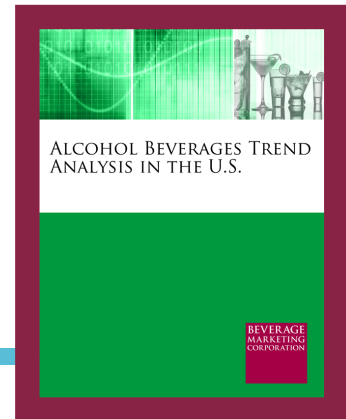


ALCOHOL BEVERAGES TREND ANALYSIS IN THE U.S.

2023 EDITION (Published April 2023. Data through 2022.) More than 25 PowerPoint slides, with extensive charts, data and infographics.



This insight-filled report from Beverage Marketing's *Focus Report* series delivers observations and analysis of trends affecting the adult beverage market via a colorful, data-filled PowerPoint presentation designed to bring busy executives up to date while providing food for thought and discussion. Based on a presentation by BMC Strategic Associates, Beverage Marketing's alcohol consulting group, it offers beer, wine and distilled spirits market data through 2022 as well as observations on the trends that are re-shaping the alcohol market in the United States.

This timely report examines key market drivers impacting consumers' alcohol choices, highlighting the effects of these factors on various beverage alcohol segments and sub-segments, while offering insights on key trends and market drivers relating to wine and spirits and beer. It looks at the blurring of alc and non-alc segments, alliances between companies from the alc and non-alc worlds, emerging trends including canned wines, organics, "orange wine", prepared cocktails etc. The report also discusses traditional beer, wine and spirits segment growth, the implications of various paradigm shifts in ingredients, distribution, corporate partnerships and other areas. It also looks at shifts in consumer consumption patterns that are impacting the wine market in particular.

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HAVE
QUESTIONS?

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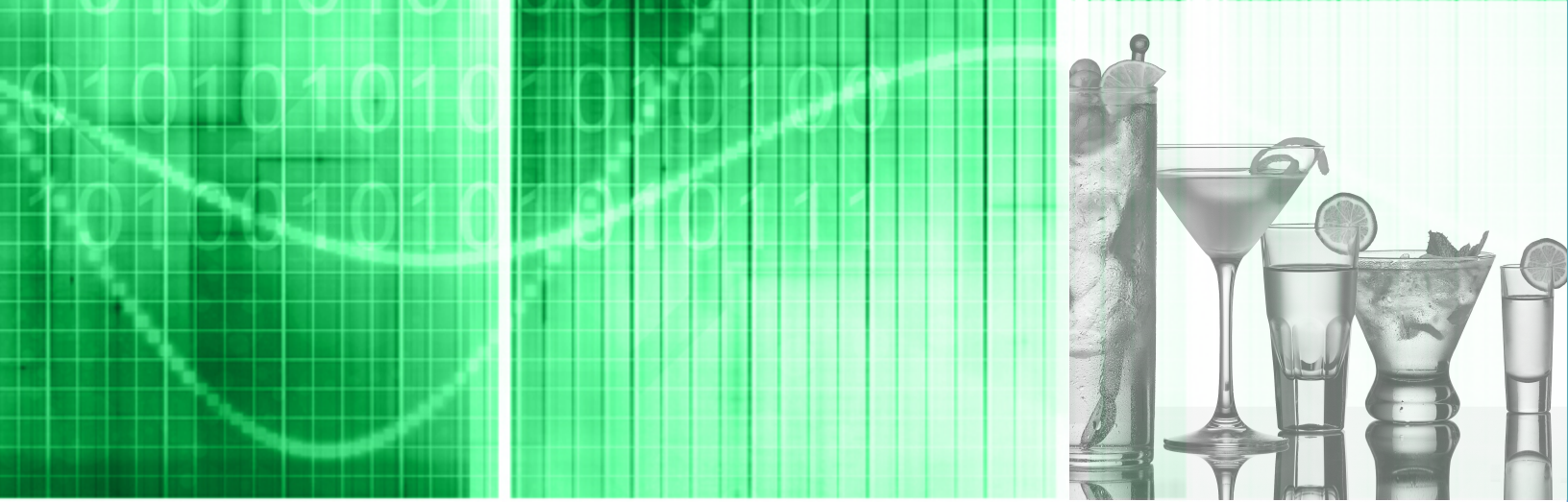
THE ANSWERS YOU NEED

This data and insight-rich PowerPoint presentation offers insights on the alcohol market, and is the perfect kickoff to brainstorming meetings. Questions answered include:

- How did the U.S. beer, distilled spirits and wine markets perform in 2022?
- What are the key trends affecting various wine segments?
- How did alternative adult beverages affect conventional beer, spirits and wine performance in 2022?

THIS ALCOHOL BEVERAGE INDUSTRY REPORT FEATURES

This graphically impactful PowerPoint presentation uses the total U.S. beverage market as the jumping off point for an analysis of trends in the beer, wine and distilled spirits sectors, from volume and growth to market drivers and expectations for high interest alcohol sectors.



ALCOHOL BEVERAGES TREND ANALYSIS IN THE U.S.

