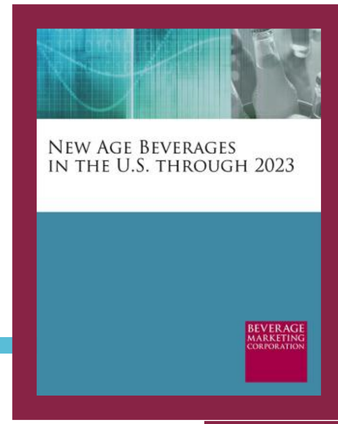
NEW AGE BEVERAGES IN THE U.S. THROUGH 2023

2019 EDITION (Published December 2019. Data through 2018. Market projections through 2023.) More than 350 pages, with extensive text analysis, graphs, charts and more than 45 tables.



This market report offers insight on a broad array of beverages that share similar attributes and consumer perceptions and often compete for shelf space and consumer loyalty. It examines ready-to-drink tea and coffee, sports beverages, energy drinks, single-serve fruit beverages, kombucha and all the various New Age segments. The study also provides data on volume and sales plus discusses leading companies and their strategies.

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INSIDE:

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The answers you need

The U.S. New Age Beverages report provides in-depth data and market analysis, shedding light on various aspects of the market through reliable data and discussions of what the numbers really mean. Questions answered include:

- Which segments of the diverse U.S. New Age beverage market grew in 2018 and which did not?
- What are the top beverage brands and how did they perform in 2018?
- What's driving developments in the New Age beverage marketplace?
- How many gallons did U.S. residents consume in 2018, and how is that likely to change in the next few years?
- What are the leading sales channels for New Age beverages?
- Which categories are poised for strong growth in the future?

This report features

This comprehensive report investigates 15 non-alcoholic beverage categories that populate the domestic landscape. It offers volume, retail dollars, wholesale dollars and per capita consumption, as well as a look at the New Age beverage market by region and distribution channel.

The report provides an in-depth look at the leading companies and brands in the category and the consumer drivers, preferences and needs likely to propel consumption growth through 2023. Advertising and demographic data are also provided. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of all facets of this beverage market including:

- An overview of the diverse New Age beverage market, anchoring it in history as well as providing insight into current trends propelling the market.
- A detailed break-out of trends in the various segments and sub-segments providing data including gallonage, wholesale dollar sales, wholesale prices per case and more for 21 segments and subsegments.
- Regional look at the U.S. New Age beverage marketplace, with volume and growth data of eight segments over the past five years, and projections five years in the future.
- 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 & statistics. Profiles the wellness beverage activities of companies such as Coca-Cola Company, Keurig Dr Pepper, Ferolito, Vultaggio & Sons, Monster Beverage Corporation, PepsiCo, Nestlé Waters North America (NWNA), Red Bull and others. Includes brand data for Gatorade, GT's, Glacéau, Arizona, Lipton, Rockstar, Frappuccino, Gold Peak, Odwalla and many more.
- Data detailing volume by distribution channels totaling 100% of market volume.
- Advertising expenditures of the leading companies and segments and a look at spending by media type (including Internet and Spanish-language advertising).
- Consumer demographic profiles comparing consumers of key brands and segments.

- Five-year volume, wholesale dollar and retail dollar sales forecast through 2023 for the New Age beverage market and its sub-segments. Including single-serve waters (breaks out retail PET water, enhanced water, alkaline water, flavored water, essence water), energy drinks, nutrient-enhanced fruit drinks, superpremium juice, regular single-serve fruit beverages, probiotics, protein drinks, RTD coffee, RTD tea, sports beverages, sparkling water, vegetable/fruit juice blends, kombucha, coconut water, plant water, premium soda and shelf-stable dairy drinks.

New Age Beverages in the U.S. through 2023

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December 2019

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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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Chapter

7. DEMOGRAPHICS OF THE NEW AGE BEVERAGE CONSUMER (cont'd)

Exhibits (cont'd)

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There now can seem no question that protein awareness is very high on consumers' radar, and the longtime leader in the segment, Muscle Milk, is ripe for disruption.

- As a beverage segment, RTD protein drinks have moved beyond their traditional constituency of bulked-up young men lurking in nutrition stores to a broader base of consumers looking for convenient but nourishing meal replacements or snacks. And for the first time the once invulnerable Muscle Milk — now a wholly owned unit of PepsiCo — is showing weakness at the hands of both plant-based and dairy based challengers.
- The latter includes brands targeting not just vegetarians and vegans but those who, on sustainability grounds, prefer to get their nutrition from non-animal sources, to avoid the cost in water and methane emissions that animal-based protein requires. We are seeing a similar trend play out on the food side via such brands as Beyond Meat and Impossible Burger. Among the plant-based entries that have been picking up steam has been one created by a husband-and-wife team of athletes called OWYN (an acronym for "only what you need") that is backed by Halen Brands.

