resealable) and even 32-ounce cans.
- Contrary to frequent predictions, so far there has not been any meaningful attempts at the legal or regulatory level to rein in the drinks (except for the entirely separate category of alcoholic energy drinks), even under the more activist Obama Administration.
- That said, Monster Beverage's disclosure that the New York state Attorney General was investigating its Monster brand (along with a couple of other brands) was enough to sent its shares skittering downward, revealing how great a concern that issue is to some investors. (In October 2014, the AG leaked information to the *New York Post* that Monster was using college-age contractors to encourage the mixing of Monster and alcohol, a charge the company vehemently denied.)
- Although the stock decline served to make the brand more affordable to potential suitors like Coca-Cola, the assumption among investors seemed to be that the threat of regulatory sanctions (it is not clear on what grounds, it should be noted) would serve as a deterrent to an acquisition by a strategic partner.
- Furthermore, in September 2012, reports surfaced that Monster has been linked to (although not proven to have caused) five deaths, including that of a 14-year-old girl named Anais Fournier who consumed two 24-ounce cans of Monster. This sent the stock spiraling down again.
- In October, the parents of Fournier filed a wrongful death lawsuit against Monster Beverage in California Superior Court, Riverside County. Monster replied that it felt it was not responsible for her death, noting that "more than eight billion cans" of Monster Energy have been sold since 2002 without any known fatalities and that Monster contains less caffeine per ounce than a cup of coffee.

- In August 2012, in response to an April letter sent by U.S. Senator Dick Durbin, the FDA essentially dismissed a request to investigate the formulation and marketing of energy drinks. Following the public disclosure of the deaths, Durbin – this time joined by Senator Richard Blumenthal – wrote another letter to the FDA urging the agency to study the effects of caffeine and other ingredients particularly on children and adolescents.

Exhibit 4.15

U.S. ENERGY DRINK MARKET
SHARE OF VOLUME BY DISTRIBUTION CHANNEL
2010 – 2020(P)

Distribution Channels	2010	2011	2012	2013	2014	2015	2020(P)
OFF-PREMISE							
Convenience Stores	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Mass Merchandisers	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Supermarkets	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Drug Stores	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
All Other*	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
ON-PREMISE							
Foodservice	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Vending	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
All Other**	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
TOTAL CHANNELS	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

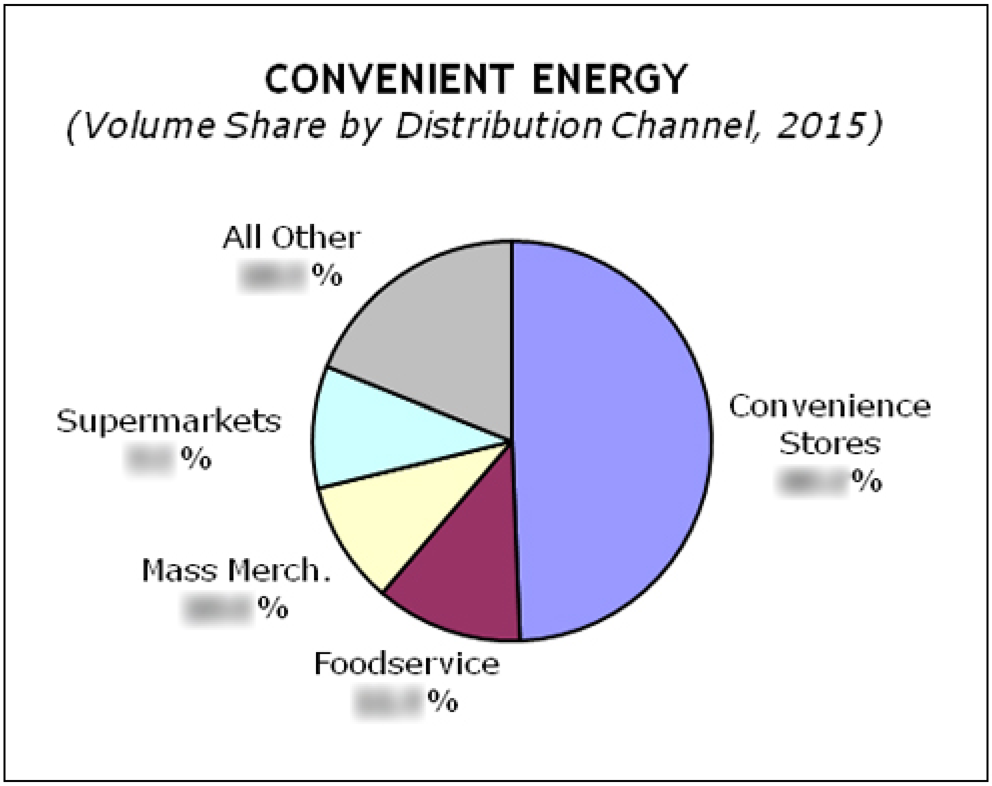
(P) Projected

n/a: Not Available

** Includes club stores, dollar stores, health-food stores, military and online retailers.*

*** Includes schools, "mom & pop" stores, airlines, stadiums, etc.*

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation