New Age Beverages in the U.S. through 2028

2024 Edition (To be published September 2024. Data through 2023, preliminary 2024 figures and forecasts through 2028.) More than 325 pages, with extensive text analysis, graphs, charts and more than 45 tables.

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Indirect competition. This new age beverage market report offers insight on a broad array of established and emerging non-alcohol drinks that share similar attributes and consumer perceptions, meet similar need states and often compete for scarce shelf space, invaluable consumer loyalty and key consumption moments. Everything from the impact of the Coronavirus pandemic to discussions of consumer drivers and innovations that are changing the face of the market are addressed in this comprehensive report. Historical, current and projected data on volume and sales plus discussion of leading companies and their strategies. This study examines diverse beverage categories including: coconut water, high-end CSDs, energy drinks, kombucha, plant water, probiotics, protein drinks, ready-to-drink tea and coffee, single serve dairy, single serve fruit beverages, single-serve water, sports beverages, single-serve sparkling water and a broad range of other segments that fall under the ever-evolving New Age beverage umbrella. The astute marketer will want to keep an eye not only on their own immediate segment but on the broader competitive set for lessons, risks and opportunities.

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To learn more, to place an advance order or to inquire about additional user licenses ***call****: Charlene Harvey +1 212.688.7640 ext. 250 charvey@beveragemarketing.com*

INSIDE:

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The answers you need

The U.S. New Age Beverages report 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 2023 and which did not? Which are estimated to have grown or declined in 2024?
- Which categories are poised for strong growth in the future? How did covid-19 impact the market?
- What are the top beverage brands and how did they perform in 2023?
- What's driving developments in the New Age beverage marketplace?
- How many gallons did U.S. residents consume in 2023, and how is that likely to change in the next few years?
- What are the leading sales channels for New Age beverages?

This report features

This comprehensive report investigates 15 non-alcoholic beverage categories that populate the domestic landscape. It offers volume, retail dollars, wholesale dollars and per capita consumption, as well as a look at the New Age beverage market by region and distribution channel.

The report provides an in-depth look at the leading companies and brands in the category and the consumer drivers, preferences and needs likely to propel consumption growth through 2028. Advertising and demographic data are also provided. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of all facets of this 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 segments and sub-segments providing data including volume, wholesale dollar sales, wholesale prices per case and more for 21 segments and subsegments.
- Regional look at the U.S. New Age beverage marketplace, with volume and growth data of eight segments over the past five years, and projections five years in the future.
- 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 and statistics. Profiles the wellness beverage activities of companies such as Coca-Cola Company, Keurig Dr Pepper, Ferolito, Vultaggio & Sons, Monster Beverage Corporation, PepsiCo, Red Bull and others. Includes brand data for Gatorade, GT's, Glacéau, Arizona, Lipton, Rockstar, Frappuccino, Gold Peak and many more.
- Data detailing volume by distribution channels totaling 100% of market volume.
- Advertising expenditures of the leading companies and segments and a look at spending by media type (including Internet and Spanish-language advertising).

- Consumer demographic profiles comparing consumers of key brands and segments.

- Five-year volume, wholesale dollar and retail dollar sales forecast through 2028 for the New Age beverage market and its sub-segments. Including single-serve waters (breaks out retail PET water, enhanced water, alkaline water, flavored water, essence water), energy drinks, nutrient-enhanced fruit drinks, superpremium juice, regular single-serve fruit beverages, probiotics, protein drinks, RTD coffee, RTD tea, sports beverages, sparkling water, vegetable/fruit juice blends, kombucha, coconut water, plant water, premium soda and shelf-stable dairy drinks.

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BEVERAGE MARKETING CORPORATION

NOTE: The 2024 edition of this report has not yet been published. The dates on tables of contents/exhibits and sample data reflect information from last year's edition of this report.

The 2024 edition you receive will have updated data through 2023 and projections through 2028 where applicable.

New Age Beverages in the U.S. through 2027

January 2024

BEVERAGE MARKETING CORPORATION

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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Value-added water is comprised of flavored, enhanced, essence and alkaline waters, together which provide value above and beyond "just hydration."

