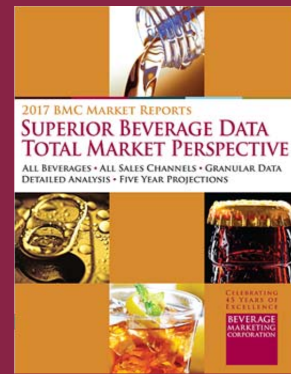
U.S. CRAFT BEER THROUGH 2021

2017 EDITION (Published October 2017. Data through 2016. Market projections through 2021.) More than 225 pages, with extensive text analysis and numerous graphs, charts and tables



A dynamic segment of the beer business receives a close examination in this report from Beverage Marketing Corporation. Situating craft beer in the context of the overall beer market, this market report analyzes the growth drivers and explains the trends. It offers data on regional markets, packaging and volume figures for the leading craft beer brands and microbreweries. The report also features advertising and demographic data and more.

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INSIDE:

HAVE QUESTIONS?

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The answers you need

- What trends are driving the fast growth of the U.S. craft beer market?
- How many gallons of craft beer per person were consumed in 2016, and how is this likely to change in the future?
- Which is the biggest regional craft beer market?
- How did the leading specialty beer companies such as Boston Beer, Sierra Nevada, New Belgium, Bell's Brewery and Craft Brew Alliance perform?
- Which distribution channel grew the fastest in 2016?
- How many specialty brewers are active in the United States, and how has this changed?

This report features

This report addresses industry developments, insights and issues of interest to beer marketers, advertising executives, industry suppliers, financial analysts and anyone else with a special interest in the beer market. It contains:

- An overview of the national and regional beer markets, including volume, per capita consumption and growth for all beer and craft beer.
- Discussion of the leading states in terms of volume and per capita consumption.
- Discussion and data breakdown of the packaged & draft craft beer markets.
- Current volume statistics for the leading craft companies including D.G. Yuengling & Son, Boston Beer, Sierra Nevada, New Belgium, Bell's Brewery, Craft Brew Alliance and more.
- Data for the top 60 microbreweries and the top 60 U.S. brewpubs – more than ever before!
- A look at packaged and draft beer trends nationally, regionally and by state.
- A look at beer pricing at the producer and consumer levels.
- A breakdown of the beer and craft beer markets by distribution channel.
- Analysis of advertising expenditures, detailed by company, brand and media.
- Comparisons of consumer demographics for all beer and craft beer.
- Projections for the future of the craft beer industry through 2021.

U.S. Craft Beer through 2021

October 2017

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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Where beer is intended to be sold largely determines the packaging mix.

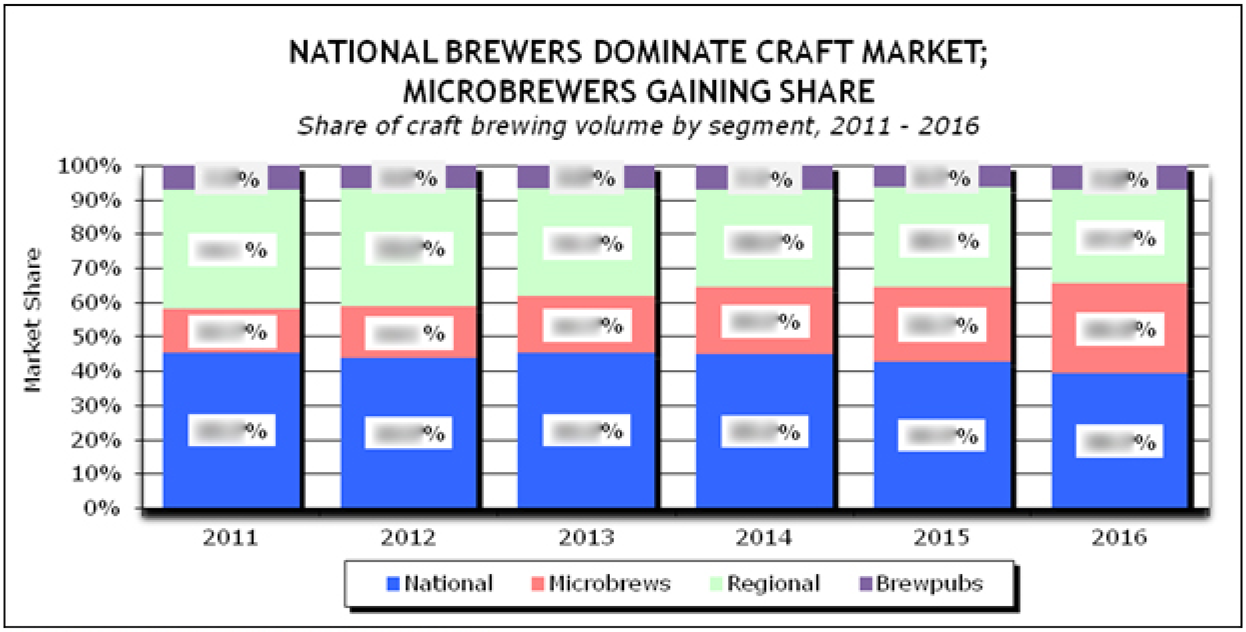
- Draft beer is necessarily sold on-premise in restaurants and bars.
- Packaged beer is sold in all venues, including on-premise venues and off-premise retail outlets such as supermarkets, convenience stores and package stores.

