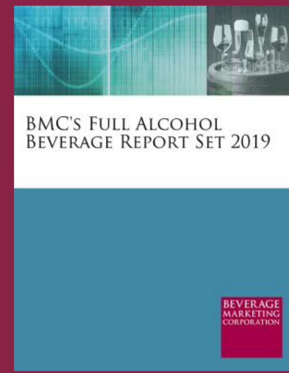
BMC's Full Alcohol Beverage Report Set

2018 & 2019 Editions



From total market, all-sales-channel inclusive beer, wine & spirits market performance data and forecasts to on- and off-premise insights, mixer market trends and more, *BMC's Full Alcohol Beverage Report Set* gives you all the data and analysis you need to stay ahead of adult beverage trends, take advantage of opportunities and enhance your business in this sector. Purchase the full set and get a 25% discount off individual report prices. Plus, get our *Cannabis Beverages in the U.S.* Report FREE (a $2,995 value) and get a handle on how this emerging opportunity can add a twist to your adult beverage product offerings! Order the *Full Alcohol Beverage Report Set* today - a $31,450 value -- for just $21,341.25!

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Inside:

Have Questions? Contact Charlene Harvey: 212-688-7640 x 1962 charvey@beveragemarketing.com

Beverage Marketing Corporation
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

THE ANSWERS YOU NEED

Explore the full range of beverage sectors and market drivers impacting the Adult Beverage Marketplace. Whether you are an alcohol beverage brand owner, manage a dedicated mixer brand or a brand often used as a mixer, manage on-premise beverage portfolios, are an investor or entrepreneur entering the adult beverage space or are a supplier who services this market and need to speak your customers' language and understand their challenges and opportunities, this report set is for you. Questions answered include:

- Which adult beverage sectors are growing fastest?
- How are millennials putting their stamp on the industry? What new, innovative sectors are emerging and how will they change the face of the industry?
- Which beer, wine & Spirits brands are growing and which are facing challenges in a changing beverage environment?
- How is the craft movement impacting the adult beverage sector?
- Which cocktails are rising favorites in the on-premise sector?
- How are various on-premise retail chains performing?
- How large is the opportunity for various non-alcohol beverages as mixers in the on-premise space?
- How big is the total mixer market (on and off-trade inclusive)?
- How large is the CBD and THC beverage opportunity?
- What does the future hold for the adult beverage sector?

THIS REPORT SET FEATURES

This report set examines the full depth and breadth of the adult beverage sector, providing market data, consumer insights, market drivers and forecasts on a broad range of alcohol beverage categories, companies and brands to on-and off-trade trends, mixer market trends and more. Plus, cannabis trends -- THC and CBD are explored. This set is made up of the following BMC Report titles:

- U.S. Alcohol Beverage Trend Analysis
- BMC's U.S. Beer Guide 2019
- BMC's U.S. Spirits Guide 2019
- BMC's U.S. Wine Guide 2019
- Cannabis is the New Alcohol: Reinventing Cannabis for Sustainable Mainstream Use
- The Global Beer Market - Advance Purchase*
- The Next Wave of Beverage Alcohol in the U.S.
- On-Premise Intelligence Report 2018
- The On-Premise Mixer Market in the U.S.
- Premium Mixers in the U.S.
- Cannabis Beverages in the U.S.

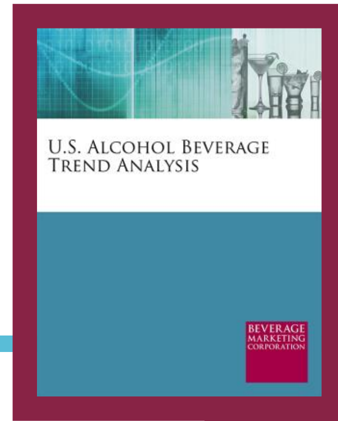
* The 2019 edition of this report has not yet been published. It will be emailed to you upon publication.

BMC's Full Alcohol Beverage Report Set 2019

BEVERAGE MARKETING CORPORATION

U.S. Alcohol Beverage Trend Analysis

2019 Edition (Published May 2019. Data through 2018.)
More than 40 PowerPoint slides, with extensive charts, data and infographics.



This title from Beverage Marketing's Focus Report series delivers observations and insights on 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 Beverage Marketing's alcohol consulting group, it offers beer, wine and distilled spirits market data through 2018 as well as observations on the trends that are re-shaping the alcohol market in the United States.

Set against a backdrop of the total alcohol market versus the non-alcohol market, this timely report examines key market drivers impacting consumers' alcohol choices. The report highlights the effects of these factors on various beverage alcohol segments and sub-segments, the report offers insight on key trends relating to wine and spirits and beer.

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The answers you need

This data and insight-rich PowerPoint presentation offers insights on the alcohol market against the backdrop of trends in the overall U.S. beverage 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 2018?
- What are the key trends impacting various wine segments?
- How did craft beer and imports perform?

This report features

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

U.S. Alcohol Beverage Trend Analysis

May 2019

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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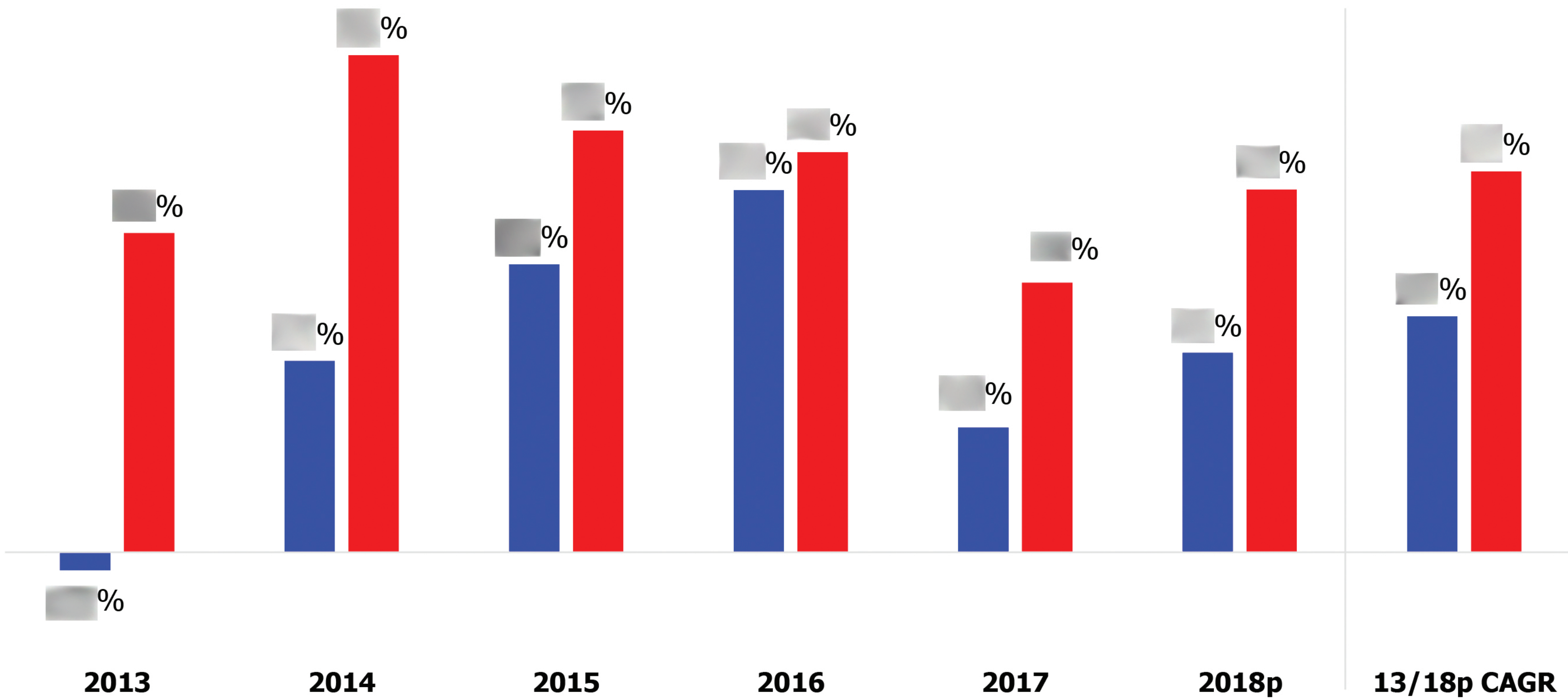
Post-recession revenues have consistently outpaced volume growth in recent years, and did so once again in 2018; trends toward premiumization and packaging mix shifts have contributed

U.S. Total Beverage Market
Change in Volume and Wholesale Dollars
2013 – 2018p

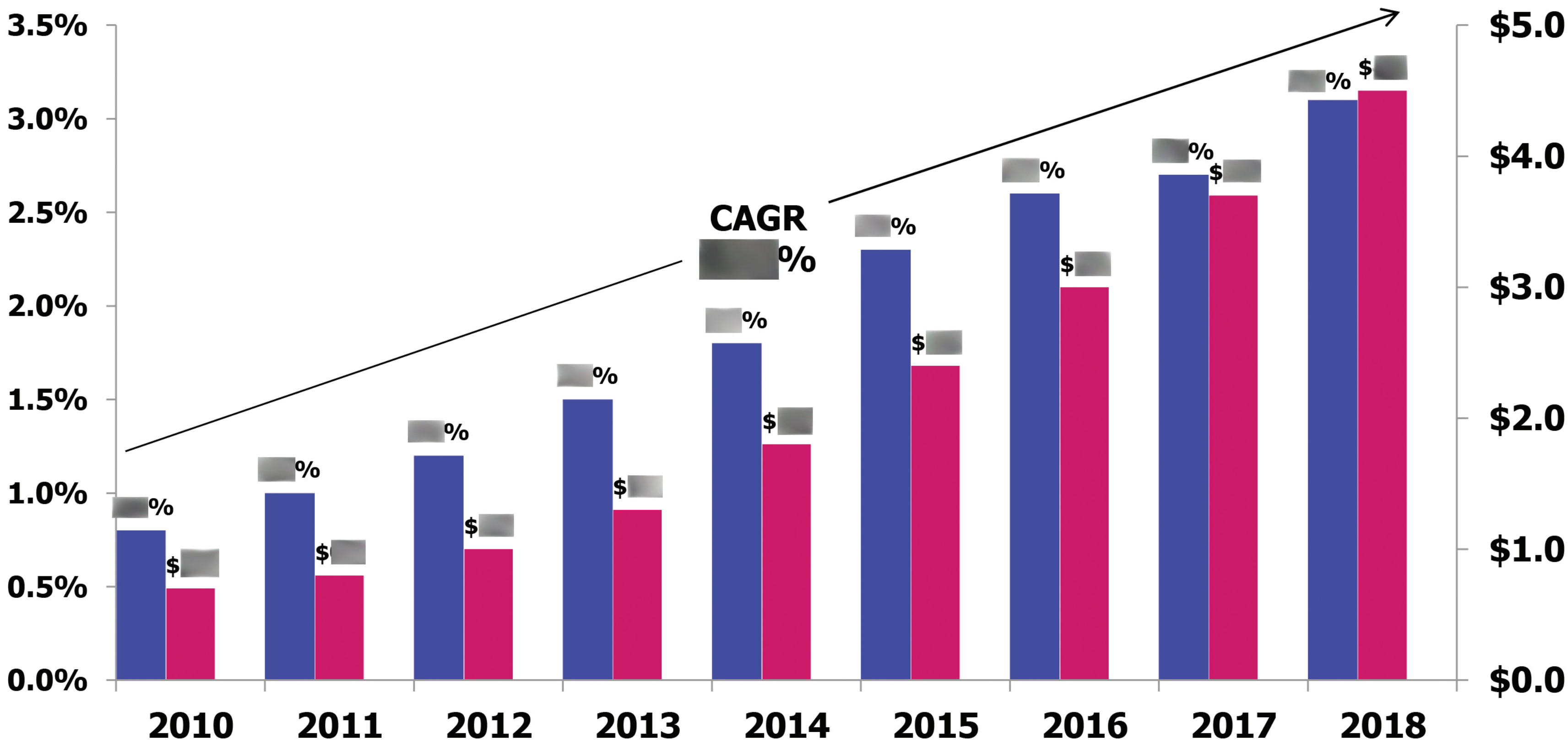


Volume Change   Wholesale Dollar Change

p: Preliminary; CAGR: Compound annual growth rate
Source: Beverage Marketing Corporation

In the current decade, craft spirits dollars have grown at an annual rate of [redacted]% per year along with volume which captured [redacted]% share of total spirits in 2018

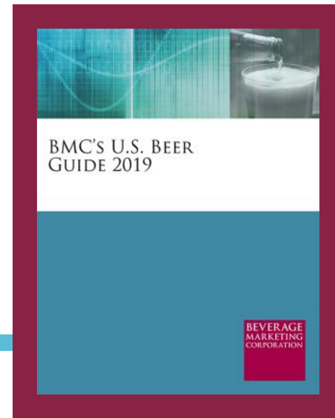
Craft Spirits Volume Share of Overall Distilled Spirits Industry vs. Category Dollars (MM) 2010-18



CAGR: Compound annual growth rate
**Craft is defined as a producer that have no more than 750K proof gallons removed from bond and not openly controlled by a larger supplier.*
Source: TTB, ACSA, Beverage Marketing Corporation

BMC's U.S. Beer Guide

2019 Edition (Published July 2019. Data through 2018. Market projections through 2023.) PowerPoint presentation features more than 75 slides, with extensive analysis, graphs, charts and tables + over 165 Excel exhibits offering even greater detail!



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From the industry leader in beer insights and intelligence, this report offers the most reliable data there is on domestic consumption and sales, capturing historical shifts in this massive market and placing them in a context that enables business planners and analysts as well as sales and marketing executives. ***New for 2019:*** Key trends now presented in a colorful PowerPoint presentation to make insights come alive. Plus, you get more than 165 Excel exhibits providing in-depth data for a deeper dive on aspects covered in the PowerPoint slides and much more.

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The answers you need

- Is beer giant diversification with its implication of stronger distribution and marketing for acquired companies and brands a hidden driver of industry growth?
- Does craft have the strength to continue as an independent phenomenon?
- Is the premiumization craft has contributed a never-ending factor in the market or is there a ceiling?
- Is a supposed return to easier drinking, lighter style brews—lagers, classic ales—evident in the volumetric trends?
- What's the overall impact of continued strong growth of certain imports (Mexican, Belgian)? Is there room for newcomers?
- Does the consolidation and contraction of the cider market have any broad implications—or is this a brand by brand phenomenon?

This report features

BMC's U.S. Beer Guide 2019 answers these questions with the industry's most comprehensive compendium of reliable, hard data. The Guide features data on the overall market volume by category, state, and top brands, plus detailed listings of top brand sales by both price categories and types. Plus, advertising, export/import data and extended projections. ***New for 2019****: Now covers more brands than ever!*

Comprehensive data coverage of imported and domestic beers of all all price tiers (premium, superpremium, value, etc), craft beers, ciders, FMBs, ice beers, light beers, IPAs, radlers etc. Data provided for the following companies and brands:

- AB InBev
- Miller/Coors
- Constellation Beers
- Heineken
- Pabst Brewing
- Boston Beer
- D. G. Yuengling & Son Inc.
- Diageo Beer Company USA
- Mikes Hard Lemonade Co.
- FIFCO USA
- Sierra Nevada
- Lagunitas Brewing Co.
- New Belgium Brewing
- Craft Brewers Alliance
- The Gambrinus Company
- Spoetzl Brewery
- Firestone Walker Brewing Co.
- Bell's Brewery
- Total Beverage Solution
- Sapporo
- Oskar Blues Brewery
- Paulaner HP USA
- Joose
- Geloso Beverage Group
- Warsteiner Importers
- Vermont Hard Cider Company, LLC
- St. Killian Importing
- Angry Orchard
- Strongbow Cider
- Crispin
- Bold Rock
- Woodchuck Hard Cider
- Stella Artois Cidre
- Magners
- Smith & Forge
- Square Mile
- Blake's Hard
- Somersby
- Hornsby
- Wyder's
- Virtue Cider Portfolio
- Rekorderlig
- Woodpecker Cider
- Fox Barrel
- Johnny Appleseed
- Michelob Ultra Light Cider
- Yuengling Traditional
- Samuel Adams Boston Lager
- Jacob Leinenkugel
- Sierra Nevada Pale Ale
- Goose Island
- Shiner
- Lagunitas IPA
- Yuengling Light
- Fat Tire
- Firestone Walker DBA
- All Day IPA
- Torpedo IPA
- Saranac Portfolio
- Bell's Two Hearted
- Rebel

- Widmer Hefeweizen
- 60 Minute IPA
- Longboard Island
- Henry Weinhard
- Samuel Adams Light
- Shipyard Brewing Company
- Shiner Light
- Ranger IPA
- Omission
- Brooklyn
- Dale's Pale
- Stone India Pale Ale
- Anchor Steam
- Rampant Imperial
- Alaskan Amber
- Sweetwater 420 Extra Pale
- Harpoon IPA
- Lagunitas Seasonals
- Bell's Seasonals
- Boulevard
- Redhook Long Hammer IPA
- JW Dundee's Honey Brown
- Mirror Pond Pale Ale
- Session
- Black Butte Porter
- 90 Minute IPA
- Magic Hat #9
- Ninkasi Domination IPA
- Sierra Nevada Celebration Ale
- Snapshot Wheat
- BridgePort IPA
- Arrogant Bastard
- Snow Day
- Pyramid Haywire
- Abita Amber
- Kilt Lifter
- Blue Point Toasted
- Inversion IPA
- Lost Coast Great White
- MacTarnahan's Brewing Company
- Sea Dog Brewing Company
- Somersault
- Pyramid IPA
- Rogue Dead Guy
- The Immortal IPA
- Full Sail Amber
- 1554 Brussels
- Redhook ESB
- Pyramid Apricot
- Trippel
- Sculpin IPA
- Sierra Nevada Hop Hunter IPA
- Broken Halo IPA
- Mighty Arrow
- Sunshine Wheat
- Dirtwolf Double IPA
- Drifter
- Sierra Nevada Nooner
- Traveler
- Dixie
- Abbey
- Rolle Bolle
- Slow Ride Session IPA
- Blue Paddle
- Nectar Ales
- Mothership Wit
- Southampton Publick House
- Celis
- Other Mike's Hard
- Smirnoff Ice (includes all extensions)
- Budweiser & Bud Light Chelada
- Twisted Tea
- White Claw
- Bon & Viv Spiked Seltzer
- Four Loko
- Modelo Especial Chelada
- Seagram's Escapes
- Bud Light Lime-a-Rita
- Mike's Hard Lemonade
- Truly Spiked & Sparkling
- Bud Light Lime Straw-Ber-Rita
- Henry’s Hard
- Smirnoff Spiked
- Mike's Harder Cranberry
- Joose
- Not Your Fathers
- Sparks
- Clubtails
- Mike's Harder Black Cherry
- Bartles & Jaymes
- Natty Rush
- Bud Light Lime Mang-O-Rita
- Seagram's Smooth
- Bud Light Lime Water-melon-Rita
- Mike's Harder Punch Mango Punch
- Palm Breeze
- Jack Daniels Country Cocktails
- Mike's Hard Light
- Bud Light Lime Apple-Ahhh-Rita
- Mike's Hard Limeade
- Bud Light Lime Lemon-Ade-Rita
- Best Damn
- Blast by Colt 45
- Mike's On The Rocks
- Margaritaville
- Pura Still
- Island Squeeze
- Coney Island
- Moskato Life
- Loko Rita
- Captain Morgan Parrot Bay Frozen Portfolio
- Coco Breve
- Bud Light Lime Raz-Ber-Rita
- Bud Light Lime Cran-Brrr-Rita
- Bud Light MixxTail
- Dos-A-Rita
- Tilt
- Jeremiah Weed (Lightning Lemonade, Roadhouse Tea & Spiked Cola)
- Amstel Radler
- ULTRA 19th Hole Light Tea & Lemonade
- Bacardi Silver (Incl. flavors, O3 & Raz)
- Natural Ice
- Milwaukee's Best Ice
- Icehouse (includes Edge)
- Bud Ice

- Busch Ice
- Keystone Ice
- Corona Extra
- Modelo Especial
- Heineken
- Stella Artois
- Dos Equis
- Guinness
- Corona Light
- Corona Familiar
- Tecate
- Pacifico
- Labatt Blue
- Corona Premier
- Tecate Light
- Labatt Blue Light
- Modelo Negra
- Heineken Premium Light
- Victoria
- Newcastle Brown
- Peroni
- Amstel Light
- Sapporo
- Sol
- Carta Blanca
- Red Stripe
- Molson Canadian
- Estrella Jalisco
- Smithwick's
- Warsteiner
- Asahi Super Dry
- Tsingtao
- Grolsch
- Pilsner Urquell
- Hacker-Pschorr
- Indio
- Molson Ice
- Paulaner
- Weihenstephaner
- St. Pauli Girl
- Moosehead
- Hoegaarden
- Tecate Michelada
- Trumer Pils
- Bohemia
- Kokanee
- Presidente
- Labatt Blue Light Lime
- Boddington's
- Harp
- Molson Golden
- Leffe
- Desperados
- Montejo
- Carlsberg
- Kronenbourg 1664
- Warsteiner Premium Dunkel
- Moretti
- Prestige
- Red Stripe Light
- Moosehead Light
- St. Pauli Girl Dark
- Lowenbrau
- Heineken Special Dark
- Moosehead Lime Light
- Lindemans
- Greene King
- Sapporo Reserve
- Sapporo Light
- Molson Canadian Light
- Elephant
- O'Hara's
- Brasserie dupont
- Fuller's
- Lefebvre
- Xiugu
- Molson Export
- Krusovice
- Old Vienna
- Coopers
- Tetley's English
- Yebisu
- Double Diamond
- Affligem
- Fruli Strawberry Beer
- Banks
- Tennents
- Day of the Dead
- Saigon
- Czech Rebel
- Godfather
- Modelo Light
- Brasserie dubuisson
- Fischer
- Bud Light
- Coors Light
- Miller Lite
- Michelob Ultra (incl. flavors)
- Natural Light
- Busch Light
- Keystone Light
- Bud Light Lime
- Milwaukee's Best Light
- Bud Light Platinum
- SELECT 55
- Bud Light Orange
- Bud Select
- Michelob Light
- Miller 64
- Miller High Life Light
- Michelob Ultra Pure Gold
- Michelob Golden Draft Light
- Old Milwaukee Light
- Miller Genuine Draft Light
- Lone Star Light
- Genny Light
- Rock Green Light
- Michelob Ultra Amber
- Schaefer Light
- Keystone Light Lime
- Two Hats
- Kirin Light
- Old Style Light
- Beck's Premier Light
- Southpaw Light
- Coors Light Citrus Radler
- Bud Light Golden Wheat
- Miller Chill
- Bud Ice Light
- Pabst Light
- Schlitz Light
- Stroh's Light
- Steel Reserve
- King Cobra
- Colt 45
- Olde English 800
- Mickey's
- Hurricane
- Schlitz Malt
- Magnum
- St. Ides
- Silver Thunder
- Country Club
- Red Bull Malt Liquor

BMC's U.S. Beer Guide 2019

July 2019

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

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Exhibit 3.3

U.S. BEER MARKET
CHANGE IN VOLUME BY CATEGORY
2013 – 2023(P)

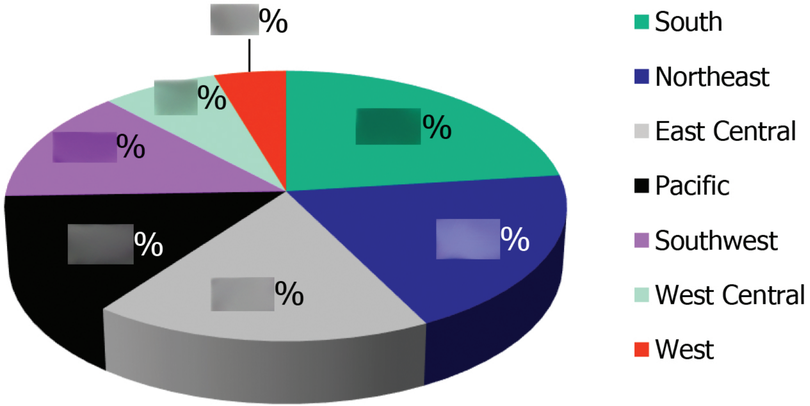
Categories	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	5-Year CAGR 2018/23(P)
Cider	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Craft	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Flavored Malt Beverages	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Ice	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Import	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Light	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Malt Liquor	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Non-Alcohol	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Premium	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Superpremium	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Value	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL*	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected; CAGR: Compound annual growth rate
** Excludes exports and cider*
Source: Beverage Marketing Corporation

From 2012 to 2018, shares of volume by region didn't change for any region by more than [redacted] percentage points, resulting in regional rankings remaining the same

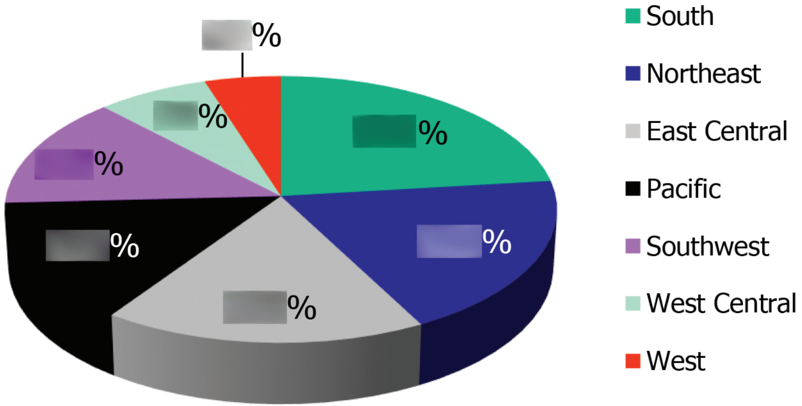
U.S. Beer Market
Share of Volume by Region

2012



[redacted] million beer barrels

2018



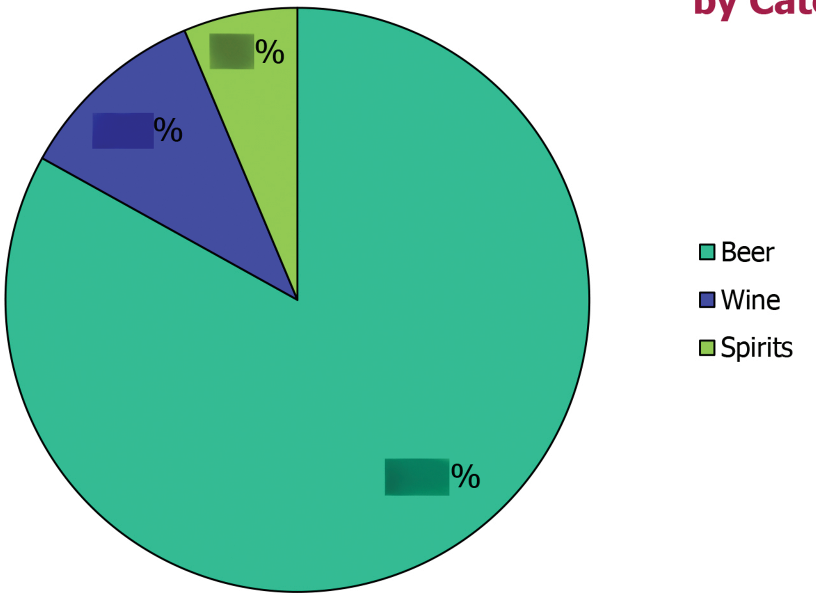
[redacted] million beer barrels

Source: Beverage Marketing Corporation

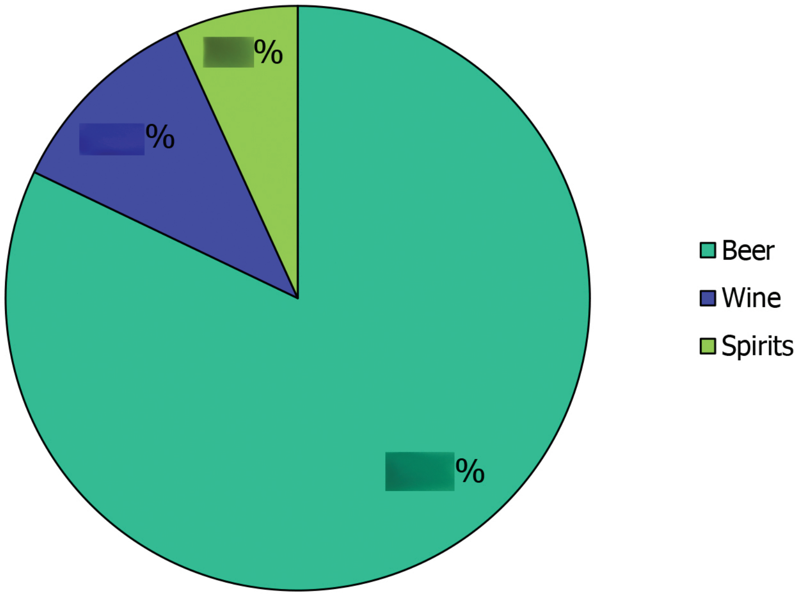
With respect to overall beverage alcohol volume, wine and spirits both gained [redacted] share points, at the expense of the beer category

Beverage Alcohol Volume Share by Category

2012



2018



Source: Beverage Marketing Corporation

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How it works: Our experts possess a wealth of top-of-mind information. Tap into it with **Access Insight**. We'll set up one or more calls at a mutually convenient time(s) to help you get your questions answered and make the information contained in your Guidebook come to life.

Please note: Access Insight Support does not include custom research or data development and is limited to discussion of an individual Guidebook topic (for example, either wine, beer or spirits).

The answers you need

- To what degree are trends such as premiumization, product proliferation and appeals to the increasingly significant Millennial consumer driving the spirits industry today?
- How are categories and brand leaders being impacted? Is a return to the historical dominance of whiskey continuing?
- How do imported brands stack up against domestics? In which categories does it matter most?
- Can the impact of a strong cocktail culture be seen in the performance of individual brands and categories?
- Is there any evidence of a resurgence in home entertaining in the on-off mix—or in brand/category performance?
- How important are the comparatively smaller incremental growth areas such as Tequila, Irish Whiskey, Cognac, Rye Whiskey, Craft Spirits to the overall health of the spirits market?
- How have advertising expenditures impacted overall brand performance?

This report features

BMC's U.S. Spirits Guide answers these questions with both expert analysis and the industry's most comprehensive compendium of reliable, hard data. The Guide features data on the overall market: volume and retail dollars, state rankings, top brands by volume and sales, fastest growing brands, leading suppliers by volume and share, and leading portfolios. Categories cover leading brands and brand share, leading suppliers and share, and sales by retail tier, plus imported and domestic share, import share by origin and details on leading flavored brands and flavor shares. ***New for 2019:** More brand breakouts than ever before. Plus, enhanced craft spirit coverage!*

Data provided for the following companies and brands:

- Diageo
- Luxco
- Beam Suntory
- Frank-Lin Distillers
- McCormick Distilling
- Bacardi USA
- Brown-Forman
- Laird & Co.
- Constellation Brands
- E & J Gallo
- Infinium Spirits
- Campari America
- Remy Cointreau USA
- William Grant & Sons USA
- Shaw-Ross International Importers
- Fifth Generation
- Star Industries
- Hood River Distillers
- Sazerac

- Patron Spirits Company
- Lucas Bols USA
- Edrington USA
- MS Walker Inc
- Charles Jacquin et Cie
- Phillips Distilling
- Moet Hennessy USA
- Heaven Hill Brands
- Kobrand
- Montebello Brands
- Winebow
- Proximo Spirits
- Pernod Ricard USA
- Mast Jagermeister U.S.
- Hennessy
- E & J Brandy
- Paul Masson Brandy
- Christian Brothers
- Remy Martin
- Courvoisier
- Korbel Brandy
- Martell
- D'ussé
- Salignac
- St. Remy
- Coronet Brandy
- Presidente Brandy
- Mr. Boston Brandy
- J. Bavet
- Raynal
- Ansac
- Aristocrat Brandy
- Meukow
- Cardenal Mendoza
- Jacques Bonet
- Laird's AppleJack
- Pisco Capel
- Alize Cognac
- Pisco Porton
- BarSol
- Landy
- Hartley Brandy
- Phillips Brandy
- Fundador/Terry
- Constantino
- Gran Duque de Alba
- Monarch Brandy
- Don Pedro/Azteca de Oro
- Stock 84
- de Fussigny
- Delamain Cognac
- Macieira
- Milenario
- Chocoviac
- Conjure
- Banker's Club
- Deau Artisan
- Fleischmann's Brandy
- McCormick Brandy
- Seagram's 7 Crown
- Kessler
- Kentucky Deluxe
- McCormick Blend
- Heaven Hill Blended Whiskey
- Beam's 8 Star
- Kentucky Gentleman
- Fleischmann's Preferred
- Calvert Extra
- Philadelphia
- Aristocrat Blended
- Imperial
- Senator's Club
- Five Star
- Club 400
- Carstairs White Seal
- Bellows Blend
- Paul Jones
- Broker's Reserve
- Old Thompson
- Banker's Club
- Potter's Special Blended
- Gold Crown
- Travelers Club
- Hawkeye
- Triple Crown
- Old Mill Stream
- Guckenheimer Private Stock
- Kasser
- Old Sunny Brook
- Hobble Creek
- Bourbon Supreme
- Mattingly Moore
- Barton Blended
- Four Queens
- Haller's Reserve
- Newport
- Ezra Brooks
- Jacquin Premium
- Idaho Gold Blend
- Monarch Reserve
- P.M. Blend
- Royal Gentleman
- Crown Royal
- Black Velvet
- Canadian Club
- Canadian Mist
- Rich & Rare
- Windsor Supreme
- Seagram's V.O.
- Canadian LTD
- Lord Calvert
- Canadian Hunter
- Pendleton
- Northern Light
- Canada House
- MacNaughton
- Crown Royal Reserve
- McMaster's Canadian
- Harwood Canadian
- Revel Stoke
- Potter's Crown Canadian
- Royal Canadian
- Wiser's Canadian
- Forty Creek
- Canadian Gold
- Monarch Canadian
- Canadian Host

- Canadian Reserve
- Mt Royal Light
- Barton Canadian
- Canadian Leaf
- Canadian Supreme
- Canadian Lake
- Tangle Ridge
- Fireball Cinnamon Whisky
- DeKuyper
- Jagermeister
- Baileys
- Southern Comfort
- Kahlua
- Jack Daniel's Tennessee Honey
- Hiram Walker Cordials
- Grand Marnier
- RumChata
- Jack Daniel's Tennessee Fire
- Wild Turkey American Honey
- Mr. Boston Cordials
- Carolans Irish Cream
- Bols Cordials
- Hpnotiq
- Disaronno
- Arrow Cordials
- Cointreau
- Leroux
- Rumple Minze
- Red Stag by Jim Beam
- Jacquin Cordials
- Dr. McGillicudy's
- Allens Cordials
- Tequila Rose
- DuBouchett Cordials
- Yukon Jack
- Phillips Cordials
- Montezuma Triple Sec
- Alize
- Goldschlager
- Paramount Cordials
- Jim Beam Kentucky Fire
- Jack Daniel's Winter Jack
- Agavero Tequila Liqueur
- Christian Brothers Honey
- E & J Cask & Cream
- Seagram's Gin
- Tanqueray
- Bombay Sapphire
- New Amsterdam
- Gordon's Gin
- Beefeater
- Hendrick's
- Barton Gin
- Gilbey's Gin
- Burnett's White Satin Gin
- Seagram's Twisted Gin
- Fleischmann's Gin
- Bombay Original
- Crystal Palace Gin
- McCormick Gin
- Broker's
- Tanqueray No.TEN
- Plymouth Gin
- Citadelle
- Pinnacle Gin
- Boodles
- Jameson
- Tullamore Dew
- Bushmills
- 2 Gingers Irish Whiskey
- Paddy Irish Whiskey
- Irishman, The
- Redbreast Irish Whiskey
- Clontarf
- Kennedy's Original
- John Power
- Teeling
- Cooley's
- Kilbeggan Irish Whiskey
- Knappogue
- Knot, The
- Proper No. 12
- Feckin
- Danny Boy
- The Sexton
- Jose Cuervo RTD
- Chi-Chi's
- 1800 Ultimate Margarita
- Kahlua Ready-To-Drink
- TGI Friday's
- Skinnygirl
- Bacardi Party
- Club Cocktails, The
- Captain Morgan Long Island Iced Tea
- Twisted Shotz
- Salvador's
- Barton Long Island Iced Tea
- Malibu Rum Cans
- Margaritaville Ready-To-Drink
- Montebello Original Long Island Iced Tea Cocktails
- Bacardi Classic Cocktails
- Desert Island Tea
- Beam Cocktails
- Malibu Cocktails
- Ice Box
- McCormick Long Island Iced Tea
- Vitafrute
- Seagram's Gin & Juice
- Buzzballz
- UV Lemonade
- Mr. Boston Prepared Cocktail

- Tarantula Azul
- Paramount LI Ice Tea
- Sauza Ready to Drink Margaritas
- Smirnoff Cocktails
- Burnett's Cocktails (Cosmo, Mojito, Margarita)
- Calle Azul
- Captain Morgan Tropical Mojito Citrus
- Captain Morgan Tropical Mojito Mango
- Diageo Prepared Cocktail Portfolio(Seagram, Dickel, Morgan & Cola, Smirnoff Lemon Lime)
- Firefly
- New Mix
- Rio Grande Margarita
- Southern Comfort Prep Cocktail
- Bacardi
- Captain Morgan
- Malibu
- Admiral Nelson
- Cruzan
- Sailor Jerry
- Castillo
- Captain Morgan's Parrot Bay
- Kraken, The
- Calico Jack Flavored Rums
- Ronrico
- Don Q
- Myers's
- Barton Rum
- Appleton
- Aristocrat Rum
- Mount Gay Rum
- RonDiaz
- Jacquin's
- Monarch Rum
- Leblon
- Shellback
- Ypioca/Toucano
- Agua Luca
- Sagatiba
- Cabana Cachaca
- Cachaca 51
- Pitu
- Dewar's
- Johnnie Walker Black Label
- Johnnie Walker Red Label
- Buchanan's
- Clan MacGregor
- Glenlivet, The
- Chivas Regal
- Macallan, The
- J & B
- Glenfiddich
- Famous Grouse, The
- Old Smuggler
- Grant's
- Inver House
- Scoresby
- Balvenie, The
- Lauder's
- Glenmorangie
- Cutty Sark
- House of Stuart
- Laphroaig
- Ballantine's
- Lagavulin
- McClelland's
- Oban
- Highland Mist
- Speyburn
- Grand Macnish
- Aberlour
- Highland Park
- Dalwhinnie
- Bowmore
- Passport
- Crawford's
- Talisker
- Jack Daniel's
- Jim Beam
- Evan Williams
- Maker's Mark
- Wild Turkey
- Small Batch Bourbon (s)
- Bulleit Bourbon
- Woodford Reserve
- Early Times
- Ten High
- Gentleman Jack
- Old Crow
- Heaven Hill Bourbon
- Ezra Brooks
- Ancient Age/AAA
- Bulleit Rye
- Kentucky Tavern
- George Dickel
- Old Grand-Dad
- Old Overholt
- Templeton Rye
- Midnight Moon
- Old Charter
- TINCUP
- Angels Envy
- Stranahan's Colorado
- Georgia Moon
- Rittenhouse Straight
- Hirsch Selection
- Wild Turkey Straight Rye Whiskey
- Sazerac Rye
- Masterson's
- Mellow Corn
- (ri)1
- Original Moonshine, The
- Catdaddy
- XXX SHINE Whiskey
- Jose Cuervo
- Patron
- Sauza
- 1800

