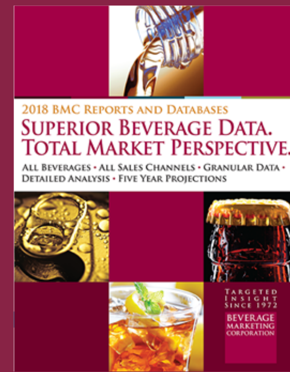
BMC's U.S. Spirits, Wine and Beer Guides

2018 Editions (Published May, July and September 2018. Data through 2017. Market projections through 2022.) **New for 2018!** PowerPoint Presentations each features more than 75 slides, with extensive analysis, graphs, charts and tables + over 600 Excel exhibits offering even greater detail!



From the industry leader in U.S. beverage market insights and intelligence these three 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.

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Inside:

HAVE QUESTIONS?

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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? Craft beer versus craft spirits, for instance?
- What about price tiers—does noise about premiumization compared to whispers about value brands reflect a changing market or just the hopes of certain marketers?
- What are the changing trends in new product introductions and how do these related to actual consumption and sales?
- As the importance of social media marketing continues to grow, does this favor the larger marketing entities or even the field for new entries and boutique suppliers?
- 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?
- Flavor preferences continue to change—or, perhaps, evolve. When does it make sense to follow them and when is it simply chasing an evanescent fad?

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.

These reports feature

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. ***New for 2018:*** Now covering more brands than ever and offering enhanced coverage of craft spirits!

BMC's U.S. Spirits Guide 2018

May 2018

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Table of Contents

Contents

TABLE OF CONTENTS

Section

TABLE OF CONTENTS

Section

TABLE OF CONTENTS

Section

TABLE OF CONTENTS

Section

Exhibit 2.2

U.S. SPIRITS MARKET

SHARE OF DOMESTIC AND IMPORTED VOLUME

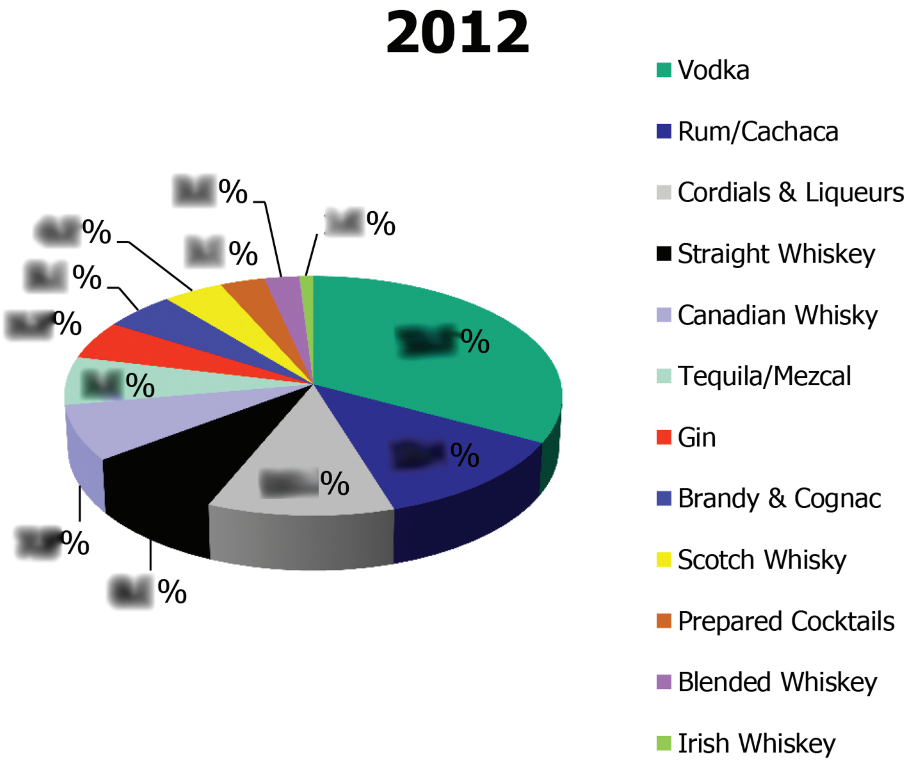
2012 - 2018(P)

