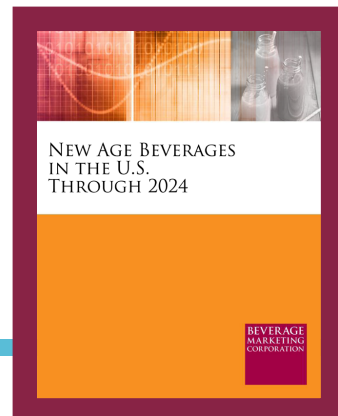


# NEW AGE BEVERAGES IN THE U.S. THROUGH 2024

**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.



**T**his 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.

## AVAILABLE FORMAT & PRICING



**Direct Download**  
Word, Excel & PDF

**\$4,995**

*To learn more, to place an advance order or to inquire about additional user licenses **call**: Charlene Harvey +1 212.688.7640 ext. 1962 [charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)*

FOR A FULL  
CATALOG OF  
REPORTS AND  
DATABASES,  
GO TO  
[bmcreports.com](http://bmcreports.com)

## INSIDE:

### REPORT OVERVIEW

A brief discussion of this report's key features. **2**

### TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. **7**

### SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. **13**



**HAVE  
QUESTIONS?**

Contact Charlene Harvey: 212-688-7640 x 1962  
[charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)

**BEVERAGE  
MARKETING  
CORPORATION**

BEVERAGE MARKETING CORPORATION  
850 Third Avenue, 13<sup>th</sup> Floor, New York, NY 10022  
Tel: 212-688-7640 Fax: 212-826-1255

## 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 (NWN), 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.



# NEW AGE BEVERAGES IN THE U.S. THROUGH 2024

BEVERAGE  
MARKETING  
CORPORATION

# New Age Beverages in the U.S. through 2024

December 2020

---

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.

---

Copyright © 2020 Beverage Marketing Corporation of New York, 850 Third Avenue, New York, New York 10022, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

# Contents

## Table of Contents

---

## TABLE OF CONTENTS

TABLE OF CONTENTS .....	i
DEFINITIONS USED IN THIS REPORT.....	vii
INTRODUCTION .....	xv

## Chapter

**1. THE MULTIPLE SEGMENT NEW AGE BEVERAGE MARKET**

The Current New Age Market .....	1
----------------------------------	---

**Exhibits**

1.1 New Age Beverage Market Dollar Sales and Volume 1985 – 2024 .....	4
1.2 New Age Beverage Market Annual Growth 1995 – 2024 .....	5
1.3 New Age Beverage Market Per Capita Consumption 1985 – 2024.....	6

**2. NEW AGE SEGMENTS**

New Age Beverage Market Segments – Dollars .....	7
--	---

• Single-Serve Water.....	10
• Single-Serve Fruit Beverages .....	16
• Sports Beverages.....	21
• Ready-to-Drink Tea.....	24
• Sparkling Water .....	28
• High-End CSDs .....	29
• Vegetable/Fruit Juice Blends.....	32
• Ready-to-Drink Coffee .....	32
• Energy Drinks.....	35
• Single-Serve Dairy .....	37
• Kombucha.....	37
• Coconut Water .....	39
• Plant Water .....	41
• Protein Drinks.....	42
• Probiotics.....	43

New Age Beverage Market Segments – Volume and Price.....	45
--	----

**Exhibits**

2.4 New Age Beverage Market Segments Estimated Retail Dollar Sales 2014 – 2024 ----	49
2.5 New Age Beverage Market Segments Share of Retail Dollar Sales 2014 – 2024 .....	50
2.6 New Age Beverage Market Segments Change in Retail Dollar Sales 2015 – 2024 ----	51
2.7 New Age Beverage Market Segments Estimated Wholesale Dollar Sales 2014 – 2024	52
2.8 New Age Beverage Market Segments Share of Wholesale Dollar Sales 2014 – 2024 -	53
2.9 New Age Beverage Market Segments Change in Wholesale Dollar Sales 2015 – 2024	54
2.10 New Age Beverage Market Segments Volume 2014 – 2024 .....	55
2.11 New Age Beverage Market Segments Share of Volume 2014 – 2024 .....	57
2.12 New Age Beverage Market Segments Change in Volume 2015 – 2024 .....	58
2.13 New Age Beverage Market Segments Estimated Wholesale Prices 2014 – 2024 .....	59

