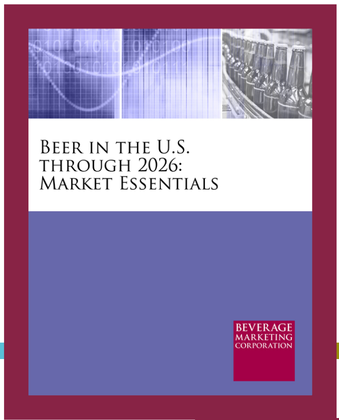
Beer in the U.S. through 2026: Market Essentials

2022 Edition (To be published July 2022. Data through 2021. Market projections through 2026.) More than 170 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



This comprehensive market research report on the largest beverage alcohol segment examines trends and top companies' strategies. It provides up-to-date statistics on key sub-segment trends, innovation transforming the category, leading brands, packaging and channels of distribution. It also offers data on regional markets, demographics, advertising, five-year growth projections and more.

The report presents the data in Excel spreadsheets, which it supplements with a concise executive summary highlighting key developments including the impact of the coronavirus pandemic as well as a detailed discussion of the leading beer companies.

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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*

Inside:

Have Questions?

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The answers you need

Beer in the U.S. through 2026: Market Essentials is the culmination of an extensive body of industry research conducted each year by Beverage Marketing Corporation. This report provides in-depth market data, shedding light on various aspects of the beer market, enabling users to gain insight into this huge and multi-faceted industry and its challenges. Questions answered in this report include:

- What are the growth prospects for regular domestic, light and imported beer in the United States?
- How did flavored malt beverages (FMBs), including hard seltzer, perform?
- How many gallons of beer did U.S. residents consume in 2021, and how did that differ from previous years? Which U.S. regions were strongest?
- Which brands and segments grew in 2021 and which did not?
- Which segments of the market will gain share by 2026?
- How did developments in the craft beer market compare with those of large, traditional national brands?
- Which are the leading distribution points for beer and how have market share figures changed in the past five years? What will the next five years likely bring in terms of distribution?
- What are the prospects for a turnaround in beer by 2026?

This U.S. Beer report features

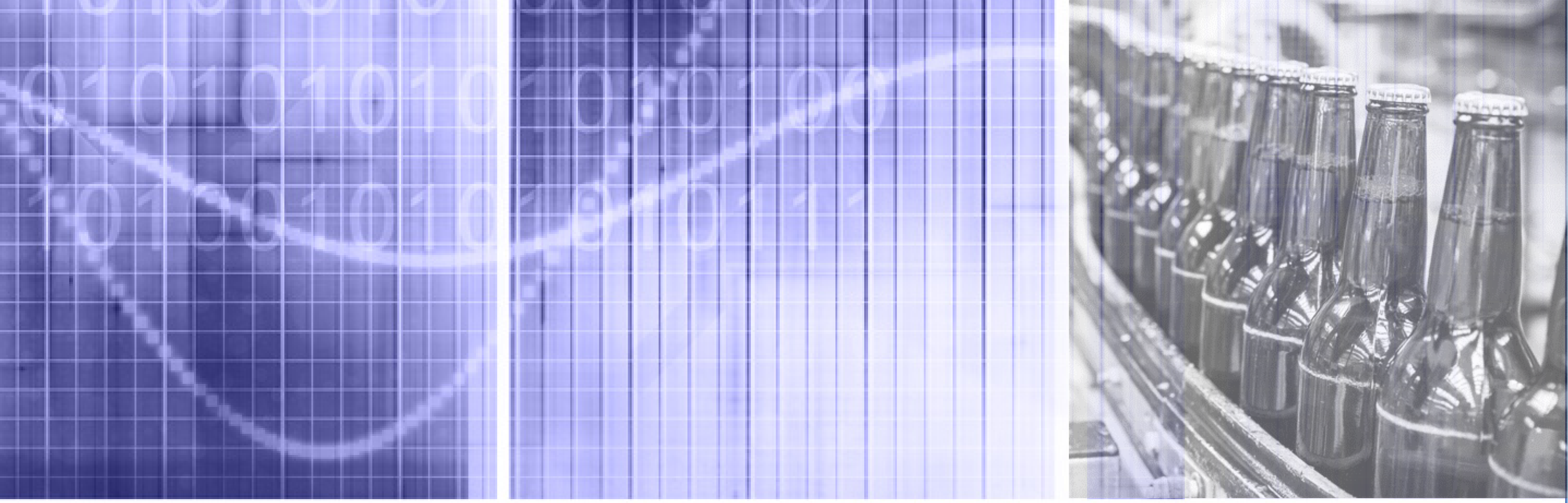
The report provides essential information on category volume, retail dollar and wholesale dollar sales, and per capita consumption figures. BMC's research provides an in-depth look at the leading companies and brands in the category. Multiple facets of the beer market, including regional data, volume by package type as well as volume by distribution channel, are covered in this industry report.

