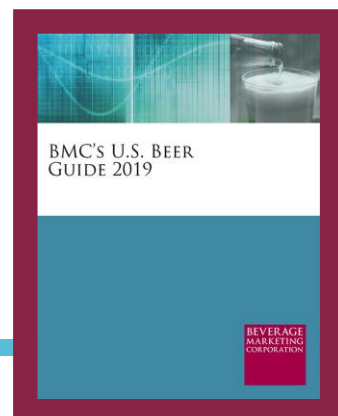


BMC's U.S. BEER GUIDE

2019 EDITION (Published July 2019. Data through 2018. Market projections through 2023.) PowerPoint presentation features more than 75 slides, with extensive analysis, graphs, charts and tables + over 165 Excel exhibits offering even greater detail!



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. **New for 2019:** Key trends now presented in a colorful PowerPoint presentation to make insights come alive. Plus, you get more than 165 Excel exhibits providing in-depth data for a deeper dive on aspects covered in the PowerPoint slides and much more.

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**HAVE
QUESTIONS?**

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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 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 2019 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. **New for 2019: Now covers more brands than ever!**

Comprehensive data coverage of imported and domestic beers of all all price tiers (premium, superpremium, value, etc), craft beers, ciders, FMBs, ice beers, light beers, IPAs, radlers etc. Data provided for the following companies and brands:

- | | | |
|--------------------------------|-----------------------------------|------------------------------|
| • AB InBev | • Total Beverage Solution | • Virtue Cider Portfolio |
| • Miller/Coors | • Sapporo | • Rekorderlig |
| • Constellation Beers | • Oskar Blues Brewery | • Woodpecker Cider |
| • Heineken | • Paulaner HP USA | • Fox Barrel |
| • Pabst Brewing | • Joose | • Johnny Appleseed |
| • Boston Beer | • Geloso Beverage Group | • Michelob Ultra Light Cider |
| • D. G. Yuengling & Son Inc. | • Warsteiner Importers | • Yuengling Traditional |
| • Diageo Beer Company USA | • Vermont Hard Cider Company, LLC | • Samuel Adams Boston Lager |
| • Mikes Hard Lemonade Co. | • St. Killian Importing | • Jacob Leinenkugel |
| • FIFCO USA | • Angry Orchard | • Sierra Nevada Pale Ale |
| • Sierra Nevada | • Strongbow Cider | • Goose Island |
| • Lagunitas Brewing Co. | • Crispin | • Shiner |
| • New Belgium Brewing | • Bold Rock | • Lagunitas IPA |
| • Craft Brewers Alliance | • Woodchuck Hard Cider | • Yuengling Light |
| • The Gambrinus Company | • Stella Artois Cidre | • Fat Tire |
| • Spoetzl Brewery | • Magners | • Firestone Walker DBA |
| • Firestone Walker Brewing Co. | • Smith & Forge | • All Day IPA |
| • Bell's Brewery | • Square Mile | • Torpedo IPA |
| | • Blake's Hard | • Saranac Portfolio |
| | • Somersby | • Bell's Two Hearted |
| | • Hornsby | • Rebel |
| | • Wyder's | |

