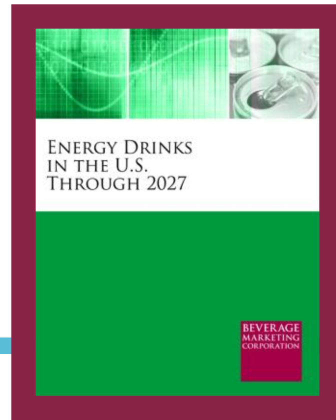
ENERGY DRINKS IN THE U.S. THROUGH 2027

2023 EDITION (Published December 2023. Data through 2022, preliminary 2023 figures and forecasts through 2027.) 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 energy category and its sub-sectors and nuances such as diet vs. regular, healthy energy, organic, high-end energy and shots. It profiles companies and brands and examines and trends and issues impacting energy drinks and energy shots, offering sales data to back its conclusions. This comprehensive report offers perspective from numerous angles, covering 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, a directory of energy drink companies and more.

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HAVE QUESTIONS? Contact Charlene Harvey: 212-688-7640 x 250
charvey@beveragemarketing.com

BEVERAGE MARKETING CORPORATION
BEVERAGE MARKETING CORPORATION
P.O. Box 2399 | 143 Canton Road, 2nd Floor
Wintersville, OH 43953
Tel: 212-688-7640 Fax: 740-314-8639

The answers you need

Energy Drinks in the U.S. through 2027 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 2027? 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 energy drinks 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 2027. 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 and high-end energy markets 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 2027.
- 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, Congo Brands (Alani Nu and Prime Energy), Anheuser-Busch and others.
- Offers a range of key metrics for analyzing performance of brands in various segment of the energy market from various perspectives. Includes brand volume and wholesale dollar sales data, growth and market share for energy drinks including: Red Bull, Monster, Bang, Rockstar, Celsius, Reign, Cellucor C4, NOS, Alani Nu, Full Throttle, Ghost Energy, Xyience, Zoa, Rip It,

Amp, HiBall Energy, Starbucks Refreshers, Hydrive and Hansen. Also offers historical and current sales results (volume, wholesale dollars) for high-end brands including: Bang, Celsius, Reign, Cellucor C4, Xyience, HiBall Energy, Runa, Zevia and Steaz. Also looks at major energy shot brands including: 5-Hour Energy, Stacker 2: 6 Hour Power, Tweaker Energy Shot, VPX, EE, Vital 4U, Rhino Rush and Private label.

- 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.

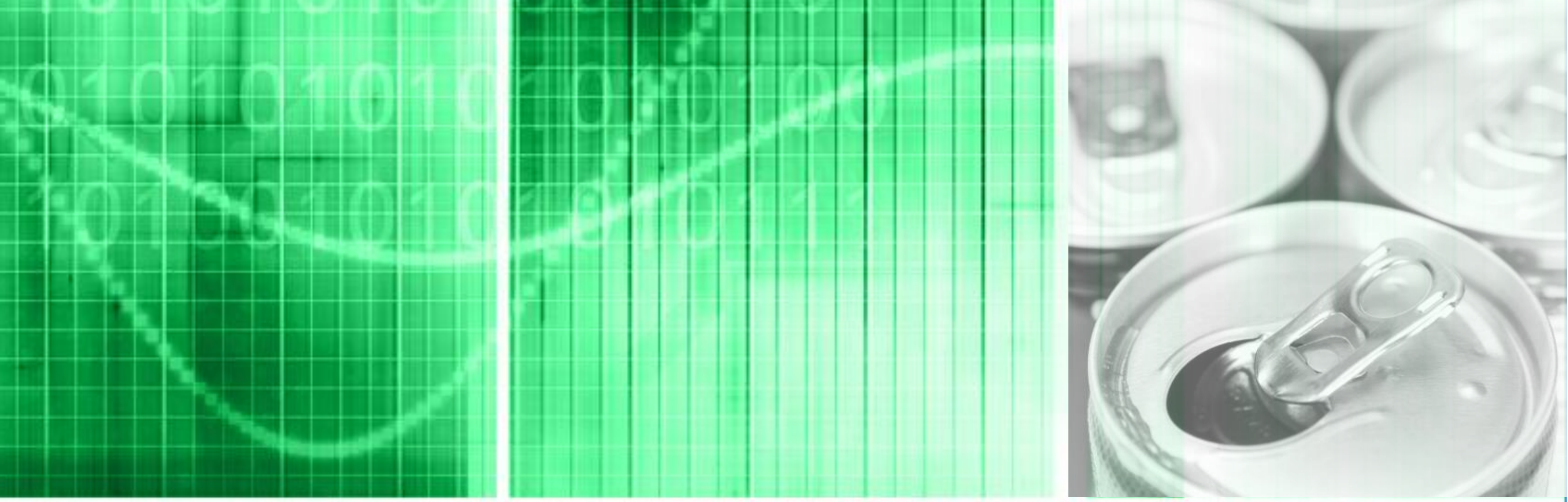
- Advertising expenditures of the leading energy drink and energy shot companies and a look at category spending by media type (including Internet and Hispanic-targeted advertising).