Advertising expenditures are broken down by 18 media types and demographic data are included, along with statistics regarding the craft and FMB segments. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users of this data-driven market research report get a thorough understanding of all aspects of the beer market including:

- A look at the all-sales-channel-inclusive historical and current statistics of the beer market.
- Data comparing packaged versus draft volume.
- Volume, share and growth of the overall beer marketplace as well as its various segments, including domestic light, regular, and super-premium; FMBs, including hard seltzer; craft; malt liquor and more.
- Detailed sales statistics for the leading companies and brands. Coverage includes brands offered by Anheuser-Busch InBev, Molson Coors Beverage Company, Constellation Brands Beer Division, Heineken USA, Boston Beer, D.G. Yuengling & Son, Diageo Beer Company, Sierra Nevada and New Belgium. Data include volume, growth and market share statistics for key companies and brands.
- Data by segment.

- Beer volume by packaging type and distribution channel.
- Advertising expenditures of the leading beer companies and brands and a look at category spending by media type (including Internet and Hispanic-targeted advertising).
- An understanding of the share of volume sold through key on-and-off channel outlets.
- Demographic profiles comparing consumers of key beer brands.
- Five-year projections for the beer market and its segments. Includes compound annual growth rates (CAGRs) through 2026 for packaged and draft beer, regional and state volume, distribution channels as well as national brand as well as craft beer volume.

As marketers shift their strategies and innovate to meet challenges brought on by changing consumer trends, beer will continue to be a segment to watch, especially with the surge in FMB volume fueled by hard seltzer brands. Beverage Marketing Corporation's report provides the reliable historical, current and projected data required to take advantage of opportunities for growth for those within, or competing against, beer.



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BEVERAGE
MARKETING
CORPORATION

NOTE: The 2022 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 2022 edition you receive will have updated data through 2021 and projections through 2026 where applicable.

Beer in the U.S. through 2025: Market Essentials

August 2021

BEVERAGE MARKETING CORPORATION

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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While with any luck beer won't see another year like 2020, the contours of the beer landscape could see significant changes in the years ahead.

