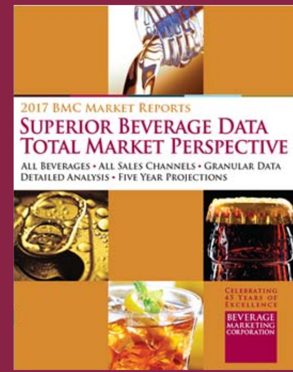
BMC's U.S. Spirits, Wine and Beer Guides

2017 Editions (To be published April, May and June 2017. Data through 2016. Market projections through 2021.) Each more than 165 pages, with extensive text analysis, graphs, charts and tables



From the industry leader in U.S. beverage market insights and intelligence these three new Guides offer the most reliable data available on domestic spirits, wine, and beer consumption and sales. Each captures and analyzes historical shifts and current directions in these trend driven markets. Data is expertly placed in a context that enables business planners, analysts as well as sales and marketing executives to plan successful paths to market.

For a Full Catalog of Reports and Databases, Go To bmcreports.com

Available Format & Pricing

Direct Download
$2,485

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?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

Beverage Marketing Corporation
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

The answers you need

- Three markets, driven by concentric circles of changing taste, demographics, and economic imperatives—what data is critical to help you plan in this complex environment?
- Are on- and off-premise trends similar or different for different beverage alcohol categories?
- What about price tiers—is "drinking better but less" still meaningful?
- Do the numbers of new product introductions make success more elusive? Do clogs in the retail and distribution pipelines matter—or this the new normal?
- As the importance of social media marketing continues to grow, do brands backed by celebrity owner or endorsers seem to have a leg up?
- Does consumption data reveal anything useful about a product and brand focus versus a strategy of portfolio building?
- What does the advertising data reveal about company and brand strategy?
- Does expanding interest in new wine varieties and regions have meaningful parallels in the growth areas for spirits and beer?
- Flavored beer, flavored spirts, even flavored wine? Trend, fad, or inevitable result of production advances and consumer demand for choice?

These reports feature

BMC's U.S. Spirits, Wine and Beer Guides answer all these questions with both expert analysis and a comprehensive compendium of reliable, hard data. Each Guide features data on the overall market volume by category, state, and top brands, a breakout of on- versus off-premise consumption by volume and sales, plus detailed listings of top brand sales by both price categories and beverage types. Fastest growing brands are featured. Plus, advertising, export/import data and extended projections. Data on craft beer sales, spirits flavors, and specialty products are all included.

BMC's U.S. Spirits Guide 2017

April 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.

Table of Contents

Contents

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

Exhibit 1.12

U.S. DISTILLED SPIRITS MARKET

SHARE OF ON-PREMISE AND OFF-PREMISE VOLUME
2011 – 2016(P)

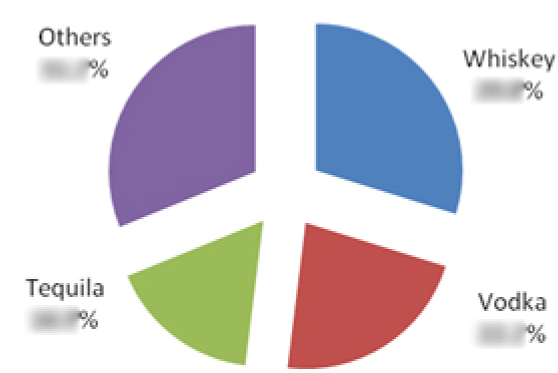
Segment	2011	2012	2013	2014	2015	2016(P)
Off-Premise	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
On-Premise	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

Source: Beverage Marketing Corporation

WHISKEY & VODKA LEAD SPIRITS IMPORTS

Share of volume by category, 2015



Source: Beverage Marketing Corporation

Moving forward, unflavored vodka will not only continue to account for the majority of volume; it will also be the primary source of category growth.

- Classic cocktails continue to retain their popularity, as do modified versions of them. While the traditional martini may call for gin, many consumers prefer iterations involving vodka.
- Pernod Ricard USA is attempting to lure these consumers to its Absolut via investments aimed at raising the brand's profile in on-premise accounts. Diageo aims to attract millennials through music-related partnerships with Live Nation and Spike TV.
- Brands like Beam Suntory's Pinnacle have been hurt by the waning popularity of flavored vodka, particularly confectionary flavors. While overall Pinnacle volume declined by [illegible]% in 2015, Pinnacle Whipped Cream's volume plummeted by [illegible]%. (The whipped cream flavor as a whole declined even more precipitously than the Pinnacle version of it.) Ciroc Apple had a positive launch but the brand was down in 2015 due a shift in Diageo's replenishment strategy.
- Peach ranked as the top type of flavored vodka, but, like most other flavored offerings, it saw volume contract in 2015. Indeed, only two of the 12 largest flavors by volume – pineapple and apple – registered growth during the year.

BMC's U.S. Wine Guide 2017

May 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.

