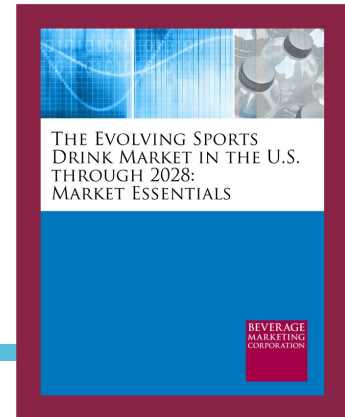


THE EVOLVING SPORTS DRINK MARKET IN THE U.S. THROUGH 2028: MARKET ESSENTIALS

2024 EDITION (Published November 2024. Data through 2023, preliminary 2024 figures and forecasts through 2028.) More than 50 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



Rehydration, protein, meal replacement. Get a comprehensive view of the market for U.S. sports beverages and the changing dynamics and brand share shifts in the sector as newer brands continue to fight to chip away at the market share of the category leaders. Plus, a view of the evolving protein drink and meal replacement market. This report provides an in-depth view of the sports drink market, including all sales channel inclusive sales, growth and market share results by brand and analysis of key players. For added perspective, current, historical and forecasted sector performance data by flavor, diet vs. regular, geographic region, distribution channels and packaging. Added insight includes quarterly growth data for the segment, pricing data, consumer demographics and advertising expenditure data. Plus, a look at protein and meal replacement market performance by brand as well as historical and current data and BMC's forecasts for the sector.

This market report also offers projections from a number of vantage points 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 as well as a detailed discussion of the leading sports beverage companies.

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SAMPLE TEXT AND INFOGRAPHICS

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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 2023 and the first nine months of 2024?
- How did the packaging mix change in 2023?
- Which distribution channel grew the fastest in 2023? Which sales channels will gain share through 2028?
- 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 2028?
- Which distribution channels will gain importance in 2028?

THIS SPORTS BEVERAGES RESEARCH 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 2028. 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.
- Sports drink company and brand sales volume data. Coverage includes PepsiCo (Gatorade and Gatorade Zero), Coca-Cola (Powerade, Powerade Zero and BodyArmor), Mas+ by Messi, Prime Hydration, Electrolit, G2 and Kill Cliff. Plus private label.
- Analysis of regular vs. reduced calorie sports drink market trends.
- A look at sports beverages by flavor through 2028.
- 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 including historical, data, current performance and forecasts.
- Protein and meal replacement brand performance including Premier Protein, Core Power, Muscle Milk, Ensure, SlimFast, Atkins, Boost, Orgain, Glucerna, Protein2O, Trimino and EAS.
- Five-year projections for the sports drink market and its sub-segments.



THE EVOLVING SPORTS DRINK MARKET IN THE U.S. THROUGH 2028: MARKET ESSENTIALS



The Evolving Sports Drink Market in the U.S. through 2028: Market Essentials

November 2024



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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2019 – 2023

In 2022, PepsiCo released a Gatorlyte Rapid Rehydration RTD line, catching the emerging rise of a “rapid hydration” subsegment in the sports drink market.

- Packaged in 20-ounce bottles, Gatorlyte Rapid Rehydration initially came in Cherry Lime, Mixed Berry, Orange, Strawberry Kiwi and Watermelon flavors. In 2023, Lime Cucumber was added, along with two Gatorlyte Zero varieties — Lemon-Lime and Strawberry Kiwi. In 2024, Gatorlyte Glacier Freeze and Gatorlyte Zero Fruit Punch joined the lineup.
- Each 20-ounce bottle contains 490 milligrams of sodium, 120 milligrams of calcium, 350 milligrams of potassium, 105 milligrams of magnesium and 1,040 milligrams of chloride.
- More recently, it bowed Gatorlyte Powder in 3.1-ounce packages containing six packets. The new product is different from the G Endurance Gatorlytes in terms of electrolyte composition and serving size.
- In 2024, it also debuted powders under the core Gatorade brand. Gatorade Hydration Booster, in Citrus Berry, Strawberry Watermelon and Tropical Mango, comes in 10 grams packets and is aimed at more casual athletes.