## TABLE OF CONTENTS

## Chapter

**3. NEW AGE REGIONAL MARKETS**

New Age Regional Markets .....	61
• The South .....	62
• The West .....	63
• The Northeast.....	64
• The Midwest .....	65
New Age Segments by Regional Markets .....	67
• Sparkling Water .....	67
• Premium Soda .....	67
• Ready-to-Drink Tea.....	68
• Single-Serve Fruit Beverages .....	68
• Sports Beverages.....	69
• Retail PET Water.....	69
• Ready-to-Drink Coffee .....	70
• Energy Drinks.....	70

**Exhibits**

3.14 New Age Beverage Regional Markets Wholesale Dollar Sales 2014 – 2024 .....	71
3.15 New Age Beverage Regional Markets Share of Wholesale Dollars 2014 – 2024 .....	72
3.16 New Age Beverage Regional Markets Change in Wholesale Dollars 2015 – 2024 .....	73
3.17 New Age Beverage Regional Markets Wholesale Dollar Sales by Segment 2014 – 2024 .....	74
3.18 New Age Beverage Regional Markets Share of Wholesale Dollars by Segment 2014 – 2024 .....	75
3.19 New Age Beverage Regional Markets Change in Wholesale Dollars by Segment 2015 – 2024 .....	76

**4. NEW AGE DISTRIBUTION CHANNELS**

Distribution of New Age Beverages .....	77
---	----

**Exhibits**

4.20 New Age Beverages Estimated Volume by Distribution Channel 2014 – 2024 .....	80
4.21 New Age Beverages Volume Share by Distribution Channel 2014 – 2024 .....	81
4.22 New Age Beverages Volume Growth by Distribution Channel 2015 – 2024 .....	82

**5. THE LEADING NEW AGE COMPANIES AND THEIR BRANDS**

The Leading Companies.....	83
----------------------------	----

**PepsiCo, Inc.**

• Overview .....	87
• Gatorade – Overview .....	89
• Gatorade – Marketing .....	90
• Gatorade – Distribution .....	115



## TABLE OF CONTENTS

## Chapter

## 5. THE LEADING NEW AGE COMPANIES AND THEIR BRANDS (cont'd)

**PepsiCo, Inc. (cont'd)**

• Aquafina – Overview -----	117
• Aquafina – Marketing-----	117
• Aquafina – Distribution-----	122
• PLTP – Overview-----	122
• PLTP – Marketing -----	123
• PLTP – Distribution -----	130
• LIFEWTR – Overview -----	131
• LIFEWTR – Marketing -----	131
• bubly – Overview -----	132
• Frappuccino – Overview-----	133
• Frappuccino – Marketing -----	133
• Tropicana – Overview -----	138
• Tropicana – Marketing-----	138
• Naked Juice – Overview-----	140
• Naked Juice – Marketing -----	143
• Naked Juice – Distribution -----	147
• Izze – Overview -----	148
• Izze – Marketing-----	149
• Izze – Distribution -----	150
• Amp – Overview -----	150
• Amp – Marketing -----	151
• Rockstar – Overview -----	156
• Rockstar – Marketing-----	158

**Coca-Cola Company**

• Overview -----	161
• Dasani – Overview-----	162
• Dasani – Marketing -----	163
• Dasani – Distribution -----	166
• Glacéau – Overview -----	167
• Glacéau – Marketing-----	168
• Glacéau – Distribution-----	175
• Gold Peak – Overview -----	175
• Gold Peak – Marketing -----	176
• Peace Tea – Overview-----	178
• Minute Maid – Overview-----	178
• Minute Maid – Marketing -----	179
• Minute Maid – Distribution -----	180
• Fuze – Overview -----	181
• Fuze – Marketing -----	182

