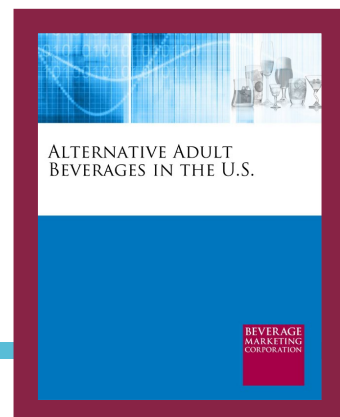


ALTERNATIVE ADULT BEVERAGES IN THE U.S.

2024 EDITION (Published February 2025. Data through 2023, selected preliminary 2024 figures and projections through 2028.) More than 175 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. This report is a must have for adult beverage companies as well as non-alcohol beverage companies interested in taking advantage of the changing industry paradigm in which convergence of beverage alcohol and no-alcohol sectors offers opportunities to partner in product development as well as for distribution synergies.*

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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. **12**



**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), hard ciders, distilled spirits related alternative adult beverages (AABs), ready-to-drink cocktails, hard kombucha, RTD mocktails, wine-related AABs including no-alcohol wines, CBD and THC infused beverages, emerging AABs such as hard tea, hard coffee, on-premise craft mocktails, healthy cocktails and much more.
- The report discusses a broad range of entrepreneurial brands in various emerging sectors and sub-sectors and quantifies key sectors and brands.
- 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, entrepreneurs, 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 in a broad range of sectors and sub-sectors. 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: Angry Orchard, Barefoot Spritzer, BON V!V, Bud Light Seltzer, Corona Hard Seltzer, Henry's Hard, White Claw, Truly Hard Seltzer, Twisted Tea, Natural Light Seltzer, Smirnoff Spiked, Wild Basin Seltzer, Vizzy, Cutwater Spirits Canned Cocktails, Mike's Hard, High Noon Sun Sips, Jose Cuervo RTD cocktails, Martini & Rossi RTD, Modelo Especial Chelada, Myx Fusions, Strongbow Cider, Topo Chico, Uptown Wine Cocktails, Woodchuck Hard and many more.



ALTERNATIVE ADULT BEVERAGES IN THE U.S.

BEVERAGE
MARKETING
CORPORATION

Alternative Adult Beverages in the U.S.

February 2025

BEVERAGE
MARKETING
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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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Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS	i
INTRODUCTION	viii

Chapter

1. THE ALTERNATIVE ADULT BEVERAGE MARKET

Alternative Adult Beverages	1
• Overview & Issues	1
• Volume.....	7
• Per Capita Consumption	7

Exhibits

1.1 U.S. Alternative Adult Beverage Market Volume and Change 2000 – 2024.....	8
1.2 U.S. Alternative Adult Beverage Market Per Capita Consumption 2000 – 2024	9

2. ALTERNATIVE ADULT BEVERAGES AND BEVERAGE ALCOHOL

Adult Beverages	10
• Overview & Issues	10
• Volume by Segment	11

Exhibits

2.3 U.S. Adult Beverage Market Volume by Segment 2018 – 2024	13
2.4 U.S. Adult Beverage Market Share of Volume by Segment 2018 – 2024	14
2.5 U.S. Adult Beverage Market Change in Volume by Segment 2019 – 2024.....	15
2.6 U.S. Adult Beverage Market Per Capita Consumption by Segment 2018 – 2024	16

3. THE ALTERNATIVE ADULT BEVERAGE MARKET BY SEGMENT

Alternative Adult Beverage Segments	17
• Overview & Issues	17
• Beer-Related Beverages	19
• Wine-Related Beverages.....	20
• Distilled Spirits-Related Beverages	21
• Cannabis Beverages	21
• Other Alternative Adult Beverages.....	22

Exhibits

3.7 U.S. Alternative Adult Beverage Market Volume by Segment 2018 – 2024.....	23
3.8 U.S. Alternative Adult Beverage Market Share of Volume by Segment 2018 – 2024 -	24
3.9 U.S. Alternative Adult Beverage Market Change in Volume by Segment 2019 – 2024	25
3.10 U.S. Alternative Adult Beverage Market Per Capita Consumption by Segment 2018 – 2024	26

TABLE OF CONTENTS

Chapter

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

3.11 U.S. Alternative Adult Beverage Market Volume by Sub-Segment 2018 – 2024 -----	27
3.12 U.S. Alternative Adult Beverage Market Share of Volume by Sub-Segment 2018 – 2024 -----	28
3.13 U.S. Alternative Adult Beverage Market Change in Volume by Sub-Segment 2019 – 2024 -----	29

