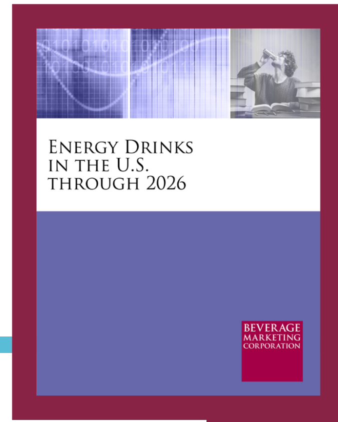
ENERGY DRINKS IN THE U.S. THROUGH 2026

2022 EDITION (Published November 2022. Data through 2021, preliminary 2022 figures and forecasts through 2026.) More than 175 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 from Beverage Marketing Corporation looks at the market disruption caused by the novel coronavirus pandemic, profiles companies and brands and examines trends and issues impacting energy drinks and energy shots. It covers regional markets, quarterly growth, packaging, distribution, consumer drivers, 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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The answers you need

Energy Drinks in the U.S. through 2026 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:

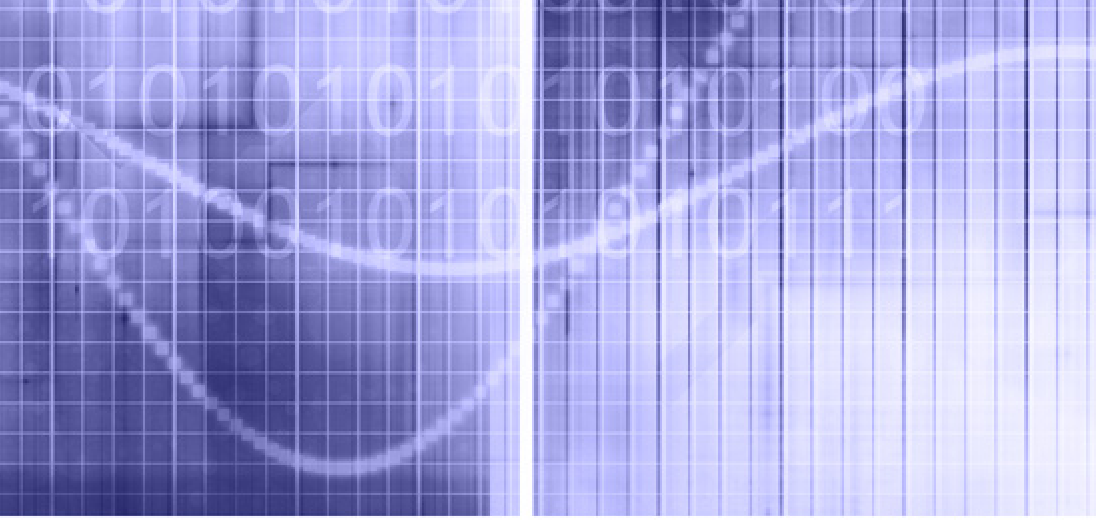
- What amount of energy drinks does the typical U.S. consumer drink in a year, and how has that changed?
- What are the latest developments in the packaging mix for energy drinks?
- Which regions have the strongest markets?
- Is "diet" a priority for consumers? What percentage of volume is full- versus low-calorie?
- How have brand rankings changed recently?
- How have smaller players revitalized the segment lately 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 2026? 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?

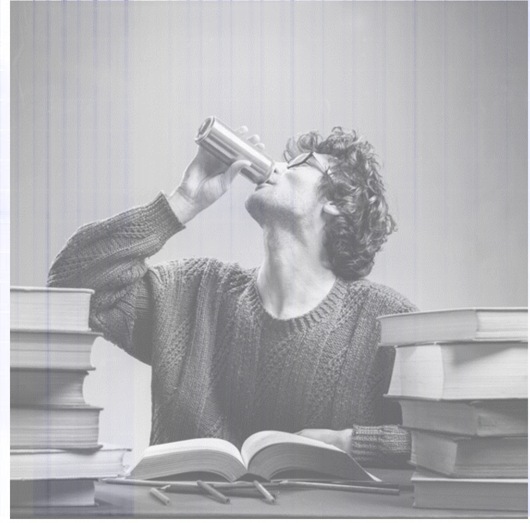
This report features

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 2026. 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 2026.
- 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), Vital Pharmaceuticals (VPX), Nutrabolt (C4), PepsiCo (Rockstar, Mtn Dew Energy, Amp and Kickstart), National Beverage (Rip It), Celsius Holdings, Anheuser-Busch 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 2026.
- A directory of the leading energy drink companies in the United States.





Energy Drinks in the U.S. through 2026

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November 2022

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Since the Red Bull brand broke upon the U.S. scene 25 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.
- However, key exceptions emerged several years ago. 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 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.

Exhibit 4.25

U.S. ENERGY DRINK MARKET
SHARE OF VOLUME BY DISTRIBUTION CHANNEL
2016 – 2026(P)

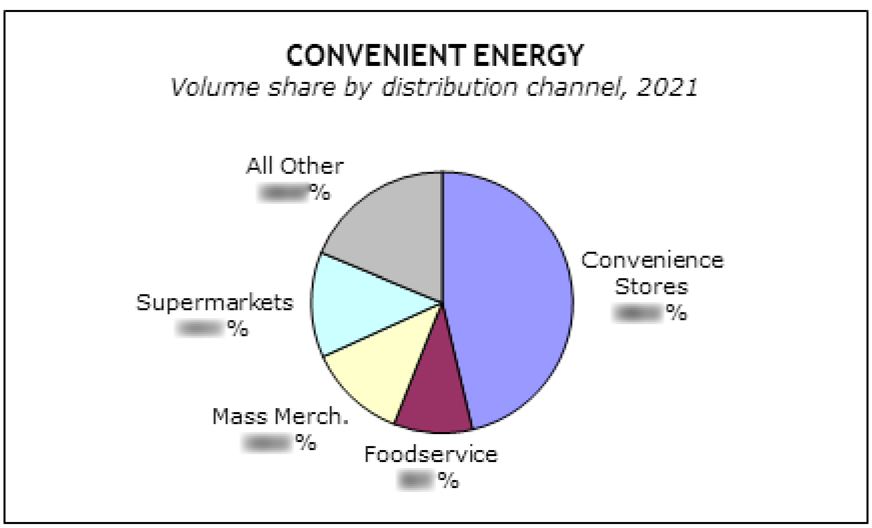
Distribution Channels	2016	2017	2018	2019	2020	2021	2022(p)	2026(P)
OFF-PREMISE								
Convenience Stores	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Supermarkets	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Mass Merchandisers	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Drug Stores	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
All Other*	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
ON-PREMISE								
Foodservice	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Vending	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
All Other**	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
TOTAL CHANNELS	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**

(p) Preliminary; (P) Projected

** Includes club stores, "mom & pop" stores, dollar stores, health food stores, military and online retailers.*

*** Includes schools, airlines, stadiums, etc.*

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation