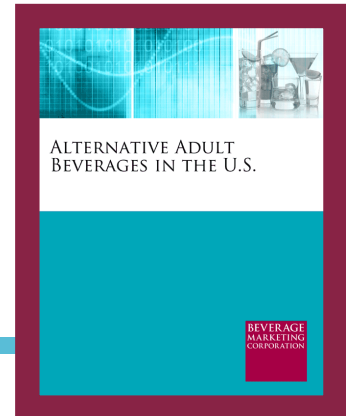


ALTERNATIVE ADULT BEVERAGES IN THE U.S.

2021 EDITION (Published August 2021. Data through 2020. Market projections through 2025.) More than 115 pages, with text analysis and tables



Alternative Adult Beverages in the U.S. examines the burgeoning adult beverage types beyond the standard beer, wine and distilled spirits categories. This market report includes data as well as discussion of innovation and the consumer need states and attitudes driving it. The impact of the coronavirus pandemic on these emerging sectors is also discussed.

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HAVE QUESTIONS?

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- This research report 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 seltzers and other flavored malt beverages (FMBs), ready-to-drink cocktails, hard kombucha and much more.
- In addition, it examines which segments represent the possible formation of something rather different (like alcohol-free distilled spirits) and which amount to efforts to give new life to an already established niche adult drink (like a number of newer takes on FMBs). It also covers cannabis beverages.
- This report will be useful to beverage marketers, suppliers to the industry, financial executives, producers in various segments of the multiple beverage marketplace and others with a special interest in innovative beverage alcohol companies. in various segments of the multiple beverage marketplace and others with a special interest in innovative beverage alcohol companies.

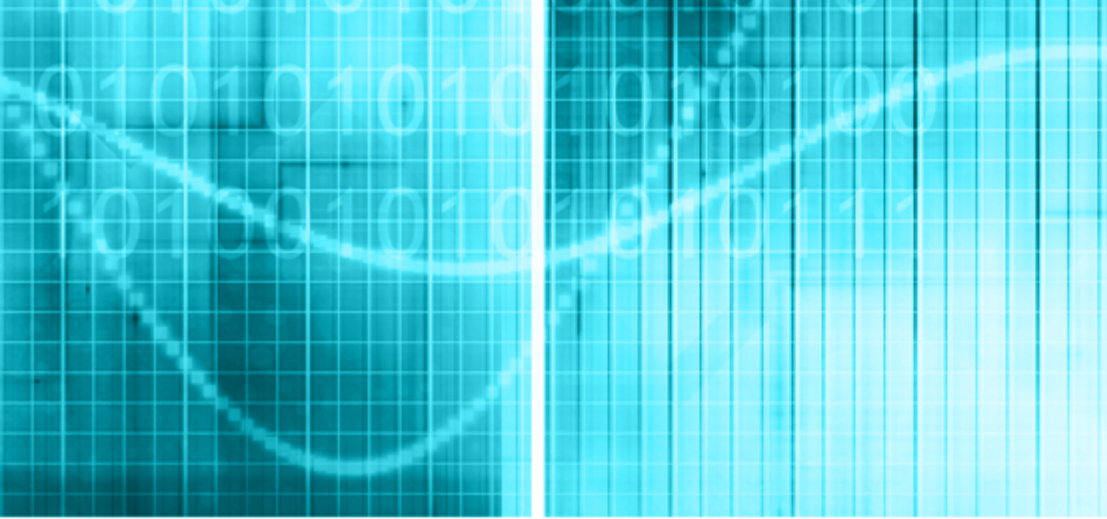
THE ANSWERS YOU NEED

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 are issues with positioning certain adult drinks as "healthy"?

THIS REPORT FEATURES

Alternative Adult Beverages 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.



ALTERNATIVE ADULT BEVERAGES IN THE U.S.

**BEVERAGE
MARKETING
CORPORATION**

Alternative Adult Beverages in the U.S.

August 2021



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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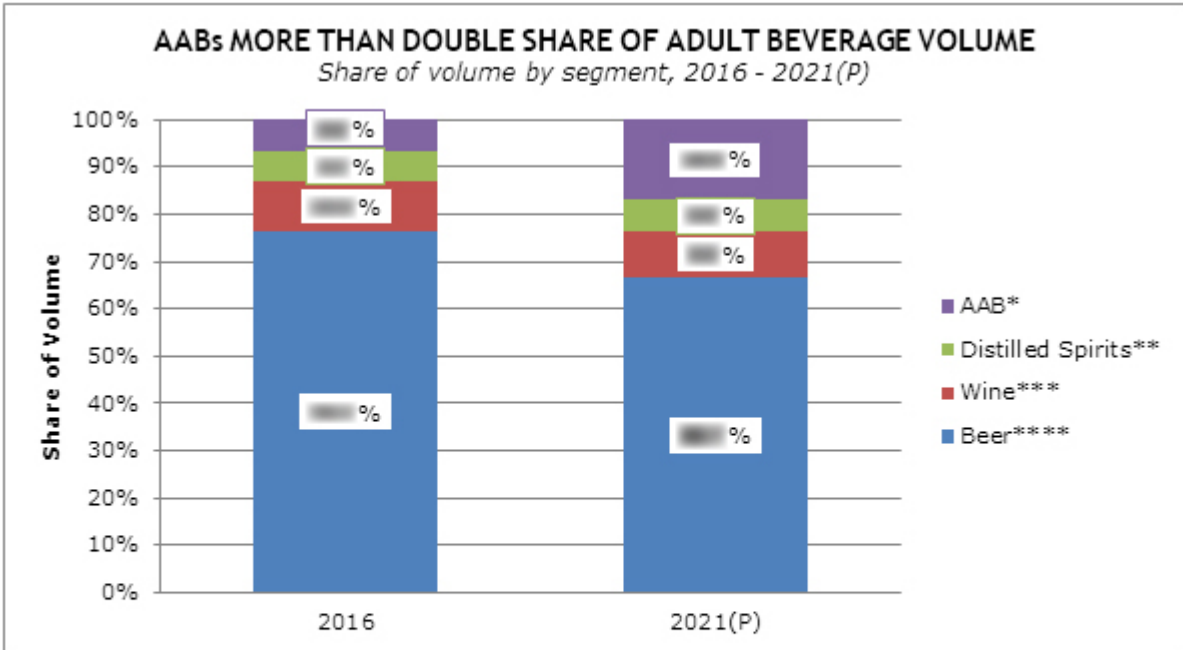
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Many U.S. consumers, especially the younger ones routinely dubbed millennials, appear to crave alternatives to conventional forms of beverage alcohol. Rather than the standard variations of beer, distilled spirits and wine, they seek something different. Several beverage types emerged that together constitute what can be designated alternative adult beverages (AABs), which consists of four primary sub-segments (as well as various smaller ones).

