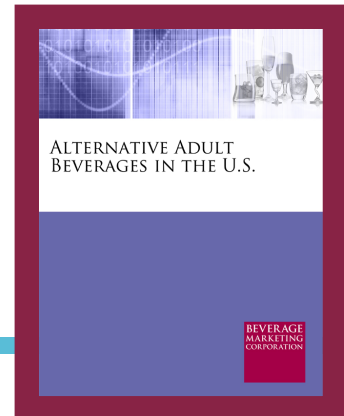


# ALTERNATIVE ADULT BEVERAGES IN THE U.S.

2022 EDITION (Published September 2022. Data through 2021. Market projections through 2026.) More than 115 pages, with text analysis and tables



**M**arket disruption continues. In *Alternative Adult Beverages in the U.S.*, Beverage Marketing Corporation examines the burgeoning adult beverage types expanding the adult beverage horizon 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 as is the emergence of a private label market as the segments reach scale. **New in 2022:** Expanded coverage of spirits-based ready-to-drink cocktails.

FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO [bmcreports.com](http://bmcreports.com)

## AVAILABLE FORMAT & PRICING



Direct Download  
Word & PDF

\$4,295

To learn more, to place an advance order or to inquire about additional user licenses **call:** Charlene Harvey +1 212.688.7640 ext. 1962 [charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)

## INSIDE:

### REPORT OVERVIEW

A brief discussion of this report's key features. 2

### TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 6

### SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. 11



HAVE QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962  
[charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)



BEVERAGE MARKETING CORPORATION  
850 Third Avenue, 13<sup>th</sup> Floor, New York, NY 10022  
Tel: 212-688-7640 Fax: 212-826-1255

- 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, THC infused beverages 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.

### 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 are the leading spirits-based RTD cocktail 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.

- Volume data, growth and market share for the various segments and the brands that comprise them are included to help marketers wrap their arms around the opportunity. Brands covered include: AriZona Sun Rise Hard Seltzer, BON V!V, Bud Light Seltzer, Agave Spiked Seltzer, Clear Coast Fresh Hard Seltzer, Corona, Henry's Hard Sparkling Water, White Claw, Truly Hard Seltzer, Bud Light Seltzer, Natural Light Seltzer, BON V!V, Smirnoff Spiked, Wild Basin Seltzer, Vizzy, Cutwater Spirits Canned Cocktails, Mike's Hard, Smirnoff Ice, Budweiser & Bud Light Chelada, Twisted Tea, High Noon Sun Sips, Jose Cuervo RTD cocktails, Modelo Especial Chelada, Four Loko, Henry's Hard, Bud Light Lime-a-Rita, Bud Light Lime Straw-Ber-Rita, Bud Light Lime Mang-O-Rita, Bud Light Lime Water-melon-Rita, Angry Orchard, Bold Rock, Strongbow Cider, Crispin, Blake's Hard, Woodchuck Hard Cider, Austin Eastciders, Stella Artois Cidre, Magners, Square Mile, Somersby, Smith & Forge, Skinnygirl, Malibu Cocktails, Barefoot Spritzer, Sparkletini by Verdi and more.



# ALTERNATIVE ADULT BEVERAGES IN THE U.S.

**BEVERAGE  
MARKETING  
CORPORATION**

# Alternative Adult Beverages in the U.S.

September 2022

---



RESEARCH • DATA • CONSULTING

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

---

Copyright © 2022 Beverage Marketing Corporation of New York, P.O. Box 2399, Wintersville, OH 43953, (212) 688-7640.  
All rights reserved. Reproductions in any form prohibited by law.

# Contents

## Table of Contents

---

TABLE OF CONTENTS

TABLE OF CONTENTS ----- i  
 INTRODUCTION ----- vii

Chapter

**1. THE ALTERNATIVE ADULT BEVERAGE MARKET**

Alternative Adult Beverages ----- 1  
 • Overview & Issues ----- 1  
 • Volume ----- 7  
 • Per Capita Consumption ----- 7  
 • Special Note on Coronavirus ----- 8

**Exhibits**

1.1 U.S. Alternative Adult Beverage Market Volume and Change 2000 – 2022 ----- 10  
 1.2 U.S. Alternative Adult Beverage Market Per Capita Consumption 2000 – 2022 ----- 11