- Widmer Hefeweizen
- 60 Minute IPA
- Longboard Island
- Henry Weinhard
- Samuel Adams Light
- Shipyard Brewing Company
- Shiner Light
- Ranger IPA
- Omission
- Brooklyn
- Dale's Pale
- Stone India Pale Ale
- Anchor Steam
- Rampant Imperial
- Alaskan Amber
- Sweetwater 420 Extra Pale
- Harpoon IPA
- Lagunitas Seasonals
- Bell's Seasonals
- Boulevard
- Redhook Long Hammer IPA
- JW Dundee's Honey Brown
- Mirror Pond Pale Ale
- Session
- Black Butte Porter
- 90 Minute IPA
- Magic Hat #9
- Ninkasi Domination IPA
- Sierra Nevada Celebration Ale
- Snapshot Wheat
- BridgePort IPA
- Arrogant Bastard
- Snow Day
- Pyramid Haywire
- Abita Amber
- Kilt Lifter
- Blue Point Toasted
- Inversion IPA
- Lost Coast Great White
- MacTarnahan's Brewing Company
- Sea Dog Brewing Company
- Somersault
- Pyramid IPA
- Rogue Dead Guy
- The Immortal IPA
- Full Sail Amber
- 1554 Brussels
- Redhook ESB
- Pyramid Apricot
- Trippel
- Sculpin IPA
- Sierra Nevada Hop Hunter IPA
- Broken Halo IPA
- Mighty Arrow
- Sunshine Wheat
- Dirtwolf Double IPA
- Drifter
- Sierra Nevada Noon
- Traveler
- Dixie
- Abbey
- Rolle Bolle
- Slow Ride Session IPA
- Blue Paddle
- Nectar Ales
- Mothership Wit
- Southampton Publick House
- Celis
- Other Mike's Hard
- Smirnoff Ice (includes all extensions)
- Budweiser & Bud Light Chelada
- Twisted Tea
- White Claw
- Bon & Viv Spiked Seltzer
- Four Loko
- Modelo Especial Chelada
- Seagram's Escapes
- Bud Light Lime-a-Rita
- Mike's Hard Lemonade
- Truly Spiked & Sparkling
- Bud Light Lime Straw-Ber-Rita
- Henry's Hard
- Smirnoff Spiked
- Mike's Harder Cranberry
- Joose
- Not Your Fathers
- Sparks
- Clubtails
- Mike's Harder Black Cherry
- Bartles & Jaymes
- Natty Rush
- Bud Light Lime Mang-O-Rita
- Seagram's Smooth
- Bud Light Lime Water-melon-Rita
- Mike's Harder Punch Mango Punch
- Palm Breeze
- Jack Daniels Country Cocktails
- Mike's Hard Light
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- Bud Light Lime Lemon-Ade-Rita
- Best Damn
- Blast by Colt 45
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- Margaritaville
- Pura Still
- Island Squeeze
- Coney Island
- Moskato Life
- Loko Rita
- Captain Morgan Parrot Bay Frozen Portfolio
- Coco Breve
- Bud Light Lime Raz-Ber-Rita
- Bud Light Lime Cran-Brrr-Rita
- Bud Light MixxTail
- Dos-A-Rita
- Tilt
- Jeremiah Weed (Lightning Lemonade, Roadhouse Tea & Spiked Cola)
- Amstel Radler
- ULTRA 19th Hole Light Tea & Lemonade
- Bacardi Silver (Incl. flavors, O3 & Raz)
- Natural Ice
- Milwaukee's Best Ice
- Icehouse (includes Edge)
- Bud Ice

- Busch Ice
- Keystone Ice
- Corona Extra
- Modelo Especial
- Heineken
- Stella Artois
- Dos Equis
- Guinness
- Corona Light
- Corona Familiar
- Tecate
- Pacifico
- Labatt Blue
- Corona Premier
- Tecate Light
- Labatt Blue Light
- Modelo Negra
- Heineken Premium Light
- Victoria
- Newcastle Brown
- Peroni
- Amstel Light
- Sapporo
- Sol
- Carta Blanca
- Red Stripe
- Molson Canadian
- Estrella Jalisco
- Smithwick's
- Warsteiner
- Asahi Super Dry
- Tsingtao
- Grolsch
- Pilsner Urquell
- Hacker-Pschorr
- Indio
- Molson Ice
- Paulaner
- Weiherstephaner
- St. Pauli Girl
- Moosehead
- Hoegaarden
- Tecate Michelada
- Trumer Pils
- Bohemia
- Kokanee
- Presidente
- Labatt Blue Light Lime
- Boddington's
- Harp
- Molson Golden
- Leffe
- Desperados

- Montejo
- Carlsberg
- Kronenbourg 1664
- Warsteiner Premium Dunkel
- Moretti
- Prestige
- Red Stripe Light
- Moosehead Light
- St. Pauli Girl Dark
- Lowenbrau
- Heineken Special Dark
- Moosehead Lime Light
- Lindemans
- Greene King
- Sapporo Reserve
- Sapporo Light
- Molson Canadian Light
- Elephant
- O'Hara's
- Brasserie dupont
- Fuller's
- Lefebvre
- Xiugu
- Molson Export
- Krusovice
- Old Vienna
- Coopers
- Tetley's English
- Yebisu
- Double Diamond
- Affligem
- Fruli Strawberry Beer
- Banks
- Tennents
- Day of the Dead
- Saigon
- Czech Rebel
- Godfather
- Modelo Light
- Brasserie dubuisson
- Fischer
- Bud Light
- Coors Light
- Miller Lite
- Michelob Ultra (incl. flavors)
- Natural Light
- Busch Light
- Keystone Light
- Bud Light Lime