- While AABs are positioned as distinct from the three traditional categories, three of the four main components are, in fact, closely related to them, even if consumers regard them as distinct. Thus, there are beer-, spirits- and wine-related AABs.
- Beer-related AABs include hard seltzer and other flavored malt beverages (FMBs) as well as hard ciders and flavored beers. While FMBs like Mike's Hard Lemonade and Smirnoff Ice have been around for years, the hard seltzer variant renewed consumer excitement for FMBs. While hard seltzers were concocted early in the century, the sub-segment really caught fire around 2017 or so, and a flurry of brands raced to market subsequently. Most of the products in the beer-related AAB realm have alcohol levels comparable to standard beer. Most are also characterized by fruit flavoring, though seltzers are generally more lightly flavored than hard lemonades or other, older-style FMBs (and typically have fewer calories as well).
- Spirits-related AABs primarily consist of ready-to-drink (RTD) prepared cocktails, often packaged in aluminum cans or other single-serve packages. Outside the United States, especially in Europe, no- or low-alcohol distilled spirits carved out a niche, and some such products have also started showing up stateside. Related to this segment are "mocktails" containing no alcohol but prepared to resemble familiar cocktails in flavor and appearance. These include both RTD formulations as well as those made on-premise (which, of course, are essentially unmeasurable).
- Wine-related AABs range from RTD wine-based cocktails to wine coolers. Wine in cans also emerged as a more accessible, casual style of wine than that in cork-sealed glass bottles. Canned wines are thus seen by many as crucially different than the usual type.

- The AAB segment unrelated to those clearly connected to the three established beverage alcohol categories are cannabis beverages, which have two main components: tetrahydrocannabinol (THC), the chemical compound in marijuana that is responsible for its intoxicating effects, and cannabidiol (CBD), one of the more than 100 cannabinoids (diverse chemical compounds that act on cannabinoid receptors) found in the cannabis plant but which (unlike THC) is non-psychoactive. (While both THC and CBD beverages have potential to grow wildly as perceptions of marijuana and laws related to it and compounds derived from it change, many complicating factors affect its status and will determine its future, and these issues are discussed in detail in the chapter devoted to the category.)



(P) Projected

* Adult alternative beverages (AABs) include low- and zero proof spirits, ready-to-drink and frozen cocktails, canned wine and wine-based cocktails, wine coolers, flavored malt beverages, hard cider, hard kombucha, hard coffee and cannabis-based drinks.

** Excludes low- and zero-proof spirits as well as ready-to-drink (RTD) and frozen cocktails.

*** Excludes canned wine, canned wine-based cocktails and wine coolers.

**** Excludes flavored malt beverages and hard cider.

Source: Beverage Marketing Corporation

U.S. ALTERNATIVE ADULT BEVERAGE MARKET
CHANGE IN VOLUME BY SUB-SEGMENT (r)
2016 – 2021(P)

Segment							CAGR
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21(P)	2016/21(P)
Beer-related	10%	10%	10%	10%	10%	10%	10%
Hard Seltzers	15%	15%	15%	15%	15%	15%	15%
All Other FMBs	10%	10%	10%	10%	10%	10%	10%
Flavored Beers	10%	10%	10%	10%	10%	10%	10%
Hard Cider	10%	10%	10%	10%	10%	10%	10%
Wine-related	10%	10%	10%	10%	10%	10%	10%
Wine Cocktails	10%	10%	10%	10%	10%	10%	10%
Wine Coolers	10%	10%	10%	10%	10%	10%	10%
Spirits-related	10%	10%	10%	10%	10%	10%	10%
RTD Cocktails	10%	10%	10%	10%	10%	10%	10%
Cannabis	10%	10%	10%	10%	10%	10%	10%
CBD	10%	10%	10%	10%	10%	10%	10%
THC	10%	10%	10%	10%	10%	10%	10%
Subtotal	10%	10%	10%	10%	10%	10%	10%
All Others*	10%	10%	10%	10%	10%	10%	10%
TOTAL	10%	10%	10%	10%	10%	10%	10%

(r) Revised; CAGR: Compound annual growth rate

(P) Projected

* Includes hard kombucha and hard coffee.

Source: Beverage Marketing Corporation