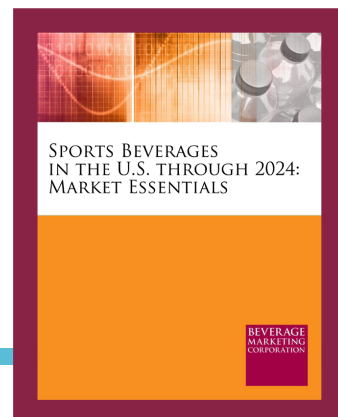


# SPORTS BEVERAGES IN THE U.S. THROUGH 2024: MARKET ESSENTIALS

**2020 EDITION** (Published October 2020. Data through 2019. Market projections through 2024.) More than 50 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



**G**et a comprehensive view of the market for U.S. sports beverages. This report includes industry data by geographic region, pricing, consumer demographics, advertising, quarterly growth, distribution channels and packaging, and low-calorie options. It provides statistics for key brands including all-sales-channel-inclusive sales results, market share and growth.

This market report also offers projections and provides users with the data needed to identify opportunities, benchmark their progress and set goals for the future.

The report presents the data in Excel spreadsheets, which it supplements with a concise executive summary highlighting key developments including the Covid-19 pandemic as well as a detailed discussion of the leading sports beverage companies.

**New in 2020:** *Expanded coverage of emerging, niche brands in the sports beverage market.*

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**HAVE  
QUESTIONS?**

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## THE ANSWERS YOU NEED

This report provides in-depth data, shedding light on various aspects of the market through reliable total market data. Questions answered in this industry research report include:

- How many gallons of sports drinks did U.S. residents consume in 2019 and the first half of 2020?
- How did the packaging mix change in 2019?
- Which distribution channel grew the fastest in 2019? Which sales channels will gain share through 2024?
- What proportion of sports drinks are low-calorie?
- Is the protein drink segment growing? If so, by how much?
- What market share will sports powders and low-calorie sports beverages command by 2024?
- Which distribution channels will gain importance in 2024?

## THIS REPORT FEATURES

The report offers an in-depth look at the category, companies and brands shaping the U.S. sports beverage market and looks at historical, current and anticipated segment growth through 2024. It provides perspective on the segment and its many facets, providing sales and volume statistics including total market retail dollar sales, wholesale dollar data and volume data. Through Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of the market including:

- Historical, current and projected market statistics with the granularity necessary to put trends in context and identify pockets of opportunity.
- Regional perspective on the marketplace in the U.S., highlighting volume and growth pattern variations from region to region.
- Company and brand sales volume data. Coverage includes PepsiCo (Gatorade), Coca-Cola (Powerade), BodyArmor, BioSteel and Coco5.
- Analysis of regular vs. reduced calorie sports drink market trends.
- A look at sports beverages by flavor through 2024.
- Data detailing sales by key on- and off-premise distribution channels totaling 100% of market volume.
- Volume and share data by package size historically, currently and five years into the future.
- Advertising expenditures of the leading companies and a look at category spending by media type (including internet advertising).
- Consumer demographic profiles comparing consumers of key brands.
- Perspective on the protein drink market.
- Five-year projections for the sports drink market and its sub-segments.



# SPORTS BEVERAGES IN THE U.S. THROUGH 2024: MARKET ESSENTIALS

BEVERAGE  
MARKETING  
CORPORATION

# Sports Beverages in the U.S. through 2024: Market Essentials

October 2020

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BEVERAGE  
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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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In June 2018, PepsiCo capitulated to competitive pressures by introducing Gatorade Zero.