---

# TABLE OF CONTENTS

---

## Chapter

---

### 5. THE LEADING NEW AGE COMPANIES AND THEIR BRANDS (cont'd)

#### Coca-Cola Company (cont'd)

• Powerade – Overview -----	182
• Powerade – Marketing-----	183
• Powerade – Distribution-----	187
• Honest Tea – Overview-----	188
• Honest Tea – Marketing-----	189
• Honest Tea – Distribution -----	199
• AHA-----	201
• Topo Chico – Overview -----	201
• Topo Chico – Marketing -----	202

#### Nestlé Waters North America

• Overview -----	203
• Marketing -----	204
• Distribution -----	217

#### Keurig Dr Pepper

• Overview -----	218
• Hawaiian Punch – Marketing -----	219
• Snapple Beverage Group – Overview -----	220
• Snapple Beverage Group – Marketing-----	220
• Snapple Beverage Group – Distribution-----	227
• Bai – Overview-----	228
• Bai – Marketing -----	229
• Core Hydration – Overview -----	233
• Core Hydration – Marketing-----	234
• Venom – Overview -----	236

#### Red Bull

• Overview -----	237
• Marketing -----	238
• Distribution -----	250

#### Ferolito, Vultaggio & Sons

• Overview -----	253
• Marketing -----	255
• Distribution -----	262

#### Monster Beverage Corporation

• Overview -----	264
• Marketing -----	265
• Distribution -----	276

## TABLE OF CONTENTS

## Chapter

**5. THE LEADING NEW AGE COMPANIES AND THEIR BRANDS (cont'd)*****Exhibits***

5.23	Leading New Age Beverage Companies Estimated Wholesale Dollar Sales 2014 – 2019-----	281
5.24	Leading New Age Beverage Companies Share of Wholesale Dollar Sales 2014 – 2019-----	282
5.25	Leading New Age Beverage Companies Change in Wholesale Dollar Sales 2015 – 2019-----	283
5.26	Leading New Age Beverage Brands Estimated Wholesale Dollar Sales 2014 – 2019 -	284
5.27	Leading New Age Beverage Brands Share of Wholesale Dollar Sales 2014 – 2019 ---	285
5.28	Leading New Age Beverage Brands Change in Wholesale Dollar Sales 2015 – 2019 -	286

**6. NEW AGE BEVERAGE ADVERTISING EXPENDITURES**

	New Age Beverage Brands Advertising Expenditures -----	287
	New Age Beverage Advertising By Media -----	289
	New Age Beverage Advertising By Category-----	291

***Exhibits***

6.29	Leading New Age Beverage Brands Advertising Expenditures 2014 – 2019-----	293
6.30	Leading New Age Beverage Brands Share of Advertising Expenditures 2014 – 2019-----	294
6.31	Leading New Age Beverage Brands Change in Advertising Expenditures 2015 – 2019-----	295
6.32	Estimated New Age Advertising Expenditures by Media 2014 – 2019 -----	296
6.33	Estimated New Age Advertising Share of Expenditures by Media 2014 – 2019 -----	297
6.34	Estimated New Age Advertising Change in Expenditures by Media 2015 – 2019 -----	298
6.35	Estimated New Age Advertising Expenditures by Market Segment 2014 – 2019-----	299
6.36	Estimated New Age Advertising Share of Expenditures by Segment 2014 – 2019----	300
6.37	Estimated New Age Advertising Change in Expenditures by Segment 2015 – 2019 --	301

**7. DEMOGRAPHICS OF THE NEW AGE BEVERAGE CONSUMER**

	The New Age Beverage Consumer -----	302
	• Overview-----	302
	• Comparative Demographics of New Age Brands-----	305