- Milwaukee's Best Light
- Bud Light Platinum
- SELECT 55
- Bud Light Orange
- Bud Select
- Michelob Light
- Miller 64
- Miller High Life Light
- Michelob Ultra Pure Gold
- Michelob Golden Draft Light
- Old Milwaukee Light
- Miller Genuine Draft Light
- Lone Star Light
- Genny Light
- Rock Green Light
- Michelob Ultra Amber
- Schaefer Light
- Keystone Light Lime
- Two Hats
- Kirin Light
- Old Style Light
- Beck's Premier Light
- Southpaw Light
- Coors Light Citrus Radler
- Bud Light Golden Wheat
- Miller Chill
- Bud Ice Light
- Pabst Light
- Schlitz Light
- Stroh's Light
- Steel Reserve
- King Cobra
- Colt 45
- Olde English 800
- Mickey's
- Hurricane
- Schlitz Malt
- Magnum
- St. Ides
- Silver Thunder
- Country Club
- Red Bull Malt Liquor

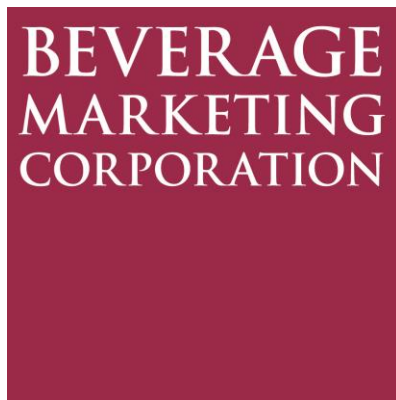


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BMC's U.S. Beer Guide 2019

July 2019



RESEARCH • DATA • CONSULTING

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U.S. BEER MARKET
CHANGE IN VOLUME BY CATEGORY
2013 – 2023(P)

Categories	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	5-Year CAGR 2018/23(P)
Cider	%	%	%	%	%	%	%
Craft	%	%	%	%	%	%	%
Flavored Malt Beverages	%	%	%	%	%	%	%
Ice	%	%	%	%	%	%	%
Import	%	%	%	%	%	%	%
Light	%	%	%	%	%	%	%
Malt Liquor	%	%	%	%	%	%	%
Non-Alcohol	%	%	%	%	%	%	%
Premium	%	%	%	%	%	%	%
Superpremium	%	%	%	%	%	%	%
Value	%	%	%	%	%	%	%
TOTAL*	%	%	%	%	%	%	%

(P) Projected; CAGR: Compound annual growth rate

* Excludes exports and cider

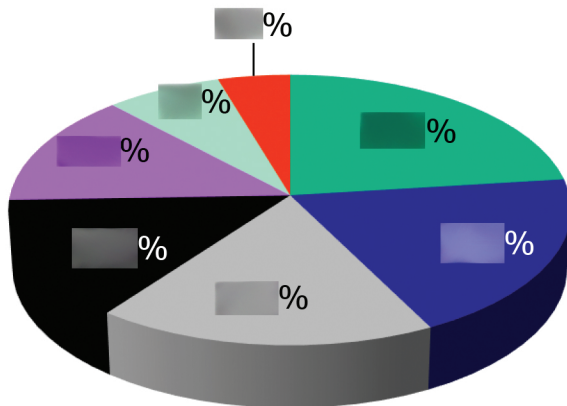
Source: Beverage Marketing Corporation

From 2012 to 2018, shares of volume by region didn't change for any region by more than percentage points, resulting in regional rankings remaining the same