- Juarez
- Montezuma Tequila
- Familia Camarena
- el Jimador
- Don Julio
- Margaritaville Tequila
- House of Cazadores
- Espolon Tequila
- Milagro
- Olmeca Altos
- Lunazul
- Pepe Lopez
- Herradura
- Tortilla Tequila
- Zarco
- Tequila Avion
- Azul
- La Prima
- Corralejo
- Rio Grande
- Pancho Villa Tequila
- Agavales
- Two Fingers
- Torada
- Gran Centenario
- Cabo Wabo
- El Charro
- Arandas Tequila
- Tequila Corazon de Agave
- El Toro
- Monte Alban
- Rosita
- Roca Patron
- Azteca
- Tarantula Azul Tequila & Citrus
- Matador
- Smirnoff
- Tito's Handmade Vodka
- Svedka
- Absolut
- New Amsterdam Vodka
- Grey Goose
- Skyy
- Pinnacle Vodka
- Burnett's Vodka
- Ketel One Vodka
- Stolichnaya
- Ciroc
- McCormick Vodka
- Barton Vodka
- Seagram's Vodka
- Platinum 7X
- Popov Vodka
- UV Vodka
- Three Olives
- Aristocrat Vodka
- Sobieski
- Fleischmann's Royal Vodka
- Kamchatka
- Gordon's Vodka
- Skol Vodka
- Nikolai
- Crown Russe Vodka
- Taaka Vodka
- Mr. Boston Vodka
- Georgi
- Belvedere Vodka
- Heaven Hill Vodka
- Crystal Palace Vodka
- Phillips Vodka
- Wolfschmidt
- Jacquin's Vodka Royale
- Gilbey's Vodka
- Potter's Vodka
- Fris Vodka
- Vladimir
- Finlandia

BMC's U.S. Spirits Guide 2019

May 2019

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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11. The U.S. Spirits Market Category Volume and Dollars (cont'd)

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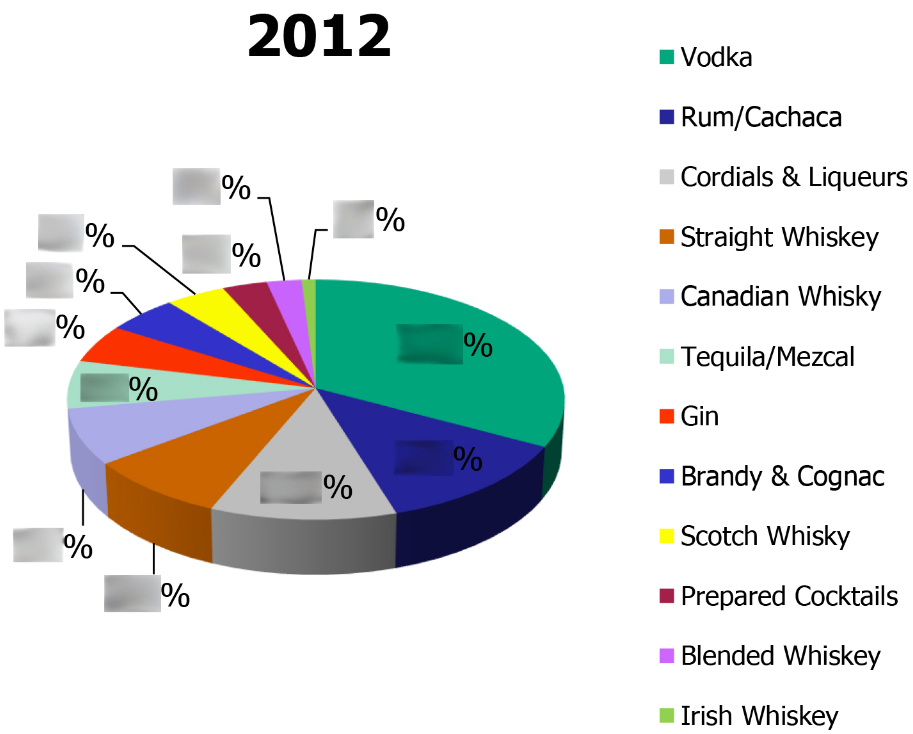
Exhibit 3.2

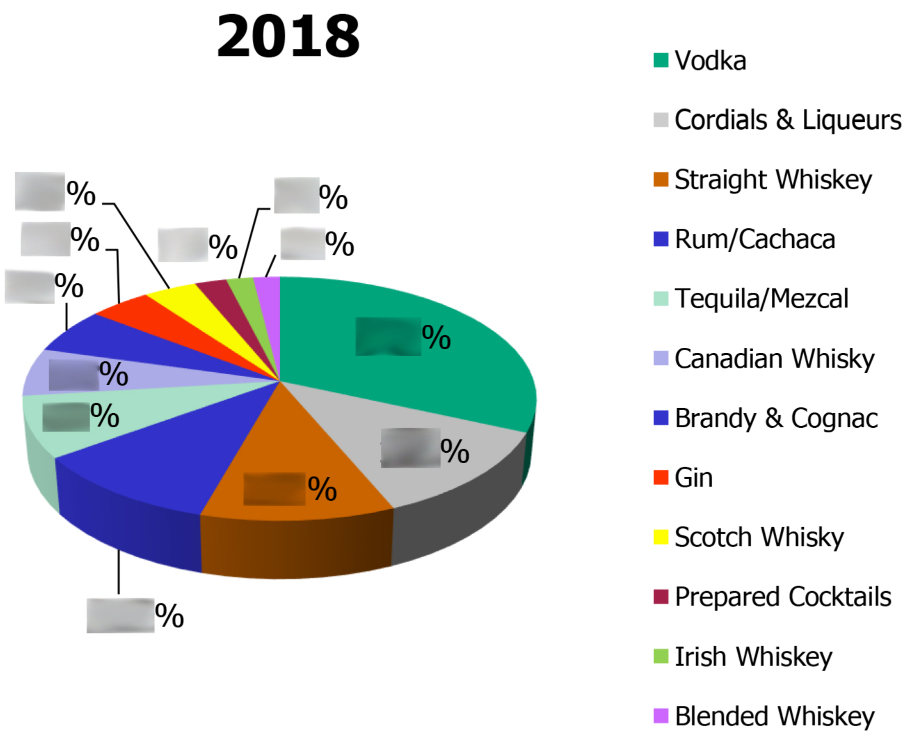
U.S. SPIRITS MARKET
SHARE OF RETAIL SALES BY CATEGORY
2012 – 2018

Category	2012	2013	2014	2015	2016	2017	2018
American Straight Whiskey	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Blended American Whiskey	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Total American Whiskey	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Canadian Whisky	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Scotch Whisky	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Irish Whiskey	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Total Imported Whisk(e)y	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Total Whisk(e)y	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Gin	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Vodka	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Rum/Cachaca	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Tequila/Mezcal	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Brandy & Cognac	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Cordials & Liqueurs	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Prepared Cocktails	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Total Non-Whiskey	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Total Distilled Spirits	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

Source: Beverage Marketing Corporation

Vodka remains the largest spirits category despite losing [redacted] share points over the 2012-to-2018 period, while straights, tequila and cordials gained [redacted], [redacted] and [redacted] share points, respectively



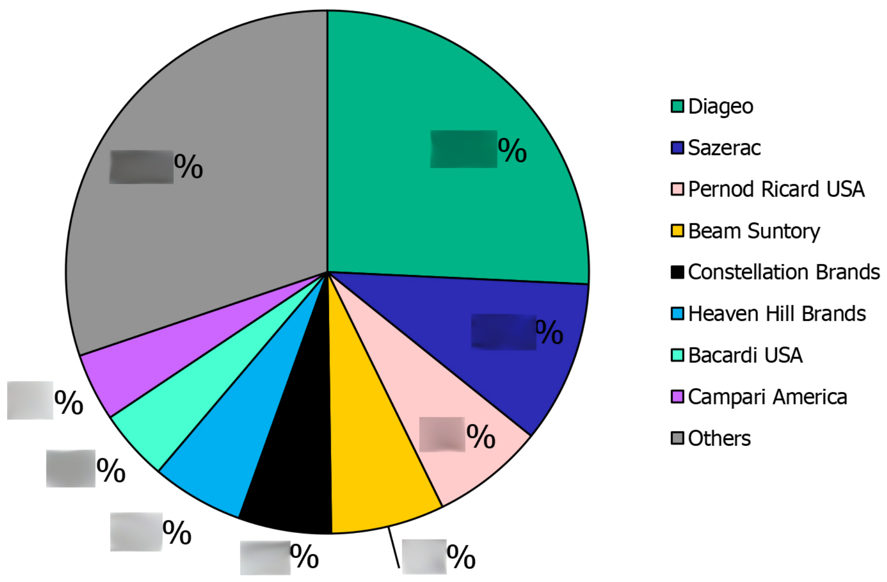


Source: Beverage Marketing Corporation

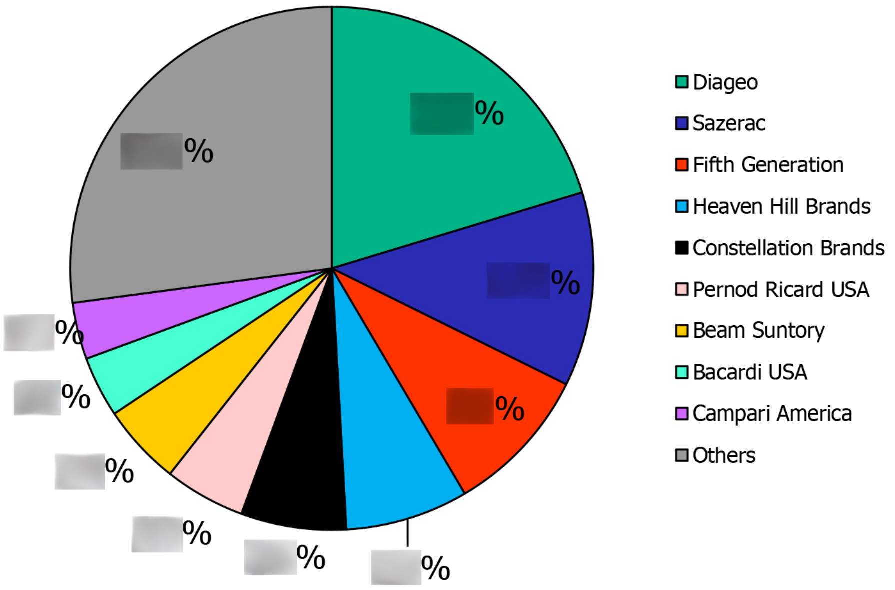
The story when looking at leading suppliers is Fifth Generation's [redacted]% share in 2018, thanks to the performance of Tito's, while Diageo lost [redacted] share points since 2012 although some of that share loss was due to sale of brands to Sazerac

Vodka Suppliers Share

2012



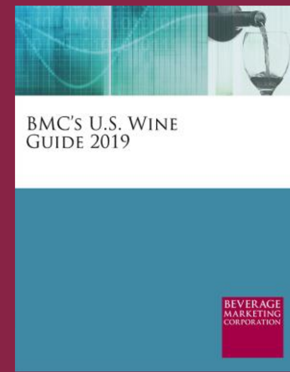
2018



Source: Beverage Marketing Corporation

BMC's U.S. Wine Guide

2019 Edition (Published June 2019. Data through 2018. Market projections through 2023.) .) PowerPoint presentation features more than 75 slides, with extensive analysis, graphs, charts and tables + over 200 Excel exhibits offering even greater detail!



The most comprehensive resource of hard number competitive tools available, taken from BMC's database of leading brand and company volumes and sales. Tracks this evolving market's changing tastes and new growth areas including varietals and regions with a spotlight on top performers.

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The answers you need

- Does longitudinal data support assumptions about the decades-long wine market impact of baby boomers being replaced by that of less affluent, more ambivalent millennial consumers?
- Whether yes or no, what exactly are the current trends in consumption by price tier?
- And what changes are there in the brands and varietals driving overall category trends?
- Which suppliers and brands are now spending the most on advertising? How does this correlate with performance?
- Is share of on-premise consumption likely to continue its longterm slide?
- What changes are there in the performance of supplier brand leaders and growing regions?
- What about imports? Are rankings changing? Are new players and trends having an evident impact?
- Is growth in direct market share having any visible macro effect?

This report features

BMC's U.S. Wine Guide answers these questions with both expert analysis and the industry's most comprehensive compendium of reliable, hard data. The Guide features volume and sales data rankings on the overall market including top brands, fastest growing brands, and leading portfolios. Table wine, sparkling wine, fortified wine and vermouth categories cover leading brands, leading suppliers, and sales by retail tier. Consumer demographics, import/export data, and advertising sections include detailed breakouts to allow for systematic analysis.

Data provided for the following companies and brands:

- E & J Gallo
- Constellation Brands
- Wine Group, The
- Trinchero Family Estates
- Treasury Wine Estates
- Deutsch Family Wine & Spirits
- DFV Wines
- Bronco Wine Co.
- Ste. Michelle Wine Estates
- Palm Bay International
- Jackson Family Wines
- Fetzer Vineyards
- Francis Ford Coppola Winery
- Banfi Vintners
- Shaw-Ross International Importers
- Walmart
- Bogle Vineyards
- Terlato Wines International
- Carriage House Imports
- Pernod Ricard USA
- Brown-Forman
- Moet Hennessy USA
- Royal Wine Co.
- CK Mondavi Winery
- Takara Sake USA
- J. Lohr Vineyards & Wine
- Kobrand
- Winebow
- Harvest Hill Beverage
- Frederick Wildman and Sons, Ltd
- Franzia Winetaps
- Barefoot Cellars
- Carlo Rossi
- Sutter Home
- Woodbridge by Robert Mondavi
- Twin Valley
- Peter Vella
- Yellow Tail
- Black Box
- Bota Box
- Beringer

- Charles Shaw
- Liberty Creek
- Livingston Cellars
- Kendall-Jackson
- Cavit
- Chateau Ste. Michelle
- Menage a Trois
- Concha y Toro
- Cupcake Vineyards
- Almaden
- Bogle
- Josh Cellars
- Oak Leaf Vineyards
- Vendange
- Corbett Canyon
- Apothic
- Inglenook
- Robert Mondavi Private Selection
- Stella Rosa
- Dark Horse
- FishEye
- Clos du Bois
- 14 Hands
- 19 Crimes
- Riunite
- Glen Ellen
- Ruffino
- C K Mondavi Vineyards
- Francis Ford Coppola Portfolio
- Barefoot Refresh
- Kim Crawford
- J. Lohr Estates
- La Crema
- Meiomi
- Boone's
- Turning Leaf
- Lindeman's
- Columbia Crest
- Naked Grape
- Mirassou Coastal Selection Wines
- Canyon Road
- MezzaCorona
- Rex Goliath
- Joel Gott Wines
- Fetzer
- Louis Martini
- Tisdale
- Alamos
- Roscato
- Leonard Kreusch
- Oyster Bay
- Ecco Domani
- Rodney Strong
- Big House
- Sterling Vineyards
- Redwood Creek
- Mark West
- Bay Bridge Vineyards
- Crane Lake Winery
- Copper Ridge
- Hess Collection, The
- Estancia Estates
- Foxhorn
- Decoy
- Bella Sera
- Sycamore Lane
- Manischewitz
- Gnarly Head
- Adler Fels
- Mogen David
- Wente Vineyards
- Noble Vines
- Castle Rock Winery
- Real Sangria (Cruz Garcia - Real)
- Santa Margherita
- Edna Valley Vineyard
- Simi
- Schmitt Sohne
- Vin Vault
- Nobilo
- Riondo
- San Antonio Maddelena
- Smoking Loon
- Santa Rita
- Taylor Tables
- Starborough
- Matua Valley
- Butter
- La Vieille Ferme
- Winking Owl
- William Hill
- Jacob's Creek
- Maison Louis Jadot
- Layer Cake
- flipflop
- MoonX
- Line 39
- Sonoma-Cutrer
- Caymus Vineyards
- Antinori
- Casillero del Diablo
- Duplin Winery
- Dreaming Tree, The
- Blackstone
- Chateau d'Esclans
- Kenwood
- Bolla
- Chateau St. Jean
- Bonterra
- Underwood
- 90+Cellars
- Carnivor
- California Roots
- William Wycliff
- Beaulieu Vineyard
- Toasted Head
- Bully Hill Vineyards
- Chloe Wine Collection
- Frei Brothers
- Hahn Estates
- Oliver
- RELAX
- Kedem
- Parducci Wine Cellars
- Citra
- Mac Murray Ranch
- Principato
- Two Vines
- Whispering Angel

- Octavin Home Wine Bar
- Gallo of California
- Ferrari-Carano
- TOG Portfolio
- Gato Negro
- Trapiche
- SeaGlass
- Da Vinci
- Green Fin
- Red Diamond Wine
- Ghost Pines
- McManis Family Vineyards
- Taylor California Cellars
- Wild Vines
- The Federalist
- Prophecy
- Bandit
- A to Z
- Salmon Creek Cellars
- Twisted
- Hogue Cellars
- King Estate
- Primal Roots
- Bread & Butter
- 7 Deadly Zins
- Erath
- Kris
- Valentin Bianchi
- Casarsa
- Red Rock
- Banfi
- Justin
- Castello di Gabbiano
- Ravenswood
- Coastal Vines Cellars
- Don Miguel Gascon
- Campo Viejo
- Franciscan Oakville Estate
- Leese-Fitch
- Cameron Hughes
- Geyser Peak
- La Terre
- Wild Horse
- Sebastiani Vineyards
- Santa Carolina
- M. Chapoutier
- Chateau Diana
- St. Francis
- Freakshow
- Avalon
- Brancott
- Folonari
- Santa Julia
- Kirkland Signature
- Paul Masson
- Baron Herzog
- Ravage
- Meridian
- Robert Mondavi Winery
- Seven Daughters
- entwine
- Leaping Horse Vineyards
- Nathanson Creek
- Sogrape Vinhos
- Save Me San Francisco
- Four Vines
- Intrinsic
- Cribari
- Marcus James
- Primo Amore
- Callaway
- Pepperwood Grove
- Gerard Bertrand
- Stone Cellars
- Prima Amore
- Murphy-Goode
- New Age
- Fox Brook Winery
- Bodega Elena De Mendoza
- Coastal Ridge
- Ste. Chapelle
- Barton and Guestier
- The Prisoner Wine Co
- Blue Nun
- Martin Codax
- Round Hill
- Straccali
- Ava Grace
- Trinity Oaks
- Marques de Riscal
- Cocobon
- Georges Duboeuf
- Pacific Rim
- Stone Creek
- OZV
- Llano Estacado
- Trivento
- Santa Cristina
- Columbia
- Benziger Family Winery
- Cherry Blossom Cellars
- Acrobat
- Avia
- Kung Fu
- Tom Gore
- Perrin
- Z Alexander Brown
- Little Penguin, The
- Monkey Bay
- Talbott
- Charles & Charles
- Five Oaks
- Hardys
- Whitehaven
- Parkers Estate
- LuLu B
- Luca Bosio
- Jewelry Box
- Educated Guess
- Duckhorn Vineyard
- Arrow Creek
- CR Cellars
- Maso Canali
- Catena
- Souverain
- House Wine Box
- Shannon Ridge

- Rare 4
- The Velvet Devil
- Acacia Vineyard
- Stag's Leap Wine Cellars
- Marques de Caceres
- Rombauer
- Hacienda Wine Cellars
- Three Thieves
- Rosatello
- Middle Sister
- Hazlitt 1852 Vineyards
- 7 Moons
- Terrazas de los Andes
- J Vineyards
- Dona Paula
- Bridlewood
- Estrella River
- Rancho Zabaco
- The Beachhouse
- Gallo of Sonoma, Single Vineyard
- Firefly Ridge
- Duck Commander
- Covey Run
- Cakebread Cellars
- Barone Fini
- Natura
- Alice White
- Domino
- Quail Oak
- St. Supery
- Radius
- Oak Ridge
- Banrock Station
- Markham
- Rose'N'Blum
- Toad Hollow Vineyards
- Johann Falkenburg
- Carmenet Vineyards
- Miraval
- Root: 1
- Arrogant Frog
- Mouton Cadet
- Waterbrook
- Milestone
- Duck Pond Cellars
- Petite Petit
- Placido
- Hob Nob
- Stags' Leap Winery
- Snoqualmie
- Napa Cellars
- ForestVille Vineyards
- Raymond Hill
- Honoro Vera
- Gazela Vinho Verde
- 1000 Stories
- Rutherford Ranch
- Thorny Rose
- Talus Collection
- Mad Housewife
- Frey Vineyards
- Diseno
- Cono Sur
- Caposaldo
- Blue Fin
- Love Noir
- Alexander Valley Vineyards
- Kono
- Sweet Bitch
- Concannon Vineyard
- Voga Italia
- Robert Hall Winery
- Newton
- Lucky Duck
- DeLoach
- Conundrum
- Century Cellars
- Giesen
- Walnut Crest
- Jordan Winery
- Douglass Hill
- Don Simon
- Ca'Donini
- Gemma di Luna
- Storypoint
- Vino dei Fratelli
- Jam Jar
- Irony
- Zenato
- Sokol Blosser
- Rutherford Hill
- Mason Cellars
- Jeunesse
- Il Poggio
- Elk Cove Vineyards
- Byron
- Belle Ambiance
- Terrain Vineyards
- Imagery
- Silver Oak
- Clifford Bay
- Anakena
- Smith & Hook
- Firesteed Cellars
- Skinnygirl
- Ows Cellar Selection
- Macaroni Grill
- LOFT
- Little Black Dress
- Dry Creek Vineyard
- Conquista
- Charles Krug
- Blue Fish
- Black Mountain
- Barkan/Segaus
- Slow Press
- Torres
- La Fiera
- Silver Palm
- Nielson
- Rosemount Estate
- Tiamo
- Little Boomey
- Indaba
- Glass Mountain
- Finca el Origen
- Alverdi
- Raymond (Reserve/Estate/Generation)
- Famiglia Pasqua

