

Energy Drinks - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The energy drink market remains an area of growth within the wider beverage industry. Sugar-free and fitness-focused energy drinks are thriving as consumers want beverages that provide a big boost without the sugar. Energy drink brands have enjoyed consistent year-over-year growth; however, waning interest in energy drinks among Gen Z is a long-term issue brands need to address."

- Caleb Bryant, Senior Beverage Analyst

This report looks at the following areas:

- Energy drinks have a Gen Z problem
- High frequency users are loyal to the market not brands
- Consumers are finding energy drinks that suit their needs
- High frequency drinkers want high energy beverages
- Promote both body and brain health

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Energy Drinks - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

Overview

Figure 1: Total US sales and fan chart forecast of energy drinks and shots, at current prices, 2013-23

The issues

Energy drinks have a Gen Z problem

Figure 2: Energy drink consumption frequency and change in consumption, February 2019

Figure 3: Energy drink attitudes, by energy drink consumption frequency, February 2019

The opportunities

Consumers are finding energy drinks that suit their needs

Figure 4: Reasons for drinking energy drinks more often, February 2019

High frequency drinkers want high energy beverages

Figure 5: Energy drink purchase motivators, by energy drink consumption frequency, February 2019

Promote both body and brain health

Figure 6: Energy drink purchase motivators, by consumers who drink energy drinks before working out, February 2019

What it means

The Market – What You Need to Know

Future growth driven by traditional energy drinks

Busy lifestyles benefit energy drink brands

Market Size and Forecast

Continued growth of energy drinks market

Figure 7: Total US sales and fan chart forecast of energy drinks and shots, at current prices, 2013-23

Figure 8: Total US retail sales and forecast of energy drinks and shots, at current prices, 2013-23

Market Breakdown

Strong performance for drinks; shots stagnate

Figure 9: Total US retail sales and forecast of energy drinks and shots, by segment, at current prices, 2013-23

Figure 10: Total US retail sales and forecast of energy drinks and shots, by segment, at current prices, 2013-23

Market Factors

Americans are working hard

Figure 11: Average hours spent per day, working and work-related activities, among those who participate in activity, among Americans aged 15+, not seasonally adjusted, 2008-17

Figure 12: Average hours spent per day, homework and research, among those who participate in activity, among Americans aged 15+, not seasonally adjusted, 2008-17

Gen Z and Millennials are entering new life stages

Key Players – What You Need to Know

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Energy Drinks - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Top trending energy drinks promote fitness and high caffeine content
Strong differentiation is necessary for natural energy drinks

Company and Brand Sales of Energy Drinks and Energy Shots

Major brands enjoy growth

Figure 13: Multi-outlet sales of energy drinks, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 14: Multi-outlet sales of energy shots, by leading companies and brands, rolling 52 weeks 2018 and 2019

What's Working?

Sugar-free energy drink sales soar
Red Bull excites loyalists with new flavors
Bang blasts away the competition
New crop of energy drink brands focuses on fitness

What's Struggling?

Natural energy drinks struggle to rise above the noise
Gen Z's love for iced coffee is an issue for energy drink brands
Figure 15: Away from home coffee consumption, any order, May 2018
Competing categories launch other energy-providing beverages
Game on with Game Fuel

What's Next?

Coke puts Monster in an awkward situation
Will Monster "Reign" on Bang's parade?
Cognitive boost without the energy

The Consumer – What You Need to Know

A small but fervent consumer base
Market growth is attributed to high frequency use consumers
Concerns over energy drink healthfulness remain
Flavor development keeps consumers engaged

Beverage Consumption

It's a young person's market

Figure 16: Beverage consumption, February 2019

Figure 17: Beverage consumption, by gender and age, February 2019

Figure 18: Beverage consumption, by generation, February 2019

High use consumers have high energy needs

Figure 19: Beverage consumption, by energy drink consumption frequency, February 2019

Energy drink consumers get a boost from a variety of beverages

Figure 20: Beverage cross-utilization, February 2019

Figure 21: Beverage cross-utilization, February 2019

Perceptions of Energy-providing Drinks Among Users

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Energy Drinks - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Energy drinks face competition from coffee

Figure 22: Perceptions of energy providing drinks, among drink users, February 2019

High frequency drinkers drive positive perception of energy drinks

Figure 23: Energy drink perception, by energy drink consumption frequency, February 2019

Energy Drink Consumption Frequency

Energy drink consumers are high frequency drinkers

Figure 24: Energy drink consumption frequency, February 2019

Millennial men drive much of the energy drink market

Figure 25: Energy drink consumption frequency, by gender and by generation, February 2019

Energy Drink Caffeine Content Consumption

Many consumers are in the dark around energy drink caffeine content

Figure 26: Energy drink caffeine consumption, February 2019

Changes in Energy Drink Consumption

Older Millennials are increasing their energy drink consumption

Figure 27: Changes in energy drink consumption, February 2019

Total market growth driven by the most devoted consumers

Figure 28: Changes in energy drink consumption, by energy drink consumption frequency, February 2019

Reasons for Drinking Energy Drinks More

Busy consumers are running on empty

Figure 29: Reasons for drinking energy drinks more often, February 2019

Reasons for Drinking Energy Drinks Less

Health concerns drive consumers out of the market

Figure 30: Reasons for drinking energy drinks less often, February 2019

Energy Drink Purchase Motivators

Provide energy that lasts

Figure 31: Energy drink purchase motivators, February 2019

Hispanics interested in a more healthful energy drink

Figure 32: Energy drink purchase motivators, by Hispanic consumers, February 2019

Give high frequency consumers the energy they want

Figure 33: Energy drink purchase motivators, by energy drink consumption frequency, February 2019

Brain health is just as important as body health to fitness consumers

Figure 34: Energy drink purchase motivators, by consumers who drink energy drinks before working out, February 2019

Energy Drink Attitudes

High frequency drinkers aren't brand loyalists

Figure 35: Energy drink attitudes, by energy drink consumption frequency, February 2019

Appendix – Data Sources and Abbreviations

Data sources

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Energy Drinks - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 36: Total US retail sales and forecast of energy drinks and shots, at inflation-adjusted prices, 2013-23

Figure 37: Total US retail sales and forecast of energy drinks, at inflation-adjusted prices, 2013-23

Figure 38: Total US retail sales and forecast of energy shots, at inflation-adjusted prices, 2013-23

Figure 39: Total US retail sales of energy drinks and shots, by channel, at current prices, 2013-18

Appendix – Key Players

Figure 40: Multi-outlet sales of energy drinks and shots, by leading companies, rolling 52 weeks 2018 and 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com