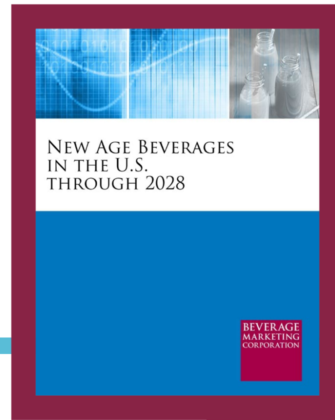
New Age Beverages in the U.S. through 2028

2024 Edition (Published December 2024. Data through 2023, preliminary 2024 figures and forecasts through 2028.) More than 325 pages, with extensive text analysis, graphs, charts and more than 45 tables.



Indirect competition. Competition isn't just between similar products within a category anymore. If you aren't keeping an eye on the products that share the shelf with, and are vying for, your product's consumer base and market share, you're missing a key part of the picture. 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 of those attributes (whether actual or perceived); meet similar need states; and often compete for scarce shelf space, invaluable consumer loyalty and key consumption moments. This comprehensive report also offers key data and forecasts to help you conduct cross category analysis and spot opportunities. Further, it discusses consumer drivers and innovations that are changing the face of the market. Historical, current and projected data on volume and sales are provided and leading companies and their strategies are analyzed. This study examines diverse beverage categories and their sub-categories that fall under the broad and ever-evolving New Age beverage umbrella 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, vegetable/fruit juice blends and others. 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.

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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 2023 and which did not? Which are estimated to have grown or declined in 2024?
- 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 2023?
- What's driving developments in the New Age beverage marketplace?
- How many gallons did U.S. residents consume in 2023, 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 and are characterized by Beverage Marketing Corporation as belonging to the New Age category. 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 2028. 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 2028 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 and others.

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BEVERAGE MARKETING CORPORATION

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December 2024

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.

Table of Contents

Contents

TABLE OF CONTENTS

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

It should be noted that from a growth perspective, flavored water has emerged as the weak partner in the value-added water market.

- Coca-Cola and Pepsi-Cola had harbored hopes that flavored waters might pose an escape from the low-margin ghetto that the heavily promotional conventional bottled water segment had become (thanks in large part to their own aggressive battling on price), but that did not prove to be the case.
- While flavored water brands under Dasani (Coke) and Aquafina (PepsiCo) succeeded in expanding the category somewhat, at least initially, they failed to capture much of a price premium, providing a further incentive for the companies to focus on the enhanced segment instead, where the promise of nutritional enhancements proved a more compelling reason for consumers to pay a premium.
- For a while flavored water was able to turn its habitual volume and dollar losses into growth again. However, as the segment declines again, Splash Blast (formerly, Nestlé Splash) and Capri Sun Roarin' Waters became the only major brands to have any meaningful sales — leading Coke and Pepsi to throw in the towel recently.

So-called essence water is unsweetened or mildly sweetened water with light flavor essences. The fledgling category has been populated with brands such as Hint and O Water.

- For consumers wary of ingesting sugar but uncomfortable with alternative sweeteners — including supposedly "natural" ones like sucralose and perhaps even the truly natural (without the quote marks) stevia — unsweetened flavored beverages would seem to be the ideal solution: no carbs, no calories, no artificial sweeteners, but something for the palate in flavor and/or carbonation.
- Early attempts to provide consumers with essence waters were not successful. In the early 2000s, Aqua Vie Hydrators, a line of unsweetened, still flavored water, was ahead of its time. Consumers then were still inured to sweet, flavored, carbonated sodas and were not ready for non-carbonated, unsweetened water.
- As implied, there has been no lack of entrants over the years, but none had broken out — until lately. After a decade-long gestation period, Hint Water started to ignite, as consumers continued to seek alternatives to traditional diet sodas. Brands like the sweetened Sparkling ICE have captured some of these consumers, but so have the unsweetened flavored brands.
- However, it is also true that the category relies on the performance of Hint Water, which has started to slow from its heady growth years.

Exhibit 2.12

NEW AGE BEVERAGE MARKET SEGMENTS

CHANGE IN VOLUME

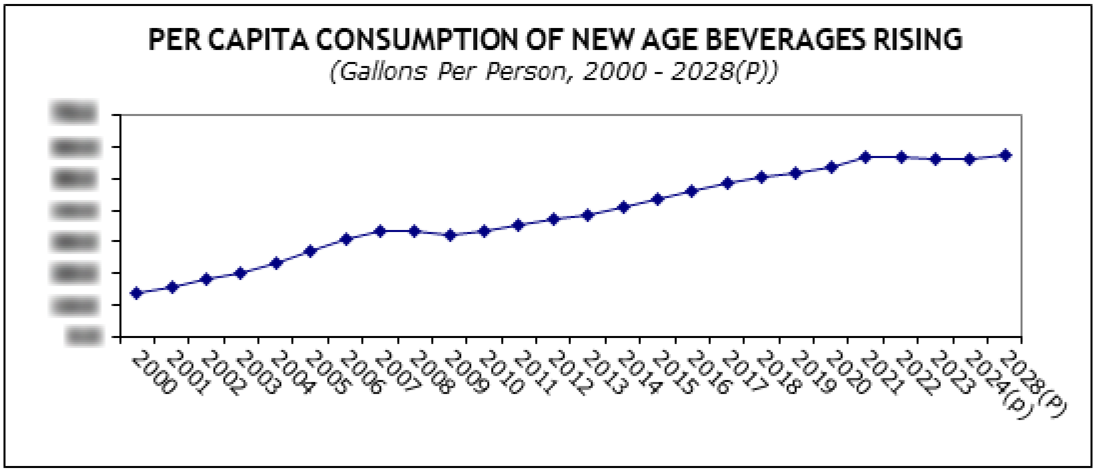
2019 – 2028(P)

Market Segments	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24(p)	2023/28(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]%
Essence Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Flavored Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal S-S Water	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Sports Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Energy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sparkling Water	[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]%**
High-End CSD	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Protein Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Coconut Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Kombucha	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Vegetable/Fruit Blends	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Probiotics	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Shelf-Stable Dairy	[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: 2023/28(P) change is projected five-year compound annual growth rate.

Source: Beverage Marketing Corporation



(p) Preliminary; (P) Projected

Source: Beverage Marketing Corporation