Table of Contents

Contents

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

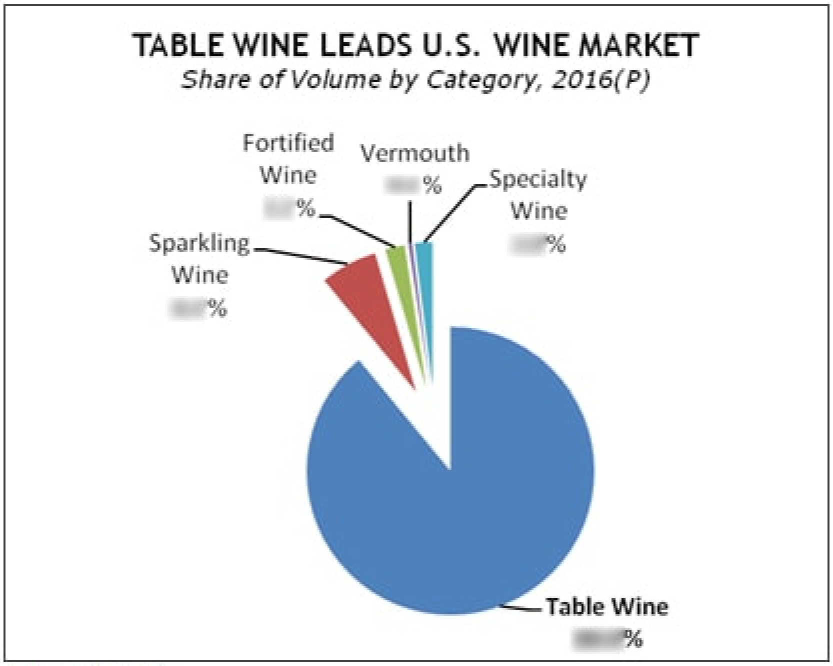
Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter



(P) Projected
Source: Beverage Marketing Corporation

Exhibit 1.6

U.S. WINE MARKET

CHANGE IN DOMESTIC AND IMPORTED VOLUME
2011 – 2016(P)

Category	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16(P)
Domestic	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

Source: Beverage Marketing Corporation

The largest wine suppliers in the United States have large brand portfolios encompassing multiple categories, though, as is to be expected given the category's stature, table wine accounts for the biggest brands by volume.

- All of the top 10 brands in the United States in 2015 were table wines, and nine of them were domestic. Indeed, it was not until the 18th ranked brand (Arbor Mist, a fruit-flavored wine from Constellation Brands' wine division) that something other than a conventional table wine appeared on the list of the leading 100 brands.
- The Wine Group claimed the number-one brand in 2015 with Franzia Winetaps, which had volume of [redacted] million cases and close to a [redacted]% share of the volume held by the leading brands (a portion of the total market it had exceeded in previous years).
- No supplier had more brands among the top 10 in 2015 than E. & J. Gallo Winery, which had four of them, including numbers two and three (Barefoot Cellars and Carlo Rossi). Barefoot Cellars and Carlo Rossi snared the number-one and -two positions when the brands were measured with respect to retail sales.
- Deutsch Family Wine & Spirits had the leading imported table wine in Australia's Yellow Tail, which ranked seventh overall among brands by volume in the U.S. market in 2015.
- Bronco Wine Company rounded out the top 10 in 2015 with its Charles Shaw trademark.
- Treasure Wine Estates had the fastest growing brand (of at least [redacted] cases in volume) in its 19 Crimes, a table wine which saw its volume grow by nearly [redacted]% in 2015.

BMC's U.S. Beer Guide 2017

July 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.

Table of Contents

Contents

TABLE OF CONTENTS

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

Appendix

Exhibit 2.12

U.S. BEER MARKET

CHANGE IN VOLUME BY REGION

2012 – 2021(P)

Region	2011/12	2012/13	2013/14	2014/15	2015/16	CAGR 2016/21(P)
South	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Northeast	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
East Central	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Pacific	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Southwest	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
West Central	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
West	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

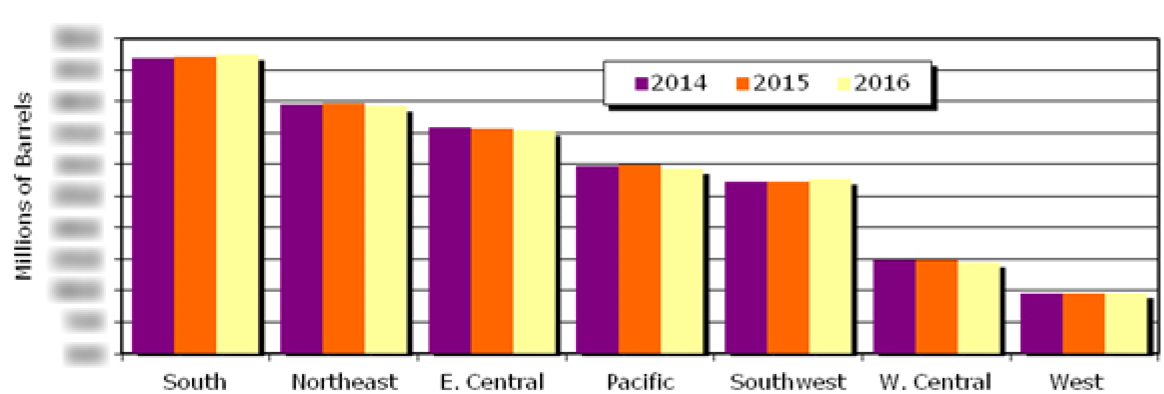
(P) Projected

CAGR: Compound annual growth rate

Source: Beverage Marketing Corporation

THE SOUTH RANKS AS NO. 1 REGIONAL BEER MARKET

Beer volume by region, 2014 - 2016



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 21st 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 [redacted]% as recently as 2012, had receded to [redacted]%. While that was several points lower than its historical high, it was still [redacted] 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.