- Much of the new-product activity in the category has been in the enhanced water segment. Caffeinated and oxygenated brands were the pioneers, coming out about 20 years ago; but none ever reached critical mass.
- Vitamin-enhanced waters began to gain traction in 2000 with Glacéau Vitaminwater. Others emerged, such as Propel, which continues to be a good revenue source for PepsiCo.
- In 2005, flavored waters such as Nestlé Pure Life, Aquafina FlavorSplash and Dasani flavors hit the market. But the flavored water segment has not seen a whole lot of activity since.
- Flavored water, comprised of a few brands, is a more mainstream targeted segment, without specific functional benefits beyond hydration. Large beverage corporations such as Sunny Delight (now owned by buyout firm Brynwood Partners), Kraft Heinz, Coca-Cola, PepsiCo and BlueTriton (formerly, Nestlé) dominate this segment.
- In 2007, Coca-Cola Company acquired Glacéau Vitaminwater, the leader in the value-added water market. Vitaminwater introduced extensions — first Vitaminwater10 and then Vitaminwater Zero (in 2010) — to cushion a decline in the core Vitaminwater.
- PepsiCo's SoBe Lifewater Zero vaulted past its regular calorie counterpart in 2014. (The regular and diet products are now amalgamated under the SoBeWater name.) Despite declining for more than a decade straight, SoBeWater Zero remained much bigger than SoBeWater. In fact, the last remaining SoBeWater variety was discontinued about four years ago.
- Although Coke has arguably mishandled Glacéau Vitaminwater, it has proved a more adept steward of stablemate Glacéau Smartwater, which has surpassed Vitaminwater. To maintain its solid double-digit growth momentum, Coke added a sparkling extension to the Smartwater trademark. Even Smartwater declined between 2016 and 2020, although it grew solidly in 2021 and 2022.

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Exhibit 2.12

NEW AGE BEVERAGE MARKET SEGMENTS

CHANGE IN VOLUME

2018 – 2027(P)

Market Segments	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23(p)	2022/27(P)
Retail PET Waters	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Enhanced Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Alkaline Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Essence Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Flavored Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal S-S Water	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
Sports Beverages	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
RTD Tea	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Energy Drinks	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Regular S-S Fruit	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Superpremium Juice	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Sparkling Juice	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal S-S Fruit	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
Sparkling Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
High-End CSD	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
RTD Coffee	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Protein Drinks	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Coconut Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Vegetable/Fruit Blends	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Kombucha	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Probiotics	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Shelf-Stable Dairy	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Plant Water	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
TOTAL	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**

(p) Preliminary; (P) Projected

Note: 2022/27(P) change is projected five-year compound annual growth rate.

Source: Beverage Marketing Corporation

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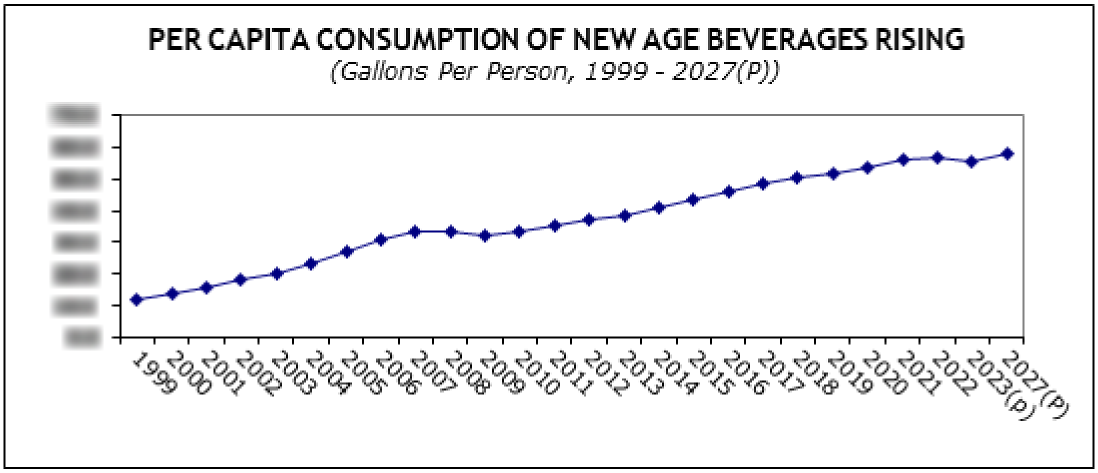

(p) Preliminary; (P) Projected

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