

# BMC's U.S. BEER GUIDE

**2020 EDITION** (To be published December 2020. Data through 2019. Market projections through 2024.) PowerPoint presentation features more than 75 slides, with extensive analysis, graphs, charts and tables + over 165 Excel exhibits offering even greater detail!



**F**rom 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. Key trends are 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. Includes discussion of impact of Covid-19 pandemic.

## AVAILABLE FORMAT & PRICING



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**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

**Optional Service – Access Insight Support** – Want to know more? This optional service provides up to two hours access to a category expert to discuss ideas and information contained in your *Guide*. Ask questions, get added perspective, clarify methodology and basically "pick our analyst's brain" for segment, company and brand insight. + \$350 (Available only with Guidebook purchase)

How it works: Our experts possess a wealth of top-of-mind information. Tap into it with **Access Insight**. We'll set up one or more calls at a mutually convenient time(s) to help you get your questions answered and make the information contained in your Guidebook come to life.

**Please note:** Access Insight Support does not include custom research or data development and is limited to discussion of an individual Guidebook topic (for example, either wine, beer or spirits).

### 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 2020* 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.

*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 was provided for the following companies and brands in the 2019 report. Coverage may differ slightly in the 2020 edition:*

- AB InBev
- Miller/Coors
- Constellation Beers
- Heineken
- Pabst Brewing
- Boston Beer
- D. G. Yuengling & Son Inc.
- Diageo Beer Company USA
- Mikes Hard Lemonade Co.
- FIFCO USA
- Sierra Nevada
- Lagunitas Brewing Co.
- New Belgium Brewing
- Craft Brewers Alliance
- The Gambrinus Company
- Spoetzl Brewery
- Firestone Walker Brewing Co.
- Bell's Brewery
- Total Beverage Solution
- Sapporo
- Oskar Blues Brewery
- Paulaner HP USA
- Joose
- Geloso Beverage Group
- Warsteiner Importers
- Vermont Hard Cider Company, LLC
- St. Killian Importing
- Angry Orchard
- Strongbow Cider
- Crispin
- Bold Rock

- Woodchuck Hard Cider
- Stella Artois Cidre
- Magners
- Smith & Forge
- Square Mile
- Blake's Hard
- Somersby
- Hornsby
- Wyder's
- Virtue Cider Portfolio
- Rekorderlig
- Woodpecker Cider
- Fox Barrel
- Johnny Appleseed
- Michelob Ultra Light Cider
- Yuengling Traditional
- Samuel Adams Boston Lager
- Jacob Leinenkugel
- Sierra Nevada Pale Ale
- Goose Island
- Shiner
- Lagunitas IPA
- Yuengling Light
- Fat Tire
- Firestone Walker DBA
- All Day IPA
- Torpedo IPA
- Saranac Portfolio
- Bell's Two Hearted
- Rebel
- 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 Nooner
- 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
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- Bartles & Jaymes
- Natty Rush
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- Best Damn
- Blast by Colt 45
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- Pura Still
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- Moskato Life
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- 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
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- Grolsch
- Pilsner Urquell
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- Indio
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- Paulaner
- Weihenstephaner
- 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
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- Sapporo Light
- Molson Canadian Light
- Elephant
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- Lefebvre
- Xiugu
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- Krusovice
- Old Vienna
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- 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
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- Beck's Premier Light
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Radler
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Wheat
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- 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



# BMC's U.S. Beer Guide



**NOTE:** The 2020 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 2020 edition you receive will have updated data through 2019 and projections through 2024 where applicable.