- 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 2027.

- A directory of the leading energy drink companies in the United States.



Energy Drinks in the U.S. Through 2027

BEVERAGE MARKETING CORPORATION

Energy Drinks in the U.S. through 2027

December 2023

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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Since the Red Bull brand broke upon the U.S. scene in 1997, the energy drink category has been a fast-growth, high-margin phenomenon, not even derailed by the financial crisis and accompanying recession.

- After its U.S. launch in 1997, Austrian pioneer Red Bull and its trademark eight-ounce slim can quickly drew a torrent of rivals numbering in the hundreds, most of them mustering caffeine-laden formulas melding hitherto unknown ingredients like the amino acid taurine — not to mention an edgy, macho positioning intended to strike a chord with the key target demographic: young males who hang around convenience stores.
- After struggling with an eight-ounce imitation of Red Bull under the granola-connoting Hansen's brand, Hansen Natural Corporation launched Monster Energy as a value play offering twice the volume at a similar $1.99 price. Monster rode its distinctive claw motif as well as savvy bets on up-and-coming alternative sports icons into a strong number two position, steadily narrowing the gap against Red Bull to the point where today they are about even, although Red Bull enjoys more premium pricing particularly as it has shifted toward 12-ounce cans as a key part of its sales mix.
- Reverberations in the segment were felt 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. Interestingly, in early 2020, Coke defied its partner by introducing Coca-Cola Energy in the U.S. after already launching it in Europe. However, Coke Energy ended up flopping in the U.S.
- Although the deal between Coke/Monster was the most striking development in energy in recent years, there has been plenty more activity. Red Bull North America has continued its long-term move to self-distribute the brand in major metropolitan areas, terminating other independent houses, particularly so-called "multi-brand" wholesalers who must answer to other masters than just Red Bull.
- Rockstar Energy, after steadily losing ground to Red Bull and Monster quarter after quarter, went on a growth tear a few years ago that, for a change, was not driven by deep discounting, but it has since faltered again — although the far worse performance of its distribution partner PepsiCo's other energy plays, Amp and Mountain Dew Kickstart, seemed to ensure that it retained a place in the network. Indeed, PepsiCo acquired Rockstar.
- After an inevitable slowdown, the energy drink market received a shot of adrenaline with the emergence of so-called performance energy drinks. As noted below, covid-19 put a temporary wrench into the market in 2020. However, the market recovered nicely in 2021. Volume grew weakly in 2022 but has returned to solid mid-single-digit range in 2023.

Exhibit 4.25

U.S. ENERGY DRINK MARKET
SHARE OF VOLUME BY DISTRIBUTION CHANNEL
2017 – 2027(P)

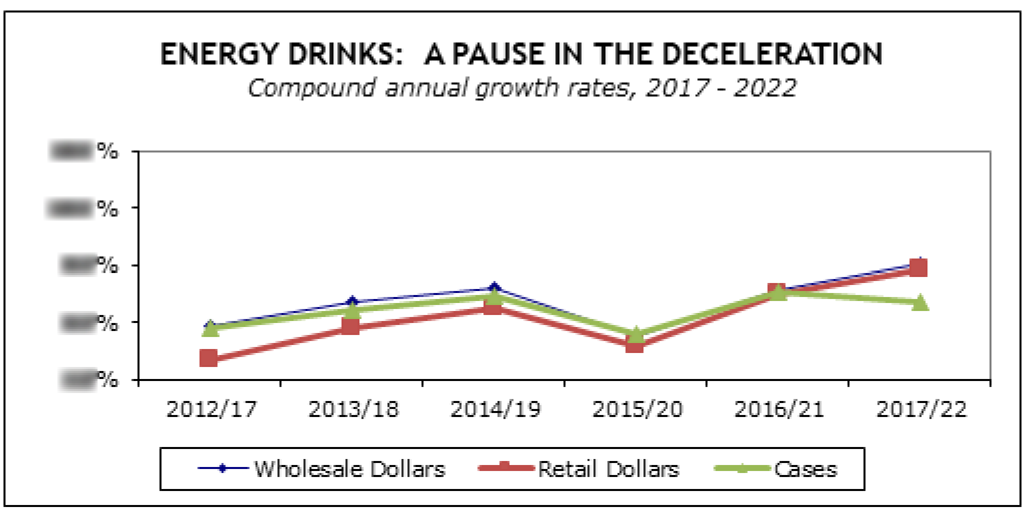
Distribution Channels	2017	2018	2019	2020	2021	2022	2023(p)	2027(P)
OFF-PREMISE								
Convenience Stores	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Supermarkets	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
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