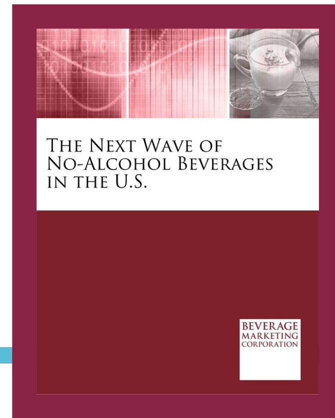
The Next Wave of No-Alcohol Beverages in the U.S.

2025 Edition (Published February 2025. Data through 2023, preliminary data through 2024.) More than 600 pages, with extensive text analysis.



Innovation revolution. From alcohol alternatives and mixers, cannabis infused drinks, gut health, high-end waters and kids drinks to plant-based waters, probiotics and yerba mate guayusa (and all the many, many innovative segments from a-z), this report from Beverage Marketing Corporation looks at the segments and brands that are creating excitement, disrupting norms and invigorating the marketplace. It scrutinizes the always-changing beverage industry, identifying and quantifying emerging and niche non-alcoholic beverage categories, discussing companies of growing significance and describing what could be the next big thing. From new and emerging categories to the innovative sub-segments and brands within more established beverage categories, this report focuses on the segments and brands to watch. It also looks at the consumer market drivers and other factors that are inspiring entrepreneurial spirit, impacting innovation and fueling enhanced functionality in line extensions and new product development efforts.

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The answers you need

In an industry where evolution and innovation are constants, this report provides in-depth analysis of ways innovation is changing the beverage landscape through the emergence of new categories and brands as well as new twists that revolutionize traditional categories. It also provides an overview of defining trends spurring developments in new categories. It also looks at the fast-growing liquid refreshment beverage companies, discusses their performance and indicates what makes them noteworthy. Questions answered include:

- What new categories are shaking up the U.S. beverage market?
- How big are these emerging sectors and why are they worthy of being on your radar?
- What trends characterize the various up-and-coming beverage types entering the marketplace?
- Which companies enjoy the backing of industry veterans and strong financial resources, and which do not?
- Which beverage companies and brands show the most promise for success in the competitive U.S. marketplace?
- Which companies could become takeover targets in the near future?

This report features

Get a comprehensive overview of several fledgling beverage segments, some of which are poised to become the next big thing. For added market perspective, the entrepreneurial brands that comprise the burgeoning beverage categories are anchored in the context of more-established beverage market.

To provide context to the research findings, the report discusses factors that have led to the development of new beverage segments despite the relative maturity of the packaged beverage market as a whole. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of key facets of emerging beverage markets including:

- Analysis of industry trends and quantification of emerging non-alcoholic beverage categories and sub-segments.
- Discussion of the types of companies driving innovation – from the traditional large beverage companies to entrepreneurs.
- Insight from our up and coming market research analysts' on the factors driving innovation into new beverage types.
- Analysis of niche and emerging segments including high-end water, cannabis-infused beverages, gut health, premium sodas, mixers and alcohol alternatives, dairy alternatives, premium ready-to-drink teas, coconut water, essence waters, kombucha, HPP/cleanses, ready-to-drink protein drinks, meal replacement, shots, functional beverages, probiotics, energy drinks, premium kids' beverages, ready-to-drink coffee and more.

- Discussion of companies with distinctive brands in each nascent and new segment. Companies/brands covered include: A-Game, Alani Nu, Alkaline Water Co, AriZona, Bulletproof Coffee, C4, Califia Farms, Calypso Lemonade, CBD Living, Celsius, Cheerwine, Cheribundi, Drip Drop, Electrolit, Evamor, Fever-Tree, GT's Living Foods, Ghost Energy, Good2Grow, GoodBelly, Green Bee Soda, Guayaki, Happy Viking, Harmless Harvest, Health-Ade, Hint Water, Hiippie Water, Humm Kombucha, Iconic, Just Ice Tea, Karma Wellness Water, Kombucha Town, Kitu Life Super Coffee, Ku Cha, La Colombe, La Croix, Lifeway, Liquid Death, Mamma Chia, Mayawell, Mingle Mocktails, Mocktail Club, Nectar Girl, Neuro, Oatly, Olipop, OWYN, Path, Pickle Juice, Plezi, poppi, Premier Protein, Prime Hydration, Protein2O, Q Mixers, Rasa Coffee, Ready Nutrition, Reed's, Sambazon, Sapsucker, Slingshot Coffee, Soylent, Sparkling ICE, Spindrift, Suja, Supergut (Muniq), Treo Fruit & Burch Water, Tractor Soda, Vita Coco, Voss, Zevia, Zola Açaí and so many more.