U.S. Beer Market
Share of Volume by Region

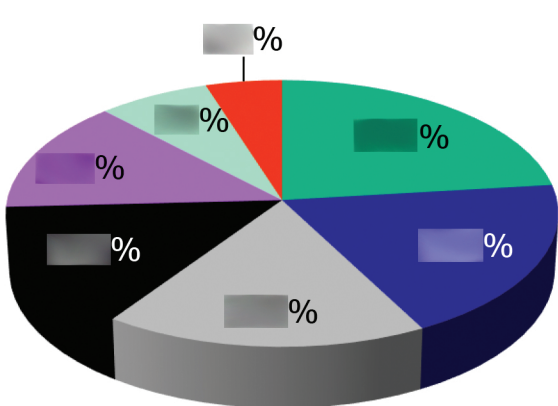
2012

2018



- South
- Northeast
- East Central
- Pacific
- Southwest
- West Central
- West

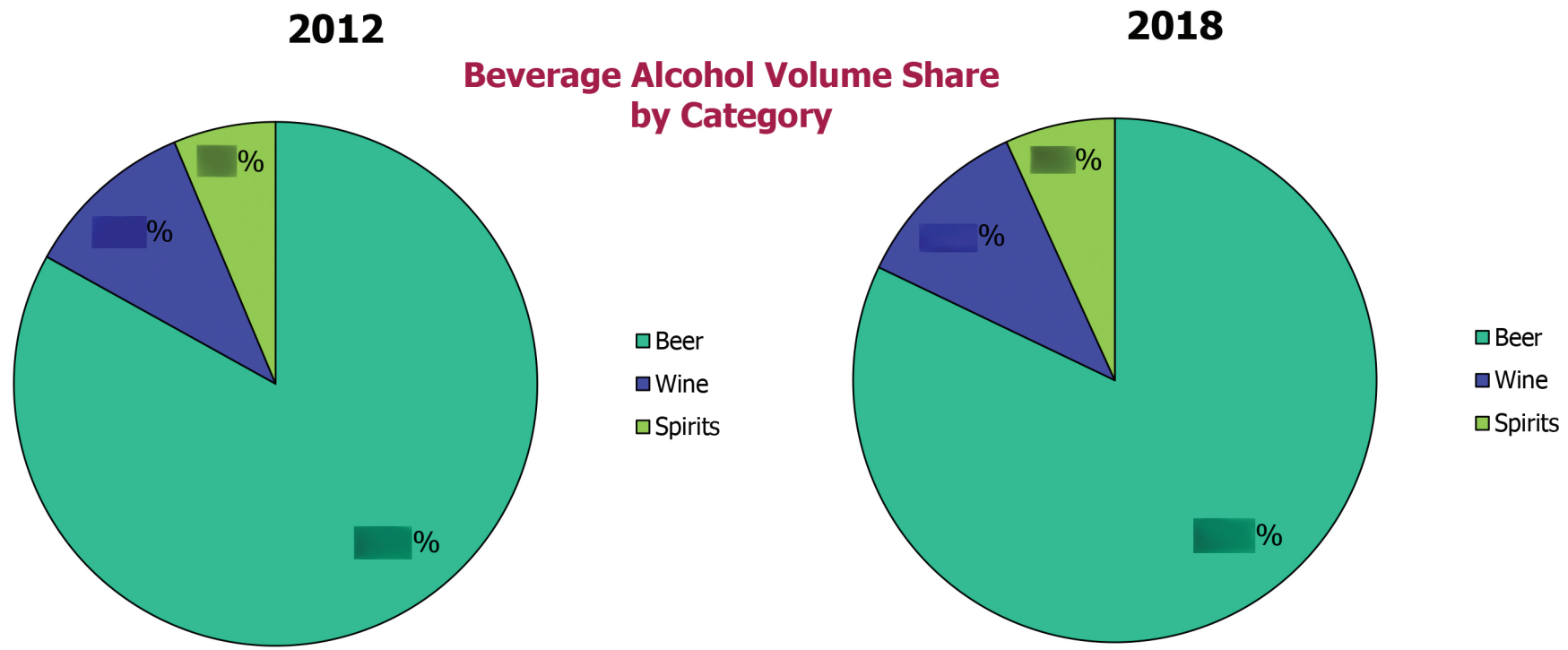
million
beer barrels



- South
- Northeast
- East Central
- Pacific
- Southwest
- West Central
- West

million
beer barrels

With respect to overall beverage alcohol volume, wine and spirits both gained █ share points, at the expense of the beer category



Source: Beverage Marketing Corporation

