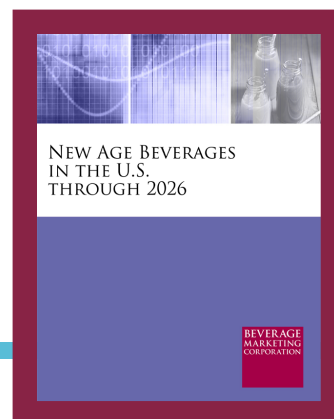


NEW AGE BEVERAGES IN THE U.S. THROUGH 2026

2022 EDITION (Published December 2022. Data through 2021, preliminary 2022 figures and forecasts through 2026.) More than 325 pages, with extensive text analysis, graphs, charts and more than 45 tables.



Indirect competition. This new age beverage market report offers insight on a broad array of established and emerging non-alcohol drinks that share similar attributes and consumer perceptions, meet similar need states and often compete for scarce shelf space, invaluable consumer loyalty and key consumption moments. 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 diverse beverage categories including: coconut water, high-end CSDs, energy drinks, kombucha, plant water, probiotics, protein drinks, ready-to-drink tea and coffee, single serve dairy, single serve fruit beverages, single-serve water, sports beverages, single-serve sparkling water and a broad range of other segments that fall under the ever-evolving New Age beverage umbrella. The astute marketer will want to keep an eye not only on their own immediate segment but on the broader competitive set for lessons, risks and opportunities.

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*

FOR A FULL
CATALOG OF
REPORTS AND
DATABASES,
GO TO
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

**BEVERAGE
MARKETING
CORPORATION**

BEVERAGE MARKETING CORPORATION
P.O. Box 2399 | 143 Canton Road, 2nd Floor
Wintersville, OH 43953
Tel: 212-688-7640 Fax: 740-314-8639

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 2021 and which did not? Which are estimated to have grown or declined in 2022?
- Which categories are poised for strong growth in the future? How did covid-19 impact the market?
- What are the top beverage brands and how did they perform in 2021?
- What's driving developments in the New Age beverage marketplace?
- How many gallons did U.S. residents consume in 2021, and how is that likely to change in the next few years?
- What are the leading sales channels for New Age beverages?

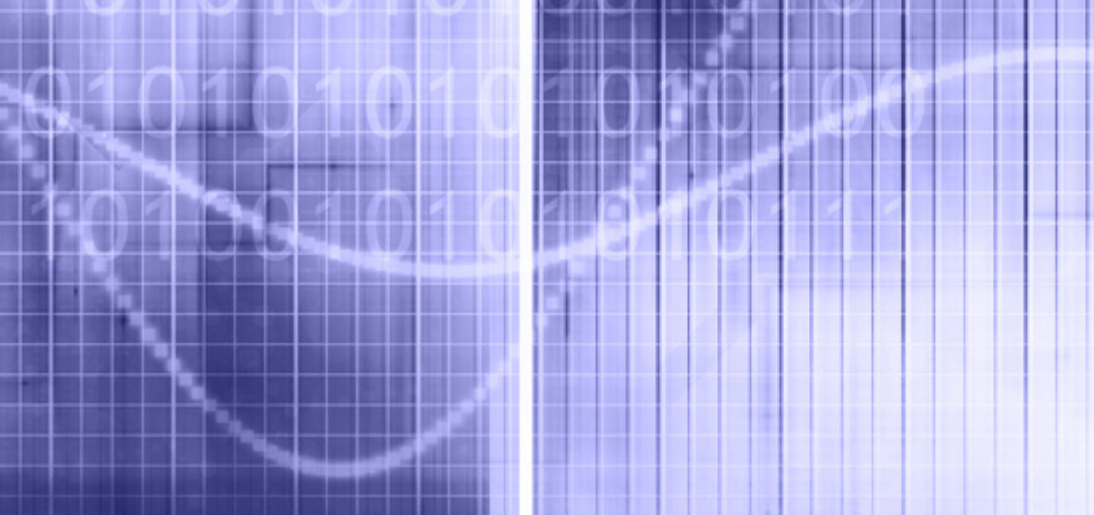
THIS REPORT FEATURES

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 2026. 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 2026 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 2026