- Our up and coming beverage companies market research analysis takes on the brands to watch in the various non-alcohol sectors and what they are doing to differentiate themselves. It also discusses the strengths of various emerging brands and categories and the challenges they'll face going forward.

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BEVERAGE
MARKETING
CORPORATION

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February 2025

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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Text Sample 1

It bears noting at this point that this new phenomenon of "creator brands" launched by YouTube and TikTok stars seems genuinely to be a seriously disruptive force.

- There is no better example of this than the rapid emergence of Prime Hydration, a sports drink launched by influencers Logan Paul and KSI in concert with Congo Brands, the player behind the successful Alani Nu Energy brand. Prime landed with explosive force as a must-have item among teens, despite a mediocre ingredient list, a frenzy stoked by online videos of shoppers fighting for the scarce quantities of the beverage as Congo scrambled to enlist enough production.
- It is believed to be a key reason that BodyArmor, acquired by Coke for over $8 million, immediately faltered, and has opened the eyes of entrepreneurs to the potential riches to be gleaned by youthful online stars who command hundreds of millions of ardent followers. Never mind that over the past year Prime has moved into steep decline, potentially another lesson to be gleaned about creator brands.
- Another key trend: the shocking flourishing of a bewildering range of alcohol alternatives, from no-alcohol beers (Athletic, Partake, Best Day, Surreal) and spirits (Lyre's) to more elevated versions of mocktails, serving a cohort of younger consumers who, in numbers not seen previously, prefer to abstain from alcohol some or all the time. The segment includes a range of hard-to-describe new entries like Kin Euphorics that harness adaptogens and nootropics to offer mood-changing effects, in a manner that overlaps a nascent cannabis beverage segment that's been stuck in neutral as federal deregulation efforts have stalled.
- On a more prosaic front, the success of La Croix sparkling water has opened the door to a flock of premium challengers like Spindrift and Waterloo, both thriving so far, as well as related canned products offering fizz, perhaps a bit of sweetness or caffeine, or maybe a different base like tea.
- Increasingly, small brands, thanks to social media and a heavy launch into direct-to-consumer (DTC) sales, often have already built consumer awareness by the time they venture into retail. Often, the most fertile pockets of online demand determine where they plant a stake in bricks-and-mortar stores. And this demonstrated strength changes the dialogue with distributors and retailers, who no longer hold all the cards.

Text Sample 2

Here are some of the other segments whose category leaders seemed particularly prone to disruption. These are segments of uncommon ferment that have yielded numerous intriguing startups with potential to grow to sizable businesses, as profiled in this report.

- **Sparkling water.** This category can be defined informally as "anything sparkling that is very-low-calorie or no-calorie." La Croix enjoyed a brilliant run as a directly shipped brand at rock-bottom prices, but some consumers are looking for something more assertive on the palate. That has cleared the way for all kinds of new twists on the category. Spindrift offers real fruit flavors right from the farm and has forced other players to upgrade their own flavoring strategies.

- Talking Rain's Sparkling ICE can be mentioned in this discussion, although it does not really qualify as a water brand due to its highly sweetened (albeit zero-calorie) nature. But its positioning seems to have resonated thanks to its efforts to appear as a non-soda. Years in, that brand is still going strong, buoyed by a caffeinated version in c-store-friendly 16-ounce cans that compete against energy drinks and, lately, an outright energy drink.

- PepsiCo is represented in the space by internally developed bubly while KDP found it expedient to align with the venerable Polar Seltzer line. Meanwhile, Coke has moved on from its AHA! entry and will attack the more premium end with a Topo Chico flavored extension called Sabores.

- **Bottled water.** For years this category has been dominated by a handful of elevated imports like Fiji and Evian along with everyday brands from Nestlé Waters North America, Coca-Cola and PepsiCo that have descended so much in price that, in Coke and Pepsi's case, they are no longer even worth carrying on the red and blue soda trucks. So retailers have proved receptive to a flock of new superpremium brands with unit prices that are a multiple of those. The star segment had been alkaline water, led by Essentia, whose explosive growth led to its acquisition by Nestlé. Two other alkaline brands, Aquahydrate and Alkaline88, also built a broad base, although Alkaline Water stalled as impatient public investors grew tired of its dilutive fund raises (although it is promising a comeback). While these can be described as "engineered" high-pH waters, naturally alkaline waters like Eternal also have been moving beyond the natural channel that incubated most of these entries.

- Among imported waters, the mainstay Fiji Water brand created a huge upheaval by exiting DSD distribution, leaving distribution and retail voids that other imports have been racing to fill. That created a crisis at its main distribution partner, KDP, but it rebounded by acquiring Core Water and forging a distribution alliance with Evian, a refugee from the poor focus it had earlier gotten in the Coca-Cola bottling system.