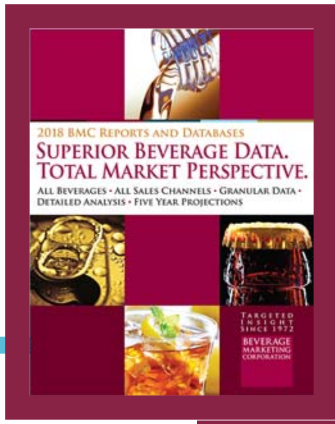
Energy Drinks in the U.S. through 2022

2018 Edition (Published November 2018. Data through 2017. Market projections through 2022.) 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 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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HAVE QUESTIONS? Contact Charlene Harvey: 212-688-7640 x 1962 charvey@beveragemarketing.com

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The answers you need

Energy Drinks in the U.S. through 2022 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 2022? 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 2022. 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 2022.
- 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 2022.

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

Energy Drinks in the U.S. through 2022

November 2018

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R E S E A R C H ● D A T A ● C O N S U L T I N G

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

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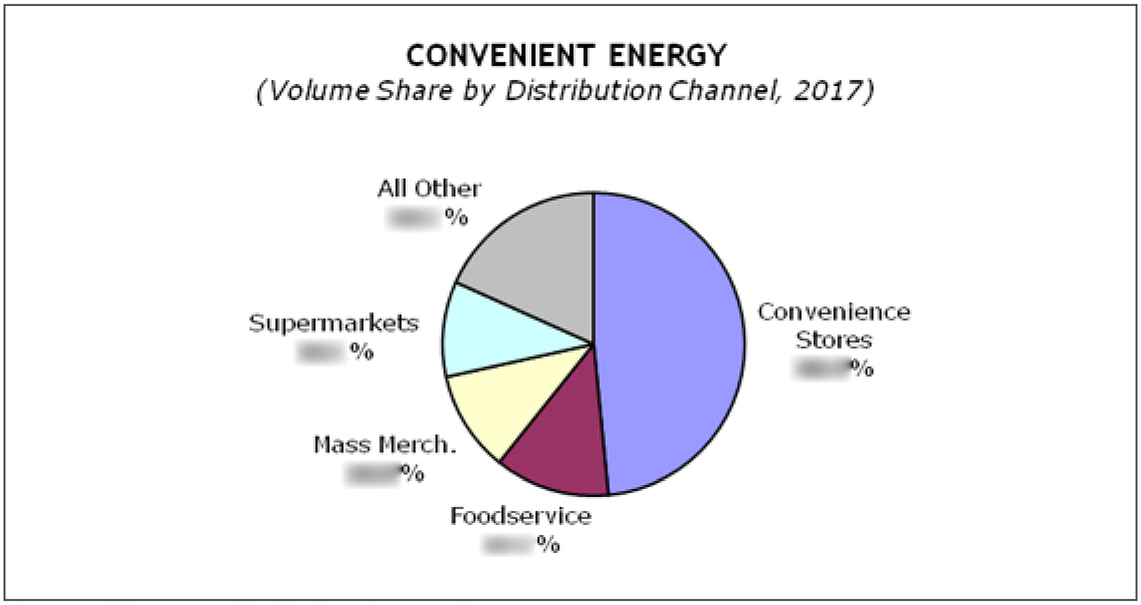
Since the Red Bull brand broke upon the U.S. scene 20 years ago, in 1997, the energy drink category has been a fast-growth, high-margin phenomenon, not even derailed by the financial crisis and accompanying recession 10 years into its run. As the segment coalesced around a handful of major brands, most of them moving to retail through captive distribution systems, for a while there was an intense flow of new entrants on the conventional energy side, some of them very well financed, but very few made much headway. So the main tack taken these days by smaller brands is to carve out an identity as healthier than mainstream brands, with their artificial ingredients and curious and misunderstood fortifiers like taurine, or to occupy carefully targeted marketing niches, as Mossy Oak tries to do with those who are into hunting and fishing.

- But could this dynamic finally be changing? As 2017 unfolded, we were confronted with the specter of dramatically slowed growth among the major brands, in the single-digit range rather than the double digits we had long been accustomed to, and few convincing rationales for why this might be a temporary glitch. (Yes, Monster Energy was dogged by some production snafus that led to out-of-stocks and delayed new-product launches, and yes, the core convenience-store channel was dogged by rising gas prices, cool summer weather and then massive hurricanes in Texas and Florida.)

- Could it be that the entering cohort of consumers was moving to other options, including cold-brewed coffee, plant-based energizers like yerba mate and perhaps those healthy-energy drinks in general? Certainly, beer giant Anheuser-Busch placed a modest bet on that happening with its acquisition of organic entry HiBall and PepsiCo raced a couple of organic, yerba-mate-based entries to market. Of course, there is a chance this is just a momentary hiccup in the category's growth, and retailers were taking solace in the fact that the three biggest players, Red Bull, Monster and Rockstar, still remain independent, and hence retain their entrepreneurial spirit and innovation capabilities.

- In terms of the category's recent history, the biggest reverberations came from Coca-Cola's move in August 2014 to make 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, Blue Sky and the company's once-eponymous Hansen's natural sodas.



Source: Beverage Marketing Corporation

Exhibit 4.15

U.S. ENERGY DRINK MARKET

SHARE OF VOLUME BY DISTRIBUTION CHANNEL

2012 – 2022(P)

Distribution Channels	2012	2013	2014	2015	2016	2017	2022(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