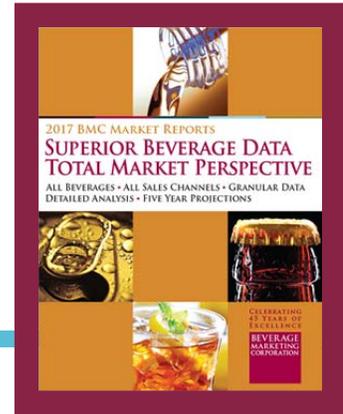


# BMC's U.S. BEER GUIDE

2017 EDITION (Published July 2017. Data through 2016. Market projections through 2021.) More than 165 pages, with extensive text analysis, graphs, charts and tables



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.

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

## AVAILABLE FORMAT & PRICING



Direct  
Download

\$995

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 key features of this report. 2

### TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 5

### SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's 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

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

## 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 to 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 2017* 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.

# BMC's U.S. Beer Guide 2017

July 2017

---



RESEARCH • DATA • CONSULTING

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

---

Copyright © 2017 Beverage Marketing Corporation of New York, 850 Third Avenue, New York, New York 10022, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

# Contents

## Table of Contents

---

**BMC's U.S. Beer Guide 2017**  
**TABLE OF CONTENTS**

---

TABLE OF CONTENTS .....	i
INTRODUCTION .....	viii

---

## Chapter

---

<b>1. THE U.S. BEER MARKET</b>	
The National Beer Market .....	1
• Overview.....	1
The Domestic and Imported Beer Markets.....	3
• Overview.....	3
<b>Exhibits</b>	
1.1 U.S. Beer Market Volume 1965 – 2021 .....	4
1.2 U.S. Beer Market Change in Volume 1976 – 2021 .....	5
1.3 U.S. Beer Market Volume by Segment Q1 2016 – 2017 .....	6
1.4 U.S. Beer Market Share of Volume by Segment Q1 2016 – 2017 .....	7
1.5 U.S. Beer Market Change in Volume by Segment Q1 2016/2017 .....	8
1.6 U.S. Beer Market Per Capita Consumption 1965 – 2021 .....	9
1.7 U.S. Beer Market Compound Annual Growth 1982 – 2021 .....	10
1.8 U.S. Beer Market Wholesale and Retail Dollar Sales 2005 – 2021 .....	11
1.9 U.S. Beer Market Domestic and Imported Volume, Share and Growth 1988 – 2021	12
<b>2. THE REGIONAL AND STATE BEER MARKETS</b>	
The Regional Beer Markets .....	13
• Overview.....	13
The Regional Imported Beer Markets .....	15
• Overview.....	15
<b>Exhibits</b>	
2.10 U.S. Beer Market Volume by Region 2011– 2021 .....	16
2.11 U.S. Beer Market Share of Volume by Region 2011 – 2021 .....	17
2.12 U.S. Beer Market Change in Volume by Region 2012 – 2021.....	18
2.13 U.S. Beer Market Per Capita Consumption by Region 2011 – 2021 .....	19
2.14 Southern Beer Market Volume by State 2011 – 2016.....	20
2.15 East Central Beer Market Volume by State 2011 – 2016 .....	21
2.16 Northeastern Beer Market Volume by State 2011 – 2016 .....	22
2.17 Pacific Beer Market Volume by State 2011 – 2016.....	23
2.18 Southwestern Beer Market Volume by State 2011 – 2016.....	24
2.19 West Central Beer Market Volume by State 2011 – 2016.....	25
2.20 Western Beer Market Volume by State 2011 – 2016.....	26
2.21 The Leading Beer Consumption States Volume 2011 – 2016.....	27
2.22 The Leading Beer Consumption States Share of Volume 2011 – 2016.....	28

**BMC's U.S. Beer Guide 2017**  
**TABLE OF CONTENTS**

---

**Chapter**

---

**2. THE REGIONAL AND STATE BEER MARKETS (cont'd)**

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

2.23	The Leading Beer Consumption States Change in Volume 2012 – 2016 -----	29
2.24	The Leading Beer Consumption States Per Capita Consumption 2011 – 2016 -----	30
2.25	U.S. Imported Beer Market Volume by Region 2011 – 2021 -----	31
2.26	U.S. Imported Beer Market Share of Volume by Region 2011 – 2021 -----	32
2.27	U.S. Imported Beer Market Change in Volume by Region 2012 – 2021 -----	33
2.28	U.S. Imported Beer Market Per Capita Consumption by Region 2011 – 2021 -----	34

