

North America Sugar Free Energy Drinks - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The North America Sugar Free Energy Drinks Market size is estimated at 5.07 billion USD in 2024, and is expected to reach 6.35 billion USD by 2030, growing at a CAGR of 3.82% during the forecast period (2024-2030).

Diverse flavor options and growing popularity of low-calorie energy drinks drives growth

In 2023, North American distribution channels experienced a significant growth of 20.52% from 2020. This surge can be attributed to the rising availability of a diverse range of sugar-free energy drinks featuring flavors like blue slush, berry pop, and cherry slush. Retailers have responded by offering an extensive selection of low-calorie energy drink brands. Notably, consumer preferences in the region lean toward brands like V Energy, Power Horse, C4 Energy, and NOCCO, with respective market shares of 28%, 19%, 18%, and 17% as of 2022.

Supermarkets and hypermarkets dominate the North American market, accounting for a significant share. In the off-trade retailing segment, these establishments command a 44.9% market share by value. Prominent players in this space include Walmart, Target, Kroger, Amazon, Costco Wholesale Corporation, Albertsons Cos., Ahold Delhaize USA, and Publix Super Markets Inc. These retailers have responded to the demand by offering an extensive range of sugar-free energy drinks. As of 2023, the price range for low-calorie and low-energy drinks falls between USD 2.20 and USD 3.10.

The online channel is poised to be the fastest-growing distribution avenue, driven by the

convenience it offers to modern consumers. In 2022, approximately 22.2% of Canadians, including those seeking low-calorie energy drinks, regularly purchased groceries online. Sales of sugar-free energy drinks through online platforms witnessed an impressive growth rate of 38.56% from 2018 to 2023. Amazon, Walmart, Target, and Walgreens are key players in this online space. These platforms entice buyers with bulk purchase discounts, seasonal offers, free deliveries, and coupon codes.

Rising demand for sports activities has shifted the consumer's focus toward sugar-free or low-calorie energy drinks in North America

Between 2018 and 2022, the energy drink market witnessed a surge in popularity, primarily driven by the 18-31 age group. These beverages, known for their potential to enhance alertness and concentration, owe their efficacy to caffeine, their primary ingredient. In 2023, a staggering 85% of Americans consumed at least one caffeinated beverage, highlighting the nation's affinity for these energy-boosting drinks.

Within the North American market, the United States emerged as the dominant player in the sugar-free and low-calorie energy drink segment in 2023. These drinks, favored by fitness enthusiasts, not only serve as energizers but also aid in carbohydrate-to-glucose conversion. In 2023, nearly half of all Americans, 49.9%, hit the gym at least twice a week, underscoring the nation's fitness consciousness.

Canada's sugar-free and low-calorie energy drink market outpaced its North American counterparts, boasting a robust CAGR of 6.34% from 2017 to 2023. This growth was fueled by a rising awareness of the benefits of healthier beverage choices. In 2022, a notable 18% of Canadians already preferred unsweetened beverages, signaling a shift away from traditional options.

During the forecast period of 2024-2027, the North American energy drink market is projected to grow by 12.07% in value. This growth will be primarily driven by a health-conscious population. Retailers, on the other hand, are expected to focus on product development as their go-to strategy to expand their consumer base in the region.

North America Sugar Free Energy Drinks Market Trends

Pertaining to health and well-being, consumers are more likely to prefer sugar-free energy drinks than their conventional alternatives

Consumption of energy drinks in the North American region has been growing exponentially, especially among teenagers and younger audience. Energy beverages are considered to be the 2nd most commonly consumed dietary supplement for young Americans, consuming approximately 30% of them on a regular basis.

As of 2022, among the overall energy drink launches in the United States, sugar-free or low-calorie energy drinks accounted for 41%. Currently, Red Bull, Monster, and Rockstar all have sugar-free and calorie-free version in the market across the North American region.

The price of energy drinks plays a significant role in consumer decisions. Consumers may be more price-sensitive during economic downturns and seek budget-friendly options.

The health implications of high sugar intake and consumption have given rise to a higher demand for low calorie and sugar free alternatives among consumers in North America. As of 2023, more than 130 million adults are living with diabetes or prediabetes in the United States in 2022, while Canada has an 11.7 million population living with diabetes or prediabetes.

North America Sugar Free Energy Drinks Industry Overview

The North America Sugar Free Energy Drinks Market is fairly consolidated, with the top five companies occupying 65.30%. The major players in this market are Congo Brands, Living Essentials, LLC, Monster Beverage Corporation, PepsiCo, Inc. and Red Bull GmbH (sorted alphabetically).

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