Although imported beer brands depend on an on-premise presence, a small proportion of imported beer than beer generally appears on tap.

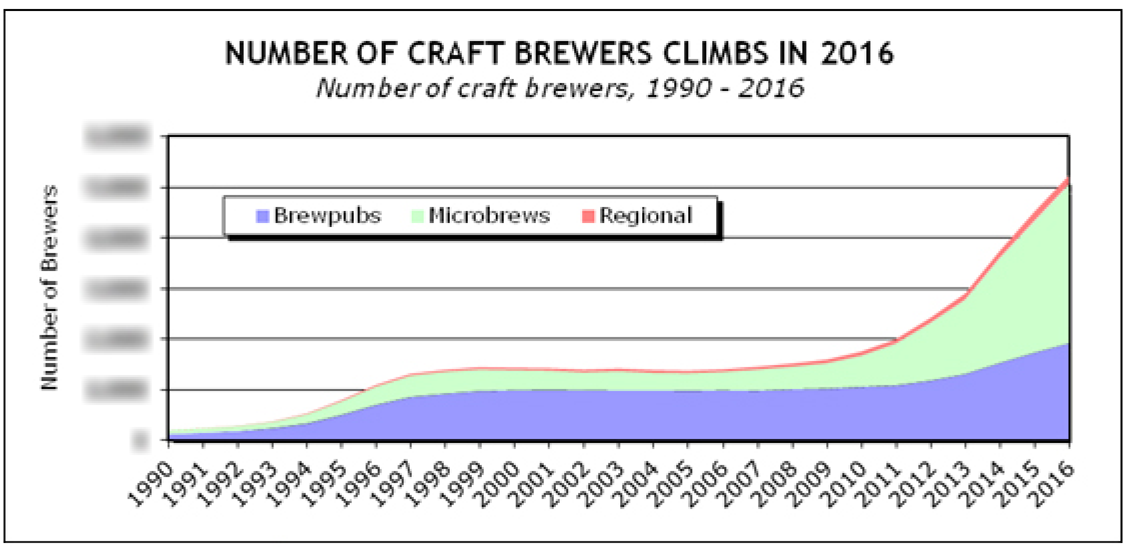
- The premium image of imports is a very important component of their success in the United States, and packaging helps to convey that high-end image.
- Additionally, the beer importers in the United States have only relatively recently been focusing on the off-premise channel, with most of their efforts and promotional support targeting groceries and other outlets.
- Importers understand the importance of on-premise and draft, but realize that their most significant volume growth will come from off-premise sales.
- Most cans and bottles are containers used only one time. Kegs, on the other hand, must be returned to the breweries. Investing in kegs and setting up a distribution system for the return of empty kegs to their countries of origin is a difficult venture.
- In some countries, such as Mexico, beer traditionally has been sold in bottles since few bars were equipped to handle draft. Consequently, breweries lacked facilities for significant draft production until recently.

The domestic premium and popular brands, generally marketed by the major U.S. brewers, are also much stronger off-premise than domestic craft beer.

- Though draft volume for the domestic premium and popular segments is significant (larger than the entire craft segment – both packaged and draft), packaged product is a much larger proportion of total volumes.
- Within the fairly stagnant domestic beer market, the major brewers have increased their focus on and support of on-premise sales programs. However, these efforts are aimed at maintaining current volumes more than driving any new untapped volume.
- Additionally, many low-end (popular) brands are not offered on draft and have a high proportion of cans in their mix.



Note: Does not include contract brewers
Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation

Exhibit 1.12

U.S. SPECIALTY BEER MARKET

SHARE OF VOLUME BY SEGMENT (r)

2011 – 2021(P)

Segment	2011	2012	2013	2014	2015	2016	2021(P)
National	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Microbrews	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Regional	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Brewpubs	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

(r) Revised

(P) Projected

Source: Beverage Marketing Corporation; Institute for Brewing Studies