- Caves da Cerca
- Rene Barbier
- Dancing Bull
- Night Harvest by RH Phillips
- Gran Passione
- Castoro Cellars
- Bodegas Muriel
- Black Stallion
- 13 Celsius
- Aime Roquesante
- Copper & Thief
- Chronic Cellars
- Masi
- Frogs Leap
- Bieler Pere et fils
- Villa Pozzi
- Starling Castle
- Etude
- Clean Slate
- Gloria Ferrer
- Stonecap
- Rashi
- Las Rocas
- Groth Vineyards
- Firestone
- Fifty Shades of Grey
- Cuvaison Estate
- Capri
- Cambria
- Fleurs de Prairie
- Elouan
- The Crossings
- Faustino
- Canoe Ridge
- Stella
- Earthquake
- The Seeker
- Santa Marvista
- Piccini
- Marietta Cellars
- Finca Flichman
- Penfolds
- Santa Barbera Landing Winery
- Le Grand Noir
- Ironstone Vineyards
- Handsome Devil
- Dr. Loosen
- Cycles Gladiator Wines
- Cloudy Bay Vineyards
- Stellina di Notte
- Pedroncelli
- Bex
- Mountain View Vintners
- Foppiano Vineyards
- 10 Span
- Terlato Family Vineyards
- Terra d'Oro
- Zuccardi
- Newman's Own
- Joseph Carr
- Honig
- Hedges Family Estates
- Clos du Val
- Chalone Vineyard
- blufeld
- Black Point
- Barnard Griffin Winery
- Skyfall Vineyard
- MAN Vintners
- Folie à Deux
- Sensual
- Albertoni Vineyards
- Torresella
- Picket Fence
- Peregrine/Mohua
- Paso Creek
- Matthew Fox
- La Merika
- HandCraft
- Greystone Cellars
- Grand Cru
- David Stone
- Backhouse
- Cigar Box
- Peregrine/Mohua
- Tunnel of Elms
- The Crusher
- Tunnel of Elms
- Pomelo
- Red Guitar
- Casa Lapostolle
- Anew
- Rabble Wine
- Woodwork
- Seven Falls
- Sagelands
- Carmel Road
- Sledgehammer
- Freemark Abbey
- Black Oak
- Simply Naked
- Uppercut
- Paul Jaboulet Aine
- Owl Ridge
- Montevina
- Hayes Ranch
- Chateau Minuty
- Tortoise Creek
- The Show
- Stimson Estate Cellars
- Napa River Winery
- Caves du Fournalet
- Barboursville Winery
- Nino Franco
- Two Oceans
- Rockbrook Cellars
- Crios
- Boutari
- BenMarco
- Lancers
- J. Lohr Vineyard Series
- Gary Farrell
- Funf Riesling
- Carmel
- Bouchard Aine & Fils
- Astica
- Sartori
- Greg Norman Estates

- Rawsons Retreat
- Widmer
- Migration
- Loveblock
- Cline Cellars
- Sequoia Grove
- Royal Bitch
- Kunde
- Valley of the Moon
- Trefethen
- Steelhead
- Silverado
- Silver Ridge
- Sanford
- Redtree
- Polka Dot
- Mount Veeder
- MontPellier Vineyards
- Fancy Pants
- Alfasi
- Siduri
- Eve
- North by Northwest
- Stave & Steel
- Renacer
- Weinstock Cellars
- Schug Carneros
- Forest Glen
- Delas Freres
- Caparzo
- Saldo
- Whitehall Lane
- The Path
- RSVP Vineyards
- Bodegas Montecillo
- Simple Life
- Matanzas Creek
- Canei
- The Great American Wine Company
- Tabali
- SAVED
- Ruta 22
- Plungerhead
- Oak Vineyards
- Kesser
- Hidden Fruit
- Graffigna
- Fat Bastard
- El Coto
- Dona Sol
- Di Majo Norante
- Cypress
- Complicated
- Clos LaChance
- Anderra
- Il Poggione
- Boom Boom!
- Chateau Smith
- Kanonkop
- Florio
- Conn Creek
- Almond Creek
- French Rabbit
- Santi
- Ernesto Catena
- Bellagio Chianti
- Tikal
- Tangley Oaks
- Shatter
- Painter Bridge
- Liberated
- Jakob Demmer
- Iron Horse
- Grgich Hills
- Girard Winery
- Black Opal
- Bellafina
- Belcrème de Lys
- Cusamano
- Hecht & Bannier
- Rainstorm
- Buena Vista
- TintoNegro
- The Divining Rod
- Paraduxx
- Fontana Candida
- Buehler Vineyards
- Arrowood
- Clos de Nit
- Vinimark
- Heinz Eifel
- XYZin
- Davis Bynum
- Tilia
- Quail Creek Cellars
- Los Dos
- Long Lake Cellars
- Dynamite
- Auspicion
- Julia James
- Tamari
- Fog Head
- Terranoble
- Septima
- Powder Keg
- Melini
- Fat Cat Cellars
- Cellar Four 79
- Three Rivers
- Tasca D'Almerita
- Campanile
- Beni di Batasiolo
- Taken
- Sea Pearl
- Entrée
- Domaines Ott
- Aquinas
- GH (Green Hungarian)
- Garnet Vineyards
- Flirt
- Fire Road
- Chateau de Beaucastel
- Carpe Diem
- Totally Random
- Pratsch
- Murrieta's Well
- Hahn SLH
- Echo Bay
- Vintage Ink
- Villa Mt. Eden
- Traviata
- The California Winery
- Massimo

- Grove Ridge
- Five Rivers
- B-Side
- Brazin
- Bearboat
- Viña Casablanca
- Tiziano
- Pietrafitta
- Pennywise
- Gunsight Rock
- Goose Bay
- Double Decker
- Diora
- Bianchi
- Rene Junot
- Raimat
- mapema
- Artesa
- Andre Lurton
- Trellis
- Redwood Vineyards
- Ramon Bilbao
- Provenance
- Pairing Collection
- Once Upon A Vine
- Labet
- La Posta
- Hayman and Hill
- Dominant 7
- Cryptic
- Chimney Rock
- Cellar No. 8
- Altoona Hills
- Julia's Dazzle
- emBrazen
- Wolf Blass
- Two Hands
- Prodigo
- Binyamima
- Run Riot
- The Monterey Vineyards by Chalone
- Sivas Sonoma
- Pasqua
- Jargon
- Distell/Cape Legends
- Cedar Brook
- Aggiolas
- 1865
- Batasiolo
- Tiefenbrunner
- Teal Lake
- Sauvion
- Moobuzz
- Eye Chart
- Belmondo
- Atlas Peak
- 3 Blind Moose
- Marco Negri
- Haraszthy Family Cellars
- Ca'Montini Estate
- Bodini
- Tohu
- Stonestreet
- Red Truck
- Rabbit Ridge Vineyards
- Purple
- Pillar Box Red
- Kosta Browne
- Hey Mambo
- Epica
- Cella
- Belvento
- Bear Flag
- Baron de Ladoucette
- Banfi Piemonte
- Ballentine Vineyards
- "Down Under" Cellars
- Numanthia
- Louis Bernard
- Filus Winery
- Evans Wine Company
- Custard
- Calabria Family Wines (formerly Evans Wine Company)
- Vina Zaco
- Umberto Fiore
- Tierra Brisa Winery
- Susana Balbo
- Snap Dragon
- Resso
- Rancho Sisquoc Winery
- Piccolo Fiore
- Offley
- Luca
- Goldeneye
- Gamla
- Edmeades
- Domaine Laurier
- Cousino Macul
- Chalk Hill
- Bennett
- Austerity
- Rancho Sisquoc Winery
- Vavasour
- The White Knight
- Ramon Cardona
- Querciabella
- Pio Cesare
- Marques de Murrieta
- High Note
- Heliotrope
- Domaines Schlumberger
- Wyndham Estate
- Trinchero Napa Valley
- Sonoma Vineyards
- Project Paso
- McWilliams
- Herzog Selections
- Gehricke
- Cadet d'OC/BPR Varietals
- Big Smooth
- Altanuta
- Black Swan
- Thousand Oaks Vineyards

- The Spanish Quarter
- Spring Valley
- Santuary
- Queens Peak
- Patianna Organic Vineyards
- Napa Ridge
- Il Donato
- Hope Estate
- Heritage Winery
- Henry's Drive
- Hawk Crest
- Fritz Zimmer
- Escudo Rojo
- Columbia River Landing
- Colores Del Sol
- Castel des Maures
- Carmen
- Bivio
- Arbor Valley
- 1749-Pierre Chainier
- Burgundies
- Vina Mayor, Spain (HAB)
- Sweet Bliss
- Rioja Vega
- Wines
- Lyeth Estates
- Kitchen Sink
- Jellybean
- Ets. Jean Pierre Moueix
- Bears' Lair
- 6 Degrees Cellars
- Vigne Regali
- Truvee
- Sonoma Landing
- Sea Ridge
- PKNT Winery
- Pierre Chainier Winery
- Napanook
- Naked Earth
- Meerlust
- Lunta
- L'Attitide 39
- Jackson-Triggs
- Inniskillin
- Fritz de katz
- Flying Fish
- Exem
- Dr. Thanisch
- Don & Sons Sonoma Signature Series
- Domaine Napa
- Clos de L'Oratoire des Papes
- Champ de Reves
- Castiglion del Bosco
- Capcanes
- Cantina di Soave-Duca Bib
- Brady Vineyards
- Blossom Hill
- Bagueri
- Mazzoni
- Squealing Pig
- Pepperjack
- St. Clement Vineyards
- Stoneleigh
- Orogeny
- Neil Ellis
- Montgravet
- Mermelada
- Mendel
- Main Street
- J.W. Morris
- J. Lohr Gesture
- Huntington
- Eye Candy
- Drylands
- Deadbolt
- Castel
- Big Ass
- Castello di Bolgheri
- Three Knights Vineyards
- Terras Gauda
- Rutherford VT Napa
- Rusack Vineyards
- Rock Hollow Wines
- Roc de Chateauvieux Winery
- Rigal Winery
- Richard Grant Estate
- Reginato
- Primosole Organic Vineyards
- Podernuovo a Palazzone
- Pazo Torrado
- Paso Grande
- Murdoch James
- Medrano Estate Vineyards
- Masseria del Fauno
- Mad Dogs & Englishmen
- Les Moirets Winery
- Les Hospices
- Left Bank Bordeaux
- Laurier Vineyards
- Lake Sonoma
- La Boca
- Igardi Sangria
- Exitus
- Evohe
- Ernst Gouws & Co.
- Elements by Artesa
- Descaves Negotiant
- Delish
- Cuvee Series
- CottonWood Creek Cellars
- Clos de Nouys Winery
- Chateau de la Roche Winery
- Carrara
- CAR MEN AIR
- Añoro
- Americano
- Alexander and Fitch
- 2up
- Hewitt
- Wynns

- New Harbor
- Bollini
- Yellow Tail Reserves
- Wolfgang Puck Wine
- Wild Hare
- Vin Parfait
- Velvet Crush
- Used Automobile Parts
- Two Tone Farm
- Twin Fin
- Tintara
- Tierra Secreta
- Three Wine Men
- The Skinny Vine
- T'Gallant
- Terramia Winery
- Taz
- Tamas Estates
- Tableleaf Winery
- Stark Raving
- Screw Kappa Napa
- Scala Dei
- Sbragia Family Vineyards
- Santa Barbera
- Rolf Binder
- Rare Earth (Organic)
- Quatro
- Quail Ridge
- Periodic
- Papio
- Northstar
- Motos Liberty
- Moon Mountain
- Mia's Playground
- Masked Rider
- Mar de Frades
- Loredona
- Lock & Key
- Legend of the Vine
- Legaris
- Laurelwood Winery
- La Tordera
- King Fish
- Juxtapoz
- June Bug
- Jekel
- Jarhead Wine Company
- Jade Mountain
- J.V. Fleury
- Ill Century
- Heritage
- Harlow Ridge
- Girl Go Lightly
- Fusee
- Fox Hollow Cellars
- Flock by Smoking Loon
- Festival 34
- Falesco/Vitiano
- Fairview/Spice Route
- Ensemble
- Emma Pearl
- Dr. Pauly
- Dominus
- Distant Bay
- Cruz de Alba
- Crimson & Quartz
- Contemassi
- Col Solare
- Cipressi
- CigarZin
- Cherry on Top
- Cheese Board
- Chateau Tanunda
- Cecchi
- Carmenet
- Butterfly Kiss
- Bohemian Highway
- Big Red Monster
- Bel Arbor
- Baron de Chartrons
- Bad Dog Ranch
- Araucano (Francois Lurton)
- Apoyo
- Almaviva
- Allegrini
- 900 Grapes
- 9 Points
- "Be."
- Red Bicyclette
- Other
- Total
- Andre/Wycliff
- Cook's
- Korbel
- Verdi Spumante
- Barefoot Bubbly
- La Marca
- J. Roget
- Mionetto
- Bartenura
- Freixenet
- Zonin
- Refresh by Turning Leaf
- Moet & Chandon
- Castello del Poggio
- Veuve Clicquot/La Grande Dame
- Martini & Rossi Asti
- Chandon
- Ballatore
- Raspberry Sparkletini
- Mumm Napa
- Jaume Serra Cristalino
- Segura Viudas
- Lunetta Prosecco
- Flipflop Sparkling
- Risata
- duc de Valmer
- Riondo
- Opera Prima
- Elunés
- Michelle
- Luccio
- Strawberry Sparkletini
- Veuve du Vernay
- Green Apple Sparkletini
- Peach Sparkletini
- Chateau Lafayette
- Roederer Estate

- Gloria Ferrer
- Maschio Prosecco
- Piper Sonoma
- Nicolas Feuillatte
- Beviamo
- Perrier-Jouet
- Astoria
- Tott's
- Taittinger
- Stanford
- Zardetto
- Arbor Mist Sparkling
- Piper Heidsieck
- Jacques Reynard
- Dom Perignon
- LaLuca Prosecco
- Chateau Napoleon
- Chateau Elysees
- Bella Bolle
- Louis Perdrier
- Lila
- Moletto
- Yellow Tail Bubbles
- Domaine Carneros
- Schramsberg Vineyards
- Saint-Hilaire
- Anna de Codorniu
- Lamberti
- Louis Roederer
- Weibel
- Heritage Spumante
- Enza
- Cinzano Asti Spumanti
- Scharffenberger
- Pol Roger
- Cavicchioli
- Bocelli Family
- G. H. Mumm
- Avissi
- Mas Fi
- Sequin
- Bollinger
- Amusant Bubbly Moscato
- Champagne Delamotte
- Ruinart
- Allure Winery
- JFJ Winery
- Codorniu
- Gancia
- Enrico
- Bouvet-Ladubay
- Krug
- Charles de Fere
- Santini Asti
- Great Western
- Blanc de Bleu
- Vivande Winery
- Capri Sparkling
- Besserat de Bellefon
- Yellowglen
- Zibibbo
- Zed
- Veuve Moisan
- Seaview
- IL'SPR!Z
- Charles Heidsieck
- Avive
- Café de Paris
- MD 20/20
- Richard's Wild Irish Rose
- Taylor Dessert
- Takara Sake
- Sho Chiku Bai
- Gekkeikan Sake
- Fairbanks
- Ozeki
- Numano
- Cribari Dessert
- Thunderbird
- Sheffield Cellars
- Cisco
- Christian Brothers Dessert Wine
- Fu-Ki
- Savory & James
- Paul Masson Desserts
- Sandeman
- Taylor Fladgate
- Cockburn's
- Colombo Marsala
- Warre's
- Night Train
- Fonseca
- Graham's
- Hartley & Gibson
- Dry Sack
- Dow's
- Presidential
- Stone's Ginger Wine
- Quinta Do Vesuvio
- Italian Swiss Colony
- Blandy's
- Quinta de la Rosa
- Martinez
- Melillo Marsalo
- Croft
- Smith Woodhouse
- Ramos Pinto
- Whidbey
- Kabuki Sake
- Wisdom & Warter Sherry
- Kasser Dessert
- Capri Dessert
- Martini & Rossi Vermouth
- Gallo Vermouth
- Tribuno
- Stock
- Noilly Prat
- Lillet
- Cinzano
- Dubonnet
- Arbor Mist
- Daily's
- Lolailo Sangria
- Madria Sangria
- Myx Fusions
- Yago Sant'gria
- Beso del Sol
- Chocovine
- Ed Hardy Sangria

- Chocolate Shop
- VineSmoothie
- Eppa Superfruit Sangria
- Sangria Terreo
- Opici Sangria
- Mija Sangria
- Soleil Mimosa
- Sol Rio
- Funf Sangria
- Croctails
- Sangria Grande
- Slices
- Pomagria
- Plaza Real Sangria
- Slim Lizzy's
- Skinnygirl Sangria
- Il Ugo

BMC's U.S. Wine Guide 2019

June 2019

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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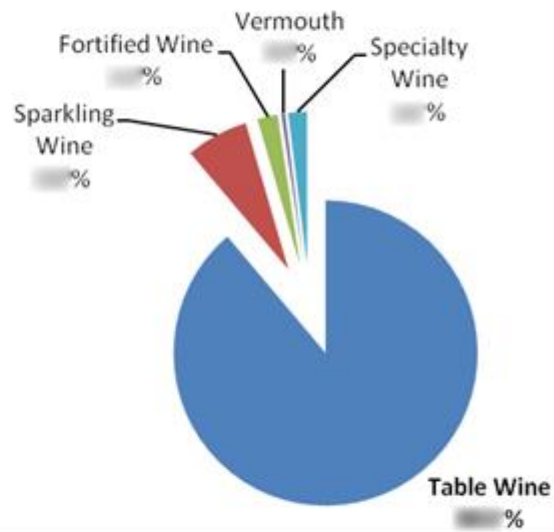
TABLE WINE LEADS U.S. WINE MARKET

Share of Volume by Category, 2017(P)



(P) Projected
Source: Beverage Marketing Corporation

Exhibit 1.6

U.S. WINE MARKET

CHANGE IN DOMESTIC AND IMPORTED VOLUME
2012 – 2017(P)

Category	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17(P)
Domestic	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

(P) Projected

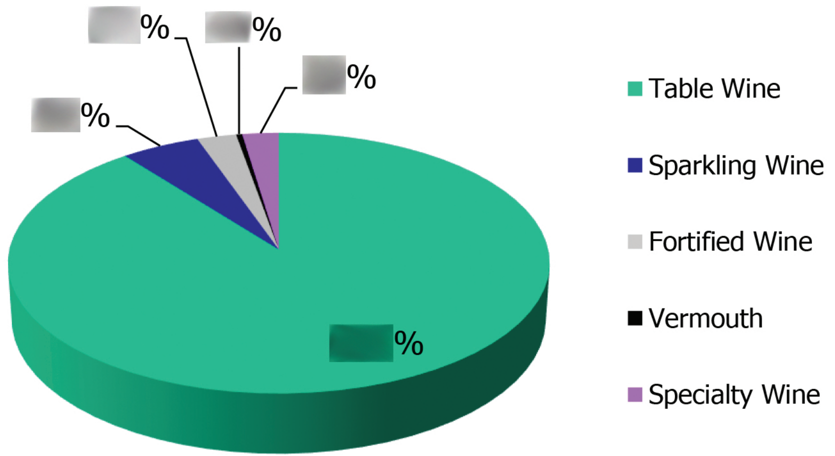
Source: Beverage Marketing Corporation

The largest wine suppliers in the United States have large brand portfolios encompassing multiple categories, though, as is to be expected given the category's stature, table wine accounts for the biggest brands by volume.