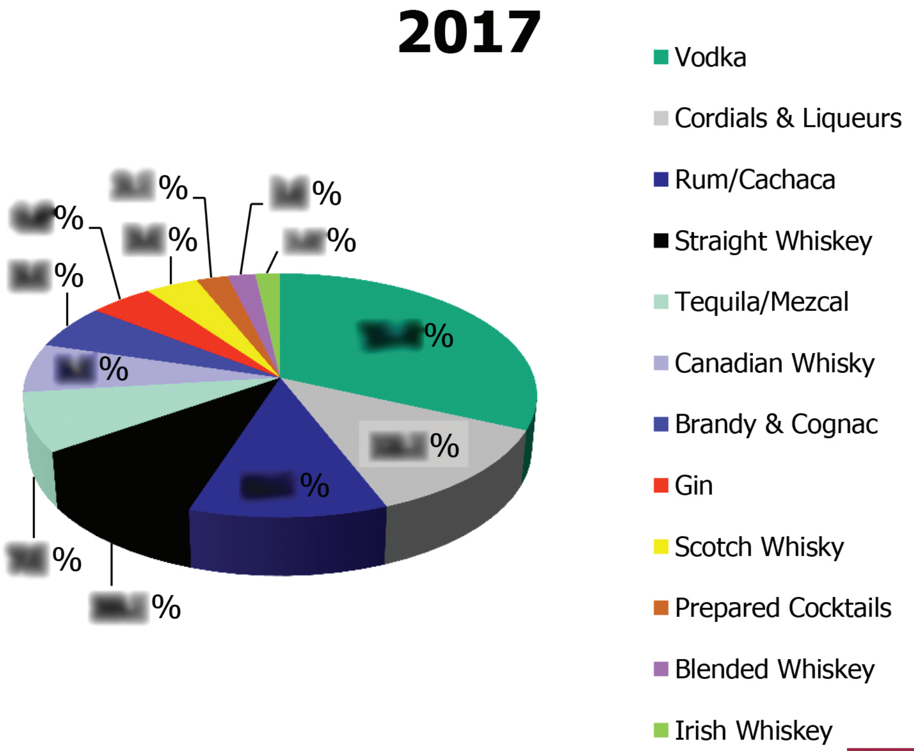
Category	2012	2013	2014	2015	2016	2017	2018(P)
Domestic	[illegible] %	[illegible] %	[illegible] %	[illegible] %	[illegible] %	[illegible] %	[illegible] %
Imported	[illegible] %	[illegible] %	[illegible] %	[illegible] %	[illegible] %	[illegible] %	[illegible] %
TOTAL	[illegible] **%**	[illegible] **%**	[illegible] **%**	[illegible] **%**	[illegible] **%**	[illegible] **%**	[illegible] **%**