- This was in the wake of a weak 2017 for the brand during which BodyArmor gained enough scale to become a real nuisance. It represented Gatorade's first no-sugar product (not counting Propel) in its 53-year history. It was rationalized as a hydration option rather than an isotonic, perhaps targeting those who would rather drink something with Gatorade, instead of Propel, on the label.
- Gatorade Zero initially came in Glacier Cherry, Lemon-Lime and Orange. All are packaged in 16.9-, 20-, 28- and 32-ounce bottles. It is sweetened with sucralose and ace-K and also contains sodium and potassium.
- The subline has performed well, with wholesale sales now exceeding \$600 million. PepsiCo added 12-ounce bottles for Glacier Cherry and Orange. It also introduced three new flavors: Berry, Glacier Freeze and Strawberry Kiwi. The latter is no longer sold, but Fruit Punch and Grape have been added to the lineup.
- In early 2019, future NBA Hall of Famer Dwyane Wade and his wife, actress Gabrielle Union, appeared in a pair of ads for Gatorade Zero in which the duo compete *mano-a-mano* in various athletic endeavors. Another ad with the same theme debuted late that year.

In May 2010, PepsiCo unveiled G Series Pro — a line of products aimed at “elite athletes” such as professionals and aspiring pros. The line has been rechristened G Endurance.

- G Series Pro was a rejigging of the Gatorade Performance Series line, which consisted of Carbohydrate Energy Formula, Endurance Formula, Protein Recovery Shake and Nutrition Shake. With G Series Pro, PepsiCo proclaimed that it was broadening the availability of its elite performance products beyond “locker room and specialized training facilities.”
- G Series Pro, as it was then known, was launched at more than 3,500 GNC nutrition stores. It was later made available at Dick's Sporting Goods, a chain of more than 400 athletic stores.
- Like the regular G Series, G Series Pro was demarcated in three stages: 01 Prime, 02 Perform and 03 Recover. However, the Recover stage was later dropped from the line and changes made to the Prime stage. Also, as noted, G Series Pro has been renamed G Endurance as the company decided to abandon the “numbered” approach — perhaps in recognition that hardcore athletes already know the correct product to consume at the appropriate “stage” of exercise.

**SPORTS BEVERAGE FLAVORS**  
**SHARE OF VOLUME BY FLAVOR (r)**  
**2014 – 2024(P)**

<b>Flavors</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2024(P)</b>
Blue	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Fruit Punch	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Lemon Lime	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Orange	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Berry	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Grape	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Strawberry	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Cherry	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Other	■ %	■ %	■ %	■ %	■ %	■ %	■ %
<b>TOTAL</b>	■ %	■ %	■ %	■ %	■ %	■ %	■ %

(r) Revised

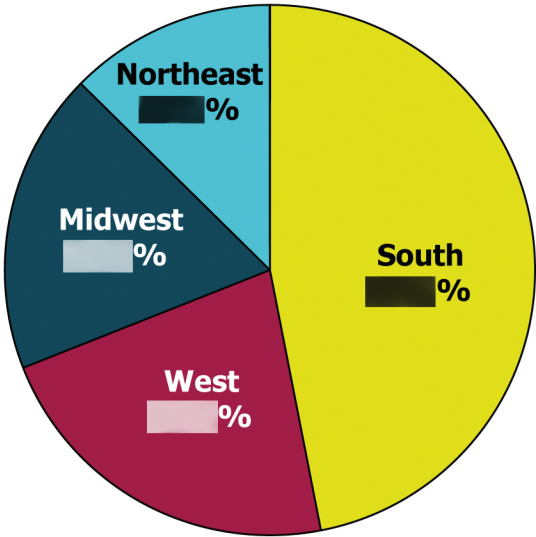
(P) Projected

Source: Beverage Marketing Corporation

## Sports Beverage Regional Trends

- Gatorade was invented in Florida. The populous South region continues to dominate the sports beverage market, accounting for a plurality of wholesale dollars (██████% share in 2019). The West and Midwest came in distant second and third place with wholesale dollar shares of ██████% and ██████%, respectively.
- The Northeast brought up the rear with only a ██████% share of sports beverage wholesale dollars in 2019. Much of this has to do with unseasonable weather for much of the year, coupled with competition from other beverages.

**Sports Beverage Wholesale Dollars: Regional Shares  
2019**



Source: Beverage Marketing Corporation