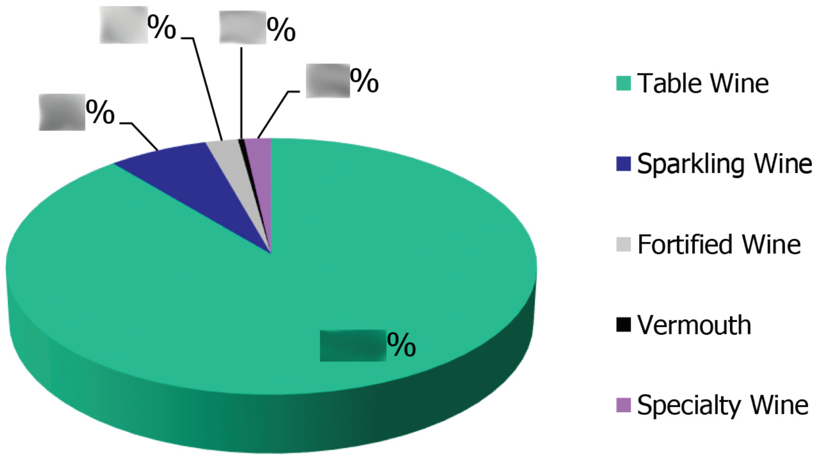
- All of the top 10 brands in the United States in 2016 were table wines, and nine of them were domestic. Indeed, it was not until the 19th ranked brand (Andre/Wycliff, a sparkling wine from E. & J. Gallo Winery) that something other than a conventional table wine appeared on the list of the leading 100 brands.
- The Wine Group claimed the number-one brand in 2016 with Franzia Winetaps, which had volume of [redacted] million cases and close to a [redacted]% share of the volume held by the leading brands (a portion of the total market it had exceeded in some previous years).
- No supplier had more brands among the top 10 in 2016 than E. & J. Gallo Winery, which had four of them, including numbers two and three (Barefoot Cellars and Carlo Rossi). Barefoot Cellars and Carlo Rossi snared the number-one and -two positions when the brands were measured with respect to retail sales.
- Deutsch Family Wine & Spirits had the leading imported table wine in Australia's Yellow Tail, which ranked seventh overall among brands by volume in the U.S. market in 2016.
- Delicato Family Vineyards rounded out the top 10 in 2016 with its Bota Box trademark.
- Arctic Beverage had the fastest growing brand (of at least 100,000 cases in volume) in its Beso del Sol, a specialty wine which saw its volume grow by more than [redacted]% in 2016.

Table wine remains by far the largest wine category but lost [redacted] share points over the 2012-to-2018 period, while sparkling wine, a key growth driver of the industry, gained [redacted] share points

2012



2018

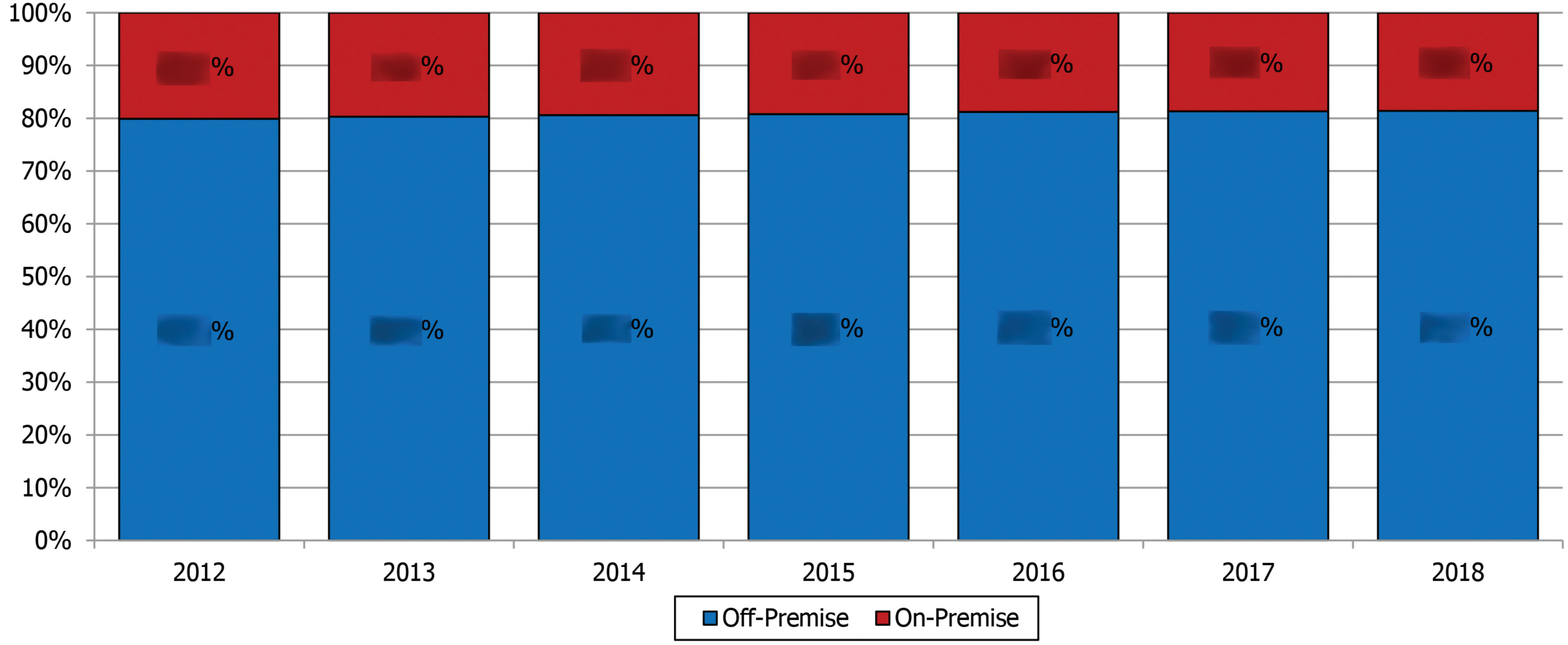


Source: Beverage Marketing Corporation

Over the past five years, despite an increase in wine consumption, the on-premise segment lost [redacted] points, falling to [redacted]%

OFF-PREMISE GAINS WINE VOLUME SHARE

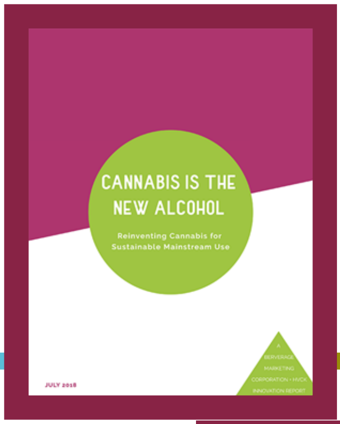
Share of volume by segment, 2012-2018



Source: Beverage Marketing Corporation

Cannabis is the New Alcohol: Reinventing Cannabis for Sustainable Mainstream Use

2018 Edition (Published July 2018.) More than 100 pages.



The beverage industry is uniquely positioned to capitalize on this growing market. Why? Because the new cannabis consumer is the old alcohol consumer.

Research indicates that many alcohol consumers are switching to or plan to switch to cannabis as it becomes legal. New food and beverage product entries into this space are key contributors to the growth of this next phase of cannabis culture because a) the bulk of new use is by mainstream consumers who want a casual high similar to the alcohol drinking experience, and b) this user wants to replicate the social experience of drinking alcohol: it's a demographic that prefers to drink or eat rather than smoke, and is most amenable to ingesting the substance over the course of an evening, slowly, in liquid or low-dose edible form.

The beverage industry is best positioned to help the new cannabis consumer replicate the social intake experience they are accustomed to with alcohol, but with fewer side effects.

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BEVERAGE MARKETING CORPORATION

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Tel: 212-688-7640 Fax: 212-826-1255

The answers you need

This report, produced in partnership between Beverage Marketing Corporation and emerging trends innovation experts HVCK, takes a closer look at the following topic areas:

- Comprehensive database of current food and beverage entries in the cannabis market
- Cannabis food and beverage trends
- Marketing and changing the cannabis narrative for an expanded customer base
- The demand for updated cannabis packaging and branding (and why the food and beverage industry will do this best)
- Exploration of the specific threat to beer posed by the rise of cannabis
- New product opportunities: CBD, THC, Terpene flavoring, low-dose products
- Dosing and user education

This Report Features

- A history of liquid cannabis
- Market stats regarding both cannabis as a whole and the cannabis beverage market
- Regulation updates, including beverage-specific regulations
- A look at the Canadian market as it becomes federally legal
- In formation on banking regulations and banks that work with cannabis companies
- An overview of trends and regulations in restaurants, bars, and other on-premise sites
- A look at new and groundbreaking retail models for cannabis
- An overview of safety, sobriety testing, and a guide to physiological responses from cannabis
- Consideration of corporate cannabis investment, including food and beverage investment
- Information on marketing and consumer education, including ad campaigns and packaging
- Discussion of opportunities and challenges surrounding cannabis beverages, including the science of liquid cannabis
- A thorough guide to most major cannabis beverages currently on the market and in development
- A look at best practices from the beverage industry informing the cannabis industry
- Suggestion regarding opportunities for involvement and investment by the food and beverage industry
- Key takeaways and unique insights
- A 10-year outlook for cannabis in food, beverage, retail, and on-premise
- In-depth interviews with leading cannabis industry experts and entrepreneurs

CANNABIS IS THE NEW ALCOHOL

Reinventing Cannabis for Sustainable Mainstream Use

A
BERVERAGE
MARKETING
CORPORATION + HVCK
INNOVATION REPORT

JULY 2018

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ABSTRACT

Cannabis is the biggest consumer product category in 80 years, since prohibition — and the beverage industry is uniquely positioned to capitalize on this growing market. Why? Because the new cannabis consumer is the old alcohol consumer. And the two industries are sharing not only consumers, but leadership, best practices, technology, and regulatory challenges.

Research indicates that many alcohol consumers are switching to or plan to switch to cannabis as it becomes legal. New food and beverage product entries into this space are key contributors to the growth of this next phase of cannabis culture because a) the bulk of new use is by mainstream consumers who want a casual high similar to the alcohol drinking experience, and b) this user wants to replicate the social experience of drinking alcohol: it's a demographic that prefers to drink or eat rather than smoke, and is most amenable to ingesting the substance over the course of an evening, slowly, in liquid or low-dose edible form.

The beverage industry is best positioned to help the new cannabis consumer replicate the social intake experience they are accustomed to with alcohol, but with fewer side effects.

This report takes a deep dive into the growing category of cannabis consumables, with an emphasis on beverages, including trends, on-premise opportunities, regulatory considerations, scientific advancements, marketing, and notable early products and brands.

This report includes:

- A history of liquid cannabis
- Market stats with regard to both cannabis as a whole and the cannabis beverage market
- Regulation updates, including beverage-specific regulations
- The Canadian market as it becomes federally legal
- Banking regulations and banks that work with cannabis companies
- Notable cannabis advocates
- Trends and regulations in restaurants, bars, and other on-premise consumption sites, as well as regulations pertaining to them
- New and groundbreaking retail models for cannabis
- Safety, sobriety testing, and a guide to physiological responses from cannabis
- Corporate cannabis investment, including food and beverage investment
- Marketing and consumer education, including ad campaigns and packaging
- Opportunities and challenges surrounding cannabis beverages, including the science of liquid cannabis
- A thorough guide to most major cannabis beverages currently on the market and in development
- Cannabis' effect on non-cannabis beverages
- Beverage executives moving over to cannabis
- Best practices from the beverage industry informing the cannabis industry
- Opportunities for involvement and investment by the food and beverage industry
- Key takeaways and unique insights
- A 10-year outlook for cannabis in food, beverage, retail, and on-premise

Additionally, this report includes originally designed infographics and five exclusive, in-depth interviews with leading cannabis industry experts and entrepreneurs within cannabis food, beverage, and retail.

CANNABIS BEVERAGE SALES IN OREGON

Market share by beverage type, 2017

Source: Beverage Marketing Corporation; HVCK

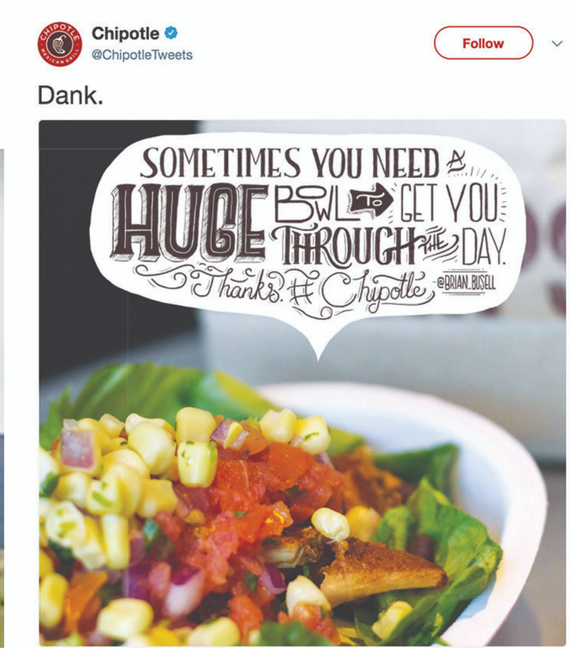
ADVERTISING NON-CANNABIS FOOD AND BEVERAGES TO CANNABIS USERS

The correlation between cannabis consumption and the munchies is well-known. And some fast food chains are capitalizing on this opportunity to be the go-to choice for hungry cannabis consumers.

In one study, cannabis consumers indicated overwhelmingly that McDonald's was their favorite fast food chain, with 43% indicating that preference. Taco Bell came in a distant second with 18%, followed by Wendy's, Burger King, and Subway. Also included in the top ten were Kentucky Fried Chicken, Arby's, Chick-Fil-A, Jack-In-The-Box and Carl's Jr.

Despite McDonald's reputation amongst cannabis consumers, the company distances itself from this demographic. A New Mexico franchise outpost of McDonald's (near the Colorado border where cannabis is legal), posted a billboard saying, "Usually when you roll something this good, it's illegal!" next to a picture of a breakfast burrito. The billboard was taken down and McDonald's condemned it.

Not every chain is taking the McDonald's approach. Some chains, like Denny's and Chipotle, have directed their social media content to this demographic — Chipotle has even used the exact phrase that McDonald's condemned as commentary on social media posts to promote their burritos. Jack-In-The-



MARIJUANA-LACED WINE

California-produced marijuana wines got their start back in the 1980s. Most used rose and the bottles sold for upwards of $100, given the "war on drugs" government crackdown and the risk involved with production. Most marijuana-laced wines sell for far less today (particularly in places like California) and are most likely to use red grapes, like cabernet sauvignon or syrah.

A pound of high-quality marijuana is placed in a cask of fermenting wine, yielding 1.5 grams of cannabis per bottle. The alcohol produced from the fermentation process extracts the THC. Some pot wine makers keep it in the barrel for nine months before bottling and serving, for maximum extraction.

And since cannabis is delivered into the system more quickly via beverages, these drinks are preferred to other edibles alternatives, not to mention the high induced by the cannabis and alcohol combo.

Due to regulations around selling products that contain both alcohol and cannabis, other vineyards, like Rebel Coast Winery, is selling marijuana-laced non-alcoholic wine.

[SOURCES: The Daily Beast, Newsweek]

SHARING BEST PRACTICES

DISTRIBUTION

The cannabis industry faces the same sort of regulation and distribution challenges that the alcohol industry faces, and a great deal of money and opportunity lies in distribution expertise. In fact, new California regulations around distribution are modeled on the post-Prohibition laws intended to limit mafia power. This means cannabis distribution is likely to be quite lucrative and positions alcohol companies to be central players, if and when they choose to enter the market.

CULTIVATION AND MANUFACTURING

Tony Magee, founder of Lagunitas Brewing Co., says “Cannabis cultivators are tapping into the experience of hop growers in the Yakima region of Washington State, and craft brewers are starting to implement extraction technologies honed by marijuana manufacturers.” Le Herbe beverage company recently designed one of the biggest cannabis manufacturing facilities in Southern California, just for cannabis beverages, and are expected to break ground in Q4 2018, and will be up and running Q1 2019. L People are stuck after they develop a great idea for a product — they don’t know how to mass produce it,” says co-founder Jay Grillo.

Companies like Yofumo are drawing inspiration from the alcohol industry by aging cannabis similarly to wine or whiskey. Curing cannabis preserves it and increases potency, smell, and flavor, by bringing out natural terpenes of various marijuana strains. Unlike most commercial growers that cure their cannabis by sealing it and leaving it for weeks or months, the “Yuofomo Pro” curation process allows for humidity, temperature, and antimicrobial control, which can produce new flavor profiles through the curation process. Their new product lines will target consumers, not just commercial growers.

INDUSTRY INSIGHTS

Interviews With Cannabis Innovation Leaders

Tarek Tabsh
Cannabis serial entrepreneur

Tarek Tabsh is the co-founder of Province Brands, a technology-driven company developing groundbreaking products (including cannabis beverages) and IP using cutting-edge cannabinoid science. He is the co-founder of Oxford Cannabinoid Technologies, a biopharmaceutical company focused on researching, developing, and licensing cannabinoid-based compounds and therapies, and is the co-founder and chief strategy officer of Forma Holdings, which builds businesses in legal medical cannabis markets around the world. He is the founder of Los Angeles and Las Vegas dispensary New Amsterdam Naturals, voted by High Times as one of the top dispensaries in LA and won the High Times World Cup 3 times. Tabsh serves on the selection committee for The ArcView Group, which facilitates the emergence of the legal cannabis industry by connecting forward-thinking investors, visionary entrepreneurs, and cannabis consumers in an effort to meet the expanding and changing needs of responsible cultivators, dispensaries, and customers nationwide. Tabsh also serves on the board of directors for Librede, which focuses on metabolic engineering, synthetic biology, and platform technologies that enable the creation of new therapeutic molecules. Librede has developed the world's first biosynthetic, yeast-based cannabinoid production and drug discovery platform to create chemical compounds that target the endocannabinoid system (ECS).

PROVINCE BRANDS OF CANADA

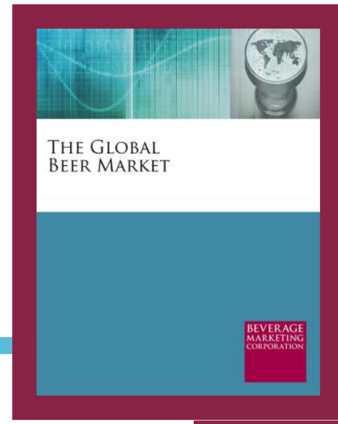
Q: When did you get in the market and how have things evolved?

I was the youngest dispensary owner in the country in LA and have been in the industry for 10 years. I've seen the evolution of the market and am a veteran in the industry. 10 years ago, the industry was filled with scumbags.

Now there's new wave of cannabis coming that goes beyond smoking dope and dabs and bongs. It's the cannabis 2.0 wave of more discrete, socially acceptable methods of ingestion.

THE GLOBAL BEER MARKET

2019 EDITION (To be published December 2019 Data through 2018. Market projections through 2023.) More than 75 exhibits in Excel. Also features an executive summary.



This global beer industry research report charts the latest developments, with data on volume by country, continent, brewer and brand. An executive summary highlights key developments.

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The answers you need

The Global Beer Market report provides market analysis on various aspects of international beer through reliable data and discussions of what the numbers really mean. Questions answered in the report include:

- How did the world's diverse regional and national beer markets perform in 2018?
- Which countries lead the world in beer production, overall consumption and per capita consumption?
- How have country by country global beer market share rankings changed recently?
- What are the top brands by volume?
- As consolidation has reshaped the global brewing industry, which companies have emerged as the leaders?
- Which regions are expected to grow the fastest to 2023?

This report features

Get a wealth of data including volume and per capita consumption by country and region with projections through 2023. Backed by Beverage Marketing's reliable data, this report facilitates a thorough understanding of all facets of the global beer market including:

- Production volume (in hectoliters), share and growth for more than 150 countries as well as consumption volume, share, growth and per capita intake for numerous selected countries.
- Production data on 50 companies as well as the world's 20 most popular beer brands. Coverage includes Anheuser-Busch InBev, Asahi, Carlsberg, China Resources Beer Company, Heineken, Kirin, Molson Coors and Tsingtao, among others.
- Analysis of the beer markets in the six major geographical areas (Europe, North America, Asia & Middle East, South America, Africa and Australia & Oceania), including the regions' production and consumption.
- Exclusive five-year projections for the international beer marketplace, including production estimates for the entire world as well as its major regions through 2023.

