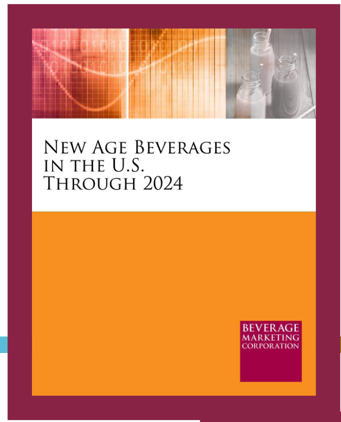
New Age Beverages in the U.S. through 2024

2020 Edition (Published December 2020. Data through 2019. Market projections through 2024.) More than 350 pages, with extensive text analysis, graphs, charts and more than 45 tables.



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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. Everything from the impact of the Coronavirus pandemic to discussions of consumer drivers and innovations that are changing the face of the market are addressed in this comprehensive report. Historical, current and projected data on volume and sales plus discussion of leading companies and their strategies. This study examines ready-to-drink tea and coffee, sports beverages, energy drinks, single-serve fruit beverages, kombucha, protein drinks, sparkling water and a broad range of other segments that fall under the diverse New Age beverage umbrella.

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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 2019 and which did not? Which are growing or declining in 2020?
- Which categories are poised for strong growth in the future? How has Covid-19 impacted the market?
- What are the top beverage brands and how did they perform in 2019?
- What's driving developments in the New Age beverage marketplace?
- How many gallons did U.S. residents consume in 2019, and how is that likely to change in the next few years?
- What are the leading sales channels for New Age beverages?

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 2024. 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 volume, 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 and 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 2024 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.



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BEVERAGE MARKETING CORPORATION

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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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However, even NWNA, the colossus that includes an array of familiar spring water brands like Poland Spring, Zephyrhills and Ozarka, along with the European imports San Pellegrino, Perrier and Acqua Panna and the massive home and office delivery network that goes by ReadyRefresh, may be throwing in the towel.

- After brilliantly weathering the twin assaults of Coca-Cola and PepsiCo on the category starting in the 1990s with their Dasani and Aquafina brands, the company has lately struggled against the concessionary pricing of those rivals, the impact of value and private-label entries from Niagara Bottling and its Swiss parent's drifting attention. It finally entered the tap-water segment with Pure Life, which can be rated a success within a low-profit category, but a diversification push via the acquisition of the Sweet Leaf Tea and Tradewinds brands failed and the brands were divested.
- Now Nestlé has decided it really doesn't want to play any more at the commodity end of the water business and is seeking buyers for all but its high-end European brands and possibly Pure Life (as a vehicle for nutritional plays, not for its tap-water brand). It is not clear whether there are any buyers for the entire entity, or whether Nestlé will have to sell it off in pieces. This leaves a great cloud of uncertainty over the sector, although it would seem to keep Nestlé still in the mix as a potential strategic exit for the superpremium entries in the space.

Value-added water is comprised of flavored, enhanced, essence and alkaline waters, together which provide value above and beyond "just hydration."

- Much of the new-product activity in the category has been in the enhanced water segment. Caffeinated and oxygenated brands were the pioneers, coming out about 20 years ago; but none ever reached critical mass.
- Vitamin-enhanced waters began to gain traction in 2000 with Glacéau Vitaminwater. Others emerged, such as Propel, which continues to be a good revenue source for PepsiCo.
- In 2005, flavored waters such as Nestlé Pure Life, Aquafina FlavorSplash and Dasani flavors hit the market. But the flavored water segment has not seen a whole lot of activity since.
- Flavored water, comprised of a few brands, is a more mainstream targeted segment, without specific functional benefits beyond hydration. Large beverage corporations such as Sunny Delight (now owned by buyout firm Brynwood Partners), Kraft Heinz, Coca-Cola, PepsiCo and Nestlé dominate this segment.

Exhibit 2.12

NEW AGE BEVERAGE MARKET SEGMENTS
CHANGE IN VOLUME
2015 – 2024(P)

Market Segments	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20(p)	2019/24(P)
Retail PET Waters	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Enhanced Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Alkaline Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Flavored Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Essence Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal S-S Water	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Sports Beverages	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sparkling Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Energy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Regular S-S Fruit	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Superpremium Juice	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sparkling Juice	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal S-S Fruit	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
RTD Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
High-End CSD	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Vegetable/Fruit Blends	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Protein Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Kombucha	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Coconut Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Shelf-Stable Dairy	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Probiotics	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Plant Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

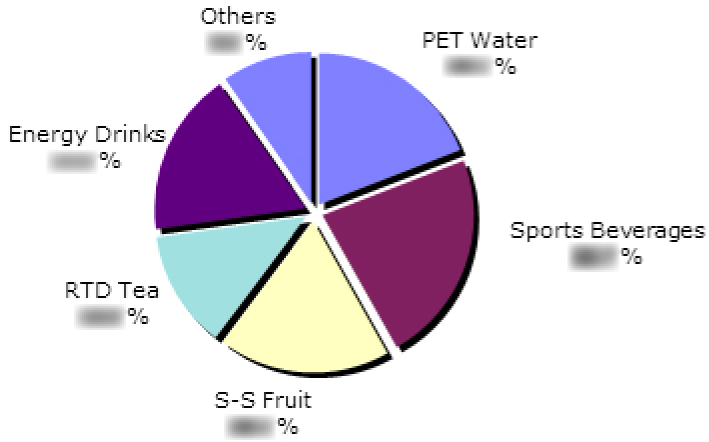
(p) Preliminary; (P) Projected

Note: 2019/24(P) change is projected five-year compound annual growth rate.

Source: Beverage Marketing Corporation

SPORTS BEVERAGES ARE TOPS IN THE SOUTH

Share of sales by segment, 2019



Source: Beverage Marketing Corporation