(P) Projected

Source: Beverage Marketing Corporation

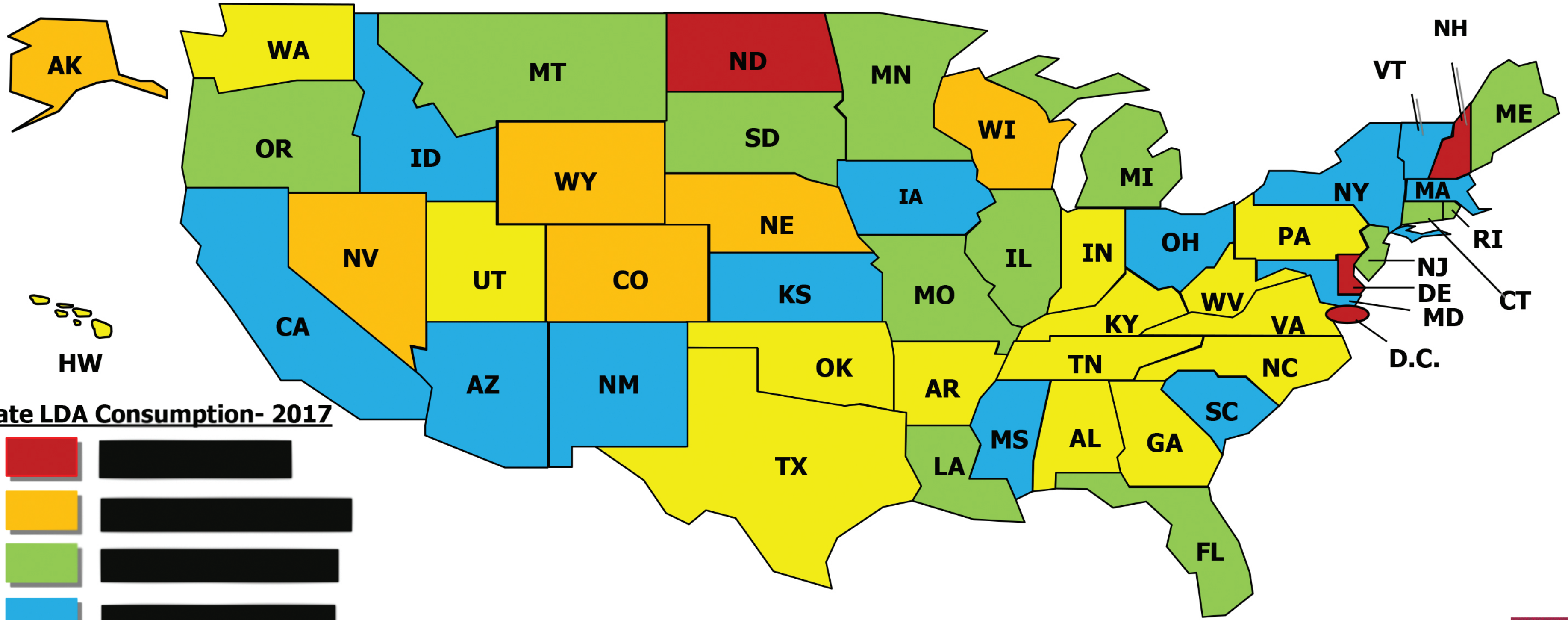
Vodka remains the largest spirits category despite losing [redacted] share points over the 2012-to-2017 period, while straights, tequila and cordials gained [redacted], [redacted] and [redacted] share points, respectively





Source: Beverage Marketing Corporation

Total U.S. spirits per capita consumption increased from [redacted] gallons per legal drinking-age adult (LDA) consumer in 2012 to [redacted] gallons per capita in 2017



State LDA Consumption- 2017

- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]

BMC's U.S. Wine Guide 2018

July 2018

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Table of Contents

Contents

TABLE OF CONTENTS

Section

TABLE OF CONTENTS

Section

TABLE OF CONTENTS

Section

Exhibit 1.2

U.S. WINE MARKET

SHARE OF VOLUME BY CATEGORY

2012 – 2018(P)

Category	2012	2013	2014	2015	2016	2017	2018(P)
Table Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Domestic	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sparkling Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Domestic	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fortified Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Domestic	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Vermouth	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Domestic	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Total Domestic Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Total Imported Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Specialty Wine*	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