NOTE: The 2019 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 2019 edition you receive will have updated data through 2018 and projections through 2023 where applicable.

NOTE: The 2019 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.

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The Global Beer Market

December 2018

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

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Countries in every part of the world produce and consume beer. A small number of nations are especially productive, but countries with significant levels of output brew and drink beer all around the globe.

- Five of the six major geographical regions of the world had countries ranking among the 20 most productive nations in 2017. Africa, Asia/Middle East, Europe, North America and South America each had one or more prominent brewing nations.
- Australia/Oceania long had a player among the top 20, but Australia has fallen off the bottom of the list as intensified output from Asian countries like Thailand and Viet Nam, Eastern European markets such as Poland and Ukraine, and African and South American nations altered the global brewing landscape. In 2017, Australia was the 27th largest brewing nation, behind 26th-place Romania. India and Nigeria ranked among the top 20 in 2017.
- The countries that make sizeable quantities of beer generally consume proportionally large amounts as well. For example, the nine largest beer-producing countries also ranked as the nine biggest consuming countries.

Beer's apparently universal appeal obscures some definite regional differences. While brewers make and market beer on every continent, history, culture and economic development contribute decisively to the popularity of beer and the magnitude of national and regional beer markets.

- For many years, the most economically advanced industrialized countries dominated the international beer industry. Europe long accounted for almost one-third of global beer production and out produced all other regions.
- The increasingly dynamic Asian/Middle Eastern market, which previously surpassed North America in beer production, displaced Europe as the leading beer-brewing region in 2009 with nothing to suggest that these supplanted regions will displace it at any time in the foreseeable future.
- Those countries with long traditions of beer production and consumption — which tend to be clustered in Europe — consume beer at a much higher rate than the rest of the world. That has not changed even with Asia's ascendance in output. For example, the 10 countries with the highest per capita beer consumption in 2017 were located in Europe.

Exhibit 1.5

GLOBAL BEER MARKET
SHARE OF PRODUCTION BY CONTINENT (r)
2012 – 2017

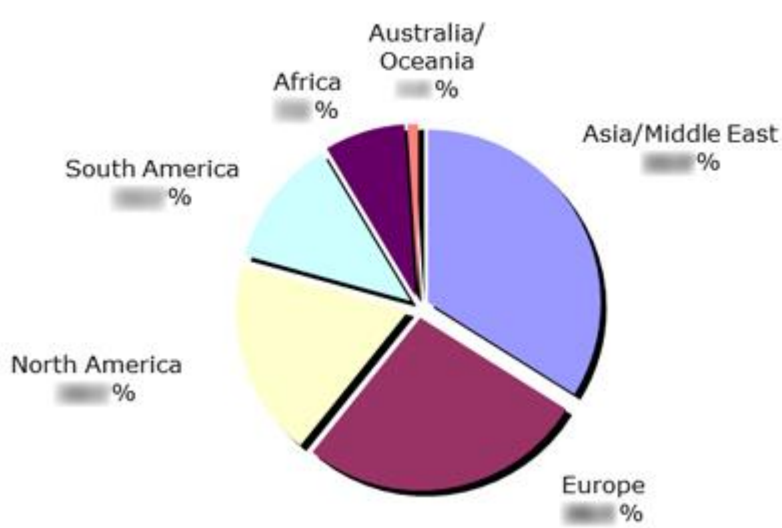
Continents	2012	2013	2014	2015	2016	2017
Asia/Middle East	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Europe	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
North America	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
South America	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Africa	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Australia/Oceania	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
TOTAL	[redacted]**%**	[redacted]**%**	[redacted]**%**	[redacted]**%**	[redacted]**%**	[redacted]**%**

(r) Revised

Source: Beverage Marketing Corporation; Productschap voor Gedistilleerde Dranken/ Commodity Board for the Distilled Spirits Industry (Netherlands); Joh. Barth & Sohn GmbH & Co.; S.S. Steiner

ASIA IS THE LEADING REGION IN GLOBAL BEER INDUSTRY

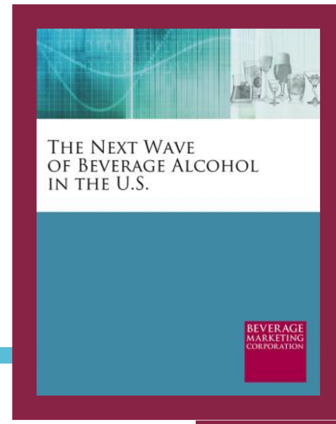
Share of beer production by region, 2017



Source: Beverage Marketing Corporation

THE NEXT WAVE OF BEVERAGE ALCOHOL IN THE U.S.

2019 EDITION (Published June 2019. Data through 2018. Market projections through 2023.) More than 60 pages, with text analysis and tables



The Next Wave of Beverage Alcohol in the U.S. endeavors to elucidate the trends and market developments giving rise to new variants on the fundamental three beverage alcohol types (beer, wine, distilled spirits) as millennials continue to make their mark on the industry. It profiles fast-growing emerging segments and the brands comprising them, documenting their performance (providing volume, growth and market share data) and indicating what makes them noteworthy.

Emerging adult beverage sectors covered include: hard/spiked seltzers, hard/spiked still waters, sports beers, hard ready-to-drink tea, hard ready-to-drink coffee, hard kombucha, ready-to-drink “mocktails”, on-premise/craft “mocktails”, “healthier” cocktails and no-alcohol wine.

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The answers you need

This report offers insights on trends such as the move, especially among younger adult consumers, toward no- and low-alcohol alternatives to conventional cocktails. It also explores developments like the emergence of new-style categories like hard kombucha and hard seltzer. Questions answered include:

- What are the top hard seltzer brands?
- What gave rise to the hard kombucha segment, and what are its growth prospects?
- What distinguishes the emerging "next wave" hard ready-to-drink teas entering the market from those that came earlier?
- What are issues with positioning cetain adult drinks as "healthy"?

This report features

The Next Wave of Beverage Alcohol in the U.S. features analysis of trends behind emerging and niche beer, wine and spirits segments as well as segments that do not fit easily into those categories. It profiles key brands and companies. It assesses the prospects as well as some challenges and implications for each.

Emerging new brands and entries from traditional players covered include: BON & VIV Spiked Seltzer, Clear Coast Fresh Hard Seltzer, Henry's Hard Sparkling Water, Nauti Seltzer Premium Hard Seltzer, Smirnoff Spiked Sparking Seltzer, Truly Spiked & Sparkling, Svedka Spiked Premium Seltzer, White Claw Hard Seltzer, Pura Still, Anheuser-Busch, Athletic Brewing Company, Avery Brewing Company, Beech Mountain Brewing Company, Boston Beer, Endo Brewing Company, Omission Brewing Company, Sufferfest Beer Company, ZēLUS Beer Company.

The Next Wave of Beverage Alcohol in the U.S.

June 2019

BEVERAGE MARKETING CORPORATION

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A number of paradoxes can be observed at play in the emergence of these alternative styles of drinks. Not the least is the simultaneous yearning among consumers for what has been perceived as attractive qualities of beer, spirits and wine – complexity, say, and grown-up-ness – without what has generally been considered their *sin qua non,* i.e., alcohol.

- While traditionalists or the literal minded might scoff at the idea of alcohol-free "wine" (isn't that just grape juice?), and connoisseurs of specific distilled spirits might turn up their noses at, say, "rum" or "gin" with little or no alcohol, less convention-bound consumers appear willing to embrace such seemingly unusual beverages. Wine without alcohol might not meet a strict definition of wine, but liquid made from grapes, put in glass bottles and intended to be consumed from standard wine glasses might offer something that grape juice poured from a carton does not, just as those who like the taste of gin and tonic or rum and Coke but don't want to worry about driving home safely or about how they'll feel in the morning might see real value in low octane spirits.
- Of course, not all niche and emerging styles of drinks considered here are low- or no-alcohol products. Many hard/spiked seltzers have an alcohol content comparable to conventional light beers. Yet even in this area, these can qualify as relatively low levels if the beverages are selected as alternatives to drinks made with distilled spirits. Suggested serving recommendations for these seltzers resemble those for no-alcohol seltzers, i.e. in a glass over ice. Thus, as a substitute for regular cocktails, hard seltzers do represent a lower-alcohol option. Some seltzers have been presented as precisely for such occasions, sometimes even using distilled spirits brand names (as with Svedka Spiked Premium Seltzer).
- Some – though by no means all – of the brands making up the "sports" beer category highlight their on-the-low-side alcohol content in order to play up their ability to hydrate active consumers. (In general, alcohol can contribute to dehydration, which makes beer an unlikely candidate for a rehydration beverage, but the lower the alcohol content, the less this is a problem.)

Another seeming contradiction is seeking healthier options among beverages required by law to bear health warnings on their labels. While this would not apply to truly alcohol-free products, of course, it would remain the case with those with the same alcohol content, and thus the same need to adhere to labeling rules, as beer.

- Making any sort of overt health claims for beverage alcohol has always been a tricky business.

Exhibit 6

U.S. HARD/SPIKED SELTZER MARKET

SHARE OF VOLUME BY BRAND

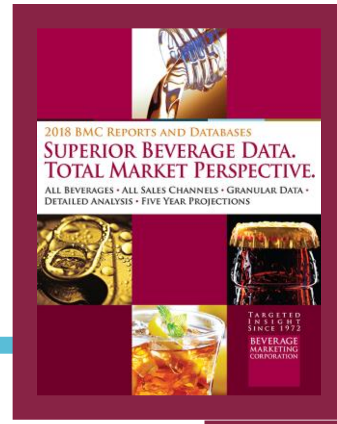
2013 – 2018

Brand	2013	2014	2015	2016	2017	2018
White Claw Hard Seltzer	[redacted]	[redacted]	[redacted]	[redacted] %	[redacted] %	[redacted] %
Truly Spiked & Sparking	[redacted]	[redacted]	[redacted]	[redacted] %	[redacted] %	[redacted] %
BON & VIV Spiked Seltzer	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %
Smirnoff Spiked Sparkling Seltzer	[redacted]	[redacted]	[redacted]	[redacted] %	[redacted] %	[redacted] %
Henry's Hard Sparkling Water	[redacted]	[redacted]	[redacted]	[redacted]	[redacted] %	[redacted] %
Press Premium Alcohol Seltzer	[redacted]	[redacted]	[redacted] %	[redacted] %	[redacted] %	[redacted] %
Nauti Seltzer Premium Hard Seltzer	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %
Subtotal	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %
All Others	[redacted]	[redacted]	[redacted] %	[redacted] %	[redacted] %	[redacted] %
TOTAL	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %

Source: Beverage Marketing Corporation

ON-PREMISE INTELLIGENCE REPORT

2018 EDITION (Published December 2018. Data, including consumer surveys.) More than 285 PowerPoint slides, with extensive text analysis, graphs charts and tables.



The new *On-Premise Intelligence Report*, jointly developed by Beverage Marketing Corporation, a leading source of U.S. beverage alcohol data and Technomic, a specialist in consumer grounded research and insights, includes channel, category and brand performance metrics, consumer and operator insights, as well as beverage menu trend information developed via primary research conducted by both firms.

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The answers you need

- What are the most important metrics for on-premise marketers?
- What kind of benchmarks can be developed from this data?
- What are the leading on-premise trends and how do they give me insights for marketing initiatives—drink and occasion opportunities?
- How do they support strategic planning—new product planning and trade programs?

This report features

The *2018 On-Premise Intelligence Report* combines Beverage Marketing Corporation's accurate hard data and in-depth trend analysis with Technomic's comprehensive surveys of on-premise accounts and consumers to bring you up to speed with what's happening and why in on-premise venues where fads become trends, new brands take root, old brands make comebacks, and new product creativity earns approval and acceptability. Volumes and sales for top performing brands are matched with metrics for top performing restaurants, hotels, and drinking establishments and expertly viewed through the lens of consumer insights. Users are introduced to using Drinker Archetypes, Technomic's new multi-phased psychographic segmentation model to analyze on-premise consumers.

On-Premise Intelligence Report

Sample pages for review

Powered by: Technomic. BEVERAGE MARKETING CORPORATION

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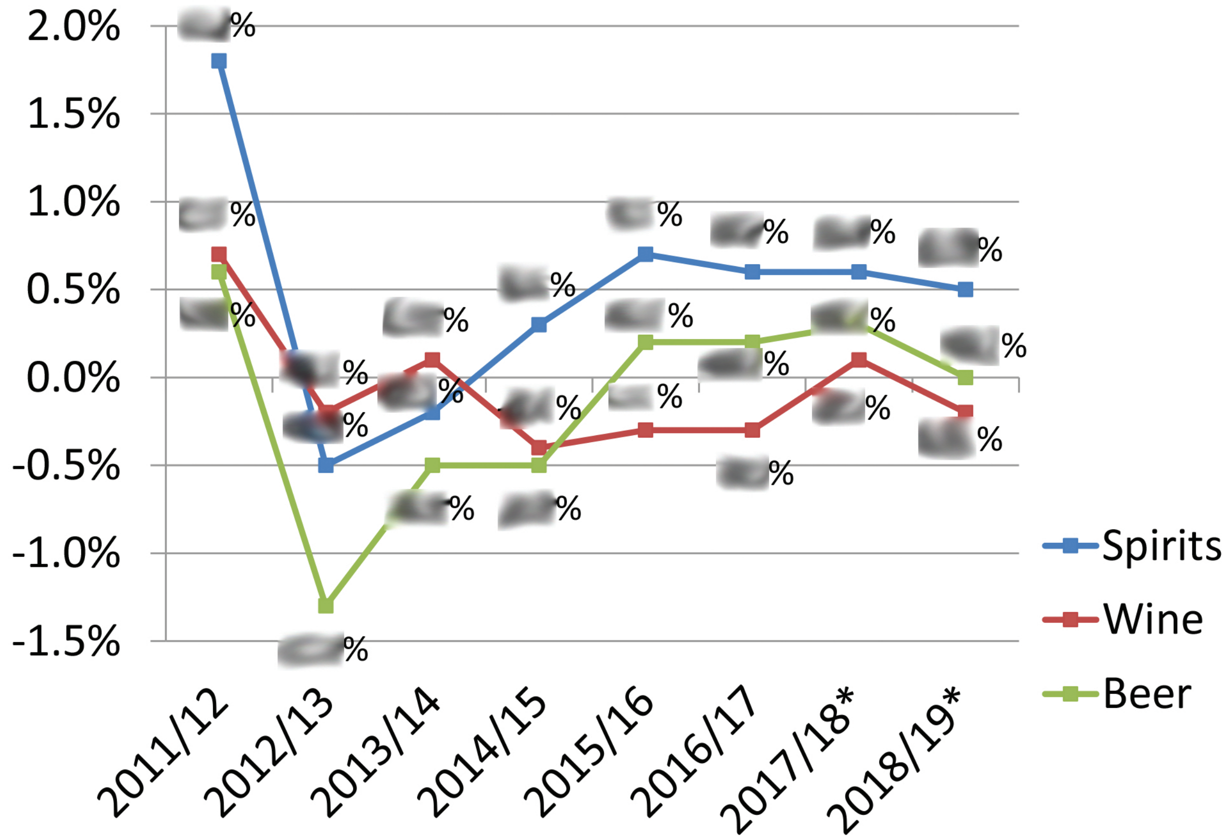
On Premise Category Volume Growth 2012-2018*



*Preliminary
Source: Beverage Marketing Corporation

Introduction

Adult beverages are a crucial component of a restaurant or bar's ability to attract customers and achieve sales and profit objectives. Beer, wine and spirits-based drinks heighten the venue's appeal to consumers and enhance the patron's experience, while also delivering comparatively higher profit margins than other menu items. In addition, the restaurants and bars that comprise the on-premise channel of the adult beverage industry play a key role in alcohol brand development and growth by providing an environment that prompts consumer trial and creates experiences that contribute to brand loyalty. The on-premise channel is vital to an alcohol brand's success.

Today's on-premise operators and adult beverage brand marketers face numerous challenges and opportunities. Consumer demand for quality, variety and authenticity are increasing while their flavor preferences are shifting. At the same time, the share of on-premise occasions that include an alcohol drink has been stagnant, although the trend in early 2018 indicates potential for growth.

While the appeal of adult beverages in restaurants and bars has never been greater, prompting purchases that drive sales growth is challenging. Competition among restaurants and bars for adult beverage occasions and among brands to win the drink order is intensifying.

To assist on-premise operators and adult beverage brand marketers with understanding consumer attitudes, behaviors and usage, as well as operator perspectives and category and brand trends, Technomic and Beverage Marketing Corporation have partnered to produce the 2018 On-Premise Intelligence Report.

Summary of Key Themes & Implications

- [illegible]
- [illegible]
- [illegible]
- [illegible]
- [illegible]
- [illegible]
- [illegible]

Major On-premise Segments Struggle

Mature, saturated segments are challenged

Casual-dining restaurants and drinking establishments, which together generate the largest share of adult beverage sales in the on-premise, continue to underperform the segment in overall F&B sales growth.

Implication:
Traffic and F&B sales declines continue across leading casual-dining chains, although smaller chains and independent full-service restaurants have momentum. Many bars, pubs, taverns and other nightlife venues are also hard put to drive growth. Saturation is one issue, while e-commerce is raising the bar on at-home occasions and non-traditional on-premise locations are gaining favor. These trends are prompting consumers to seek unique, differentiated away-from-home experiences. Operators in these segments must strategize to meet consumers' expectations to remain relevant and competitive.

Adult Beverage Sales in Leading Casual-Dining Restaurants

2017 ranked by alcohol sales

Rank	Chain name	Menu classification	Alcohol sales %	Alcohol sales* $000	Total sales growth	Total sales $000	Unit growth	U.S. units	Check average
27	Texas de Brazil Churrascaria	Steak	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
28	Mellow Mushroom	Italian/Pizza	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
29	Old Chicago Pizza & Taproom	Varied Menu	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
30	Fleming's Prime Steakhouse & Wine Bar	Steak	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
31	Mastro's Restaurants	Steak	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
32	Cheddar's Scratch Kitchen	Varied Menu	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
33	Cooper's Hawk Winery & Restaurants	Varied Menu	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
34	Dave & Buster's	Sports Bar	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
35	Morton's The Steakhouse	Steak	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
36	Chuy's	Mexican	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
37	On The Border Mexican Grill & Cantina	Mexican	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
38	Maggiano's Little Italy	Italian/Pizza	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
39	Seasons 52	Varied Menu	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
40	McCormick & Schmick's	Seafood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
41	Pappadeaux Seafood Kitchen	Seafood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
42	Ninety Nine Restaurants	Varied Menu	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
43	Del Frisco's Double Eagle Steak House	Steak	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
44	Brio Tuscan Grille	Italian/Pizza	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
45	Bahama Breeze Island Grille	Varied Menu	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
46	Tilted Kilt Pub & Eatery	Sports Bar	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
47	Legal Sea Foods	Seafood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
48	Famous Dave's	Specialty	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
49	Fogo de Chao	Steak	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
50	Rock Bottom Restaurant & Brewery	Varied Menu	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

*Alcohol sales calculated from the percent of sales from alcohol coming from total revenue. Due to possible revisions to previous years' data, direct comparisons should be avoided.

Leading Cocktails' Share of Menu

Leading Cocktails by Menu Incidence 2018

Cocktail Type	***Percent of Total Cocktail Offerings***
Restaurant originals	[illegible]%
Margarita	[illegible]%
Martini	[illegible]%
Classic cocktails	[illegible]%
Moscow mule/other mule	[illegible]%
Shot/shooter	[illegible]%
Sangria	[illegible]%
Mojito	[illegible]%
Long Island iced tea/other teas	[illegible]%
Adult coffee drinks	[illegible]%
Beer cocktails	[illegible]%

Base: Q2 2018—Cocktail offerings across 389 leading restaurant chain menus
Source: MenuMonitor; Technomic Inc.