4. THE HARD SELTZER AND OTHER FLAVORED MALT BEVERAGES MARKET

Hard Seltzers -----	30
• Overview & Issues -----	30
• Volume-----	32
• AriZona Sun Rise Hard Seltzer -----	33
• BON V!V -----	34
• Bud Light Seltzer-----	35
• Cacti Agave Spiked Seltzer-----	37
• Clear Coast Fresh Hard Seltzer-----	38
• Corona -----	39
• Dos Equis Ranch Water -----	40
• Henry's Hard Sparkling Water-----	41
• Michelob Ultra Organic Seltzer -----	42
• Natural Light Seltzer -----	43
• Nauti Seltzer Premium Hard Seltzer -----	44
• Pabst Blue Ribbon Stronger Seltzer-----	45
• Smirnoff Spiked Sparkling Seltzer -----	46
• Social Club Seltzer -----	47
• Sparkling ICE Spiked -----	48
• Svedka Spiked Premium Seltzer -----	49
• Topo Chico-----	49
• Truly Hard Seltzer-----	51
• Vizzy -----	53
• White Claw Hard Seltzer-----	54
• Wild Basin Hard Seltzer-----	56
Other Flavored Malt Beverages-----	57
• Overview & Issues -----	57
• Volume-----	58
• Mike's Hard Lemonade-----	59
• HARD MTN DEW-----	60
• Happy Thursday-----	61
• Jim Beam Kentucky Coolers -----	61

TABLE OF CONTENTS

Chapter

4. THE HARD SELTZER AND OTHER FLAVORED MALT BEVERAGES MARKET (cont'd)

Other Flavored Malt Beverages (cont'd)

• General Admission -----	62
• The Beast Unleashed -----	63
• Nasty Beast Hard Tea -----	63
• Peace Hard Tea -----	64
• Spindrift Spiked -----	64
• Simply Spiked -----	65
• Tampico Hard Punch -----	65

Exhibits

4.14 U.S. Hard Seltzer and Flavored Malt Beverage Market Volume by Brand 2018 – 2023 -----	67
4.15 U.S. Hard Seltzer and Flavored Malt Beverage Market Share of Volume by Brand 2018 – 2023 -----	68
4.16 U.S. Hard Seltzer and Flavored Malt Beverage Market Change in Volume by Brand 2019 – 2023 -----	69

5. THE HARD CIDER MARKET

Hard Cider -----	70
• Overview & Issues -----	70
• Volume -----	73

Exhibits

5.17 U.S. Hard Cider Market Volume by Brand 2018 – 2023 -----	74
5.18 U.S. Hard Cider Market Share of Volume by Brand 2018 – 2023 -----	75
5.19 U.S. Hard Cider Market Change in Volume by Brand 2019 – 2023 -----	76

6. THE DISTILLED SPIRITS-RELATED AAB MARKET

Distilled Spirits-Related Alternative Adult Beverages -----	77
• Overview & Issues -----	77
• Volume -----	78
Ready-to-Drink Cocktails -----	79
• Overview & Issues -----	79
• Absolut Cocktails and Vodka Soda -----	79
• Bacardi Real Rum Cocktails -----	80
• Bombay Sapphire Gin & Tonic -----	81
• Crown Royal RTD Cocktails -----	81
• Cutwater Spirits Canned Cocktails -----	82
• Dos Equis Classic Lime Margarita -----	83
• Fresca Mixed -----	83
• High Noon -----	84

TABLE OF CONTENTS

Chapter

6. THE DISTILLED SPIRITS-RELATED AAB MARKET (cont'd)

Ready-to-Drink Cocktails (cont'd)

• Jack Daniel's & Coca-Cola -----	85
• Jameson -----	85
• Jim Beam RTD Cocktails -----	86
• Jose Cuervo -----	87
• Malibu Pre-Mix Cans -----	87
• Monoco -----	88
• Nütrl Vodka Seltzer -----	88
• Red Stripe Rum Drinks -----	89
• Skinnygirl -----	89
• Stone Buenafiesta Margaritas -----	90
• The Spritz -----	90
• White Claw Tequila Smash -----	91

Ready-to-Drink "Mocktails" ----- 92

• Overview & Issues -----	92
• ArKay Beverages -----	92
• Bar Nøne -----	93
• Ceder's -----	94
• Curious Elixirs -----	94
• Gordon's Ultra Low Alcohol Gin & Tonic -----	95
• Herbie Virgin -----	96
• Mocktails -----	96
• Seedlip -----	97
• Stryyk -----	98
• Surendran & Bownes -----	98