- Light beer's fall from favor looks unlikely to be a temporary aberration. The declines in volume that have characterized the segment look likely to continue, meaning further share loss for light beer between 2020 and 2025.
- Many of the most popular hard seltzers have some of light beer's qualities – fairly low calories (often around 100 per 12-ounce serving) and low alcohol by volume (frequently about 5%). Consequently, light beer's projected volume and share loss is at least partly related to the rise of hard seltzers, which have the added feature of a wide range of (usually) fruit flavors.
- While FMBs are unlikely to sustain the sort of growth recorded in 2020, they are poised to remain the fastest growing segment of the U.S. beer business for the foreseeable future. As a result, FMBs could grow to become the second largest beer type – ahead of both craft beer and imported beer, both of which had larger shares of volume than FMBs as of 2020.
- While **Beverage Marketing** does expect imports and craft beers to see growth again in the years ahead, neither segment is likely to see the sort of muscular growth that characterized them in their respective heydays. From 2020 to 2025, imports are likely to see a compound annual growth rate (CAGR) of less than 1%, while craft beer's projected five-year CAGR is only slightly higher than 1%.
- Imported beer's future depends on a variety of factors, not all of them related to imported brands' diminishing in consumers' regard. Some of it has to do with the simple fact that some brewers, such as Diageo Beer Company, began producing some of what had been imported beers on U.S. soil. However, there are some signs that the badge value of imports has lessened over time, and consumers appear less concerned with the provenance of the beer they drink.
- The latter factor also affects craft beer, as consumers become less inclined to distinguish between craft and non-craft beer (which can become more difficult to do in any case, as many formerly independent beer makers are acquired by non-craft beer makers and lose the craft label, if precisely applied). While consumers may perceive no change in their favorite brands, recent deals such as Heineken buying Lagunitas and Anheuser-Busch InBev absorbing Craft Brew Alliance do have implications for beer segment classifications.

Exhibit 2.13

U.S. BEER MARKET
SHARE OF VOLUME BY REGION
2015 – 2025(P)

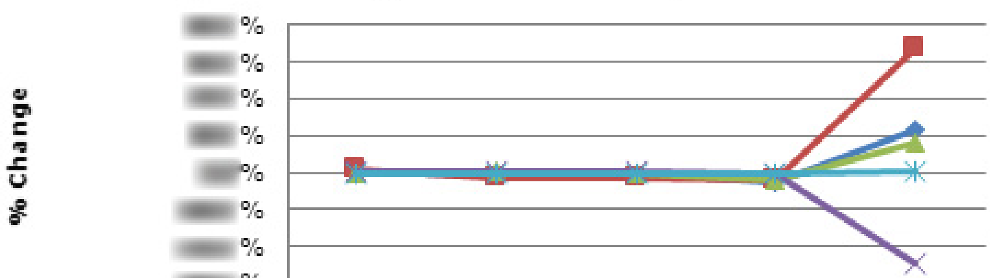
Region	2015	2016	2017	2018	2019	2020	2025(P)
South	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Northeast	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
East Central	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Pacific	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Southwest	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
West Central	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
West	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

(P) Projected

Source: Beverage Marketing Corporation

PANDEMIC ALTERS BEER DISTRIBUTION PATTERN

Change in Volume by Distribution Channel, 2016 - 2020



	2015/16	2016/17	2017/18	2018/19	2019/20
Supermarkets	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Warehouse/Club	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
C-Stores	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
On-Premise	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Total Beer	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

Source: Beverage Marketing Corporation

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11. THE U.S. BEER PROJECTIONS (cont'd)

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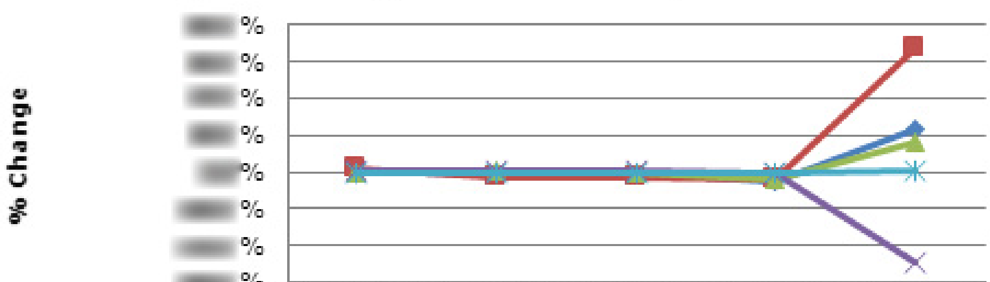
Southwest	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
West Central	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
West	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

(P) Projected

Source: Beverage Marketing Corporation

PANDEMIC ALTERS BEER DISTRIBUTION PATTERN
Change in Volume by Distribution Channel, 2016 - 2020



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