Leading On-Premise Gin Brands

000s of 9-liter cases

Brand	Marketer/supplier	2013	2014	2015	2016	2017	2018*	% change 2017/2018*
Domestic								
Seagram's Gin	Pernod Ricard USA	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
New Amsterdam	E & J Gallo Winery	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Barton Gin	Sazerac	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Gordon's Gin	Diageo	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Crystal Palace Gin	Sazerac	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Total leading domestic gin brands		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Others		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Total domestic gin		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
								Imported
Tanqueray	Diageo	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Bombay Sapphire	Bacardi USA	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Beefeater	Pernod Ricard USA	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Hendrick's	William Grant & Sons	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Bombay Original	Bacardi USA	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Total leading imported gin brands		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Others		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Total imported gin		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%

*Projection
Note: (000s of 9-liter cases)

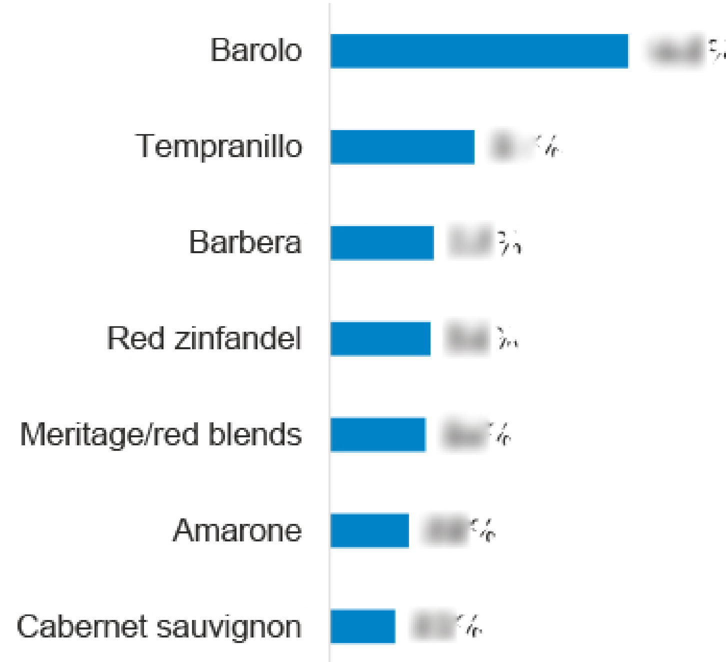
Red Wine Varietal & Style Share of Menu

Most Commonly Menued Red Wine Varietals & Styles at Leading U.S. Restaurant Chains in 2018

Red wine varietal	***Percent of total red wine offerings***
Cabernet sauvignon	[illegible]%
Pinot noir	[illegible]%
Meritage/red blends	[illegible]%
Other red wine	[illegible]%
Merlot	[illegible]%
Malbec	[illegible]%
Red zinfandel	[illegible]%
Shiraz/syrah	[illegible]%
Bordeaux	[illegible]%
Chianti	[illegible]%

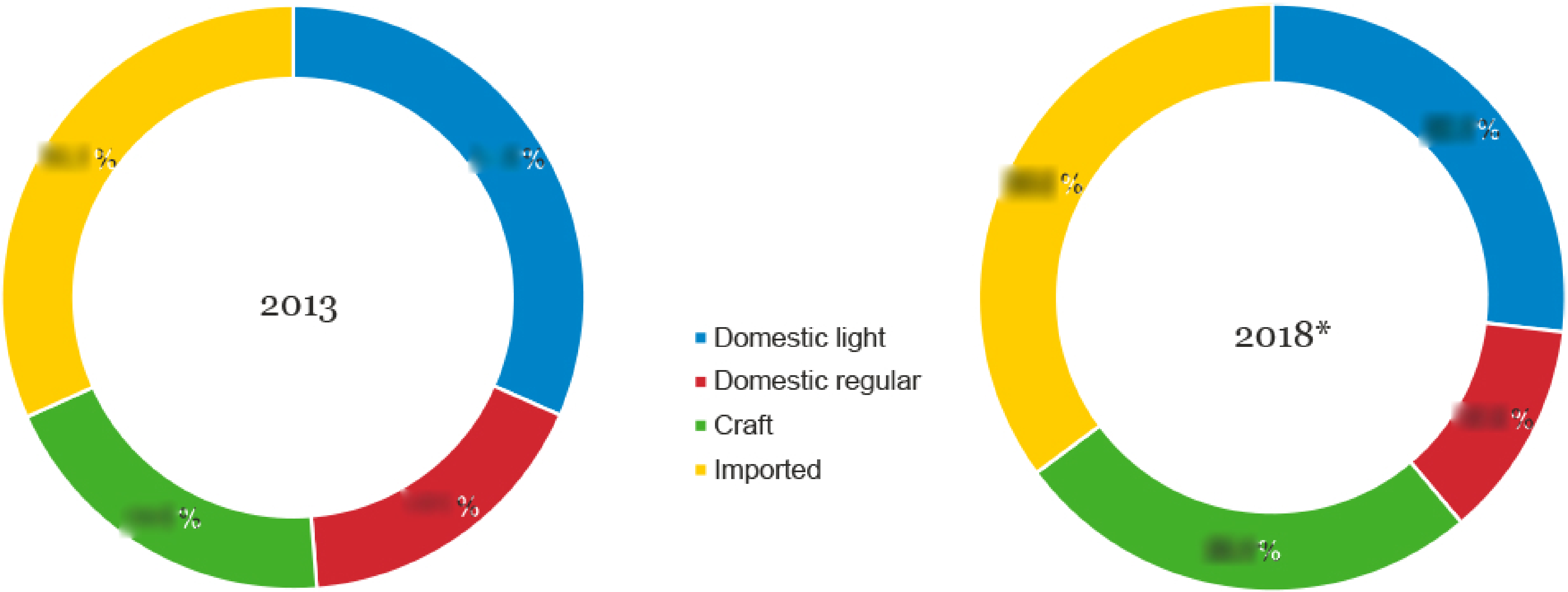
Base: Q2 2018—Red wine offerings across 438 leading restaurant chain menus
Source: MenuMonitor; Technomic Inc.

Fastest-Growing Red Wine Varietals & Styles on Leading Restaurant Menus (Percent change 2017-2018)



Base: Q2 2017 & Q2 2018—Red wine offerings from 411 U.S. menus
Minimum 10 mentions (2018) required for inclusion; growth based on menu incidence
Source: MenuMonitor; Technomic Inc.

Beer On-Premise Dollar Share by Category



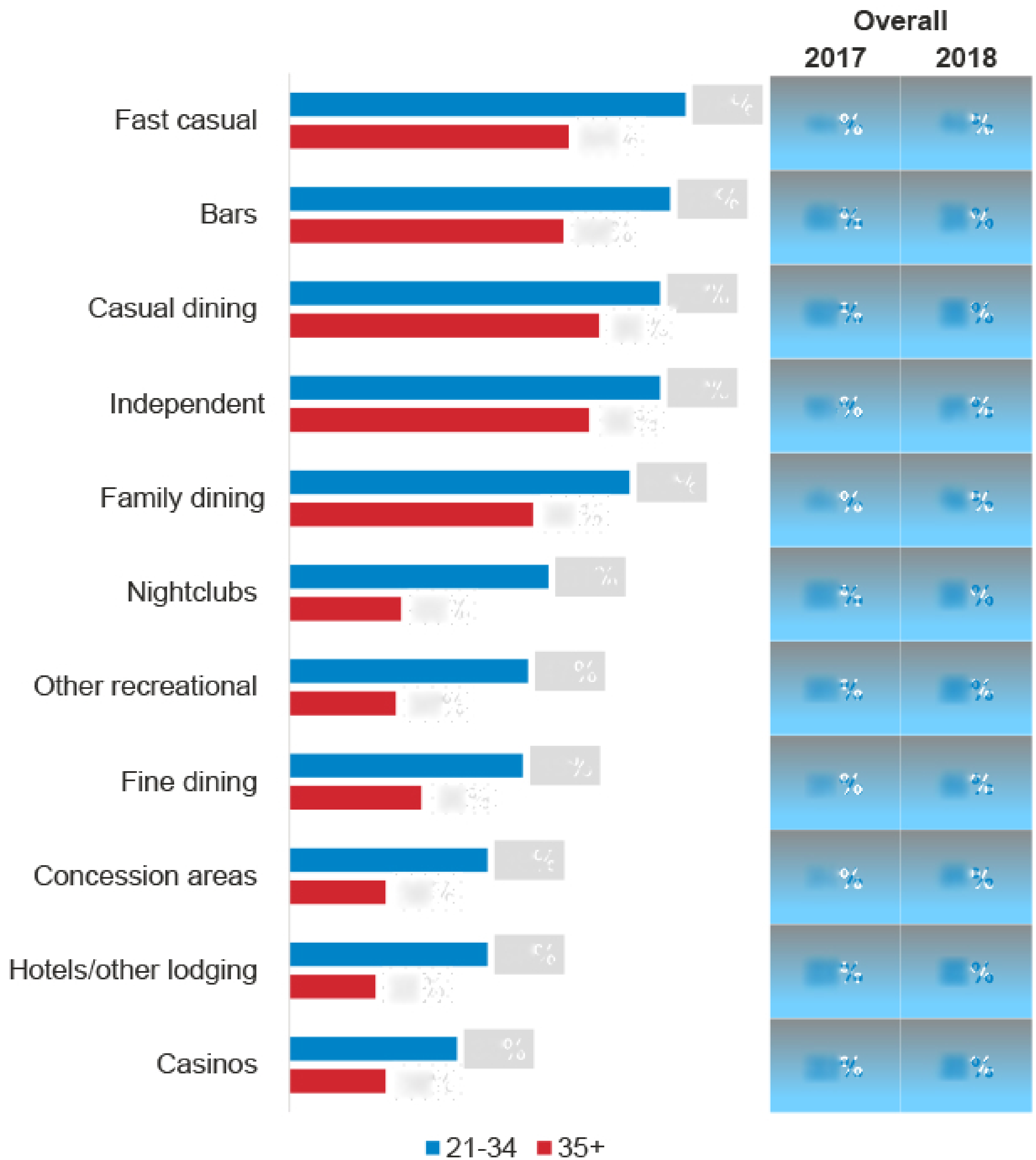
*Projection

Patronage Frequency by Location

Monthly +

Younger consumers (ages 21-34) visit all on-premise segments more frequently than older consumers. Younger consumers overindex at fast casual, family dining, bars and local independent establishments.

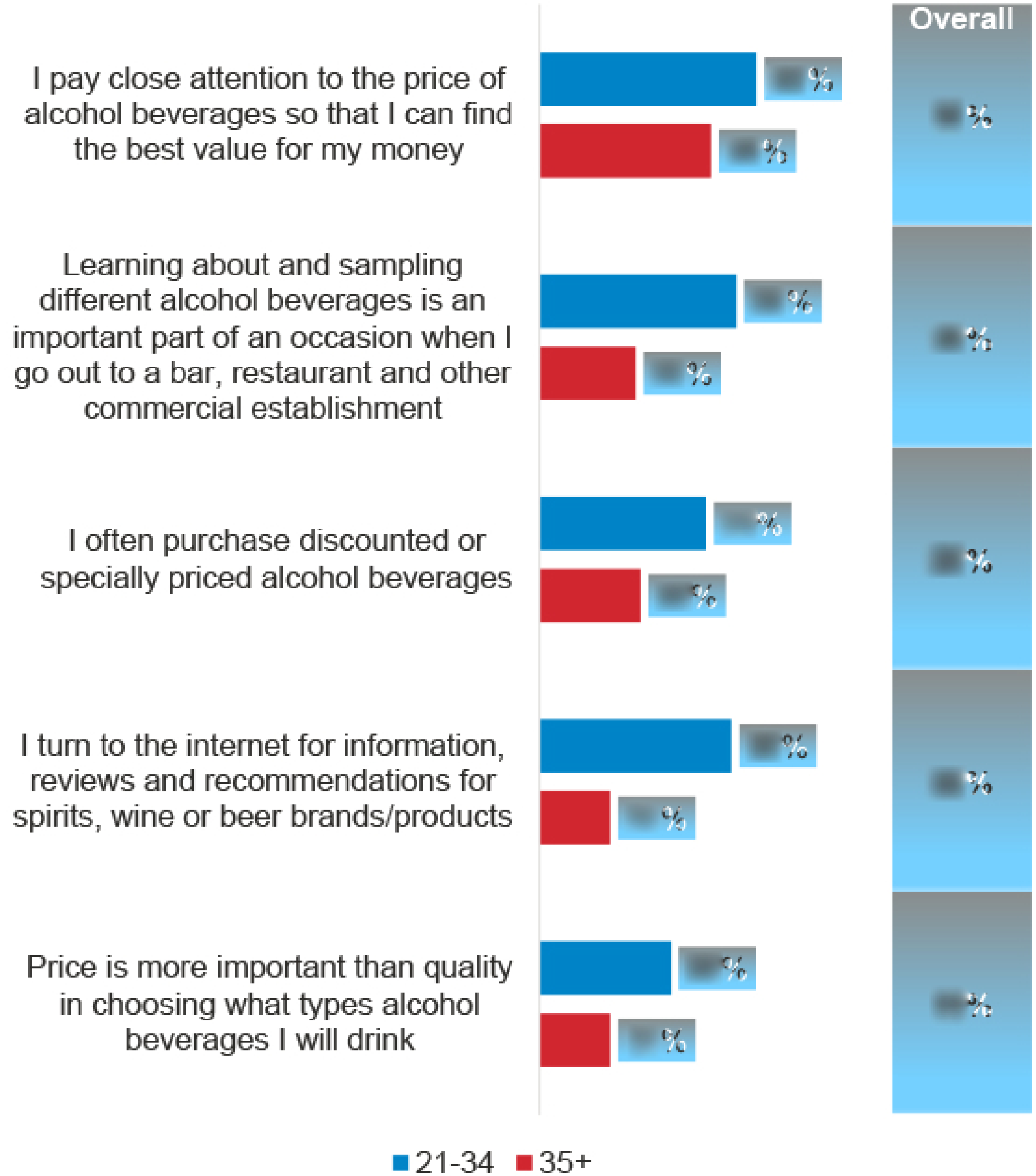
The 2017 data shows moderate decreases from 2016 patronage in the casual-dining, fast-casual, family-dining and fine-dining restaurant segments.



Base: 1,500 (all respondents); 458 (21-34), 1,042 (35+)
Q: How often do you visit the following types of establishments?

Alcohol Beverage Attitudes

Education has become increasingly more important, as one-quarter of consumers indicate learning about and sampling different alcohol beverages. This is more common among consumers ages 21-34.



Base: 1,500 (All respondents)
Q: How much do you agree or disagree with each of the following statements? Please use a scale of 1 to 6, where 1=disagree completely and 6=agree completely.

Drinker Archetypes Overview

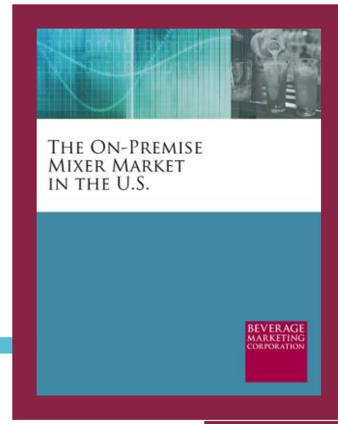




	The Maximizer	***The Chameleon***	***The Extrovert***	***The Purist***	***The Tourist***
Category Index (Monthly+ consumption away from home)					
Beer	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Wine	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Spirits	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Channel Opportunity Index (Monthly+ channel visits* likelihood to purchase beverage at visit)					
Fast casual	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Family dining	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Casual dining	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Fine dining	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Independent	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Bars	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nightclubs	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Hotels/lodging	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Casinos	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Concession areas	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other recreational areas	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

The On-Premise Mixer Market in the U.S.

2019 Edition (Published November 2019. Data through 2018. Market projections through 2021.) 38 PowerPoint slides, with text analysis, graphs and charts



It's no surprise that a broad range of non-alcohol beverages are used as mixers for adult beverages in on-premise settings — and it isn't limited to beverages labeled as mixers. But getting your arms around the breadth and scope of that end-use market has always been a challenge. In this report, Beverage Marketing Corporation raises the bar by sizing the market and giving brand owners and marketers the information needed to grow this somewhat incidental — yet potentially sizeable — sales channel. For a handle on the size of the on-premise market for various types of mixers as well as a look at key players and the potential size of the opportunity, you won't want to miss this new BMC Report: *The On-Premise Mixer Market in the U.S.*

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The answers you need

Beverage Marketing Corporation research shows that as consumers continue to trade up to premium and above-premium spirits in their cocktails, quality in all components, including mixers and other non-alcohol ingredients, has become increasingly important to both operators and consumers.

Who needs this report? If you market - or plan to produce - a branded premium mixer product geared to on-trade, this report is for you. If you manage an all-occasion beverage and are seeking to expand your brand's into the adult on-premise sector and want to better understand the size of the opportunity and assess whether changing trends and preferences might make it worthwhile to partner with an adult beverage manufacturer or create a signature on-premise cocktail featuring your product as a mixer, this report gives you the vantage point to plan your strategy. If you are already marketing your non-alcohol beverage as a mixer to the on-premise sector, this report gives you everything you need to benchmark your progress. If you are an investor considering investing in the mixer segment or an on-premise venue planning your next move in the beverage arena, this report is for you.

To assess the current and future opportunity, this market report explores the competitive landscape, looking at:

- How big is the overall on-premise market for mixers?
- How big are each of the on-premise mixer segments, how fast are they growing and what does Beverage Marketing forecast for each sector?
- What are the key brands used as mixers in on-premise outlets?
- How intense is the competition in each mixer segment? What volume and market share of their particular on-premise mixer segment do each of the key players control?

This report features

It's no surprise that fruit juices — and energy drinks for that matter — are used as cocktail mixers in on-premise settings. As millennial consumers put their personalized, healthy, high quality twist on the sector, the mixer segment, like many other beverage categories, is ripe for innovation. In an evolving marketplace, truly understanding on-premise adult beverage consumption market opportunities means not only looking at alcohol beverages but at the elements that complete and personalize the mixed drink and cocktail experience: mixers. This report provides:

- An overview of on-premise alcohol beverage consumption and growth trends as a backdrop for the discussion of non-alcohol mixer market trends.
- A look at the size of the on-premise mixer market. The scope of the report is limited to on-premise use of non-alcohol beverage ingredients in mixed drinks/cocktails involving spirits, which will be referred to as "mixers" for the purposes of the report.
- An exploration of consumer drivers
- On-premise market size, growth and share for each mixer segment including:
    - Juices
    - Mixes
    - Syrups/flavorings
    - Purées
    - Tonic water/Club soda/Seltzer
    - Carbonated soft drinks
    - Energy drinks
- An all-outlet inclusive view that quantifies on-premise mixer usage across outlets including casual-dining restaurants, fine-dining restaurants, hotels and drinking establishments including taverns, pubs, lounges, nightclubs, sports bars, music/comedy clubs.

- A review of the competitive landscape within each mixer segment

- On-premise mixer volume and share for leading brands such as Red Bull, Monster, Rockstar, Full Throttle, Amp, Island Oasis, Finest Call, Daily's, Lyon's Maui, Mr & Mrs. T, Minute Maid, Ocean Spray, Dole, Florida's Natural, Tropicana, Monin, DaVinci, Torani, Finest Cal, Fee Brothers, Schweppes, Canada Dry, Q Tonic, FeverTree, Coca-Cola Classic, Diet Coke, Pepsi, Sprite, Canada Dry, Seagrams, Fever Tree and many more.

Please note: Premixed cocktails or ready-to-drink cocktails are specifically excluded from the scope of this report.

The On-Premise Mixer Market in the U.S.

