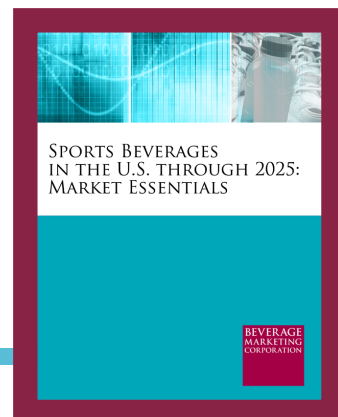


SPORTS BEVERAGES IN THE U.S. THROUGH 2025: MARKET ESSENTIALS

2021 EDITION (Published November 2021. Data through 2020. Market projections through 2025.) More than 50 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



Get 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.

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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 2020 and the first half of 2021?
- How did the packaging mix change in 2020?
- Which distribution channel grew the fastest in 2020? Which sales channels will gain share through 2025?
- 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 2025?
- Which distribution channels will gain importance in 2025?

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 2025. 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 2025.
- 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 2025: MARKET ESSENTIALS

**BEVERAGE
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Sports Beverages in the U.S. through 2025: Market Essentials

November 2021

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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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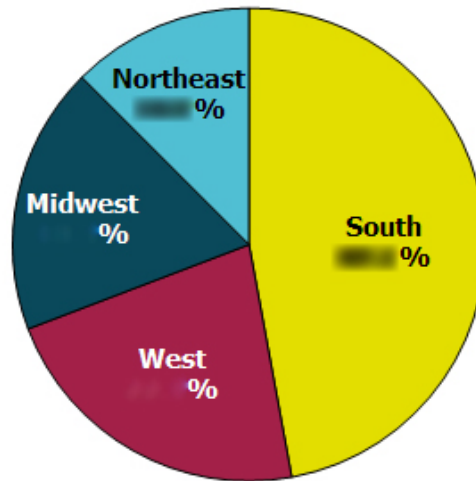
In summer 2019, PepsiCo introduced BOLT24, which contains electrolytes but also an enhanced level of vitamins.

- Fully-wrap 0.5-liter bottles eschew the Gatorade name but have the unmistakable trademark lightning bolt with “Antioxidant” printed on the top and the “Hydration with Electrolytes” slogan beneath the brand name. Initial flavors were Mixed Berry, Tropical Mango and Watermelon Strawberry.
- Besides water, cane sugar and citric acid, BOLT24’s main ingredients are clarified watermelon concentrate and sea salts. It is also sweetened with purified stevia extract to yield a calorie count of 80 per bottle. Each bottle also contains 230 milligrams of sodium, 65 milligrams of potassium and 100% of the daily value of vitamins A, C, B₃, B₅ and B₆.
- The product proposition seems to be as a more “natural” version of G2. According to the company, the mission is to “provide advanced, all-day hydration for the 24/7 athlete off-the-field.” SRP is \$2.19.
- The BOLT24 brand was also viewed as a springboard for other functional entries in the future. The initial effort in this regard were three new caffeinated entries that debuted in early 2020: Cherry Lime Energize, Orange Passion Fruit Energize and Strawberry Lemon Energize, each containing 53 milligrams of caffeine. These are reportedly the first Gatorade products ever with caffeine. Meanwhile, the original BOLT24 varieties now have the word “Antioxidant” at the end of their flavor names.
- Gatorade revealed part of the inspiration for introducing BOLT24 while finally firing back at BodyArmor (which has derided Gatorade in ads) with a new outdoor and point-of-sale campaign for BOLT24 that points out that BOLT24 has 30% less sugar than BodyArmor.
- Two newer BOLT24 SKUs have the Restore designation, with 10 grams of collagen peptides. Flavors are Apple Pear and Peach Mango.

In early 2020, PepsiCo overtly targeted tweens with a new line called Gatorade Juiced.

- Gatorade Juiced comes in Apple Raspberry, Berry Lemonade, Citrus Berry Punch and Mixed Berry flavors. Each contains 25% juice with no added sugar. Purified stevia leaf provides additional sweetness. Electrolyte levels are the same as base Gatorade.
- It is packaged in 12-ounce bottles at only 40 calories. It is intended to be merchandised in the shelf-stable juice aisle.

Sports Beverage Wholesale Dollars: Regional Shares 2020



Source: Beverage Marketing Corporation

Exhibit 4.35

SPORTS BEVERAGE FLAVORS SHARE OF VOLUME BY FLAVOR (r) 2015 – 2025(P)

Flavors	2015	2016	2017	2018	2019	2020	2021(P)	2025(P)
Blue	1%	1%	1%	1%	1%	1%	1%	1%
Fruit Punch	1%	1%	1%	1%	1%	1%	1%	1%
Lemon Lime	1%	1%	1%	1%	1%	1%	1%	1%
Orange	1%	1%	1%	1%	1%	1%	1%	1%
Berry	1%	1%	1%	1%	1%	1%	1%	1%
Grape	1%	1%	1%	1%	1%	1%	1%	1%
Strawberry	1%	1%	1%	1%	1%	1%	1%	1%
Cherry	1%	1%	1%	1%	1%	1%	1%	1%
Other	1%	1%	1%	1%	1%	1%	1%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

(r) Revised

(P) Projected

Source: Beverage Marketing Corporation