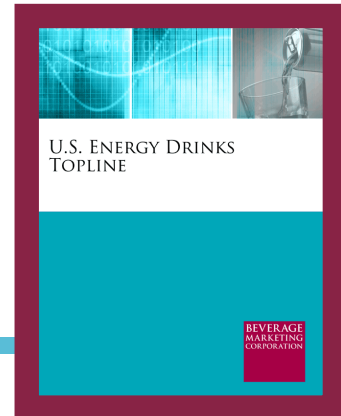


# U.S. ENERGY DRINKS TOPLINE

2021 EDITION (Published December 2021. Data through 2020. Market projections through 2025.) 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 2025 and how has covid-19 altered these expectations?
- What is the share breakdown of the energy drinks market in terms of full-calorie versus no-/reduced-calorie in 2020? 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 2025.



# U.S. ENERGY DRINKS TOPLINE

**BEVERAGE  
MARKETING  
CORPORATION**

# U.S. Energy Drinks Topline

December 2021

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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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Despite the arguable requirement of energy drinks to contain a sufficient amount of sugar for the energy function, market realities have dictated the development of low-calorie energy drinks.

- With many people taking in too much sugar already and given the fact that some people crave caffeine without necessarily choking down teaspoons of sugar, low-calorie energy drinks such as Red Bull Sugarfree, Monster Energy Lo-Carb and Rockstar Sugar Free, among others, meet a need state.
- These top energy drink companies have also increased the number of diet energy drinks on offer in recent years. Notable products in this regard include Red Bull Total Zero, Monster Ultra and Rockstar Pure Zero. Monster Ultra has added several variants and collectively is Monster Beverage's number two seller behind the original Monster.
- In general, diet drinks tend to appeal more to females — and undoubtedly diet energy drinks have brought women into the franchise — but as males get older they are increasingly more likely to switch to diet versions of their favorite drinks, particularly if the marketing is perceived as “cool” enough — the main examples in the CSD realm being Diet Mtn Dew and Coca-Cola Zero Sugar. PepsiCo has used a hybrid sweetener approach with success for its “energizing” CSD line, Mountain Dew Kickstart, without calling that much attention to the fact that it is mid-calorie.
- What's more, one of the hottest energy drink brands — Bang — is zero calorie. Consumers either probably don't realize it's zero calories or don't care, as their focus is on the ingredients that confer energy and other performance-related benefits. (For some on the keto or paleo diets, zero calorie is a plus.)
- Low-calorie energy drinks have risen from 17.3% of energy drink volume in 2006 to 41.7% in 2020. Low-calorie energy drinks had only come into existence in January 2003 with the launch of Red Bull Sugarfree.
- Low-calorie energy drinks outperformed their higher-calorie counterparts in 2020, a trend which should continue in the next five years. Diet energy drinks should increase their share of volume from 41.7% in 2020 to 42.1% in 2025. Their share of wholesale dollars is expected to grow from 39.2% to 40.0% in the identical five-year period.

**U.S. ENERGY DRINK MARKET  
COMPOUND ANNUAL GROWTH  
2002 – 2025(P)**

Years	Compound Annual Growth		
	Wholesale Dollars	Retail Dollars	Gallons
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	█████%	█████%	█████%
2014/19	█████%	█████%	█████%
2015/20	█████%	█████%	█████%
2020/25(P)	█████%	█████%	█████%

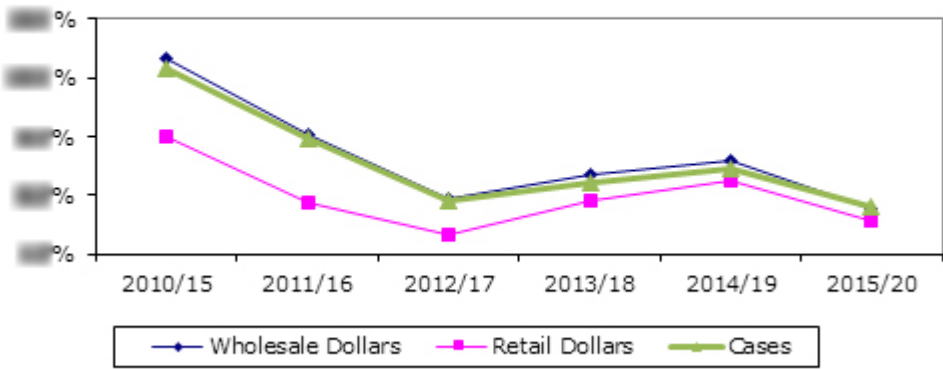
*(P) Projected*

*Source: Beverage Marketing Corporation*



### ENERGY DRINKS: COVID-INFLUENCED DECELERATION

(Compound annual growth rates, 2015 - 2020)



Source: Beverage Marketing Corporation