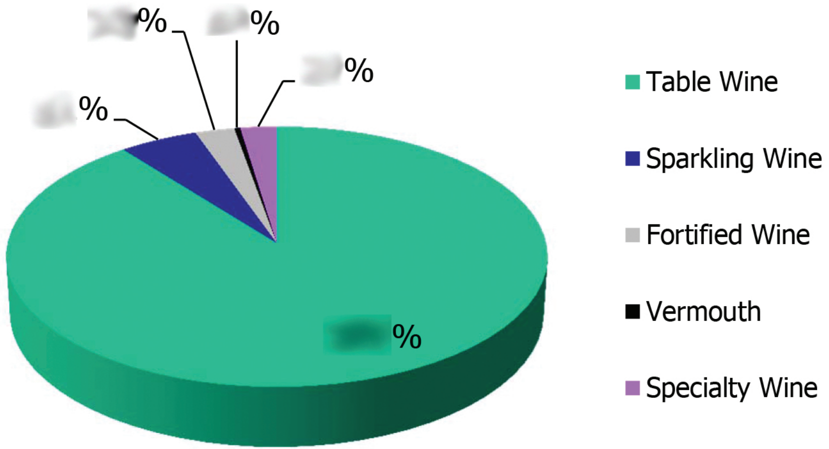
(P) Projected

** Includes fruit wine, chocolate wine, sangria*

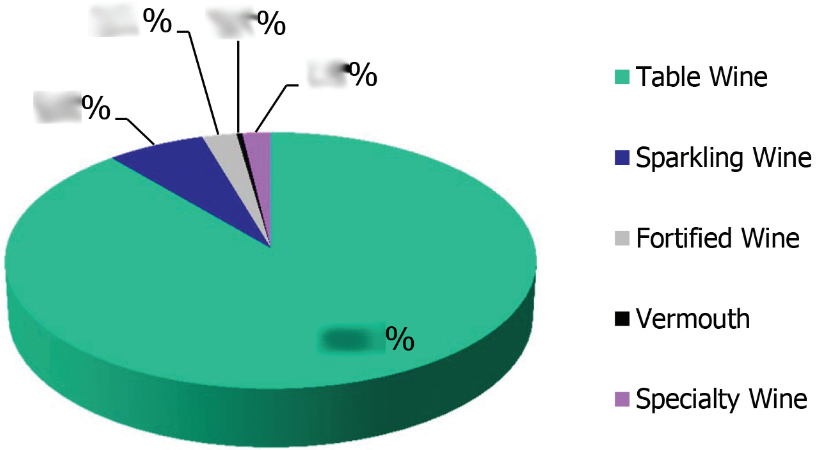
Source: Beverage Marketing Corporation

Table wine remains by far the largest wine category but lost [redacted] share points over the 2012-to-2017 period, while sparkling wine, a key growth driver of the industry, gained [redacted] share points

2012



2017



Source: Beverage Marketing Corporation

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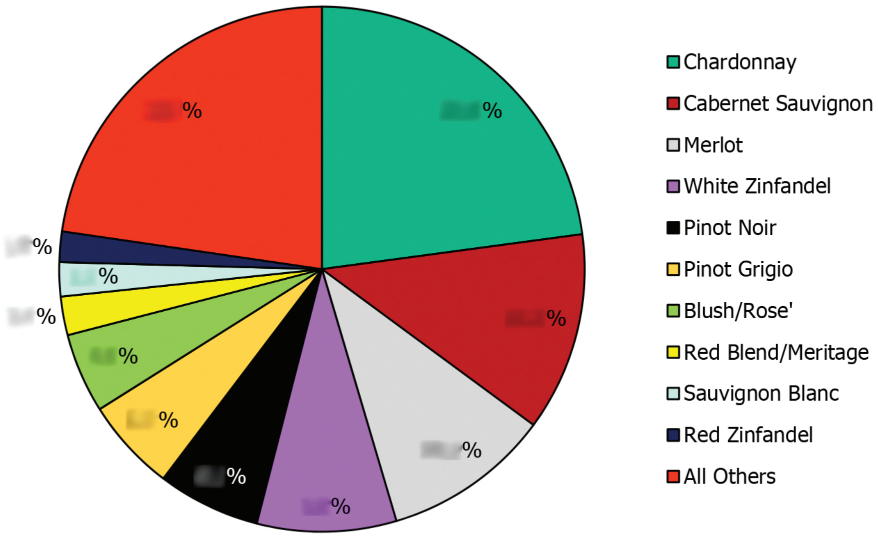
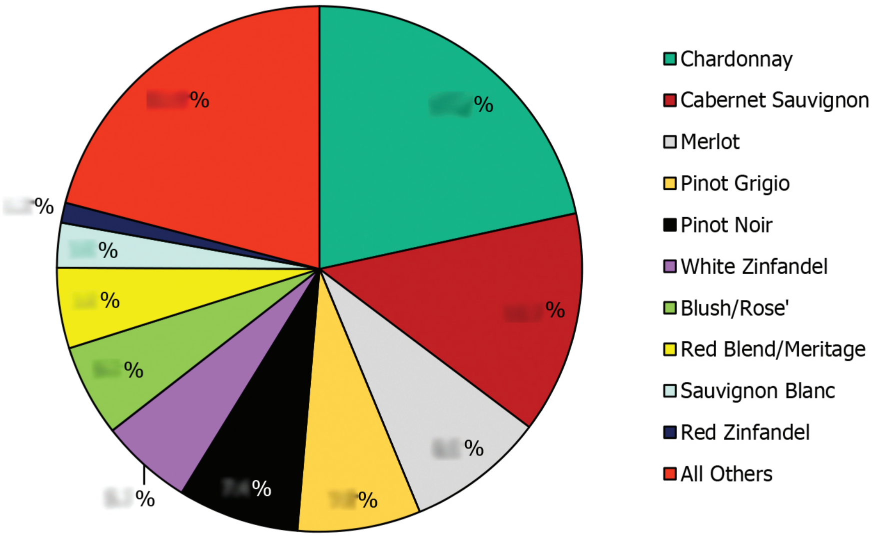
Between 2012 and 2017, the top three varietals remained the same while Pinot Grigio, Blush, Red Blend and Sauvignon Blanc all increased share over the period