**3. THE U.S. BEER MARKET CATEGORIES**

The U.S. Beer Market by Category -----	35
• Overview-----	35

***Exhibits***

3.29	U.S. Beer Market Volume by Category 2011 – 2021 -----	37
3.30	U.S. Beer Market Share of Volume by Category 2011 – 2021 -----	38
3.31	U.S. Beer Market Change in Volume by Category 2012 – 2021 -----	39
3.32	U.S. Light Beer Market Volume by Brand 2011 – 2016 -----	40
3.33	U.S. Light Beer Market Share of Volume by Brand 2011 – 2016 -----	41
3.34	U.S. Light Beer Market Change in Volume by Brand 2012 – 2016 -----	42
3.35	U.S. Imported Beer Market Volume by Brand 2011 – 2016 -----	43
3.36	U.S. Imported Beer Market Share of Volume by Brand 2011 – 2016 -----	44
3.37	U.S. Imported Beer Market Change in Volume by Brand 2012 – 2016 -----	45
3.38	U.S. Premium Beer Market Volume by Brand 2011 – 2016-----	46
3.39	U.S. Premium Beer Market Share of Volume by Brand 2011 – 2016-----	47
3.40	U.S. Premium Beer Market Change in Volume by Brand 2012 – 2016-----	48
3.41	U.S. Craft Beer Market Volume by Brand 2011 – 2016 -----	49
3.42	U.S. Craft Beer Market Share of Volume by Brand 2011 – 2016 -----	50
3.43	U.S. Craft Beer Market Change in Volume by Brand 2012 – 2016 -----	51
3.44	U.S. Value Beer Market Volume by Brand 2011 – 2016-----	52
3.45	U.S. Value Beer Market Share of Volume by Brand 2011 – 2016 -----	53
3.46	U.S. Value Beer Market Change in Volume by Brand 2012 – 2016-----	54
3.47	U.S. Flavored Malt Beverage Market Volume by Brand 2011 – 2016 -----	55
3.48	U.S. Flavored Malt Beverage Market Share of Volume by Brand 2011 – 2016 -----	56
3.49	U.S. Flavored Malt Beverage Market Change in Volume by Brand 2012 – 2016-----	57
3.50	U.S. Ice Beer Market Volume by Brand 2011 – 2016 -----	58
3.51	U.S. Ice Beer Market Share of Volume by Brand 2011 – 2016 -----	59
3.52	U.S. Ice Beer Market Change in Volume by Brand 2012 – 2016 -----	60
3.53	U.S. Superpremium Beer Market Volume by Brand 2011 – 2016 -----	61
3.54	U.S. Superpremium Beer Market Share of Volume by Brand 2011 – 2016 -----	62

BMC's U.S. Beer Guide 2017  
TABLE OF CONTENTS

Chapter

**3. THE U.S. BEER MARKET CATEGORIES (cont'd)**

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

3.55	U.S. Superpremium Beer Market Change in Volume by Brand 2012 – 2016 -----	63
3.56	U.S. Malt Liquor Market Volume by Brand 2011 – 2016 -----	64
3.57	U.S. Malt Liquor Market Share of Volume by Brand 2011 – 2016 -----	65
3.58	U.S. Malt Liquor Market Change in Volume by Brand 2012 – 2016 -----	66
3.59	U.S. Non-Alcohol Beer Market Volume by Brand 2011 – 2016 -----	67
3.60	U.S. Non-Alcohol Beer Market Share of Volume by Brand 2011 – 2016 -----	68
3.61	U.S. Non-Alcohol Beer Market Change in Volume by Brand 2012 – 2016 -----	69
3.62	U.S. Beer Market Price Categories Comparative Volumes 2011 – 2016-----	70
3.63	U.S. Beer Market Price Categories Comparative Volume Shares 2011 – 2016 -----	71
3.64	U.S. Beer Market Price Categories Comparative Growth 2012– 2016-----	72

**4. BEER IMPORTS AND EXPORTS**

The Imported Beer Market-----	73
• Overview-----	73
U.S. Beer Exports -----	74
• Overview-----	74