In early 2023, PepsiCo rolled out an energy drink called Fast Twitch whose labels announce it is “from the makers of Gatorade”.

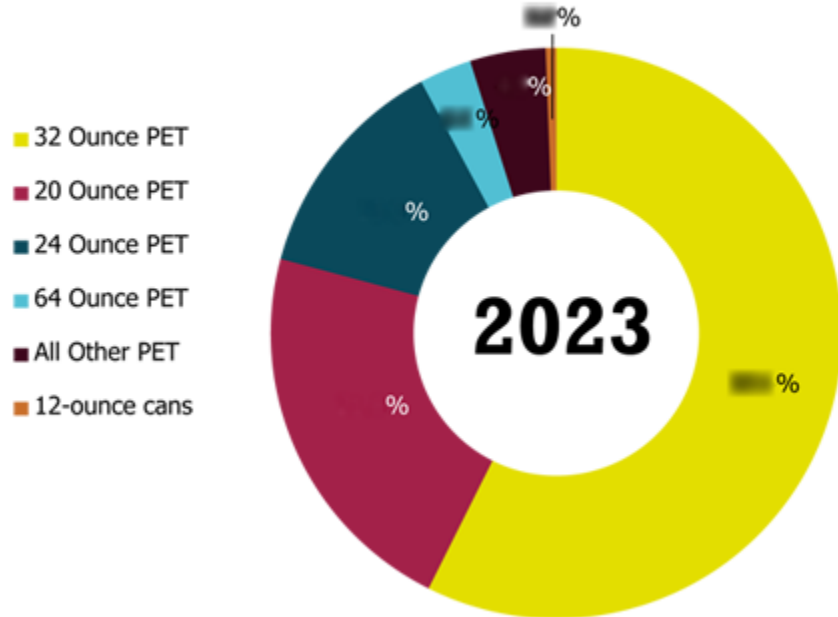
- The zero-sugar (5 calorie) line is packaged in 12-ounce bottles in Cool Blue, Glacier Freeze, Grape, Strawberry Lemonade, Strawberry Watermelon and Tropical Mango flavors. It contains 200 milligrams of caffeine, as well as electrolytes and vitamins B₆ and B₁₂. Fast Twitch was made available in 12-packs for \$23.99 and singles of 12-ounce bottles for \$2.79.
- Fast Twitch Pre-Workout Supplement is powders packaged in 16.2-ounce canisters, in Fruit Punch and Grape. The newest product is Fast Twitch Energy Drink Mix packets in Cool Blue (2.5 grams), Glacier Freeze (2.5 grams) and Strawberry Watermelon (3 grams).

**SPORTS BEVERAGE FLAVORS
SHARE OF VOLUME BY FLAVOR
2018 – 2028(P)**

| Flavors | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024(p) | 2028(P) |
|--------------|----------|----------|----------|----------|----------|----------|----------|----------|
| Fruit Punch | % | % | % | % | % | % | % | % |
| Blue | % | % | % | % | % | % | % | % |
| Orange | % | % | % | % | % | % | % | % |
| Lemon Lime | % | % | % | % | % | % | % | % |
| Berry | % | % | % | % | % | % | % | % |
| Other | % | % | % | % | % | % | % | % |
| Grape | % | % | % | % | % | % | % | % |
| Strawberry | % | % | % | % | % | % | % | % |
| Cherry | % | % | % | % | % | % | % | % |
| TOTAL | % | % | % | % | % | % | % | % |

(p) Preliminary; (P) Projected
Source: Beverage Marketing Corporation

**Share of Sports Drink Volume by
Packaging Type and Size
2023**



Source: Beverage Marketing Corporation