Exhibits

6.20 U.S. Spirits-Related AAB Market Volume by Brand 2018 – 2023 -----	99
6.21 U.S. Spirits-Related AAB Market Share of Volume by Brand 2018 – 2023 -----	100
6.22 U.S. Spirits-Related AAB Market Change in Volume by Brand 2019 – 2023 -----	101

7. THE WINE-RELATED AAB MARKET

Wine-Related Alternative Adult Beverages ----- 102

• Overview & Issues -----	102
---------------------------	-----

No-Alcohol Wine ----- 104

• Overview & Issues -----	104
• O.Vine Wine Grape Infused Water -----	105

Exhibits

7.23 U.S. Wine-Related AAB Market Volume by Brand 2018 – 2023 -----	107
7.24 U.S. Wine-Related AAB Market Share of Volume by Brand 2018 – 2023 -----	108
7.25 U.S. Wine-Related AAB Market Change in Volume by Brand 2019 – 2023 -----	109

TABLE OF CONTENTS

Chapter

8. THE CANNABIS-INFUSED BEVERAGE MARKET

Cannabis Beverages-----	110
• Overview & Issues -----	110
• Retail Dollar Sales-----	115
• Cann/Sweet Reason-----	118
• Wynk/Countdown -----	119
• Recess -----	120
• Daytrip-----	121
• Vybes -----	122
• Ceria -----	124
• Weller-----	125
• Sprig -----	126
• Kalo -----	128
• Wnder-----	129
• CBD Living-----	130
• Cloud Water -----	130
• Defy-----	131
• Mad Tasty -----	133
• Trip Hemp -----	133
• Sati-----	134
• Altitude -----	135
• Loki -----	136
• Cann-Ade -----	137
• Stay Cool -----	137
• Gym Weed-----	138
• Centr-----	139
• Harney & Sons -----	140
• Bimble -----	140
• TreTap -----	141
• Other CBD Beverage Brands -----	141
• Other THC Beverage Brands-----	145

Exhibit

8.26 U.S. Cannabis-Infused Beverage Market Retail Sales, Share and Change by Type 2016 – 2028 -----	157
--	-----

9. EMERGING ALTERNATIVE ADULT BEVERAGES

Non-FMB Hard Ready-to-Drink Tea -----	158
• Overview & Issues -----	158
• Noveltea -----	159
• Vrai -----	159

TABLE OF CONTENTS

Chapter

9. EMERGING ALTERNATIVE ADULT BEVERAGES (cont'd)

Hard Ready-to-Drink Coffee -----	161
• Overview & Issues -----	161
Hard Kombucha -----	162
• Overview & Issues -----	162
• Bambucha Organic Hard Kombucha -----	163
• Boochcraft -----	163
• Kombrewcha -----	164
• KYLA Hard Kombucha -----	165
• Unity Vibration -----	166
• Wild Tonic -----	166
On-Premise/Craft “Mocktails” -----	167
• Overview & Issues -----	167
“Healthier” Cocktails -----	170
• Overview & Issues -----	170

