

ALTERNATIVE ADULT BEVERAGES IN THE U.S.

2025 EDITION (To be published August 2025. Data through 2024, selected preliminary 2025 figures and projections through 2029.) More than 175 pages, with text analysis and tables.

Market 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.

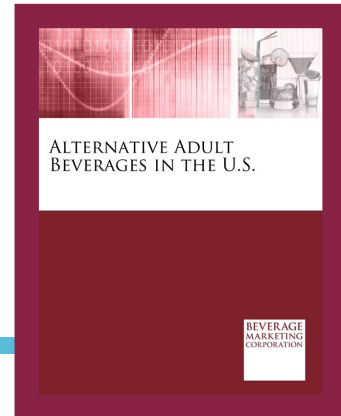
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HAVE QUESTIONS?

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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.

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NOTE: The 2025 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 2025 edition you receive will have updated data through 2024, preliminary 2025 figures and projections through 2029 where applicable.

Alternative Adult Beverages in the U.S. February 2025

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

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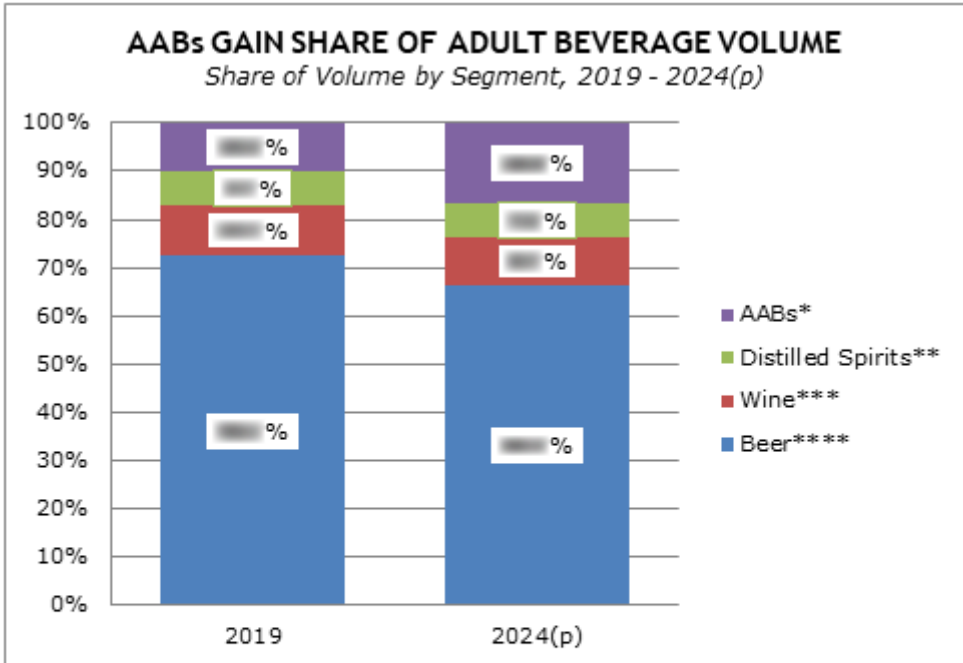
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Often those seeking alternatives to traditional adult beverages seem to want something that resembles the usual types but with little, or even no, actual alcohol. Thus, the AAB market also includes emerging segments beyond the four primary types outlined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



(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	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%
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) Preliminary

* Includes hard kombucha and hard coffee.

Source: Beverage Marketing Corporation