**2. ALTERNATIVE ADULT BEVERAGES AND BEVERAGE ALCOHOL**

Adult Beverages ----- 12  
 • Overview & Issues ----- 12  
 • Volume by Segment ----- 13

**Exhibits**

2.3 U.S. Adult Beverage Market Volume by Segment 2016 – 2022 ----- 15  
 2.4 U.S. Adult Beverage Market Share of Volume by Segment 2016 – 2022 ----- 16  
 2.5 U.S. Adult Beverage Market Change in Volume by Segment 2017 – 2022 ----- 17  
 2.6 U.S. Adult Beverage Market Per Capita Consumption by Segment 2016 – 2022 ----- 18

**3. THE ALTERNATIVE ADULT BEVERAGE MARKET BY SEGMENT**

Alternative Adult Beverage Segments ----- 19  
 • Overview & Issues ----- 19  
 • Beer-Related Beverages ----- 21  
 • Wine-Related Beverages ----- 22  
 • Distilled Spirits-Related Beverages ----- 23  
 • Cannabis Beverages ----- 23  
 • Other Alternative Adult Beverages ----- 24

**Exhibits**

3.7 U.S. Alternative Adult Beverage Market Volume by Segment 2016 – 2022 ----- 25  
 3.8 U.S. Alternative Adult Beverage Market Share of Volume by Segment 2016 – 2022 - 26  
 3.9 U.S. Alternative Adult Beverage Market Change in Volume by Segment  
 2017 – 2022 ----- 27

TABLE OF CONTENTS

Chapter

**3. THE ALTERNATIVE ADULT BEVERAGE MARKET BY SEGMENT (cont'd)**

***Exhibits (cont'd)***

3.10 U.S. Alternative Adult Beverage Market Per Capita Consumption by Segment 2016 – 2022 -----	28
3.11 U.S. Alternative Adult Beverage Market Volume by Sub-Segment 2016 – 2022 -----	29
3.12 U.S. Alternative Adult Beverage Market Share of Volume by Sub-Segment 2016 – 2022 -----	30
3.13 U.S. Alternative Adult Beverage Market Change in Volume by Sub-Segment 2017 – 2022 -----	31

**4. THE HARD SELTZER AND OTHER FLAVORED MALT BEVERAGES MARKET**

Hard Seltzers -----	32
• Overview & Issues -----	32
• Volume -----	34
• AriZona Sun Rise Hard Seltzer -----	35
• BON V!V -----	36
• Bud Light Seltzer -----	37
• Cacti Agave Spiked Seltzer -----	39
• Clear Coast Fresh Hard Seltzer -----	40
• Corona -----	41
• Dos Equis Ranch Water -----	42
• Henry's Hard Sparkling Water -----	43
• Michelob Ultra Organic Seltzer -----	44
• Natural Light Seltzer -----	45
• Nauti Seltzer Premium Hard Seltzer -----	46
• Pabst Blue Ribbon Stronger Seltzer -----	47
• Smirnoff Spiked Sparkling Seltzer -----	48
• Social Club Seltzer -----	49
• Sparkling ICE Spiked -----	50
• Svedka Spiked Premium Seltzer -----	51
• Topo Chico -----	52
• Truly Hard Seltzer -----	53
• Vizzy -----	55
• White Claw Hard Seltzer -----	56
• Wild Basin Hard Seltzer -----	58
Other Flavored Malt Beverages -----	59
• Overview & Issues -----	59
• Volume -----	60
• Mike's Hard Lemonade -----	61
• HARD MTN DEW -----	62
• The Beast Unleashed -----	63

