New Age Beverages in the U.S.


Offering insight on a broad array of beverages that share similar attributes and consumer perceptions and compete for shelf space and consumer loyalty, this report examines ready-to-drink tea and coffee, sports beverages, energy drinks, single-serve-fruit beverages, kombucha and all the various New Age segments. It provides data on the segments’ volume and sales and discusses leading companies and their strategies.

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Have Questions?
Contact Charlene Harvey: 212-688-7640 x 1962 charvey@beveragemarketing.com
New Age Beverages in the U.S. provides in-depth data and market analysis, shedding light on various aspects of the market through reliable data and discussions of what the numbers really mean. Questions answered include:

- Which segments of the diverse U.S. New Age beverage market grew in 2013, and which did not?
- What are the top New Age beverage brands and how did they perform in 2013?
- What’s driving developments in the New Age beverage marketplace?
- How many gallons of New Age beverages did U.S. residents consume in 2013, and how is that likely to change in the next few years?
- What are the leading sales channels for New Age beverages?
- Which categories are poised for strong growth in the future?

This report features

New Age Beverages in the U.S. delves into 12 non-alcoholic beverage categories that populate the domestic landscape. It offers volume, retail dollars, wholesale dollars and per capita consumption are offered, as well as a look at the protean market by region and distribution channel. The report naturally provides an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth through 2017. Advertising and demographic data are also provided. Backed by Beverage Marketing’s reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of the New Age beverage market including:

- An overview of the diverse New Age beverage market, anchoring it in history as well as providing insight into current trends propelling the market
- A detailed break-out of trends in the various New Age segments and sub-segments providing data including gallonage, wholesale dollar sales, wholesale prices per case and more for 19 New Age segments
- Regional look at the U.S. New Age beverage marketplace, with volume and growth data of seven New Age segments over the past three years
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales volume data. Profiles the New Age beverage activities of companies such as Coca-Cola Company, Dr Pepper Snapple, Fersolito, Vultaggio & Sons, Monster Beverage Corporation, PepsiCo, Nestlé Waters North America (NWNA), Red Bull and others. Includes brand data for Gatorade, G2, Glaceau, Arizona, Lipton, Rockstar, Frappuccino, V8 Splash, SoBe, Odwalla and others
- Data detailing volume by distribution channels totaling 100% of market volume
- Advertising expenditures of the leading New Age beverage companies and segments and a look at spending by media type (including internet advertising)
- Consumer demographic profiles comparing consumers of key New Age beverage brands and segments
- Five-year wholesale dollar projections through 2018 for the New Age beverage market and its sub-segments including single serve waters (breaks out retail PET water, enhanced water, flavored water, essence water), energy drinks, nutrient-enhanced fruit drinks, superpremium juice, regular single-serve fruit beverages, regular RTD teas, nutrient-enhanced teas, sports beverages, sparkling water, RTD Coffee, vegetable/fruit juice blends, kombucha, coconut water, premium soda and shelf-stable dairy drinks
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Coconut water has long been a staple in South America and Asia, as well as a presence in ethnic groceries in the U.S. One of the bigger successes among beverage entrepreneurs in recent years has occurred as this ancient staple – a commodity everywhere else – has been put into more upscale, non-ethnic packages and pitched as an all-natural sports drink rich with electrolytes but lacking the sugar and other liabilities that have caused some consumers to shy away from brands like Gatorade.

- Even boosters of the category were shocked at how quickly the American consumer has taken up a coconut water habit, as well as at how quickly the three multinational soft drink players have moved into this not-so-long-ago obscure category.

- With each of the three key coconut water pioneers now tied to one of those systems – Zico with Coca-Cola, ONE with PepsiCo and Vita Coco with Dr Pepper Snapple Group – the segment has lately seen a race by other companies to offer coconut-water brands that might fill the void in the independent channel.

- Some of these seek differentiation by melding coconut water with another category – say, PowerCoco, with overt sports-drink ingredients and ties to NBA star Carmelo Anthony, or CocoCafé, melding coconut water and espresso.

- Others are existing brands in other categories – say, Zola in açai, Purity Organic in fruit juice, KonaRed in coffee-berry beverages or even Rockstar in energy drinks – that have found it expedient to offer a coconut water under their brand, even at the risk of diverging from their core identity and strategy. The ambitiously funded functional line BodyArmor has made coconut water a heavily emphasized part of its formula even as it has dropped other ingredients out of the mix in the interest of improving the flavor.

As often happens with cutting-edge new segments, coconut water began to show unmistakable signs of momentum in trend-setting cities like New York and Los Angeles but by now it is making real inroads in secondary and tertiary markets not always quick onto the next beverage bandwagon.

- The three key players in the business – Vita Coco, Zico and ONE (One Natural Experience) – have been ramping up their resources, staff and outside alliances to capitalize on the opportunity, constrained mainly by a simple shortage of juice to pack. Sourced mainly in South America at the category’s inception, most brands now are relying heavily on Asian coconuts, helping resolve the supply quandary with fruit that many view as having a more appealing taste for general consumers.
## NEW AGE BEVERAGE MARKET SEGMENTS

**CHANGE IN VOLUME (r)**

2009 – 2014(p)

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(r) Revised

(p) Preliminary

* Includes mate.

Source: Beverage Marketing Corporation
SINGLE-SERVE FRUIT BEVERAGES ARE KING IN THE SOUTH

Share of sales by segment, 2013

Source: Beverage Marketing Corporation