***Exhibits***

4.65	U.S. Imported Beer Market Total Volume and Value 1965 – 2016 -----	75
4.66	U.S. Imported Beer Market Volume by Country 2011 – 2016 -----	76
4.67	U.S. Imported Beer Market Share of Volume by Country 2011 – 2016 -----	77
4.68	U.S. Imported Beer Market Change in Volume by Country 2012 – 2016 -----	78
4.69	U.S. Imported Beer Market Dollar Value by Country 2011 – 2016 -----	79
4.70	U.S. Imported Beer Market Share of Dollar Value by Country 2011 – 2016-----	80
4.71	U.S. Imported Beer Market Change in Dollar Value by Country 2012 – 2016 -----	81
4.72	U.S. Imported Beer Market Dollars Per Barrel by Country 2011 – 2016 -----	82
4.73	U.S. Imported Beer Market Volume by Leading Regional Markets 2011 – 2016 ----	83
4.74	U.S. Imported Beer Market Share of Volume by Leading Regional Markets 2011 – 2016 -----	84
4.75	U.S. Imported Beer Market Change in Volume by Leading Regional Markets 2012 – 2016 -----	85
4.76	U.S. Beer Exports Volume by Country 2011 – 2016 -----	86
4.77	U.S. Beer Exports Share of Volume by Country 2011 – 2016 -----	87
4.78	U.S. Beer Exports Change in Volume by Country 2012 – 2016-----	88

**5. THE LEADING BEER COMPANIES AND THEIR BRANDS**

The Beer Companies -----	89
• Overview-----	89
• The Leading Brands -----	91

**BMC's U.S. Beer Guide 2017**  
**TABLE OF CONTENTS**

---

**Chapter**

---

**5. THE LEADING BEER COMPANIES AND THEIR BRANDS (cont'd)**

***Exhibits***

5.79	Leading Beer Companies Volume 2011 – 2016-----	92
5.80	Leading Beer Companies Share of Volume 2011 – 2016-----	93
5.81	Leading Beer Companies Change in Volume 2012 – 2016-----	94
5.82	The Top 15 Beer Brands Volume 2011 – 2016 -----	95
5.83	The Top 15 Beer Brands Share of Volume 2011 – 2016 -----	96
5.84	The Top 15 Beer Brands Change in Volume 2012 – 2016 -----	97
5.85	Anheuser-Busch InBev Volume by Brand 2011 – 2016 -----	98
5.86	Anheuser-Busch InBev Share of Volume by Brand 2011 – 2016 -----	100
5.87	Anheuser-Busch InBev Change in Volume by Brand 2012 – 2016 -----	102
5.88	MillerCoors Volume by Brand 2011 – 2016 -----	104
5.89	MillerCoors Share of Volume by Brand 2011 – 2016 -----	106
5.90	MillerCoors Change in Volume by Brand 2012 – 2016 -----	108
5.91	Constellation Brands Beer Division Volume by Brand 2011 – 2016 -----	110
5.92	Constellation Brands Beer Division Share of Volume by Brand 2011 – 2016 -----	111
5.93	Constellation Brands Beer Division Change in Volume by Brand 2012 – 2016 -----	112
5.94	Heineken USA Volume by Brand 2011 – 2016-----	113
5.95	Heineken USA Share of Volume by Brand 2011 – 2016-----	114
5.96	Heineken USA Change in Volume by Brand 2012 – 2016-----	115
5.97	Diageo Beer Company USA Volume by Brand 2011 – 2016 -----	116
5.98	Diageo Beer Company USA Share of Volume by Brand 2011 – 2016 -----	117
5.99	Diageo-Beer Company USA Change in Volume by Brand 2012 – 2016 -----	118

**6. PACKAGED AND DRAFT BEER IN THE U.S.**

Beer Packaging -----	119
• Overview-----	119

***Exhibits***

6.100	U.S. Beer Market Packaged and Draft Volume and Share 1975 – 2021-----	122
6.101	U.S. Beer Market Change in Packaged and Draft Volume 1980 – 2021-----	123
6.102	U.S. Beer Market Packaged Volume and Share by Container Type 1982 – 2021-----	124
6.103	U.S. Beer Market Change in Packaged Volume by Container Type 1983 – 2021-----	125
6.104	Regional Beer Markets Packaged and Draft Volume 2011 – 2021-----	126
6.105	Regional Beer Markets Share of Packaged and Draft Volume 2011 – 2021-----	127
6.106	Regional Beer Markets Change in Packaged and Draft Volume 2012 – 2021-----	128
6.107	The Leading States in Packaged Beer Volume 2011 – 2016-----	129
6.108	The Leading States in Draft Beer Volume 2011 – 2016-----	130
6.109	U.S. Imported Beer Market Packaged and Draft Volume and Share 1972 – 2021---	131
6.110	U.S. Imported Beer Market Packaged and Draft Volume Growth 1973 – 2021-----	132

