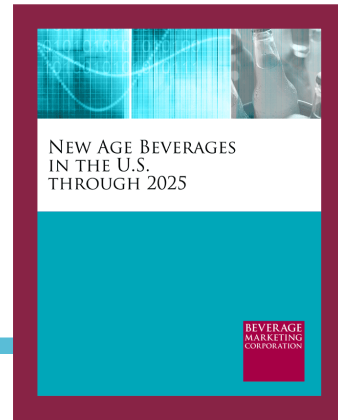
New Age Beverages in the U.S. through 2025

2021 Edition (Published December 2021. Data through 2020. Market projections through 2025.) More than 325 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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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 2020 and which did not? Which are estimated to have grown or declined in 2021?
- 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 2020?
- What's driving developments in the New Age beverage marketplace?
- How many gallons did U.S. residents consume in 2020, 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 2025. 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, Red Bull and others. Includes brand data for Gatorade, GT's, Glacéau, Arizona, Lipton, Rockstar, Frappuccino, Gold Peak 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 2025 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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December 2021

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.

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However, even NWNA, the colossus that included 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 ReadyRefresh home and office delivery network threw in the towel to some degree.

- 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 later 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 was 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.
- Thus Nestlé decided it really didn't want to play any more at the commodity end of the water business and sought buyers for all but its high-end European brands. It ended up finding a buyer in an entity known as BlueTriton Brands.

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 BlueTriton (formerly, Nestlé) dominate this segment.

Exhibit 2.12

NEW AGE BEVERAGE MARKET SEGMENTS

CHANGE IN VOLUME

2016 – 2025(P)

Market Segments	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21(p)	2020/25(P)
Retail PET Waters	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Enhanced Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Alkaline Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Essence Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Flavored Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal S-S Water	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
Sports Beverages	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
RTD Tea	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Energy Drinks	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Sparkling Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Regular S-S Fruit	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Superpremium Juice	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Sparkling Juice	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal S-S Fruit	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
RTD Coffee	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
High-End CSD	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Protein Drinks	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Vegetable/Fruit Blends	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Coconut Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Kombucha	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Shelf-Stable Dairy	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Probiotics	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Plant Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
TOTAL	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**

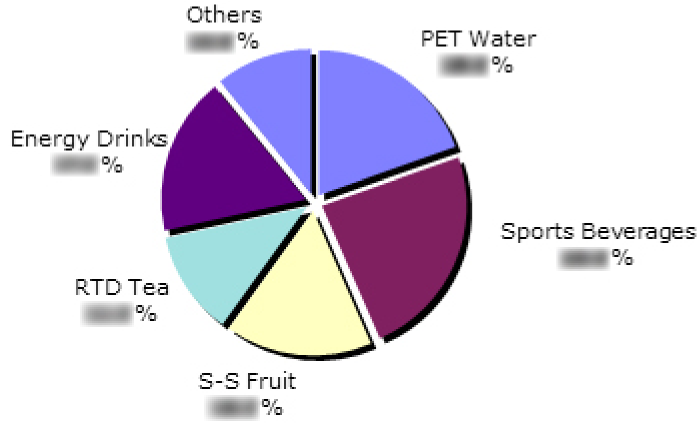
(p) Preliminary; (P) Projected

Note: 2020/25(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, 2020



Source: Beverage Marketing Corporation