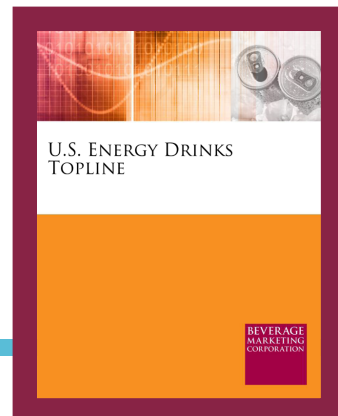


U.S. ENERGY DRINKS TOPLINE

2020 EDITION (October 2020. Data through 2019.
Market projections through 2024.) 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. Includes a brief overview of key trends including discussion of the impact of the covid-19 pandemic.

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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 2024 and how has covid-19 altered these expectations?
- What is the share breakdown of the energy drinks market in terms of full-calorie versus diet in 2019? How has this changed over the 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 2024.



U.S. ENERGY DRINKS TOPLINE

**BEVERAGE
MARKETING
CORPORATION**

U.S. Energy Drinks Topline

October 2020



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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Energy shots are considered liquid energy supplements rather than energy drinks, which allows retailers to minimize cannibalization.

- Since they contain so little liquid and are meant to be consumed quickly, energy shots do not need to be refrigerated.
- Energy shots are placed near the cash register where impulse items reside. Since energy shots usually retail for about \$2.99, c-store and other operators are glad to stock energy shots in lieu of some of the lower-priced items that have traditionally populated the ring-up counter.
- Energy shots do not take much space as the standard size is 2 ounces. However, as in the energy drink market, some energy shot marketers have introduced larger sizes — such as 2.5-, 3- and even 4-ounce — to differentiate themselves.

In addition to being merchandized differently, energy shots also have a different target audience than energy drinks.

- Energy shots tend to appeal to older consumers — mostly men — looking for a quick source of energy but may not be inclined to energy drinks, which are targeted to teens that enjoy them also for the taste and refreshment.
- Since energy shots have less liquid, truckers are a target since they have a need to travel long distances with a minimum of rest room breaks.
- Of course, some consumers imbibe both energy shots and energy drinks, even occasionally one right after the other.

The story of energy shots is of a single brand that reached utter and tenacious dominance of the segment, then leveled off, but still does not seem to have left the door open to new entrants.

- The Novi, Michigan-based company created by Manoj Bhargava launched 5-Hour Energy only in 2004 in GNC stores with no marketing support whatsoever, with Bhargava's team following their gut to the right positioning and line extensions. It had gotten its start at venues like truck stops, where drivers were seeking a dose of energy but wanted to consume as little liquid as possible given their long shifts at the wheel.

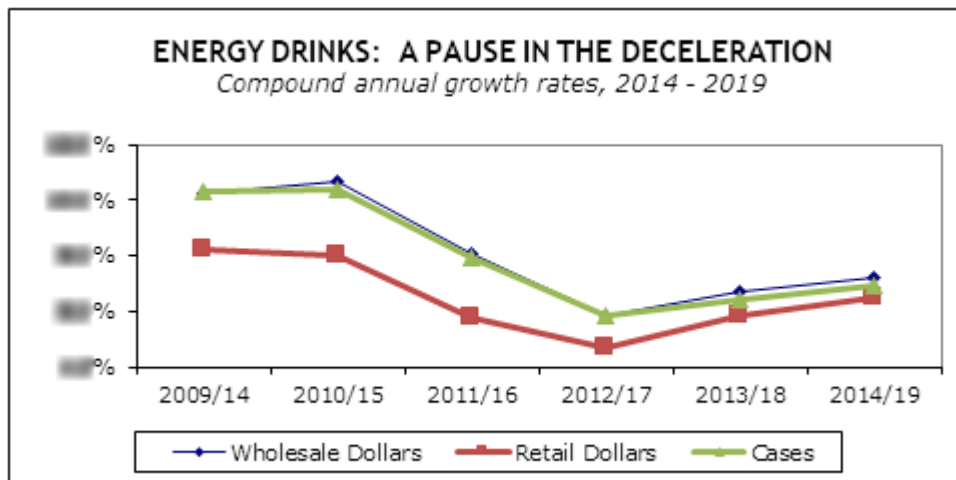
Exhibit 3

**U.S. ENERGY DRINK MARKET
COMPOUND ANNUAL GROWTH
2002 – 2024(P)**

Years	Compound Annual Growth		
	Wholesale Dollars	Retail Dollars	Gallons
1997/02	10.5%	10.5%	10.5%
1998/03	10.5%	10.5%	10.5%
1999/04	10.5%	10.5%	10.5%
2000/05	10.5%	10.5%	10.5%
2001/06	10.5%	10.5%	10.5%
2002/07	10.5%	10.5%	10.5%
2003/08	10.5%	10.5%	10.5%
2004/09	10.5%	10.5%	10.5%
2005/10	10.5%	10.5%	10.5%
2006/11	10.5%	10.5%	10.5%
2007/12	10.5%	10.5%	10.5%
2008/13	10.5%	10.5%	10.5%
2009/14	10.5%	10.5%	10.5%
2010/15	10.5%	10.5%	10.5%
2011/16	10.5%	10.5%	10.5%
2012/17	10.5%	10.5%	10.5%
2013/18	10.5%	10.5%	10.5%
2014/19	10.5%	10.5%	10.5%
2019/24(P)	10.5%	10.5%	10.5%

(P) Projected

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation