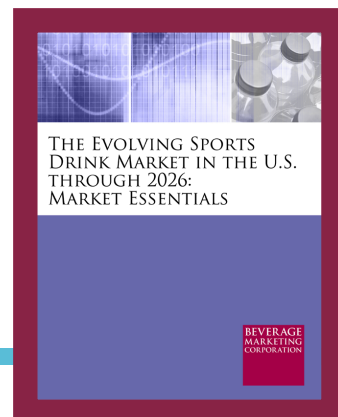


THE EVOLVING SPORTS DRINK MARKET IN THE U.S. THROUGH 2026: MARKET ESSENTIALS

2022 EDITION (Published December 2022. Data through 2021, preliminary 2022 figures and forecasts through 2026.) More than 50 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



Market shifts continue. Get a comprehensive view of the market for U.S. sports beverages and the changing dynamics in the sector. 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 for 2022: *The Evolving Sports Drink Market in the U.S.*, as its name suggests, also delves into some of the newer brands that have emerged as a result of the success of BodyArmor in recent years.

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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 2021 and the first half of 2022?
- How did the packaging mix change in 2021?
- Which distribution channel grew the fastest in 2021? Which sales channels will gain share through 2026?
- 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 2026?
- Which distribution channels will gain importance in 2026?

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 2026. 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 and, BodyArmor), BioSteel and Coco5 as well as fledgling brands hoping to establish a bulwark in the category.
- Analysis of regular vs. reduced calorie sports drink market trends.
- A look at sports beverages by flavor through 2026.
- 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.



THE EVOLVING SPORTS DRINK MARKET IN THE U.S. THROUGH 2026: MARKET ESSENTIALS

**BEVERAGE
MARKETING
CORPORATION**

The Evolving Sports Drink Market in the U.S. through 2026: Market Essentials

December 2022



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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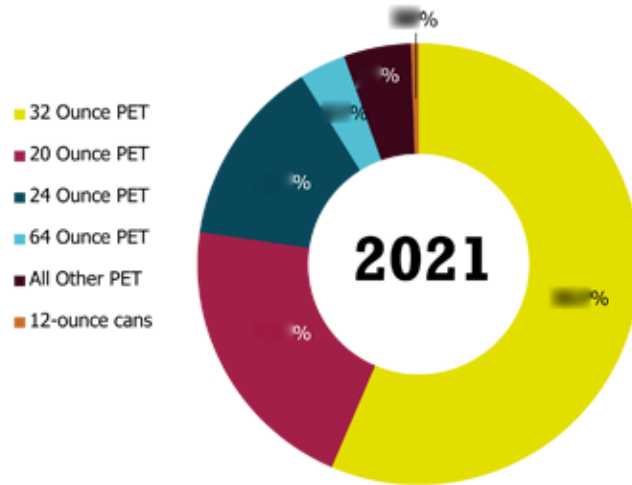
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A Toronto-based company called BioSteel Sports Nutrition turned heads last fall when it landed beer and wine giant Constellation Brands as its distribution partner, with the powerful Reyes Group and Manhattan Beer distributorships aboard.

- BioSteel had forged its initial connection to Constellation a year earlier when Canadian cannabis player Canopy Growth, which Constellation controls, made an investment in BioSteel with a path to full ownership, a move that was viewed as mainly having implications for a CBD launch. Until then, Constellation's non-alcoholic activities were exceedingly modest, with venture investments in brands like the probiotic RTD Karma, which like Constellation has roots in Rochester, New York, and the alcohol-adjacent mixer brand Crafthouse.
- Until now, the decade-old BioSteel was mainly an endemic play, with more clout behind the scenes in athletes' locker rooms than at retail, but it has been moving its powders into a growing array of retail banners with the support of high-profile endorsers from Wayne Gretzky to Patrick Mahomes, while laying the groundwork for an entry into the higher-velocity RTD segment.
- The BioSteel Sports Drink line goes out in resealable half-liter Tetra Pak boxes that contain a range of five electrolytes and are sweetened with stevia. "Drink BioSteel, not sugar," urges an on-pack slogan reminiscent of Hint Water's "Drink water, not sugar." The line excludes artificial flavors or colors or preservatives and is listed as non-GMO.
- By now BioSteel, which was created in 2009 by retired NHL player Michael Cammalleri and his co-CEO John Celenza, has assembled a compelling array of athlete and fitness endorsers, including NFLer DeAndre Hopkins, Yankees shortstop Gleyber Torres and golfer Brooke Henderson, whose use would have been restricted for any push into CBD. Thus, the non-CBD-infused line rolling out through the Constellation network will open the door for their associations with the brand to be fully exploited, with a national campaign in development.
- Although still in its early stages, BioSteel brand performed well enough to draw plaudits from Canopy Growth.

Share of Sports Drink Volume by Packaging Type and Size 2021



Source: Beverage Marketing Corporation

Exhibit 2.23

REGIONAL SPORTS BEVERAGE MARKETS
SHARE OF VOLUME
1986 – 2026(P)

Year	Midwest	Northeast	South	West	TOTAL
1986	%	%	%	%	%
1987	%	%	%	%	%
1988	%	%	%	%	%
1989	%	%	%	%	%
1990	%	%	%	%	%
1991	%	%	%	%	%
1992	%	%	%	%	%
1993	%	%	%	%	%
1994	%	%	%	%	%
1995	%	%	%	%	%
1996	%	%	%	%	%
1997	%	%	%	%	%
1998	%	%	%	%	%
1999	%	%	%	%	%
2000	%	%	%	%	%
2001	%	%	%	%	%
2002	%	%	%	%	%
2003	%	%	%	%	%
2004	%	%	%	%	%
2005	%	%	%	%	%
2006	%	%	%	%	%
2007	%	%	%	%	%
2008	%	%	%	%	%
2009	%	%	%	%	%
2010	%	%	%	%	%
2011	%	%	%	%	%
2012	%	%	%	%	%
2013	%	%	%	%	%
2014	%	%	%	%	%
2015	%	%	%	%	%
2016	%	%	%	%	%
2017	%	%	%	%	%
2018	%	%	%	%	%
2019	%	%	%	%	%
2020	%	%	%	%	%
2021	%	%	%	%	%
2022(p)	%	%	%	%	%
2026(P)	%	%	%	%	%

(p) Preliminary; (P) Projected

Source: Beverage Marketing Corporation