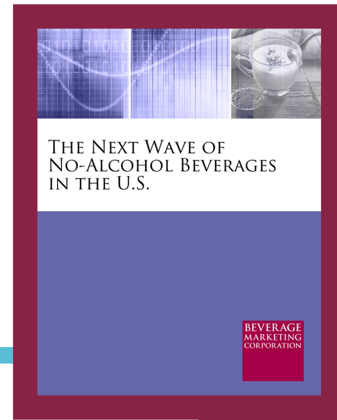
# The Next Wave of No-Alcohol Beverages in the U.S.

2022 Edition (Published December 2022. Data through 2021, preliminary data through 2022.) More than 550 pages, with extensive text analysis.




This report from Beverage Marketing Corporation scrutinizes the always-changing marketplace by identifying and quantifying emerging and niche non-alcoholic beverage categories, discussing companies of growing significance and describing what could be the next big thing. It also looks at the consumer market drivers and other factors impacting innovation, functionality and new product development.

For a Full Catalog of Reports and Databases, Go To bmcreports.com

## Available Format & Pricing

**Direct Download**
Word & PDF

**$4,295**

*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*

## Inside:



**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

In an industry where innovation is a constant, this report provides in-depth analysis of ways innovation is changing the beverage landscape through the emergence of new categories and brands. It also provides an overview of defining trends spurring developments in new categories. It also looks at the fast-growing liquid refreshment beverage companies, discusses their performance and indicates what makes them noteworthy. Questions answered include:

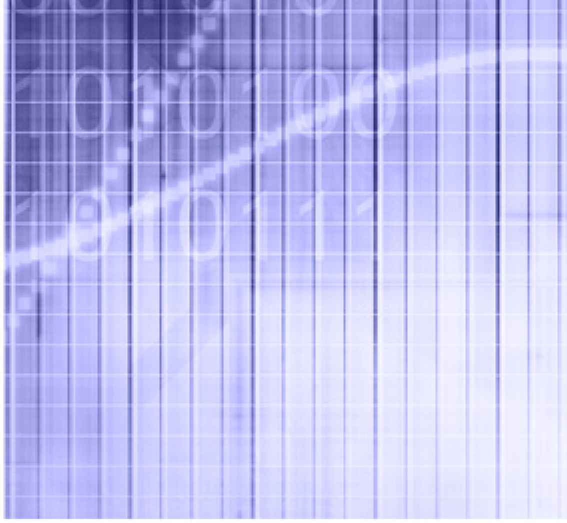
- What new categories are enlivening the U.S. beverage market?
- How big are these emerging sectors and why are they worthy of being on your radar?
- What trends characterize the various up-and-coming beverage types entering the marketplace?
- Which companies enjoy the backing of industry veterans and strong financial resources, and which do not?
- Which beverage companies and brands show the most promise for success in the competitive U.S. marketplace?
- Which companies could become takeover targets in the near future?

## This report features

Get a comprehensive overview of several fledgling beverage segments, some of which are poised to become the next big thing. For added market perspective, the entrepreneurial brands that comprise the burgeoning beverage categories are anchored in the context of more-established beverage market.

To provide context to the research findings, the report discusses factors that have led to the development of new beverage segments despite the relative maturity of the packaged beverage market as a whole. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of key facets of emerging beverage markets including:

- Analysis of industry trends and quantification of emerging non-alcoholic beverage categories and sub-segments.
- Discussion of the types of companies driving innovation – from the traditional large beverage companies to entrepreneurs.
- Insight from our up and coming market research analysts' on the factors driving innovation into new beverage types.
- Analysis of niche and emerging segments including high-end water, cannabis-infused beverages, premium sodas, dairy alternatives, premium ready-to-drink teas, coconut water, essence waters, kombucha, cleanses, ready-to-drink protein drinks, functional beverages, probiotics, energy drinks, premium kids' beverages, ready-to-drink coffee and more.
- Discussion of companies with distinctive brands in each nascent and new segment. Companies/brands covered may include: Alkaline Water Co, Apres, Argo Tea, AriZona, Bang Energy, BioSteel, Bulletproof Coffee, C4, Califia Farms, Calypso Lemonade, Celsius, Cheribundi, Evamor, GT's Living Foods, GoodBelly, Guayaki, Harmless Harvest, Health-Ade, High Brew, Hint Water, Humm Kombucha, Inko's, Karma Wellness Water, Kitu Super Coffee, La Croix, Lifeway, Mamma Chia, MatchaBar, Neuro, Oatly, Olipop, OWYN, Protein2O, Purity Organic, Q Tonic, Ready Nutrition, Reed's, Sambazon, Soylent, Sparkling ICE, Suja, Sweet Leaf/Tradewinds, Trimino, Vita Coco, Voss, Zevia, Zola Açaí and more.
- Our up and coming beverage companies market research analysis takes on the brands to watch in the various non-alcohol sectors and what they are doing to differentiate themselves. It also discusses the strengths of various emerging brands and categories and the challenges they'll face going forward.