***Exhibits***

7.38	Demographics of the Bottled Water Consumer 2019 -----	314
7.39	Demographics of the RTD Tea Consumer 2019 -----	316
7.40	Demographics of the Sports Beverage Consumer 2019 -----	318
7.41	Demographics of the Energy Drink Consumer 2019 -----	320
7.42	Demographics of the Poland Spring Consumer 2019 -----	322
7.43	Demographics of the Aquafina Consumer 2019 -----	324
7.44	Demographics of the AriZona Tea Consumer 2019 -----	326

TABLE OF CONTENTS

Chapter

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

***Exhibits (cont'd)***

7.45 Demographics of the Lipton Consumer 2019 ----- 328

7.46 Demographics of the Gatorade Consumer 2019----- 330

7.47 Demographics of the Powerade Consumer 2019 ----- 332

7.48 Demographics of the Red Bull Consumer 2019----- 334

7.49 Demographics of the Monster Consumer 2019 ----- 336

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.

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

<b>Market Segments</b>	<b>2014/15</b>	<b>2015/16</b>	<b>2016/17</b>	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20(p)</b>	<b>2019/24(P)</b>
Retail PET Waters	100%	100%	100%	100%	100%	100%	100%
Enhanced Water	100%	100%	100%	100%	100%	100%	100%
Alkaline Water	100%	100%	100%	100%	100%	100%	100%
Flavored Water	100%	100%	100%	100%	100%	100%	100%
Essence Water	100%	100%	100%	100%	100%	100%	100%
<b>Subtotal S-S Water</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Sports Beverages	100%	100%	100%	100%	100%	100%	100%
RTD Tea	100%	100%	100%	100%	100%	100%	100%
Sparkling Water	100%	100%	100%	100%	100%	100%	100%
Energy Drinks	100%	100%	100%	100%	100%	100%	100%
Regular S-S Fruit	100%	100%	100%	100%	100%	100%	100%
Superpremium Juice	100%	100%	100%	100%	100%	100%	100%
Sparkling Juice	100%	100%	100%	100%	100%	100%	100%
<b>Subtotal S-S Fruit</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
RTD Coffee	100%	100%	100%	100%	100%	100%	100%
High-End CSD	100%	100%	100%	100%	100%	100%	100%
Vegetable/Fruit Blends	100%	100%	100%	100%	100%	100%	100%
Protein Drinks	100%	100%	100%	100%	100%	100%	100%
Kombucha	100%	100%	100%	100%	100%	100%	100%
Coconut Water	100%	100%	100%	100%	100%	100%	100%
Shelf-Stable Dairy	100%	100%	100%	100%	100%	100%	100%
Probiotics	100%	100%	100%	100%	100%	100%	100%
Plant Water	100%	100%	100%	100%	100%	100%	100%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

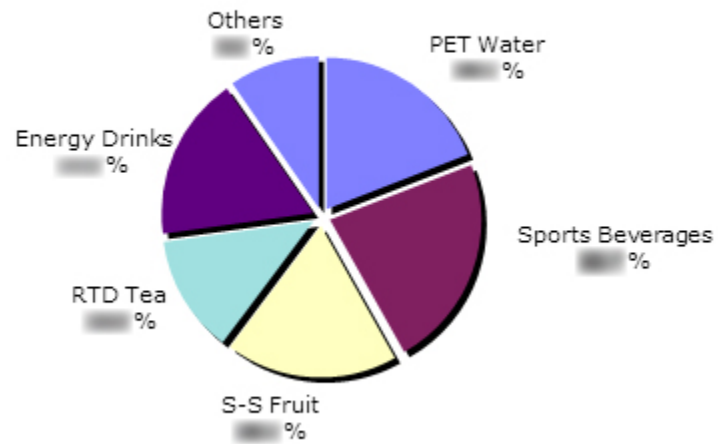
(p) Preliminary; (P) Projected

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*