November 2019

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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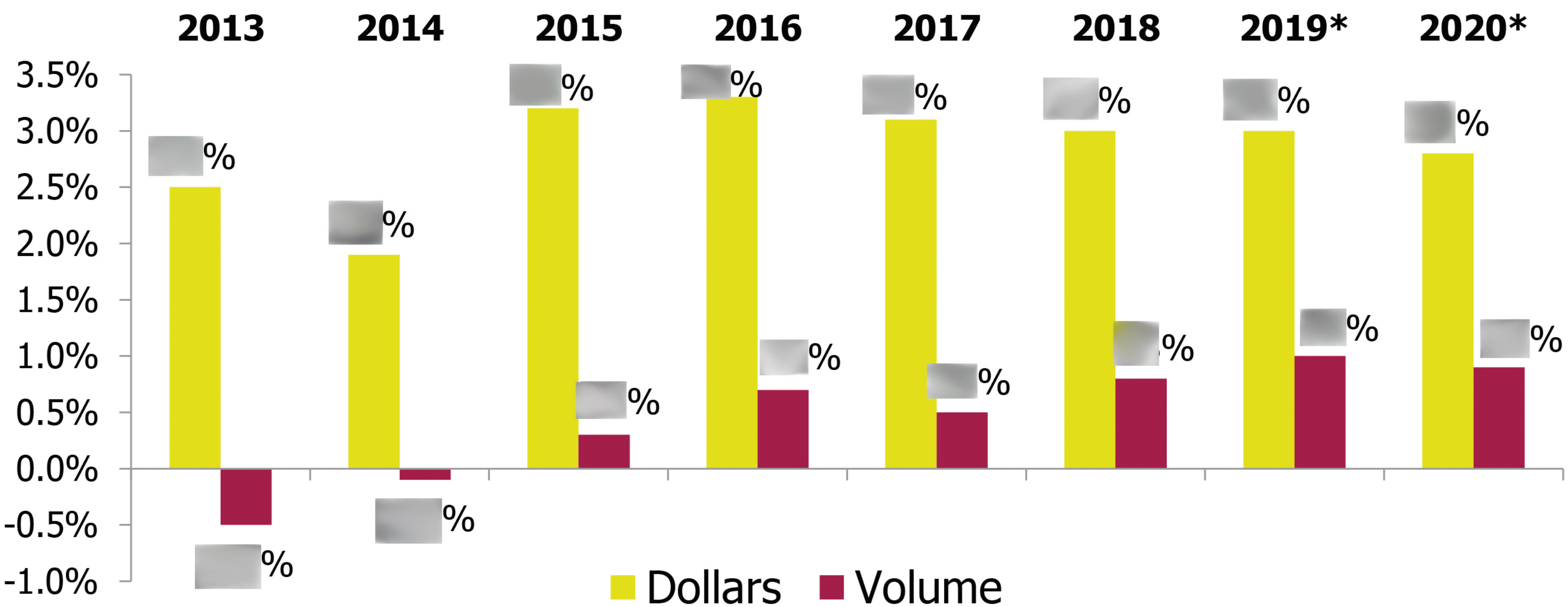
III. Mixer Categories and Trends

IV. Outlook and Future

On-premise spirits trends

- Spirits sales growth is due to continue in the on-premise channel, with dollars reaching $[redacted] in 2019, a [redacted]% increase.
- Dollar growth is attributed both to continued premiumization, wherein consumers explore and trade up to more-expensive categories, segments and brands, and to drink price increases.
- Volume, however, is challenged because of compressed on-premise traffic and increased competition from wine and beer. Spirits volume on-premise is due to increase in 2019 (+[redacted]%) slightly above the growth in 2018, ending the year at [redacted] 9-liter cases.

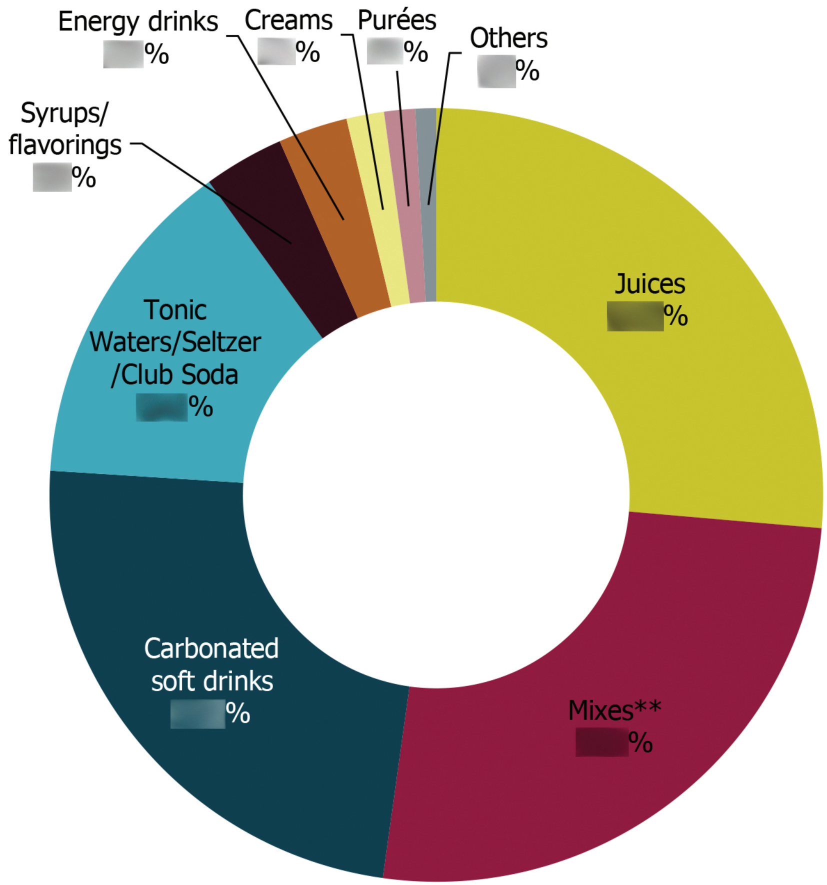
On-Premise Dollar and Volume Growth 2013 – 2020*



**Projection*
Source: Beverage Marketing Corporation

BEVERAGE MARKETING CORPORATION

Category share of on-premise mixer volume 2019*

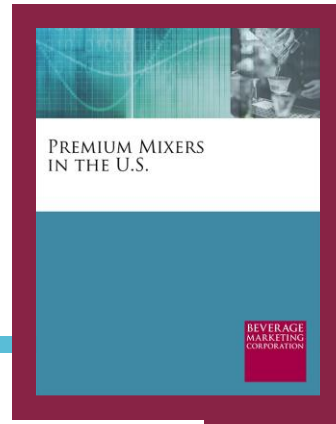


Competitive landscape

- Mixers intended for use in adult beverages include categories that are consumed primarily as non-alcohol beverages, such as carbonated soft drinks, juices and energy drinks, as well as products that are primarily used in bar and/or kitchen applications. Consumer and trade brand awareness in on-premise varies due to individual marketer prioritization of the channel.
- Carbonated soft drinks, juice, tonic water and energy drink marketers leverage brand equity built at retail when competing for placement behind the bar. Some brands benefit from multi-year beverage contracts with on-premise operators, and many provide promotional support to on-premise partners that yields visibility via menu placement, branded signage and other merchandising programs.
- Leading brands suppliers in other categories, such as syrup/flavoring and purée, often focus marketing and brand-building efforts on the trade; some also provide promotional support to operator partners. Syrups/flavorings leaders Monin, DaVinci and Torani, however, enjoy strong presence in the coffee café segment, affording them consumer and trade brand recognition.
- Product innovation around flavor and format is a key driver of every category in the mixer market. Consumer segments, particularly the younger generations, continue to seek out new flavors and are less brand loyal than prior generations. This has spurred on-premise locations to introduce their own original cocktails to entice these consumers.
- A trend that has taken place of the last few years is the popularity of classic cocktails following the adage "everything old is new again," although this hasn't had an overarching effect on the size of the mixer market

Premium Mixers in the U.S.

2019 Edition (Published March 2019. Data through 2018. Market projections through 2023.) More than 30 pages, with extensive text analysis, charts and tables



Will the swiftly growing premium mixers market be sustained into the future?

Beverage Marketing Corporation considers the possibilities in its industry report entitled: *Premium Mixers in the U.S.* The question is an important one as this report considers a beverage type that a decade ago was not even on most people's radar. Now that premium mixers have become a reliable grower, it is important to consider what can be learned here for entrepreneurs and market veterans alike.

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The answers you need

This brief but insightful market report measures volume, wholesale dollar sales and retail dollar sales, covers top brands and discusses key issues in the premium mixers category. BMC's exclusive five-year projections are also included. Questions answered include:

- Which are the leading brands of premium mixers? Is the market sewn up by big companies or is there room for smaller players to capture a significant percentage of market share?
- Why has the category been so successful?
- How much is the premium mixers market expected to grow in the next five years? What are the growth drivers going forward?

This report features

This report examines a unique offshoot of the premium soda market. The presentation of industry research begins with an overview of the premium mixers market. It then analyzes various brands and the companies behind them, taking note of innovations they have achieved and the marketing strategies behind them.

After outlining this context, the report describes the issues likely to determine what is next in the U.S. premium mixers marketplace and projects market size five years into the future. In this report, readers get a thorough understanding of all facets of the premium mixers market including:

- Wholesale dollar sales, retail dollar sales and volume of the premium mixers market going back to 2012, as well as projections of the same to 2023.
- Discussion of the main competitors and their likely prospects, including analysis of the strategies of the largest brands in the segment.
- Analyzes key brands and quantifies sales, offering volume and wholesale dollars for brands including Q Tonic, Fever-Tree, Distill Ventures/Seedlip, Mocktails, Ripe Craft Bar Juice, Owl's Brew, East Imperial, Frose (Kelvin Slush Co.), 18.21 Bitters, O.Vine , Be Mixed, Navy Hill, Nectar Girl and Arriba Chelada

Premium Mixers in the U.S.

March 2019

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

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Summary

On the mixer front, proponents say it has been a revolution long waiting to happen. As consumers' tastes in spirits have gravitated further upscale and an entire industry of artisanal spirits has emerged over the past 20 years, it has been recognized by mixologists, bartenders, retailers and entrepreneurs how inconsistent it is to blend a Grey Goose Vodka or Old Potrero gin with a cheap, fructose-sweetened mixer squirted from a gun or dispensed from a flimsy plastic bottle.

- That has prompted a wave of high-end mixer marketers, and the acquisition of one of them, Stirrings, by global spirits giant Diageo several years ago further highlighted the opportunities ahead and stimulated a new wave of entrepreneurship.
- A few prognosticators have put out reports projecting that the category is ripe to explode by a factor of five or even 10 in the coming years, further fueling the interest. At the Fancy Food Show in New York in summer 2018, it seems that there were elegant mixer brands on view in every aisle, some of them bitters and other non-beverage formats, but also an abundance of beverages.
- On the sparkling beverage side, some of the new entrants have come from overseas, such as London-based Fever-Tree, which was founded by Charles Rolls and Tim Warrillow in 2005 and by now has built a sizeable on-premise and specialty-grocery business in the States. There have been rumors that PepsiCo, among others, might want to add that brand to its arsenal. Its success has also prompted an influx of newer rivals such as an importer operating as East Imperial with its own extensive offering of traditional tonic waters and other mixers.
- Among the intriguing domestic players has been one, Q Brands, that for its first several years took an opposite tack from Stirrings, focusing on just a single entry, a better tonic water (the "Q" stands for quinine), rather than offering a broad range of products intended to meet a bartender's every need.
- That step-by-step approach by the company's youthful founder, Jordan Silbert, has served the company well, and it steadily increased distribution. In 2011, Q Tonic began to accede to retailers' requests to broaden the line, starting with a ginger ale SKU, and by now it has a range of flavors and packaging formats, and has pulled in significant equity capital. (See profile below.)
- With cold-pressed juices proving to be revelation among juice consumers for their freshness and the integrity of their ingredients, it might have seemed inevitable for a mixer play, given the role of fresh fruit juices in mixologists' regimens. So far, however, there has only been one company employing that fresh-tasting, natural approach to bar mixers, under the name Ripe Craft Bar Juice, enjoying what seems to be modest success.

Exhibit 7

LEADING PREMIUM MIXERS BRANDS
CHANGE IN VOLUME
2013 – 2018(p)

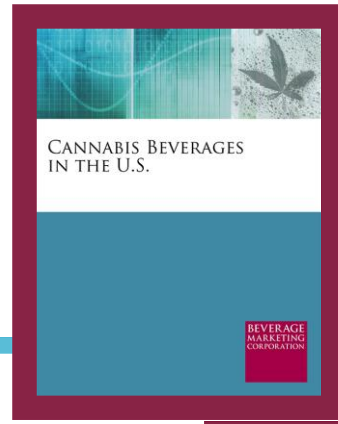
Brand	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18(p)
Fever-Tree	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Q Tonic	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fentimans	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Jin+Ja	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Llanllyr Source	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%	[illegible]%
Top Note	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]%
Subtotal	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
All Other	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(p) Preliminary

Source: Beverage Marketing Corporation

Cannabis Beverages in the U.S.

2019 Edition (Published May 2019. Data through 2018. Market projections through 2025.) More than 55 pages, with extensive text analysis, graphs, charts and tables



Cannabis-infused products — the next great market disruptors — are here. In this market report, Beverage Marketing Corporation helps entrepreneurs, market veterans and investors get their arms around the U.S. cannabis beverage and edibles opportunity. Its size, the hurdles, progress to date and projections for the future, plus data, analysis, a look at new products and market projections. It's all here.

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The answers you need

This brief but insightful market report measures retail dollar sales and discusses key issues in the cannabis and cannabis beverage markets. BMC's exclusive seven-year projections are also included. Questions answered include:

- What is the size of the cannabis opportunity? What is the value of the current and historical legal vs. illegal cannabis market and how does this data, combined with growing demand for legalized product impact the projected size of a legalized market for cannabis products in general and beverage products in particular?

- What is the difference between CBD and THC, and what are the market dynamics underpinning both?

- How big is the cannabis market and its CBD and THC segments? How do the market shares of CBD and THC differ when looking at the cannabis market in general and the beverage segment specifically? Which segment is likely to grow more quickly to 2025? Is one segment inclined to have more "staying power"?

- What are some of the formulation, regulatory and educational hurdles facing makers of cannabis-infused edibles and beverages? What are some of the possible solutions on the horizon?

- Which are the noteworthy cannabis beverage brands so far and how have they been positioned to withstand the challenge of big companies expected to enter the market? What moves have the larger companies made to date to ready themselves to fully take advantage of this opportunity?

- How much is the cannabis beverage market expected to grow in the next seven years? What are the growth drivers going forward? (Ditto for the legal cannabis market as a whole.)

- How has the legal and regulatory environment changed in the past several years? What is the state by state status, the likelihood of legalization at the federal level, and when?

This report features

This report examines the very rare case of an industry that is transitioning from mostly illegal to mostly legal, which not only has societal implications but also an impact on beverage segments such as beer, wine and spirits, as well as on functionally-oriented, no-alcohol drinks. This presentation of industry research begins with a very brief overview of the (mostly illegal) global cannabis market and its uptake by region. It then discusses the main product segments of the fledgling legal cannabis market, and details legal and regulatory issues regarding marijuana and hemp in Canada and the U.S. This is followed by a brief summary of the principal cannabis growers and marketers in Canada, some of which have already made partnerships with large beverage companies.

After outlining this context, the report describes the two main segments of the U.S. cannabis beverage market — no-alcohol CBD beverages and no-alcohol THC beverages — and touches on the challenges facing a third segment — CBD-infused alcohol beverages. In this report, readers get a thorough understanding of all facets of the nascent cannabis beverage market including:

- Retail dollar sales of the cannabis market and the cannabis beverage market by segment going back to 2016.

- Discussion of the main competitors and their product lines, as well as their strategies and competitive advantages. Also discusses raw material suppliers and formulation breakthroughs. Companies and brands covered up and down the supply chain include Tilray, Sproutly, Infusion Biosciences, Canopy Growth, Aurora, Alkaline 88, New Age Beverages, Recess, Sprig, Bimble, Sweet Reason, Just Chill, Aethics, Cannabliss, Dream Catcher, Elev8, Kickback, Stillwater, Cloud Water, Dram, Weller CBD Seltzers, Moosehead, Lagunitas Hi-Fi Hops, Ceria Grainwave, Two Roots, Truss, High Style Brewing, Kikoko, Cannabis Quencher, Stoney Mountain Root Beer and more…

- Analysis of the prospects of the cannabis and cannabis beverage markets in the next seven years, with Beverage Marketing's retail dollar sales category projections to 2025.

Cannabis Beverages in the U.S.

May 2019

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RESEARCH ● DATA ● CONSULTING

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Summary

In the United States, cannabis is still illegal on the federal level. The legality of cannabis continues to vary from state to state. (Exhibit 7)

- Cannabis is forbidden throughout much of the world. Only Canada and Uruguay have legalized cannabis for recreational (adult) use. However, there are a few green shoots: according to Canadian pot producer Tilray, 41 countries have legalized access to medical cannabis and more than 50 countries have legalized CBD products.
- In the United States, the federal government passed the Marijuana Tax Act in 1937, which seriously curtailed the use of marijuana. However, in the two decades or so before 1933, 29 states had criminalized marijuana on their own — partly due to exaggerated perceptions of it being used by crime-ridden, immigrant populations.
- Subsequent governmental actions tended towards greater prohibition of marijuana. In 1970, the U.S. Congress passed the Controlled Substances Act, which was signed into law by President Richard Nixon. Cannabis was classified as "Schedule 1", which applied to drugs or substances with a high potential for abuse, no currently accepted medical use in treatment and a lack of accepted safety for its use under medical supervision.
- Proponents of legalized cannabis obviously argued that marijuana did not meet all three of these Schedule 1 criteria. The movement to shift policy began almost immediately. Over the next two decades or so, several states "decriminalized" marijuana, which meant possession was still a crime but that people caught with a small amount of cannabis would receive a misdemeanor instead of a felony. (States, as well as municipalities, have continued these "decriminalization" efforts.)
- A further step towards liberalization began in the 1990s when activists focused on convincing states to allow marijuana usage in a limited number of cases. The so-called "medical marijuana" movement unsurprisingly was birthed in California. In 1996, voters in the Golden State approved Proposition 215, which legalized marijuana for medical purposes at the state level for the first time. Currently, 33 states (plus D.C., Guam and Puerto Rico) have legalized medical marijuana.

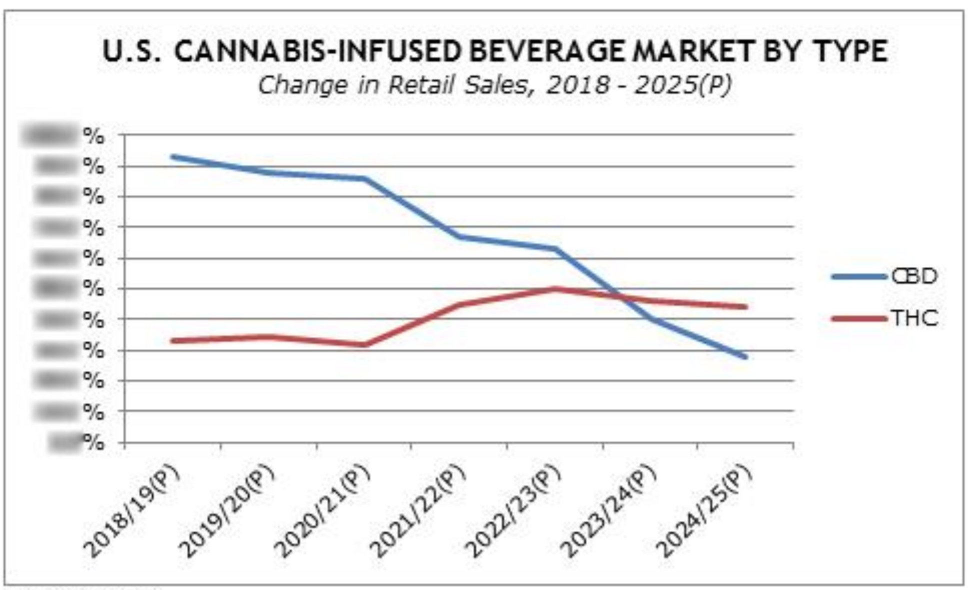
Exhibit 10

U.S. CANNABIS-INFUSED BEVERAGE MARKET
SHARE OF RETAIL SALES BY TYPE
2016 – 2025(P)

Year	CBD	THC	Total
2016	[redacted]%	[redacted]%	[redacted]%
2017	[redacted]%	[redacted]%	[redacted]%
2018	[redacted]%	[redacted]%	[redacted]%
2019(P)	[redacted]%	[redacted]%	[redacted]%
2020(P)	[redacted]%	[redacted]%	[redacted]%
2021(P)	[redacted]%	[redacted]%	[redacted]%
2022(P)	[redacted]%	[redacted]%	[redacted]%
2023(P)	[redacted]%	[redacted]%	[redacted]%
2024(P)	[redacted]%	[redacted]%	[redacted]%
2025(P)	[redacted]%	[redacted]%	[redacted]%

(P) Projected

Source: Beverage Marketing Corporation



(P) Projected
Source: Beverage Marketing Corporation