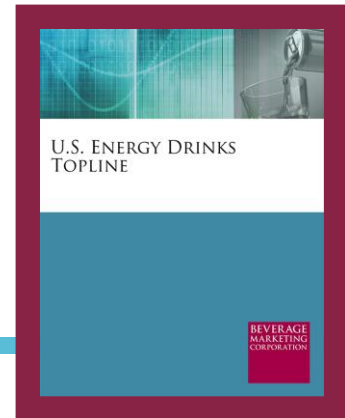


U.S. ENERGY DRINKS TOPLINE

2019 EDITION (Published November 2019. Data through 2018. Market projections through 2023.) 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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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 as well as retail and wholesale dollar sales? What are the expectations for the market by 2023?
- What is the share breakdown of the energy drinks market in terms of full-calorie versus diet in 2018? How has this changed in the last 12 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 2023.



U.S. ENERGY DRINKS TOPLINE

**BEVERAGE
MARKETING
CORPORATION**

U.S. Energy Drinks Topline

November 2019



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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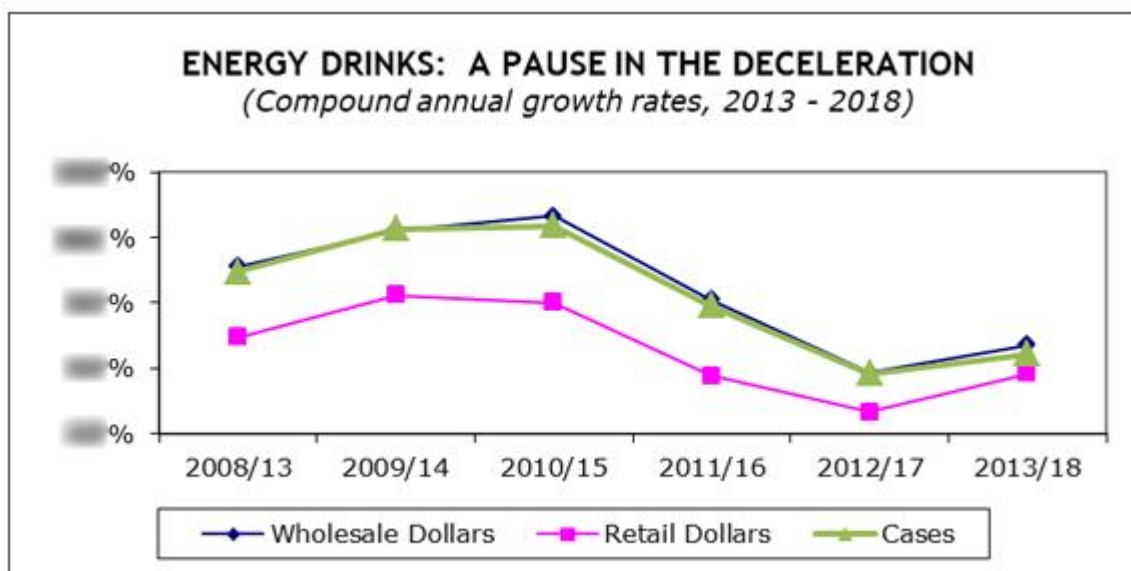
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Since the Red Bull brand broke upon the U.S. scene more than 20 years ago, in 1997, the energy drink category has been a fast-growth, high-margin phenomenon, not even derailed by the financial crisis and accompanying recession 10 years into its run.

- The main tack taken by smaller brands was 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 Golazo tried to do with soccer in the futbol-crazy Pacific Northwest (ultimately unsuccessfully) or as Mossy Oak tries to do with those who are into hunting and fishing.
- However, key exceptions have emerged in the past year or so. The most notable of these is VPX's Bang energy drink brand, which contains a potent mix of 300 milligrams of caffeine and such other fortifiers as creatine and has ignited to the point where it forced reactions from rivals like Monster and Rockstar, whether attempts to duplicate it or, in Monster's case, filing lawsuits.
- Also significant is the emergence of other brands, such as C4, which helps to buttress the case that "performance energy" is not just a one-brand phenomenon, as is energy shots—which similarly exploded on the scene but then stagnated.
- There may, or may not, be a significant threat to the energy drink category emerging from other fast-growing categories, including cold-brewed coffee and plant-based energizers like yerba mate. Cold-brewed coffee carries the advantages of being all-natural, often lacking in calories (when drunk black), being easy to differentiate in a variety of ways (say, via nitro expressions) and of capturing the imagination of a younger cohort of consumers. Given the core energy category's continued brisk growth, it is hard to make a case that coffee is having a significant dampening effect, but it is early days, and the energy drink companies are being vigilant.



Source: Beverage Marketing Corporation

Exhibit 3

**U.S. ENERGY DRINK MARKET
COMPOUND ANNUAL GROWTH
2002 – 2023(P)**

Years	Compound Annual Growth	
	Wholesale Dollars	Cases
1997/02	█████ %	█████ %
1998/03	█████ %	█████ %
1999/04	█████ %	█████ %
2000/05	█████ %	█████ %
2001/06	█████ %	█████ %
2002/07	█████ %	█████ %
2003/08	█████ %	█████ %
2004/09	█████ %	█████ %
2005/10	█████ %	█████ %
2006/11	█████ %	█████ %
2007/12	█████ %	█████ %
2008/13	█████ %	█████ %
2009/14	█████ %	█████ %
2010/15	█████ %	█████ %
2011/16	█████ %	█████ %
2012/17	█████ %	█████ %
2013/18	█████ %	█████ %
2018/23(P)	█████ %	█████ %

(P) Projected

Source: Beverage Marketing Corporation