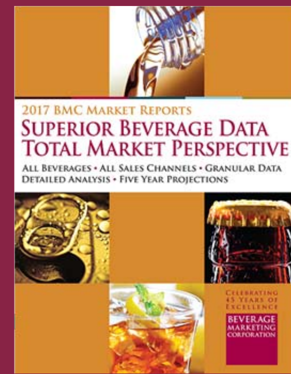
U.S. ENERGY DRINKS THROUGH 2021

2017 EDITION (Published September 2017. Data through 2016. Market projections through 2021.) More than 150 pages, with extensive text analysis, graphs, charts and more than 40 tables



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 from Beverage Marketing Corporation 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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INSIDE:

HAVE QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

The answers you need

U.S. Energy Drinks through 2021 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 2021? 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 2021. 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.

- 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 2021.
- 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 2021.

- A directory of the leading energy drink companies in the U.S.

U.S. Energy Drinks through 2021

September 2017

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.

Table of Contents

Contents

TABLE OF CONTENTS

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

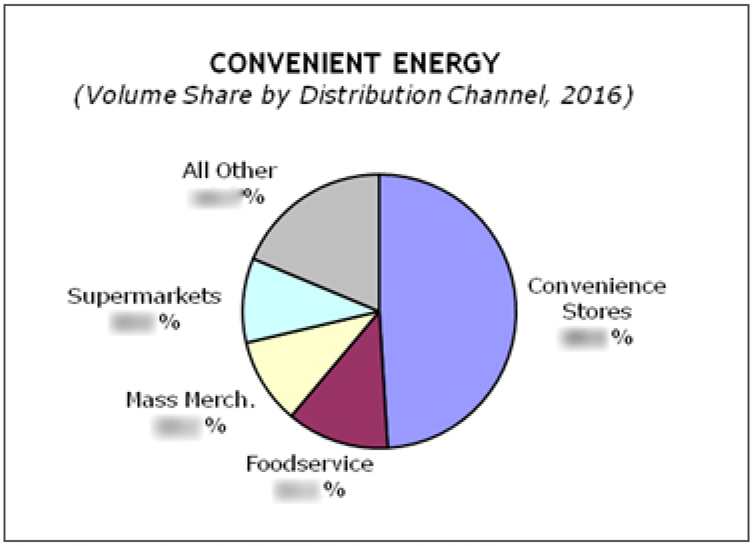
Chapter

TABLE OF CONTENTS

Chapter

Since the Red Bull brand arrived in the U.S. in 1997, the energy drink category has been a fast-growth, high-margin phenomenon. As the segment coalesced around a handful of major brands, most of them moving to retail through captive distribution systems, for a while there was an intense flow of new entrants, some of them very well financed, but that has slowed as the difficulty of making much headway has become clear. Thus, many smaller brands either seek to carve out an identity as healthier than mainstream brands, with their artificial ingredients and curious and misunderstood fortifiers like taurine, or have sought to occupy carefully targeted marketing niches.

- In mid-2015, Coca-Cola completed a minority investment of 16% in Monster Beverage Corporation, which it had distributed in about half of the U.S. and in some overseas markets. The sweeping deal, for $2.15 billion, called for Monster to move almost entirely into the Coke network in North America and to ride its partner into new overseas markets including China.
- It also involved a brand swap that saw Monster Beverage take ownership of all of Coke's domestic and overseas energy brands, under names like NOS, Full Throttle, Burn and Relentless, even as Monster hived off its non-energy brands to Coke, including Peace Tea, Hubert's Lemonade and the company's once-eponymous Hansen's natural sodas.
- The biggest victims of the deal were the Anheuser-Busch beer houses that distributed Monster in nearly half the country, who lost a major moneymaker and growth engine that sometimes accounted for 30% of their profit.
- Beneficiaries included the Coke bottling system, as well as key rivals Red Bull and Rockstar, which were able to exploit the Monster distribution transition (as well as its decision to defer taking a price hike, as Red Bull successfully did) until after the transition. By fall 2015, the Monster/Coke transition had been traversed and the disruptions were subsiding, and Monster had put through its own price increase roughly matching Red Bull's of nearly a year earlier.
- Although Coke/Monster was the most striking development in energy, there has been plenty more activity. Red Bull North America has continued its long-term move to self-distribute the brand in major metropolitan areas, terminating other independent houses.
- One of the key independent brands available to the independent distribution system, Xyience, settled in under its new owner Big Red Ltd., after its owners the Fertitta brothers, with far better prospects in their Ultimate Fighting Championship mixed-martial arts empire and other involvements, threw in the towel. It has since pivoted from a sponsorship of the polarizing UFC to an emphasis on college football.



Source: Beverage Marketing Corporation

Exhibit 4.15

U.S. ENERGY DRINK MARKET
SHARE OF VOLUME BY DISTRIBUTION CHANNEL
2011 – 2021(P)

Distribution Channels	2011	2012	2013	2014	2015	2016	2021(P)
OFF-PREMISE							
Convenience Stores	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Mass Merchandisers	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Supermarkets	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Drug Stores	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
All Other*	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
ON-PREMISE							
Foodservice	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Vending	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
All Other**	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
TOTAL CHANNELS	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**

(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