TABLE OF CONTENTS

Chapter

<b>4. THE HARD SELTZER AND OTHER FLAVORED MALT BEVERAGES MARKET (cont'd)</b>	
<b><i>Exhibits</i></b>	
4.14 U.S. Hard Seltzer and Flavored Malt Beverage Market Volume by Brand 2016 – 2021 -----	64
4.15 U.S. Hard Seltzer and Flavored Malt Beverage Market Share of Volume by Brand 2016 – 2021 -----	65
4.16 U.S. Hard Seltzer and Flavored Malt Beverage Market Change in Volume by Brand 2017 – 2021 -----	66
<b>5. THE HARD CIDER MARKET</b>	
Hard Cider -----	67
• Overview & Issues -----	67
• Volume -----	70
<b><i>Exhibits</i></b>	
5.17 U.S. Hard Cider Market Volume by Brand 2016 – 2021 -----	71
5.18 U.S. Hard Cider Market Share of Volume by Brand 2016 – 2021 -----	72
5.19 U.S. Hard Cider Market Change in Volume by Brand 2017 – 2021 -----	73
<b>6. THE DISTILLED SPIRITS-RELATED AAB MARKET</b>	
Distilled Spirits-Related Alternative Adult Beverages -----	74
• Overview & Issues -----	74
• Volume -----	75
Ready-to-Drink Cocktails -----	76
• Overview & Issues -----	76
• Absolute Cocktails and Vodka Soda -----	76
• Bacardi Real Rum Cocktails -----	77
• Bombay Sapphire Gin & Tonic -----	78
• Crown Royal RTD Cocktails -----	78
• Cutwater Spirits Canned Cocktails -----	79
• Dos Equis Classic Lime Margarita -----	80
• High Noon -----	80
• Jack Daniel's & Coca-Cola -----	81
• Jameson -----	81
• Jim Beam RTD Cocktails -----	82
• Jose Cuervo -----	83
• Malibu Pre-Mix Cans -----	83
• Monoco -----	84
• Nütrl Vodka Seltzer -----	84
• Skinnygirl -----	85



## TABLE OF CONTENTS

## Chapter

<b>6. THE DISTILLED SPIRITS-RELATED AAB MARKET (cont'd)</b>	
Ready-to-Drink "Mocktails" -----	86
• Overview & Issues -----	86
• ArKay Beverages -----	86
• Bar Nøne -----	87
• Ceder's -----	88
• Curious Elixirs -----	88
• Gordon's Ultra Low Alcohol Gin & Tonic -----	89
• Herbie Virgin -----	90
• Mocktails -----	90
• Seedlip -----	91
• Stryyk -----	92
• Surendran & Bownes -----	92
<b>Exhibits</b>	
6.20 U.S. Spirits-Related AAB Market Volume by Brand 2016 – 2021 -----	93
6.21 U.S. Spirits-Related AAB Market Share of Volume by Brand 2016 – 2021 -----	94
6.22 U.S. Spirits-Related AAB Market Change in Volume by Brand 2017 – 2021 -----	95
<b>7. THE WINE-RELATED AAB MARKET</b>	
Wine-Related Alternative Adult Beverages -----	96
• Overview & Issues -----	96
No-Alcohol Wine -----	97
• Overview & Issues -----	97
• O.Vine Wine Grape Infused Water -----	97
<b>Exhibits</b>	
7.23 U.S. Wine-Related AAB Market Volume by Brand 2016 – 2021 -----	100
7.24 U.S. Wine-Related AAB Market Share of Volume by Brand 2016 – 2021 -----	101
7.25 U.S. Wine-Related AAB Market Change in Volume by Brand 2017 – 2021 -----	102
<b>8. THE CANNABIS-INFUSED BEVERAGE MARKET</b>	
Cannabis Beverages -----	103
• Overview & Issues -----	103
<b>Exhibit</b>	
8.26 U.S. Cannabis-Infused Beverage Market Leading Brands and Companies in Select States 2021 -----	122