BEVERAGE
MARKETING
CORPORATION

Alcohol Beverages Trend Analysis in the U.S.

April 2023

BEVERAGE
MARKETING
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NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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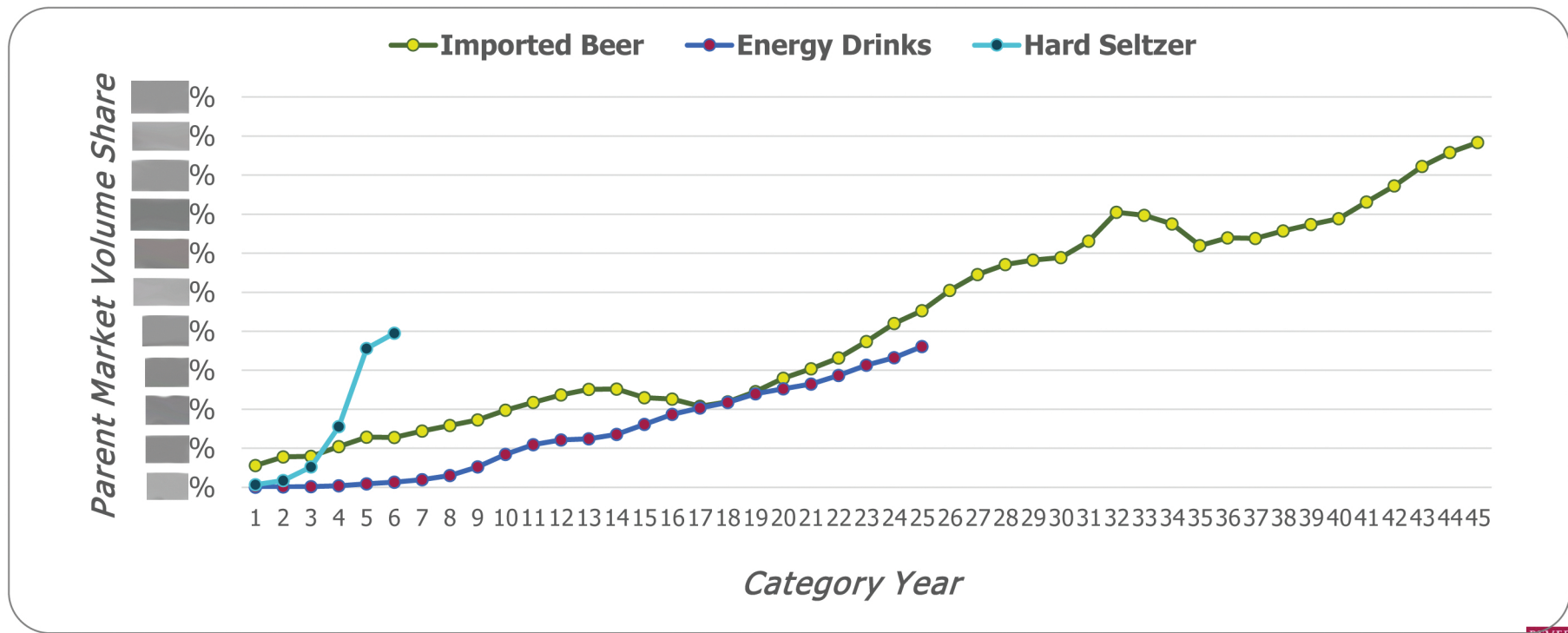
Current Key Beer Market Trends & Activity

Beer

- The total U.S. beer market **volume performance deteriorated** in 2022 as the benefit seen during covid eroded. **Depletions dropped nearly █%** while **shipments eroded faster** at around █%.
 - The difference was driven primarily by **distributor inventories** being brought in line after building in 2021.
- Beer was once again **led by three segments**, FMBs, Mexican imports and non-alcoholic beer while rest of market declined. These long-term trends are likely to continue in 2023.
- **Outside of Mexican imports** which represent over █% of total, **imported beer declined**. Growth in 2022 was led by Modelo Especial which once again grew in double digits.
- **Craft beer grew for second consecutive year** after significant challenges due to covid in 2020 growing around █%.
- **Light beer and value beer continued to decline**; however, brands such as Michelob Ultra and Busch Light grew against the trend while brands like Miller Lite saw improved performance.
- **Non-alcoholic beer continues to grow** off small base as other major brands get **non-alcoholic brand extensions** introduced, e.g. Budweiser Zero and Corona Zero.
- Four of the top 5 suppliers **entered partnerships** with beverage companies to bring **beverage brands to market in an alcoholic form**. Only Mark Anthony did not enter the fray.

The growth of hard seltzer in its first six years far exceeded both imported beer and energy drinks in same time frame; the dip was expected before resuming growth

Disruptive Beverage Category Market Share Evolution – 45 Year Picture



Note: Imported Beer Year 1 is 1975 & Year 45 is 2019, Energy Drinks Year 1 is 1997 & Year 25 is 2021, & Hard Seltzer Year 1 is 2016. Energy Drink Share aggregate of Energy+CSDs
 Source: Beverage Marketing Corporation, BMC Strategic Associates Analysis