10. THE PROJECTED ALTERNATIVE ADULT BEVERAGE MARKET

Projected Alternative Adult Beverages -----	171
• Overview & Issues -----	171

Exhibits

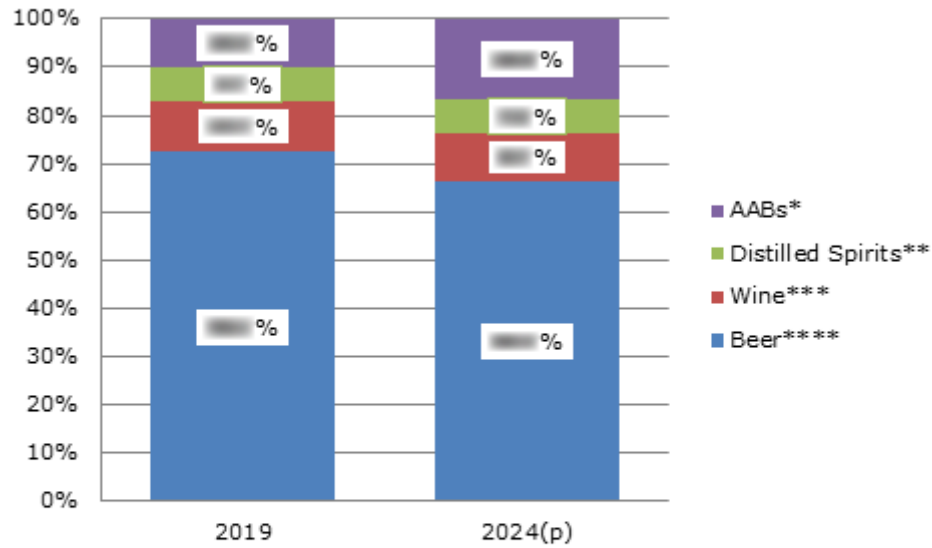
10.27 U.S. Alternative Adult Beverage Market Projected Volume by Segment 2023 – 2028 -----	174
10.28 U.S. Alternative Adult Beverage Market Share of Projected Volume by Segment 2023 – 2028 -----	175
10.29 U.S. Alternative Adult Beverage Market Change in Projected Volume by Segment 2023 – 2028 -----	176
10.30 U.S. Alternative Adult Beverage Market Projected Per Capita Consumption by Segment 2023 – 2028 -----	177
10.31 U.S. Alternative Adult Beverage Market Projected Volume by Sub-Segment 2023 – 2028 -----	178
10.32 U.S. Alternative Adult Beverage Market Share of Projected Volume by Sub-Segment 2023 – 2028 -----	179
10.33 U.S. Alternative Adult Beverage Market Change in Projected Volume by Sub-Segment 2023 – 2028 -----	180

Often those seeking alternatives to traditional adult beverages seem to want something that resembles the usual types but with little, or even no, actual alcohol. Thus, the AAB market also includes emerging segments beyond the four primary types outlined above.

- Some AAB consumers are searching for something closer to functional beverages (but with some alcohol). Ready-to-drink (RTD) teas long ago became a significant part of the liquid refreshment beverage market. Now some beverage makers are exploring “hard” RTD teas. These are not the iced tea-flavored “malternatives” that brewers like Boston Beer (Twisted Iced Tea) and Pabst Brewing (Not Your Mother’s Iced Tea) have been peddling for years (and are part of the FMB segment along with hard lemonades and the like) but rather tea-tinged “cocktails” that seem to bring the wellness and functional aura of RTD tea into the beverage alcohol arena.
- There’s a noticeable preference for lower-calorie/lighter alternatives to conventional beer.
- Healthier-seeming beverages always have an appeal, including in the alcohol space. (This is also a key driver of growth for CBD beverages.)
- Low- and no-alcohol “mocktails” offer complex, sophisticated-seeming drinks while allowing consumers to stay in control of themselves. (Many RTD “mocktails” originated in the United Kingdom, and while not all have entered the U.S. market, they could represent a precursor of things to come.)
- The “mocktail” trend can also be observed on-premise, with mixologists concocting various low- and no-alcohol craft cocktails. New Age Shirley Temples, as these might be considered, could appeal to underage consumers and pregnant women as well as those pursuing healthier options in general.
- The New Age connection can, in fact, become quite literal, with niche beverages associated with the wellness and functional beverage market moving into the pseudo-cocktail or very-low-alcohol cocktail sector. Kombucha, which as a fermented beverage can have some naturally occurring alcohol content (often considered a downside for those seeking no-alcohol drinks), has been embraced in some quarters as an appealing part of “healthier” cocktails. Packaged “hard” kombucha also emerged.

AABs GAIN SHARE OF ADULT BEVERAGE VOLUME

Share of Volume by Segment, 2019 - 2024(p)



(p) Preliminary

* Adult alternative beverages (AABs) include low- and-zero proof spirits, ready-to-drink (RTD) 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 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)
2019 – 2024(p)

Segment							CAGR
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24(p)	2019/24(p)
Beer-related	%	%	%	%	%	%	%
Hard Seltzers	%	%	%	%	%	%	%
All Other FMBs	%	%	%	%	%	%	%
Flavored Beers	%	%	%	%	%	%	%
Hard Cider	%	%	%	%	%	%	%
Wine-related	%	%	%	%	%	%	%
Wine Cocktails	%	%	%	%	%	%	%
Wine Coolers	%	%	%	%	%	%	%
Spirits-related	%	%	%	%	%	%	%
RTD Cocktails	%	%	%	%	%	%	%
Cannabis	%	%	%	%	%	%	%
CBD	%	%	%	%	%	%	%
THC	%	%	%	%	%	%	%
Subtotal	%	%	%	%	%	%	%
All Others*	%	%	%	%	%	%	%
TOTAL	%	%	%	%	%	%	%

(r) Revised; CAGR: Compound annual growth rate

(p) Preliminary

* Includes hard kombucha and hard coffee.

Source: Beverage Marketing Corporation