# BMC's U.S. Beer Guide 2019

July 2019

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

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

(P) Projected; CAGR: Compound annual growth rate

\* Excludes exports and cider

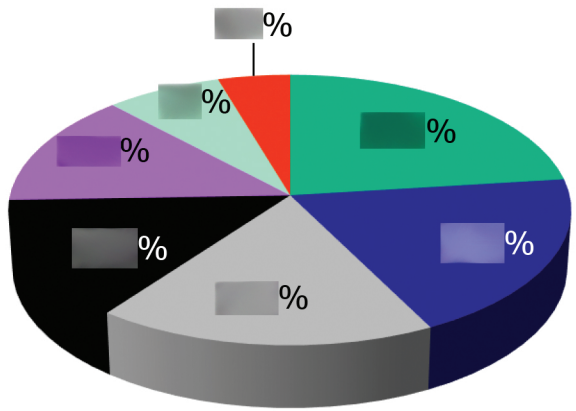
Source: Beverage Marketing Corporation

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

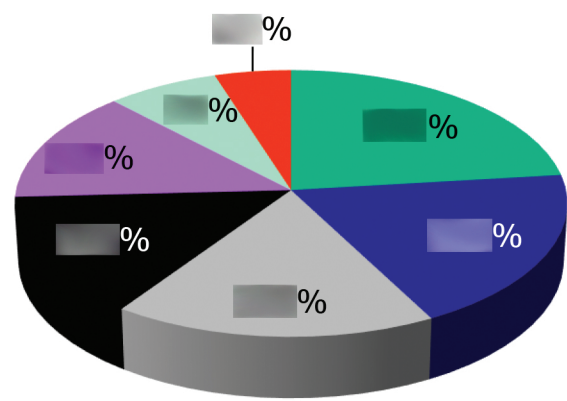
U.S. Beer Market Share of Volume by Region

2012

2018



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



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

million beer barrels

million beer barrels

Source: Beverage Marketing Corporation

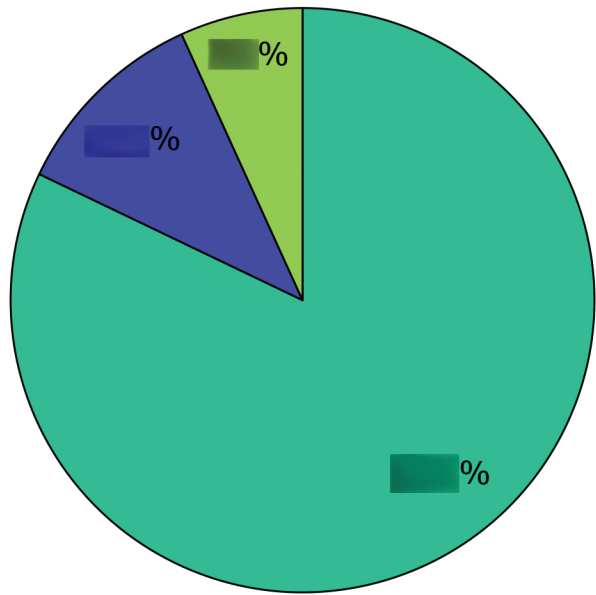
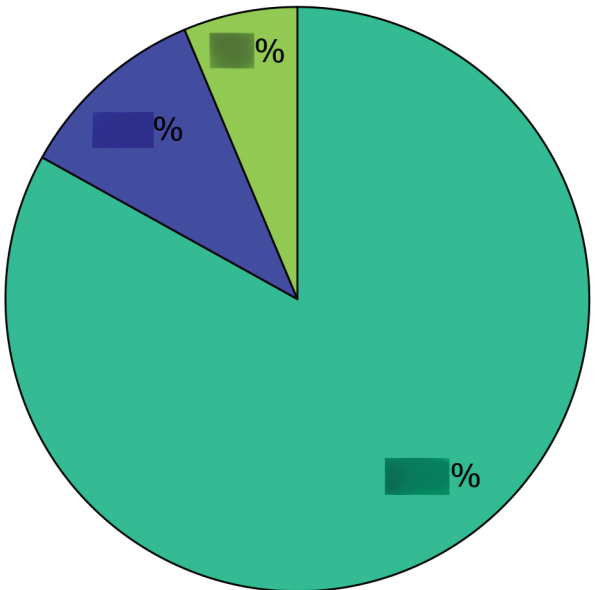


With respect to overall beverage alcohol volume, wine and spirits both gained [redacted] share points, at the expense of the beer category

2012

2018

Beverage Alcohol Volume Share by Category



- Beer
- Wine
- Spirits

- Beer
- Wine
- Spirits

Source: Beverage Marketing Corporation