Although traditionally protein drinks mainly were the narrow province of gym rats who purchased them in powder form, this changed dramatically over the past decade once the beverage world saw the explosive success awaiting the ready-to-drink version of powder-based Muscle Milk.

- This occurred after diets like Atkins, while discrediting carbohydrates, helped to make protein a buzzword in nutrition earlier in the 2000s. When giant Pepsi Bottling Group (PBG) forged a national distribution alliance with Muscle Milk over a decade ago, this was enough to legitimize the segment in the channel, and this was one alliance in which the bottling system does appear to have accorded a guest brand a reasonable amount of attention, even if took a while before PepsiCo was willing to fully integrate the brand via acquisition.
- In 2012, Coca-Cola made a modest bet on Core Power, an independent protein brand launched by a group of milk producers and run by former Coca-Cola executive Steve Jones. Liking the results of its initial tests within the Coke system, it has since made an investment in the company via its VEB incubation system and rolled out the brand through its bottling system so that for the purposes of this report we are regarding Core Power as a captive Coke brand. Its product features clearly have resonated with some consumers, but so has Coke's aggressive pricing strategy, which has made life more difficult for rivals in the category — including Muscle Milk itself.

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Exhibit 2.12

NEW AGE BEVERAGE MARKET SEGMENTS

CHANGE IN VOLUME

2014 – 2023(P)

Market Segments	2013/14	2014/15	2015/16	2016/17	2017/18	2018/23(P)
Retail PET Waters	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Enhanced Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Alkaline Water	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Flavored Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Essence Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal S-S Water	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
RTD Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sports Beverages	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Energy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Regular S-S Fruit	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Superpremium Juice	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sparkling Juice	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal S-S Fruit	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Sparkling Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Premium CSD	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Vegetable/Fruit Blends	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Kombucha	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Protein Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Coconut Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Shelf-Stable Dairy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Probiotics	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Plant Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

Note: 2018/23(P) change is projected five-year compound annual growth rate.

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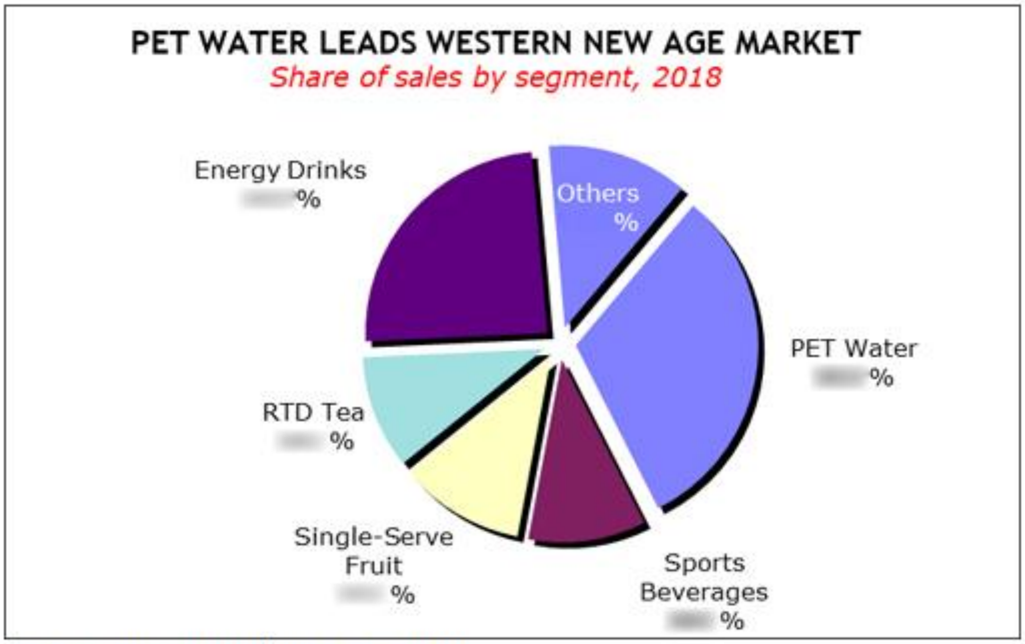

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