BMC's U.S. Beer Guide 2017  
TABLE OF CONTENTS

Chapter

<b>6. PACKAGED AND DRAFT BEER IN THE U.S. (cont'd)</b>	
<i>Exhibits (cont'd)</i>	
6.111 U.S. Imported Beer Market Packaged Volume by Container Type 2011 – 2021 -----	133
6.112 U.S. Imported Beer Market Share of Packaged Volume by Container Type 2011 - 2021 -----	134
6.113 U.S. Imported Beer Market Change in Packaged Volume by Container Type 2012 – 2021 -----	135
6.114 U.S. Imported Beer Market Dollar Value by Container Type 2011 – 2021 -----	136
6.115 U.S. Imported Beer Market Share of Dollar Value by Container Type 2011 – 2021 -	137
6.116 U.S. Imported Beer Market Change in Dollar Value by Container Type 2012 – 2021 -----	138
<b>7. BEER INDUSTRY PRICING IN THE U.S.</b>	
Beer Pricing-----	139
• Consumer Prices -----	139
• Producer Prices-----	141
• Producer Prices by Package Type -----	143
<i>Exhibits</i>	
7.117 Consumer Price Indexes Beer and Ale vs. All Items Change 1975 – 2016-----	144
7.118 Producer Price Indexes Malt Beverages vs. All Items Change 1990 – 2016 -----	145
7.119 Producer Price Index Malt Beverages vs. All Commodities Change by Package Types 1991 – 2016-----	146
<b>8. BEER DISTRIBUTION IN THE U.S.</b>	
Beer Distribution -----	147
• Overview-----	147
• Volume by Distribution Channel-----	148
<i>Exhibits</i>	
8.120 U.S. Beer Market Estimated Volume by Channel 2011 – 2021 -----	152
8.121 U.S. Beer Market Estimated Share of Volume by Channel 2011 – 2021 -----	153
8.122 U.S. Beer Market Estimated Change in Volume by Channel 2012 – 2021 -----	154
<b>9. THE U.S. HARD CIDER MARKET</b>	
The National Hard Cider Market -----	155
• Overview-----	155
<i>Exhibits</i>	
9.123 U.S. Hard Cider Market Volume and Change 2010 – 2021 -----	157
9.124 U.S. Hard Cider Market Volume by Brand 2011 – 2016-----	158
9.125 U.S. Hard Cider Market Share of Volume by Brand 2011 – 2016-----	159
9.126 U.S. Hard Cider Market Change in Volume by Brand 2012 – 2016-----	160

