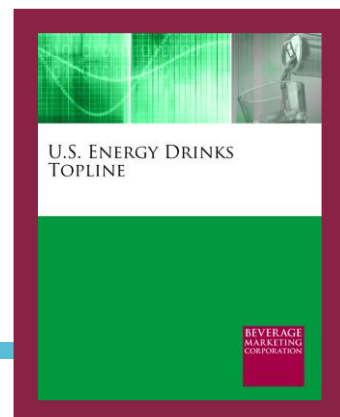


U.S. ENERGY DRINKS TOPLINE

2023 EDITION (Published February 2024. Data through 2022, preliminary 2023 figures and forecasts through 2027.) More than 20 pages, with text analysis, graphs and charts.



U.S. Energy Drinks Topline from Beverage Marketing Corporation provides a concise 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.

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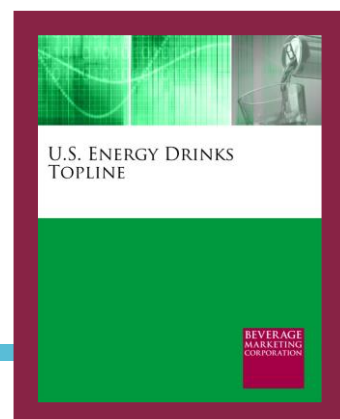
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THE ANSWERS YOU NEED

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 2027 and how did covid-19 alter these expectations?
- What is the share breakdown of the energy drinks market in terms of full-calorie versus no-/reduced-calorie? 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 2027.



U.S. ENERGY DRINKS TOPLINE

**BEVERAGE
MARKETING
CORPORATION**

U.S. Energy Drinks Topline

February 2024



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 enough 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 males are more likely to switch to diet versions of their favorite drinks as they get older, 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 hotter energy drink brands to emerge was Bang, which is zero calorie. Consumers either probably didn't realize it's zero calories or didn't care, as their focus is on the ingredients that confer energy and other performance-related bona fides. (For some on the keto or paleo diets, zero calorie is a plus.) Although Bang has struggled lately, other zero-calorie brands such as Celsius and C4 have performed strongly.
- Low-calorie energy drinks have risen from 17.3% of energy drink volume in 2006 to 42.0% in 2022. Low-calorie energy drinks had only come into existence in January 2003 with the launch of Red Bull Sugarfree.
- The general trend of low-calorie energy drinks outperforming their higher-calorie counterparts should continue to 2027. Diet energy drinks should increase their share of volume from 42.0% in 2022 to 45.9% in 2027. Their share of wholesale dollars is expected to grow from 41.0% to 54.2% in the identical five-year period.

Exhibit 3**U.S. ENERGY DRINK MARKET
COMPOUND ANNUAL GROWTH
2002 – 2027(P)**

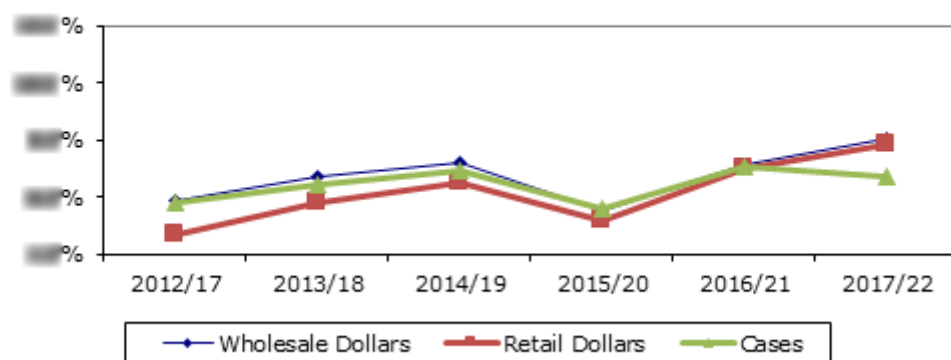
Years	Compound Annual Growth		
	Wholesale Dollars	Retail Dollars	Gallons
1997/02	████ %	████ %	████ %
1998/03	████ %	████ %	████ %
1999/04	████ %	████ %	████ %
2000/05	████ %	████ %	████ %
2001/06	████ %	████ %	████ %
2002/07	████ %	████ %	████ %
2003/08	████ %	████ %	████ %
2004/09	████ %	████ %	████ %
2005/10	████ %	████ %	████ %
2006/11	████ %	████ %	████ %
2007/12	████ %	████ %	████ %
2008/13	████ %	████ %	████ %
2009/14	████ %	████ %	████ %
2010/15	████ %	████ %	████ %
2011/16	████ %	████ %	████ %
2012/17	████ %	████ %	████ %
2013/18	████ %	████ %	████ %
2014/19	████ %	████ %	████ %
2015/20	████ %	████ %	████ %
2016/21	████ %	████ %	████ %
2017/22	████ %	████ %	████ %
2022/27(P)	████ %	████ %	████ %

(P) Projected

Source: Beverage Marketing Corporation

ENERGY DRINKS: A PAUSE IN THE DECELERATION

Compound annual growth rates, 2017 - 2022



Source: Beverage Marketing Corporation