Domestic Table Wine Volume by Varietal

2012



2017



Source: Beverage Marketing Corporation

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September 2018

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Table of Contents

Contents

TABLE OF CONTENTS

Section

TABLE OF CONTENTS

Section

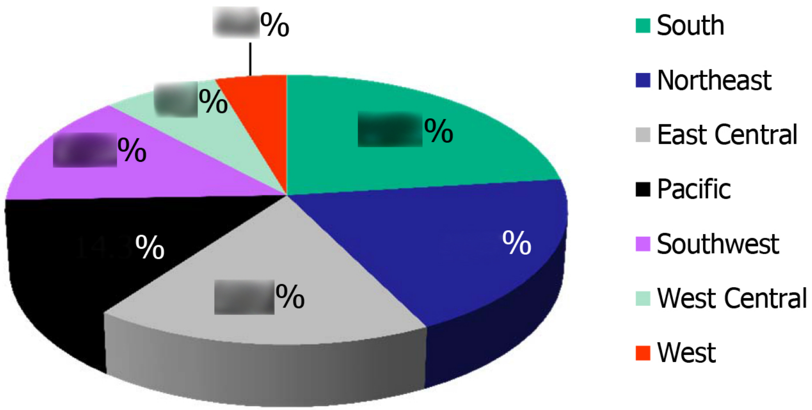
TABLE OF CONTENTS

Section

From 2012 to 2017, shares of volume by region didn't change for any region by more than [redacted] percentage points, resulting in regional rankings remaining the same

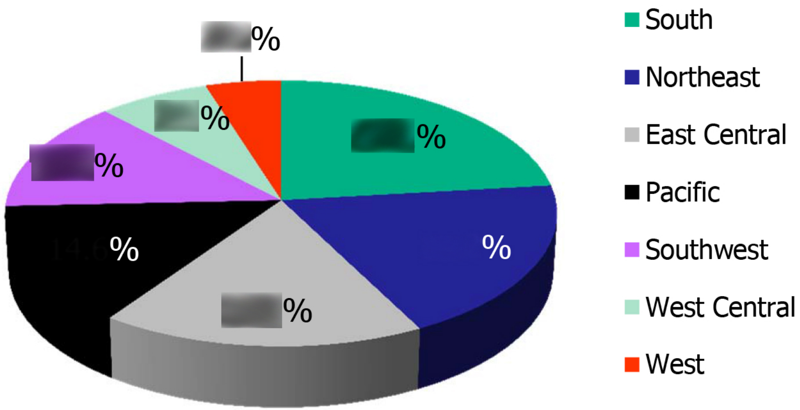
U.S. Beer Market
Share of Volume by Region