**BEVERAGE
MARKETING
CORPORATION**

New Age Beverages in the U.S. through 2026

December 2022

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 © 2022 Beverage Marketing Corporation of New York, P.O. Box 2399, Wintersville, OH 43953, (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 – 2026 -----	4
1.2 New Age Beverage Market Annual Growth 1995 – 2026 -----	5
1.3 New Age Beverage Market Per Capita Consumption 1985 – 2026-----	6

2. NEW AGE SEGMENTS

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

• Single-Serve Water-----	10
• Single-Serve Fruit Beverages -----	15
• Sports Beverages-----	20
• Ready-to-Drink Tea-----	22
• Sparkling Water -----	26
• High-End CSDs -----	27
• Vegetable/Fruit Juice Blends-----	30
• Ready-to-Drink Coffee -----	31
• Energy Drinks-----	33
• Single-Serve Dairy -----	35
• Kombucha-----	35
• Coconut Water -----	37
• Plant Water -----	38
• Protein Drinks-----	40
• Probiotics-----	41

New Age Beverage Market Segments – Volume and Price-----	43
--	----

Exhibits

2.4 New Age Beverage Market Segments Estimated Retail Dollar Sales 2016 – 2026-----	47
2.5 New Age Beverage Market Segments Share of Retail Dollar Sales 2016 – 2026 -----	48
2.6 New Age Beverage Market Segments Change in Retail Dollar Sales 2017 – 2026 ----	49
2.7 New Age Beverage Market Segments Estimated Wholesale Dollar Sales 2016 – 2026	50
2.8 New Age Beverage Market Segments Share of Wholesale Dollar Sales 2016 – 2026 -	51
2.9 New Age Beverage Market Segments Change in Wholesale Dollar Sales 2017 – 2026	52
2.10 New Age Beverage Market Segments Volume 2016 – 2026 -----	53

TABLE OF CONTENTS

Chapter

2. NEW AGE SEGMENTS (cont'd)***Exhibits (cont'd)***

2.11 New Age Beverage Market Segments Share of Volume 2016 – 2026 -----	55
2.12 New Age Beverage Market Segments Change in Volume 2017 – 2026 -----	56
2.13 New Age Beverage Market Segments Estimated Wholesale Prices 2016 – 2026 -----	57

3. NEW AGE REGIONAL MARKETS

New Age Regional Markets -----	59
• The South -----	60
• The West -----	61
• The Northeast -----	62
• The Midwest -----	63
New Age Segments by Regional Markets -----	65
• Sparkling Water -----	65
• Premium Soda -----	65
• Ready-to-Drink Tea -----	66
• Single-Serve Fruit Beverages -----	66
• Sports Beverages -----	67
• Retail PET Water -----	67
• Ready-to-Drink Coffee -----	67
• Energy Drinks -----	68

Exhibits

3.14 New Age Beverage Regional Markets Wholesale Dollar Sales 2016 – 2026 -----	69
3.15 New Age Beverage Regional Markets Share of Wholesale Dollars 2016 – 2026 -----	70
3.16 New Age Beverage Regional Markets Change in Wholesale Dollars 2017 – 2026 -----	71
3.17 New Age Beverage Regional Markets Wholesale Dollar Sales by Segment 2016 – 2026 -----	72
3.18 New Age Beverage Regional Markets Share of Wholesale Dollars by Segment 2016 – 2026 -----	73
3.19 New Age Beverage Regional Markets Change in Wholesale Dollars by Segment 2017 – 2026 -----	74

4. NEW AGE DISTRIBUTION CHANNELS

Distribution of New Age Beverages -----	75
---	----

Exhibits

4.20 New Age Beverages Estimated Volume by Distribution Channel 2016 – 2026 -----	78
4.21 New Age Beverages Volume Share by Distribution Channel 2016 – 2026 -----	79
4.22 New Age Beverages Volume Growth by Distribution Channel 2017 – 2026 -----	80