# The Next Wave of No-Alcohol Beverages in the U.S.

BEVERAGE MARKETING CORPORATION

# The Next Wave of No-Alcohol Beverages in the U.S.

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.

# Table of Contents

Contents

# TABLE OF CONTENTS

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

# TABLE OF CONTENTS

## Chapter

## Text Sample 1

There also was huge upheaval in the sector's most lucrative segment, energy drinks, particularly for the independent wholesalers who play a key role in incubating new brands.

- The key insurgent, Bang Energy, took it on the chin in litigation brought against its benefit claims and its intellectual property, even as its disastrous distribution alliance with PepsiCo was unwound. Between the legal rulings and exit fee to PepsiCo, it was left saddled with massive debt and forced to file for bankruptcy protection, while hoping to re-enlist the independent beer wholesalers it had spurned for Pepsi a mere two years earlier.
- The bed wasn't even cold yet when Pepsi set a new alliance — this time with equity — with the explosively growing Celsius brand. Celsius in turn exited the beer houses that had nurtured it for years, which often filled the void with Bang, despite the acrimony of Bang's sloppy exit from those very houses. The Celsius exit also opened doors to two other fast-growing brands, Alani Nu and C4 Energy — only for C4 to promptly set its own strategic alliance via an investment and distribution deal with Keurig Dr Pepper (KDP).
- As for Red Bull, which usually sits sedately above the fray, self-distributing to continued growth in most major metros, something seemed seriously awry. Its ingenious Austrian co-founder and leader Dietrich Mateschitz, who brooked no thought of selling the company because of the sheer fun it brought him, vanished from sight amid rumors that he was seriously ill. Red Bull responded with a blunt "no comment" to questions of his status, even as it set an uncharacteristic distribution deal with KDP in Mexico. Soon enough, it emerged that he had in fact passed away, releasing only limited information on the succession plan. The world was left to wonder: might this iconic brand and company be in play? Was the Mexico deal just the first sign of future deals to come? The implications would be enormous in a sector whose continued innovation and premium positioning have been a glory of the beverage business.

## Text Sample 2

Among other key features of the beverage landscape have been legislative initiatives to tax sodas and other sugar-sweetened beverages that, with some major wins in cities like Philadelphia and Berkeley, California, have galvanized soda lobbyist the American Beverage Association and its members to spend unprecedented amounts to beat them back.

- Meanwhile, corporate campuses have been opening up their beverage sets to new ideas, sometimes voted on by their employees, as the companies adopt health-and-wellness policies that definitely do not emphasize soda, highly sweetened teas and other traditional refreshers. (They also are moving increasingly to banning single-use plastic as a beverage package.) And quick-serve and fast-food restaurant chains increasingly were looking to ease ingredients like high-fructose corn syrup (HFCS) out of their offerings, with chains like Panera and Chipotle Grill among the leaders in such efforts, and fountain brands like organic Tractor Soda making major inroads as a result. Tractor won an investment and distribution partnership with KDP as a result.
- On the retail side, a growing number of mainstream retailers, seeing chains like Whole Foods and Sprouts Farmers Market developing an image as homes for innovative new brands, have decided to stop ceding that ground, and stepped up their efforts to make themselves more hospitable incubators for interesting new items.
- Thus, Walmart, Target, Safeway, Kroger and drug chains like CVS have been fostering programs that ease the entry of newer brands by bringing down the slotting, distribution and other barriers to such brands getting on their shelves, at least in limited, experimental sets. (Of course, if the brands don't turn, these retailers sometimes prove to have short fuses on keeping them on their shelves.)

As accepting as the climate has become to healthier, more premium entries, this is not to say that beverages do not remain a brutally competitive business, even at the premium end that is emphasized in this report.

- There is a debate about how steep the cost of entry is. Successful serial entrepreneurs like Mike Repole (the Vitaminwater veteran now running BodyArmor) and Lance Collins (the Fuze veteran who sold Core to KDP and is managing the Zen WTR, A Shoc and My Muse brands) like to say that if you don't have tens of millions of dollars to bring to the table you may as well stay home, and their easy access to capital has enabled them to pursue expensive "landgrab" strategies that call for quick national rollouts, backed by expensive direct store distribution (DSD) and field marketing efforts. Thanks to their access to resources, they can stay in the game until they hit upon the right combination of product and positioning elements to attain success, and a successful exit.