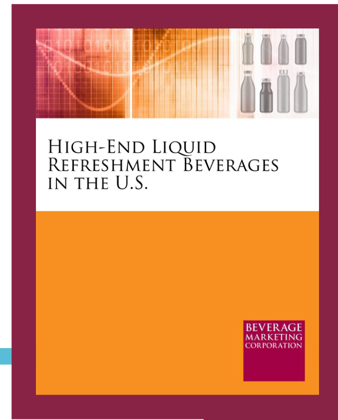
High-End Liquid Refreshment Beverages in the U.S. – NEW!

2020 Edition (Published December 2020. Preliminary data through 2020. Market projections through 2024.) More than 25 pages, with analysis and charts, as well as more than 75 exhibits in Excel format.



High-End Liquid Refreshment Beverages in the U.S. charts how the premiumization trends has affected the various components of the liquid refreshment beverage (LRB) market. It considers the high-end segments of bottled water, energy drinks, carbonated soft drinks (CSDs) and more. It measure volume for each category and shows how high-end segments' shares have changed in recent years. Will include discussions of the impact of the Covid-19 pandemic on the market.

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The answers you need

This report — new in 2020 — examines the trend toward premiumization, analyzing how various LRB categories have segmented to include not only the most familiar brands comprising each beverage type but also superpremium iterations of those brands or exclusively high-end brands. High-end segments of the following non-alcohol beverage categories are covered: bottled water and value added waters, fruit beverages, RTD Coffee, RTD Tea, CSDs, energy drinks and sports beverages. Questions answered include:

- How do high-end energy drinks differ from standard ones, and how has this affected the overall category's performance.
- Can upscale CSDs revitalize the long-languishing category?
- What are the trends driving high-end LRB developments?
- How is Covid-19 likely to impact this segment in the short and long-term?

This report features

High-End LRBs in the U.S. looks at the upper-echelon components of still-growing categories such as energy drinks as well as slow growth and stagnating or declining categories seeking opportunities for rejuvenation and pockets of growth and revitalization in an otherwise lackluster performance picture It chronicles a cross-category phenomenon of increasing segmentation as companies seek to meet consumer needs as well as capitalize on opportunities for improved profit margins through premiumization. It also discusses at some of the vehicles for premiumization and differentiation — from ingredients to processing differences such as HPP, cold pressed and cold brew to marketing and packaging, etc. Using Beverage Marketing's exclusive data, the report provides insights into:

- The emergence of energy drinks promising functional benefits in addition to, or more targeting than, a jolt of caffeine.
- The ongoing cultivation of craft-style CSDs that aim to appeal to consumers in ways the biggest brands haven't been able to do.
- What distinguishes high-end waters from the single-serve PET bottles that account for the majority of volume?
- What are some of the key brands in high end fruit beverages, sports drinks, RTD Tea, cold brew coffee, bottled water and value added waters, RTD tea and energy drink markets? How are they performing and what makes them brands to watch?
- Brands covered include: Evian, Essentea, Essentia, Voss, Fiji, Hint, Smartwater, Bang, Celsius, Reign, Nocco, C4, Celsius, Boylan, Stubborn, Reed's, Suja, Naked, Odwalla, Bolthouse, Honest Tea, Ito En, Teas' Tea and more.

High-End Liquid Refreshment Beverages in the U.S.

BEVERAGE MARKETING CORPORATION

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December 2020

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NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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The high-end LRB segments performed similarly in terms of producer prices as they did with volume. That is to say, the share movement of individual categories evinced the same general pattern. Nonetheless, categories do have different relative strengths in terms of producers' sales and volume because of their differing price points.

- For instance, bottled water constitutes a lower share of the high-end LRB market by producers' sales versus volume, but still leads the pack by either measure. Bottled water's share of high-end LRB producers' sales has declined by 4.2 percentage points between 2018 and 2020.
- In contrast, fruit beverages have a higher share of producers' sales than volume but have lost share either way. High-end fruit beverages have lost 4.4 share points since 2018.
- Energy drinks have picked up the slack, increasing share of high-end LRB producers' sales by 9.7 percentage points in the past two years. As a result, high-end energy drinks have surpassed high-end CSDs in sales.
- Sports beverages have more than doubled their share of high-end LRB sales in the past two years, while RTD tea has almost halved its share in the same time frame. RTD coffee has remained steady.

The main factors underlying the better performance of high-end LRBs versus mainstream LRBs are severalfold.

- The main factor is that high-end LRBs are perceived as healthier or of better quality than mainstream LRBs. Examples include HPP juices, whose production process is said to better preserve enzymes and nutrients; energy drinks that offer additional ingredients that are purported to improve athletic or cognitive performance; and sports drinks that have fewer artificial ingredients and colors.
- As with all things high-end, some high-end LRB consumers may also be seeking badge value, such as being seen toting an imported bottled water. Consumers able to pay a higher price for these beverages have been in ample supply during the purported economic recovery of the past 12 years. The coronavirus has obfuscated the fact that the economy might have taken a downturn anyway, but regardless, fewer people may be able to pay a high price point for beverages based solely on image in the future.
- What cannot be overlooked is that the mainstream LRB market has a much higher base than high-end LRBs, making comparably strong growth much harder to achieve. Indeed, one of the motivations for introducing high-end LRBs in the first place is to escape the slow growth paradigm of mainstream LRBs.

Exhibit 4.31

U.S. HIGH-END ENERGY DRINK MARKET
HIGH-END VS. MAINSTREAM WHOLESALE DOLLAR GROWTH
2015 – 2020(p)

Year	High-End	Mainstream	Total
2014/15	[illegible] %	[illegible] %	[illegible] %
2015/16	[illegible] %	[illegible] %	[illegible] %
2016/17	[illegible] %	[illegible] %	[illegible] %
2017/18	[illegible] %	[illegible] %	[illegible] %
2018/19	[illegible] %	[illegible] %	[illegible] %
2019/20(p)	[illegible] %	[illegible] %	[illegible] %

(p) Preliminary

Source: Beverage Marketing Corporation