TABLE OF CONTENTS

Chapter

5. THE LEADING NEW AGE COMPANIES AND THEIR BRANDS

The Leading Companies-----	81
PepsiCo, Inc.	
• Overview -----	85
• Gatorade – Overview -----	87
• Gatorade – Marketing -----	88
• Gatorade – Distribution -----	113
• Aquafina – Overview -----	115
• Aquafina – Marketing -----	115
• Aquafina – Distribution -----	120
• PLTP – Overview -----	120
• PLTP – Marketing -----	121
• PLTP – Distribution -----	128
• LIFEWTR – Overview -----	129
• LIFEWTR – Marketing -----	129
• bubly – Overview -----	130
• Frappuccino – Overview -----	132
• Frappuccino – Marketing -----	132
• Rockstar – Overview -----	137
• Rockstar – Marketing -----	139
• Amp – Overview -----	142
• Amp – Marketing -----	143
Coca-Cola Company	
• Overview -----	149
• Dasani – Overview -----	150
• Dasani – Marketing -----	151
• Dasani – Distribution -----	154
• Glacéau – Overview -----	155
• Glacéau – Marketing -----	156
• Glacéau – Distribution -----	162
• Gold Peak – Overview -----	163
• Gold Peak – Marketing -----	164
• Peace Tea – Overview -----	165
• Minute Maid – Overview -----	166
• Minute Maid – Marketing -----	167
• Minute Maid – Distribution -----	168
• Fuze – Overview -----	169
• Fuze – Marketing -----	169
• Powerade – Overview -----	170
• Powerade – Marketing -----	170
• Powerade – Distribution -----	174

TABLE OF CONTENTS

Chapter

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

Coca-Cola Company (cont'd)

• BodyArmor – Overview -----	175
• BodyArmor – Marketing -----	177
• AHA – Overview -----	180
• Topo Chico – Overview -----	181
• Topo Chico – Marketing -----	181

BlueTriton Brands

• Overview -----	183
• Marketing -----	184
• Distribution -----	194

Keurig Dr Pepper

• Overview -----	195
• Hawaiian Punch – Marketing -----	196
• Snapple Beverage Group – Overview -----	197
• Snapple Beverage Group – Marketing -----	197
• Snapple Beverage Group – Distribution -----	202
• Bai – Overview -----	204
• Bai – Marketing -----	205
• Core Hydration – Overview -----	208
• Core Hydration – Marketing -----	209

Red Bull

• Overview -----	211
• Marketing -----	212
• Distribution -----	225

Ferolito, Vultaggio & Sons

• Overview -----	228
• Marketing -----	230
• Distribution -----	237

Monster Beverage Corporation

• Overview -----	238
• Marketing -----	239
• Distribution -----	250

PAI Partners

• Overview -----	255
• Tropicana – Overview -----	255
• Tropicana – Marketing -----	255
• Naked Juice – Overview -----	257
• Naked Juice – Marketing -----	260
• Naked Juice – Distribution -----	263

TABLE OF CONTENTS

Chapter

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

• Izze – Overview	264
• Izze – Marketing	264
• Izze – Distribution	265

Exhibits

5.23 Leading New Age Beverage Companies Estimated Wholesale Dollar Sales 2016 – 2021	266
5.24 Leading New Age Beverage Companies Share of Wholesale Dollar Sales 2016 – 2021	267
5.25 Leading New Age Beverage Companies Change in Wholesale Dollar Sales 2017 – 2021	268
5.26 Leading New Age Beverage Brands Estimated Wholesale Dollar Sales 2016 – 2021 --	269
5.27 Leading New Age Beverage Brands Share of Wholesale Dollar Sales 2016 – 2021 ----	270
5.28 Leading New Age Beverage Brands Change in Wholesale Dollar Sales 2017 – 2021 --	271

6. NEW AGE BEVERAGE ADVERTISING EXPENDITURES

New Age Beverage Brands Advertising Expenditures	272
New Age Beverage Advertising By Media	274
New Age Beverage Advertising By Category.....	276

Exhibits

6.29 Leading New Age Beverage Brands Advertising Expenditures 2016 – 2021	278
6.30 Leading New Age Beverage Brands Share of Advertising Expenditures 2016 – 2021	279
6.31 Leading New Age Beverage Brands Change in Advertising Expenditures 2017 – 2021	280
6.32 Estimated New Age Advertising Expenditures by Media 2016 – 2021	281
6.33 Estimated New Age Advertising Share of Expenditures by Media 2016 – 2021	282
6.34 Estimated New Age Advertising Change in Expenditures by Media 2017 – 2021	283
6.35 Estimated New Age Advertising Expenditures by Market Segment 2016 – 2021	284
6.36 Estimated New Age Advertising Share of Expenditures by Segment 2016 – 2021 ----	285
6.37 Estimated New Age Advertising Change in Expenditures by Segment 2017 – 2021 --	286