BMC's U.S. Beer Guide 2017  
TABLE OF CONTENTS

Chapter

**10. BEER ADVERTISING IN THE U.S.**

Beer Marketing ----- 161

- Overview----- 161

Advertising Expenditures by Category ----- 163

- Overview----- 163

Advertising Expenditures by Media----- 164

- Overview----- 164

**Exhibits**

10.127 Domestic and Imported Beer Market Advertising Expenditures 1981 – 2016 ----- 166

10.128 U.S. Beer Market Advertising Expenditures by Category 2011 – 2016----- 167

10.129 U.S. Beer Market Share of Advertising Expenditures by Category 2011 – 2016 ---- 168

10.130 U.S. Beer Market Change in Advertising Expenditures by Category 2012 – 2016--- 169

10.131 Leading Beer Companies Advertising Expenditures 2011 – 2016 ----- 170

10.132 Leading Beer Companies Share of Advertising Expenditures 2011 – 2016 ----- 171

10.133 Leading Beer Companies Change in Advertising Expenditures 2012 – 2016----- 172

10.134 Leading Beer Companies Advertising Dollars Per Barrel 2011 – 2016 ----- 173

10.135 Leading Beer Brands Advertising Expenditures 2011 – 2016 ----- 174

10.136 Leading Beer Brands Share of Advertising Expenditures 2011 – 2016----- 175

10.137 Leading Beer Brands Change in Advertising Expenditures 2012 – 2016 ----- 176

10.138 Leading Beer Brands Advertising Dollars Per Barrel 2011 – 2016 ----- 177

10.139 U.S. Beer Market Advertising Expenditures by Media 2011 – 2016 ----- 178

10.140 U.S. Beer Market Share of Advertising Expenditures by Media 2011 – 2016 ----- 179

10.141 U.S. Beer Market Change in Advertising Expenditures by Media 2012 – 2016 ----- 180

**11. DEMOGRAPHICS OF THE U.S. BEER CONSUMER**

The Beer Consumer ----- 181

- Overview----- 181

**Exhibits**

11.142 Demographics of the Beer Consumer 2016 ----- 183

11.143 Demographics of the Budweiser Consumer 2016----- 184

11.144 Demographics of the Miller Lite Consumer 2016 ----- 185

11.145 Demographics of the Corona Extra Consumer 2016----- 186

11.146 Demographics of the Heineken Consumer 2016----- 187

11.147 Demographics of the Corona Light Consumer 2016 ----- 188

Appendix

U.S. Population by Region 1980 – 2016 ----- 189

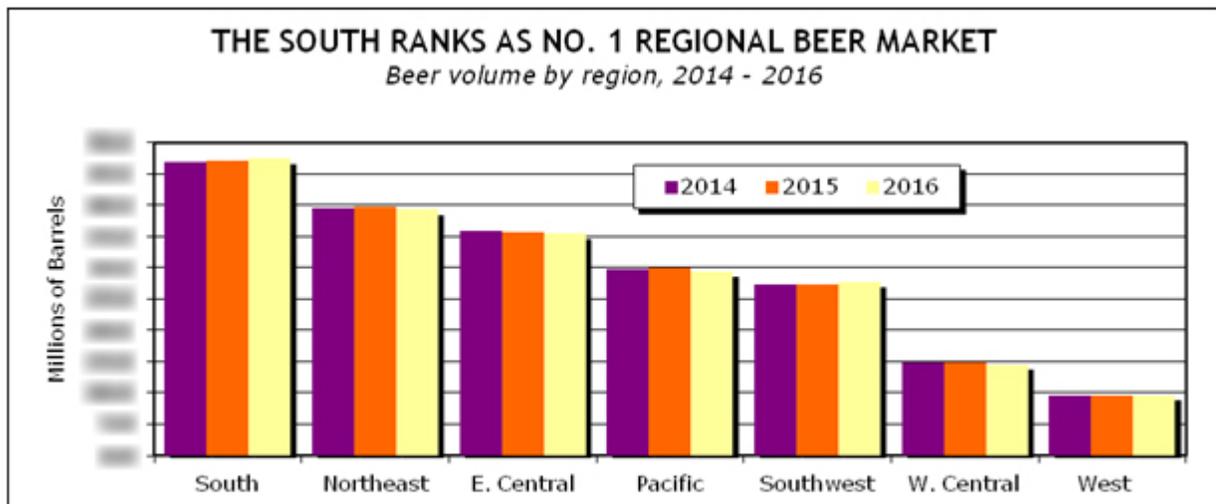
**U.S. BEER MARKET  
CHANGE IN VOLUME BY REGION  
2012 – 2021(P)**

Region	CAGR					
	2011/12	2012/13	2013/14	2014/15	2015/16	2016/21(P)
South	%	%	%	%	%	%
Northeast	%	%	%	%	%	%
East Central	%	%	%	%	%	%
Pacific	%	%	%	%	%	%
Southwest	%	%	%	%	%	%
West Central	%	%	%	%	%	%
West	%	%	%	%	%	%
<b>TOTAL</b>	%	%	%	%	%	%

(P) Projected

CAGR: Compound annual growth rate

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation

In terms of defining qualities (regardless of price), light beers dominate the American beer scene.

- Lower in calories (and, often, alcohol) than their regular counterparts, light beers have proven to be attractive across the entire price spectrum and with a multitude of different types of drinkers. Specialty brewers have entered the segment, and high-profile imported lights entered the market during the 2000s.
- In the second decade of the 21<sup>st</sup> century, however, light beer (or, more precisely, domestic light beer) tended to decline, resulting in a share loss. By 2016, its share, which had exceeded █% as recently as 2012, had receded to █%. While that was several points lower than its historical high, it was still █ points larger than the number-two beer category, imports (and some of that imported volume consisted of light beers like Corona Light and Heineken Light).
- Brewers may brew popular non-light beers, but large-scale success typically requires having at least one light beer in their portfolios.
- For the major brewers active in the United States, their primary light brands also stand as their biggest brands overall, and they all have multiple other light beer brands as well.