TABLE OF CONTENTS

Chapter

<b>9. EMERGING ALTERNATIVE ADULT BEVERAGES</b>	
Non-FMB Hard Ready-to-Drink Tea -----	123
• Overview & Issues -----	123
• Noveltea -----	124
• Vrai -----	124
Hard Ready-to-Drink Coffee -----	126
• Overview & Issues -----	126
Hard Kombucha -----	127
• Overview & Issues -----	127
• Bambucha Organic Hard Kombucha -----	128
• Boochcraft -----	128
• Kombrewcha -----	129
• KYLA Hard Kombucha -----	130
• Unity Vibration -----	131
• Wild Tonic -----	131
On-Premise/Craft “Mocktails” -----	132
• Overview & Issues -----	132
“Healthier” Cocktails -----	134
• Overview & Issues -----	134
<b>10. THE PROJECTED ALTERNATIVE ADULT BEVERAGE MARKET</b>	
Projected Alternative Adult Beverages -----	135
• Overview & Issues -----	135
<b><i>Exhibits</i></b>	
10.27 U.S. Alternative Adult Beverage Market Projected Volume by Segment 2021 – 2026 -----	138
10.28 U.S. Alternative Adult Beverage Market Share of Projected Volume by Segment 2021 – 2026 -----	139
10.29 U.S. Alternative Adult Beverage Market Change in Projected Volume by Segment 2021 – 2026 -----	140
10.30 U.S. Alternative Adult Beverage Market Projected Per Capita Consumption by Segment 2021 – 2026 -----	141
10.31 U.S. Alternative Adult Beverage Market Projected Volume by Sub-Segment 2021 – 2026 -----	142
10.32 U.S. Alternative Adult Beverage Market Share of Projected Volume by Sub-Segment 2021 – 2026 -----	143
10.33 U.S. Alternative Adult Beverage Market Change in Projected Volume by Sub-Segment 2021 – 2026 -----	144

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.)

**U.S. ALTERNATIVE ADULT BEVERAGE MARKET  
CHANGE IN VOLUME BY SUB-SEGMENT (r)  
2017 – 2022(P)**

Segment							CAGR
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22(P)	2017/22(P)
<b>Beer-related</b>	10%	10%	10%	10%	10%	10%	10%
Hard Seltzers	10%	10%	10%	10%	10%	10%	10%
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%
<b>Wine-related</b>	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%
<b>Spirits-related</b>	10%	10%	10%	10%	10%	10%	10%
RTD Cocktails	10%	10%	10%	10%	10%	10%	10%
<b>Cannabis</b>	10%	10%	10%	10%	10%	10%	10%
CBD	10%	10%	10%	10%	10%	10%	10%
THC	10%	10%	10%	10%	10%	10%	10%
<b>Subtotal</b>	10%	10%	10%	10%	10%	10%	10%
All Others*	10%	10%	10%	10%	10%	10%	10%
<b>TOTAL</b>	10%	10%	10%	10%	10%	10%	10%

(r) Revised; CAGR: Compound annual growth rate

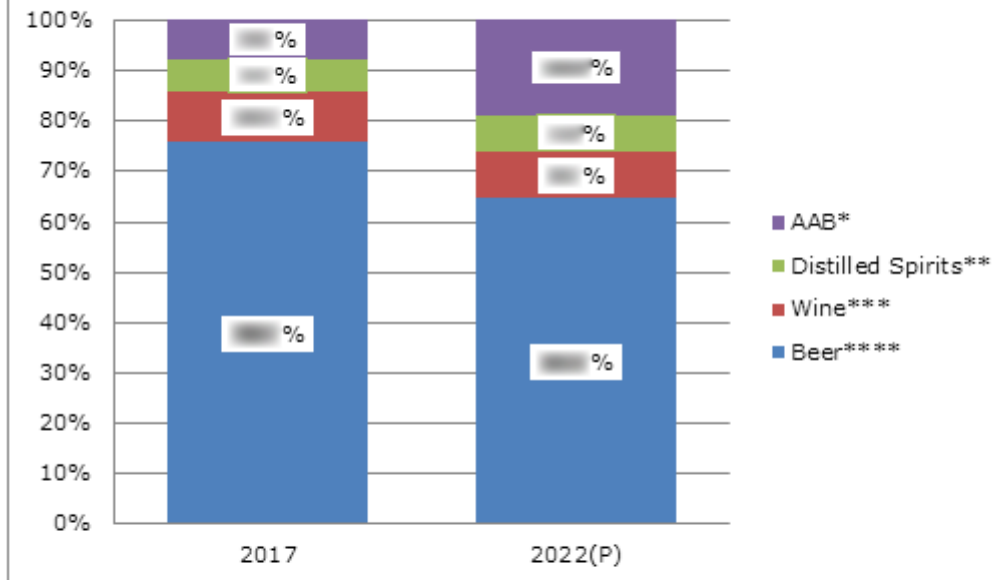
(P) Projected

\* Includes hard kombucha and hard coffee.

Source: Beverage Marketing Corporation

## AABs TO MORE THAN DOUBLE SHARE OF ADULT BEVERAGE VOLUME

*Share of Volume by Segment, 2017 - 2022(P)*



*(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