7. DEMOGRAPHICS OF THE NEW AGE BEVERAGE CONSUMER

The New Age Beverage Consumer	287
Overview	287
Comparative Demographics of New Age Brands	290

Exhibits

7.38 Demographics of the Bottled Water Consumer 2021	299
7.39 Demographics of the RTD Tea Consumer 2021	301
7.40 Demographics of the Sports Beverage Consumer 2021	303

TABLE OF CONTENTS

Chapter

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

Exhibits (cont'd)

7.41 Demographics of the Energy Drink Consumer 2021 -----	305
7.42 Demographics of the Evian Consumer 2021 -----	307
7.43 Demographics of the Aquafina Consumer 2021-----	309
7.44 Demographics of the AriZona Tea Consumer 2021 -----	311
7.45 Demographics of the Lipton Consumer 2021 -----	313
7.46 Demographics of the Gatorade Consumer 2021 -----	315
7.47 Demographics of the Powerade Consumer 2021 -----	317
7.48 Demographics of the Red Bull Consumer 2021 -----	319
7.49 Demographics of the Monster Consumer 2021 -----	321

For many years, retail PET water was the most dynamic segment of the New Age beverage market due to its portability, purity and low price point.

- Prompted at first by concerns about municipal water systems, people quickly found that low cost retail PET packages in 1-liter and 1.5-liter sizes were a convenient, portable beverage.
- At the same time, bottled water represents something of a “default” beverage, a fall back for consumers overwhelmed by the dizzying array of beverage alternatives in the display case.
- Best of all, unlike other drinks, bottled water can be enjoyed cold or tepid.

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.

NEW AGE BEVERAGE MARKET SEGMENTS
CHANGE IN VOLUME
2017 – 2026(P)

Market Segments	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22(p)	2021/26(P)
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%
Essence Water	100%	100%	100%	100%	100%	100%	100%
Flavored Water	100%	100%	100%	100%	100%	100%	100%
Subtotal S-S Water	100%	100%	100%	100%	100%	100%	100%
Sports Beverages	100%	100%	100%	100%	100%	100%	100%
RTD Tea	100%	100%	100%	100%	100%	100%	100%
Energy Drinks	100%	100%	100%	100%	100%	100%	100%
Sparkling Water	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%
Subtotal S-S Fruit	100%	100%	100%	100%	100%	100%	100%
High-End CSD	100%	100%	100%	100%	100%	100%	100%
RTD Coffee	100%	100%	100%	100%	100%	100%	100%
Protein Drinks	100%	100%	100%	100%	100%	100%	100%
Coconut Water	100%	100%	100%	100%	100%	100%	100%
Kombucha	100%	100%	100%	100%	100%	100%	100%
Vegetable/Fruit Blends	100%	100%	100%	100%	100%	100%	100%
Probiotics	100%	100%	100%	100%	100%	100%	100%
Shelf-Stable Dairy	100%	100%	100%	100%	100%	100%	100%
Plant Water	100%	100%	100%	100%	100%	100%	100%
TOTAL	100%	100%	100%	100%	100%	100%	100%

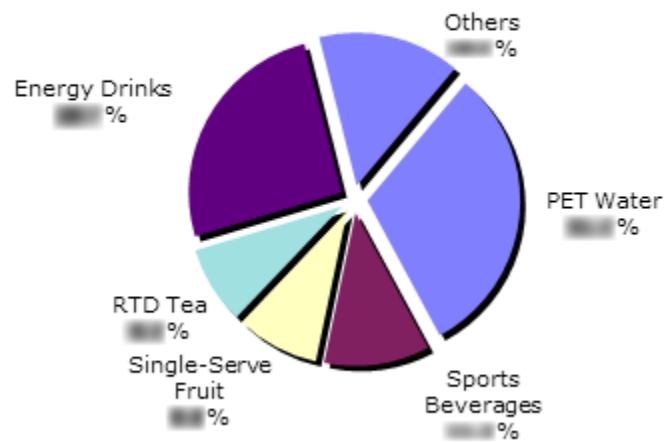
(p) Preliminary; (P) Projected

Note: 2021/26(P) change is projected five-year compound annual growth rate.

Source: Beverage Marketing Corporation

PET WATER LEADS WESTERN NEW AGE MARKET

Share of sales by segment, 2021



Source: Beverage Marketing Corporation