2012



207.2 million beer barrels

2017



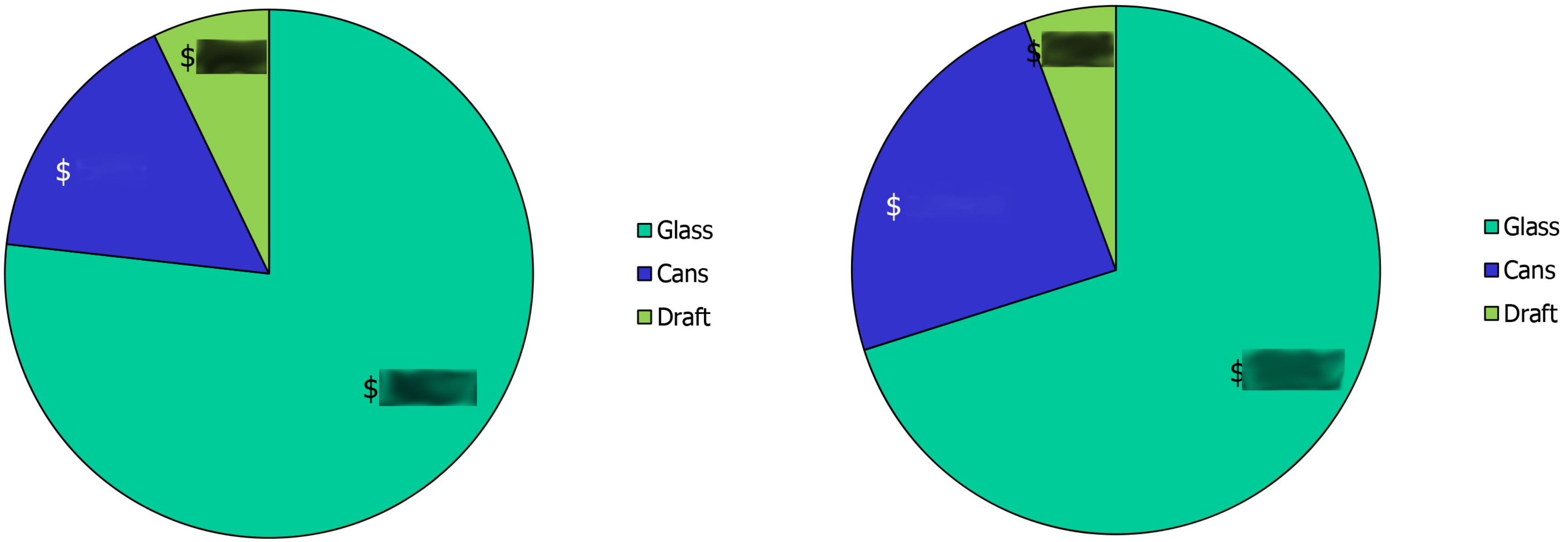
201.2 million beer barrels

Source: Beverage Marketing Corporation

Glass packaging continued to be the preferred package type among imported beer although its share declined to [redacted]% in 2017 from [redacted]% five years earlier

U.S. Imported Beer
Dollar Value by Container Type

2012 | **2017**



Millions of Dollars

Source: Beverage Marketing Corporation

Exhibit 3.3

U.S. BEER MARKET
CHANGE IN VOLUME BY CATEGORY
2013 – 2022(P)

Categories	2012/13	2013/14	2014/15	2015/16	2016/17	5-Year CAGR 2017/22(P)
Cider	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Craft	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Flavored Malt Beverages	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Ice	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Import	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Light	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Malt Liquor	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Non-Alcohol	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Premium	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Superpremium	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Value	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL*	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected; CAGR: Compound annual growth rate

** Excludes exports and cider*

Source: Beverage Marketing Corporation