

U.S. ENERGY DRINKS TOPLINE

2017 EDITION (Published September 2017. Data through 2016. Market projections through 2021.) More than 20 pages, with extensive text analysis, graphs, charts.

U.S. Energy Drinks Topline from Beverage Marketing Corporation provides a brief overview of the energy drinks category with key data and five year forecasts. Perfect for investors, entrepreneurs requiring statistics for their business plan, ad agencies preparing an account pitch or anyone who needs a quick view of the energy drinks sector.

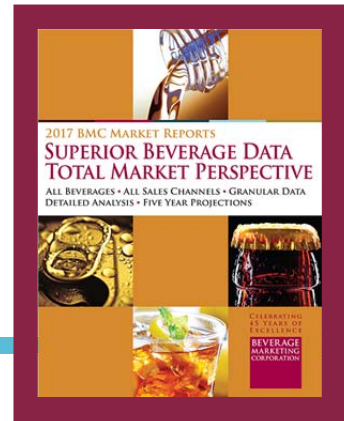
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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

U.S. Energy Drinks Topline offers a concise summary of the overall market. Questions answered include:

- What has been the long-term trend in energy drinks volume and wholesale dollar sales?
- What is the share breakdown of the energy drinks market in terms of full-calorie versus diet? How has this changed in the last nine years?
- What are the wholesale dollar and volume trends for the energy shot segment?
- What are the leading brands and media for energy drink advertising expenditures?

THIS REPORT FEATURES

U.S. Energy Drinks Topline contains key information and identifies key trends concerning the U.S. energy drink market; it features category volume, wholesale and retail dollar sales and per capita consumption data; wholesale dollar sales by calorie; leading advertisers and advertising media; and five-year projections.

U.S. Energy Drinks Topline

September 2017



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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Since the Red Bull brand arrived in the U.S. in 1997, the energy drink category has been fast-growth and high-margin. As the segment centered on a handful of major brands, most of them moving to retail through captive distribution systems, for a while there was an large 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.

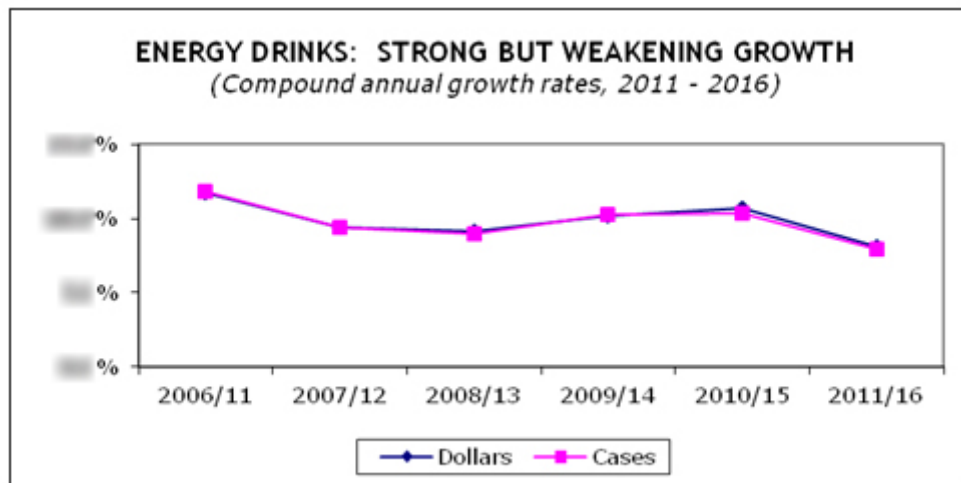
Exhibit 3

**U.S. ENERGY DRINK MARKET
COMPOUND ANNUAL GROWTH
2002 – 2021(P)**

Years	Compound Annual Growth	
	Wholesale Dollars	Cases
1997/02	10.5%	10.5%
1998/03	10.5%	10.5%
1999/04	10.5%	10.5%
2000/05	10.5%	10.5%
2001/06	10.5%	10.5%
2002/07	10.5%	10.5%
2003/08	10.5%	10.5%
2004/09	10.5%	10.5%
2005/10	10.5%	10.5%
2006/11	10.5%	10.5%
2007/12	10.5%	10.5%
2008/13	10.5%	10.5%
2009/14	10.5%	10.5%
2010/15	10.5%	10.5%
2011/16	10.5%	10.5%
2016/21(P)	10.5%	10.5%

(P) Projected

Source: Beverage Marketing Corporation



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