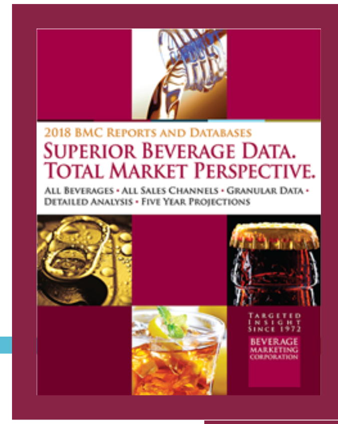
U.S. Energy Drinks Topline

2018 Edition (Published November 2018. Data through 2017. Market projections through 2022.) More than 20 pages, with text analysis, graphs and charts.



U.S. Energy Drinks Topline from Beverage Marketing Corporation provides a statistical 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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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 as well as retail and wholesale dollar sales? What are the expectations for the market by 2022?

- What is the share breakdown of the energy drinks market in terms of full-calorie versus diet in 2017? How has this changed in the last 11 years?

- What is 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 through 2022.

U.S. Energy Drinks Topline

November 2018

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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Summary

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.

Exhibit 3

U.S. ENERGY DRINK MARKET
COMPOUND ANNUAL GROWTH
2002 – 2022(P)

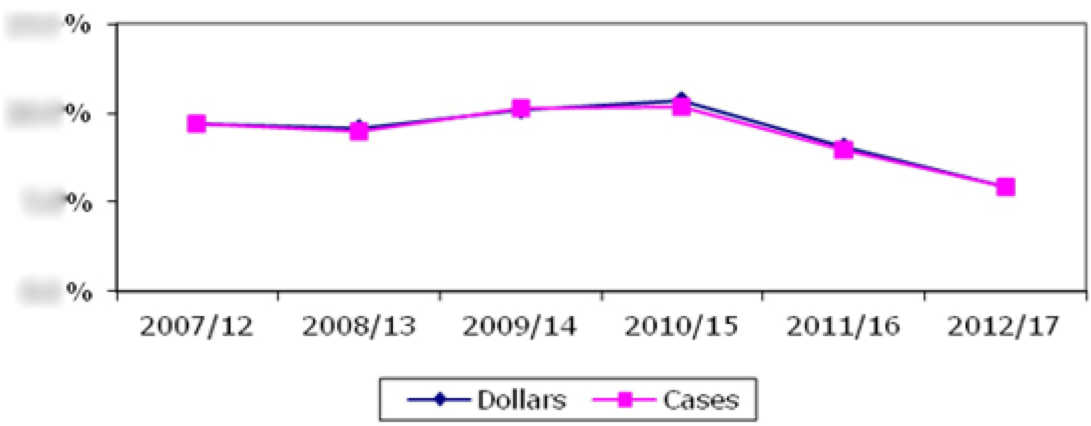
	Compound Annual Growth	
Years	**Wholesale Dollars**	**Cases**
1997/02	[illegible]%	[illegible]%
1998/03	[illegible]%	[illegible]%
1999/04	[illegible]%	[illegible]%
2000/05	[illegible]%	[illegible]%
2001/06	[illegible]%	[illegible]%
2002/07	[illegible]%	[illegible]%
2003/08	[illegible]%	[illegible]%
2004/09	[illegible]%	[illegible]%
2005/10	[illegible]%	[illegible]%
2006/11	[illegible]%	[illegible]%
2007/12	[illegible]%	[illegible]%
2008/13	[illegible]%	[illegible]%
2009/14	[illegible]%	[illegible]%
2010/15	[illegible]%	[illegible]%
2011/16	[illegible]%	[illegible]%
2012/17	[illegible]%	[illegible]%
2017/22(P)	[illegible]%	[illegible]%

(P) Projected

Source: Beverage Marketing Corporation

ENERGY DRINKS: STRONG BUT WEAKENING GROWTH

(Compound annual growth rates, 2012 - 2017)



Source: Beverage Marketing Corporation