

NORTH AMERICAN TOPLINE

2021 EDITION (Published December 2021. Data through 2020. Market projections through 2025.) More than 55 Excel tables plus an executive summary.



*N*orth American Topline from Beverage Marketing Corporation provides a data overview of the total North American beverage market with key market statistics and five-year forecasts. Also features an executive summary highlighting developments and trends including impact of covid-19 pandemic. Perfect for investors, entrepreneurs requiring statistics for their business plan, ad agencies preparing an account pitch or anyone who needs a quick view of the region.

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HAVE QUESTIONS?

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THE ANSWERS YOU NEED

North American Topline offers a concise summary of the overall regional market. Questions answered include:

- How much bottled water is consumed per capita in the United States, Canada and Mexico, and how has this changed in recent years?
- How did the carbonated soft drink market perform in the region in 2020, and how is it likely to develop in the future?
- In which North American country do residents drink the most coffee, tea and milk per capita?
- What's the number-one beverage category by volume in Mexico?
- What are the growth prospects for coffee in the region and in the individual markets?
- How have energy drinks and sports beverages fared on a regional basis?

THIS REPORT FEATURES

This report contains key information on each major beverage category and on the beverage markets of the countries comprising the region; it features volume for 11 beverage types as well as per capita consumption data and five-year forecast data. Beverage categories covered include bottled water, carbonated soft drinks, coffee, distilled spirits, energy drinks, fruit beverages, milk, sports beverages, tea and wine. Data include volume, growth, share and per capita consumption for Mexico, Canada, U.S. and islands in the region. Caribbean island data provided in select beverage categories.



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North American Topline

December 2021

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North America, a large and diverse market, contained 542.2 million consumers as of 2020.

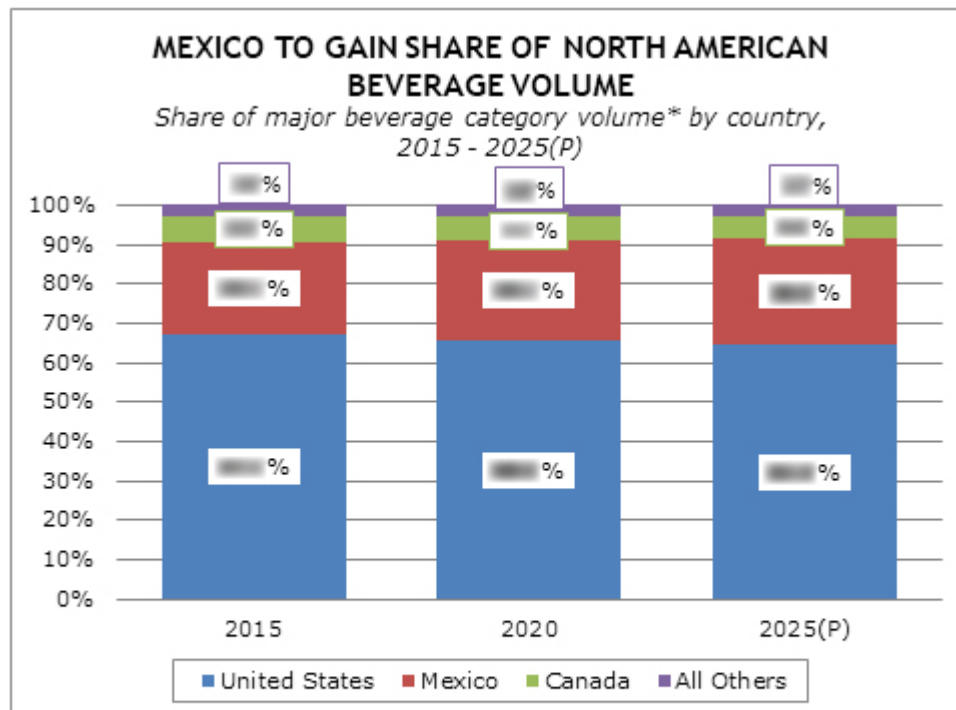
- While the majority of those consumers – more than 329 million – resided in the United States, the region also had a populous member in Mexico, which had almost 134 million consumers in 2020.
- Canada was the third largest North American market with 37.6 million residents. Another approximately 41.2 million consumers were spread across various island nations in the Caribbean, including Haiti, the Dominican Republic, Cuba, Jamaica and the U.S. territory of Puerto Rico.
- As by far the biggest market in the region, the United States predictably ranks as the top market in overall volume across all the beverage categories. It is not number-one in per capita consumption in all categories, however, and the region displays significant variety among countries in the performances of the 11 major beverage categories measured in this report – beer, bottled water, carbonated soft drinks (CSDs), coffee, distilled spirits, energy drinks, fruit beverages, milk, sports beverages, tea and wine.
- Together, those 11 categories saw volume in the region exceed 3.2 billion hectoliters, or almost 85 billion gallons in 2020.
- The United States accounted for almost two-thirds of regional beverage volume with nearly 2.1 billion hectoliters (55.5 billion gallons). Thus the largest individual North American market had a higher share of beverage volume (65.6%) than its share of the region's population (60.8%).
- Mexico's share of regional beverage volume in 2020 (25.4%) was not much different than its share of population (24.7%).
- Canada accounted for 6.2% of the market's beverage volume.
- The small island countries accounted for the remaining 2.8% in 2020.
- As recently as 2013, CSDs stood as the largest category by volume, but bottled water surpassed them the following year. By 2020, bottled water volume was more than 286 million hectoliters, or 7.5 billion gallons, larger than regional CSD volume.

Exhibit 2

**NORTH AMERICAN BEVERAGE MARKET
SHARE OF VOLUME BY COUNTRY
2015 – 2020**

Countries	2015	2016	2017	2018	2019	2020
United States	68%	67%	66%	65%	64%	63%
Mexico	22%	23%	24%	25%	26%	27%
Canada	10%	10%	10%	10%	10%	10%
Subtotal	100%	100%	100%	100%	100%	100%
All Others	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%

Source: Beverage Marketing Corporation



* Includes beer, bottled water, carbonated soft drinks, coffee, distilled spirits, energy drinks, fruit beverages, milk, sports drinks, tea and wine.
(P) Projected

Source: Beverage Marketing Corporation