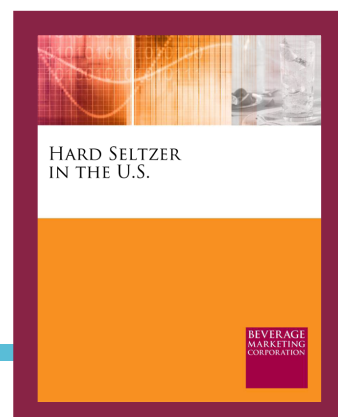


# HARD SELTZER IN THE U.S. – NEW!

**2020 EDITION** (Published December 2020. Data through 2019.  
Market projections through 2024.) More than 35 pages, with  
extensive text analysis, graphs, charts and tables



**T**his report describes and measures the burgeoning hard seltzer sub-segment of the flavored malt beverage market. It includes data on the numerous brands comprising this fast-growing component of the brewing business and offers Beverage Marketing Corporation's exclusive five year forecasts on the future prospects of the category. Impact of the coronavirus pandemic is discussed.

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**HAVE  
QUESTIONS?**

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## THE ANSWERS YOU NEED

In addition to volume data on the leading brands and discussion of their makers' strategies, the report quantifies the category as a whole and charts its growth. It also provides data on per capita consumption and growth. Get answers to questions such as:

- What is the leading hard seltzer brand in the United States?
- Which brands are growing the fastest?
- How much hard seltzer was consumed on a per-person basis?
- How is the category likely to perform a few years from now?

## THIS REPORT FEATURES

Highlights of *Hard Seltzer in the U.S.* include:

- An overview of the relatively new category and a discussion of the latest trends and developments.
- Volume, growth and market share data for the major brands.
- Analysis of the various brewers and their approaches to the new beverage type.
- Per capita consumption figures.
- Discussion of hard seltzer impact on the U.S. total beer category.
- Volume projections through 2024.
- Companies and brands covered include: White Claw, Truly, Mark Anthony Group Boston Beer Company, Bon & Viv, Anheuser-Busch InBev, MillerCoors, Constellation Brands, Diageo-Guinness USA and more.



# HARD SELTZER IN THE U.S.

BEVERAGE  
MARKETING  
CORPORATION

# Hard Seltzer in the U.S.

December 2020

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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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In essence, hard seltzer started as a variation on the FMB theme, which in turn makes them a variety of beer. However, since they are positioned slightly differently, and perceived differently than their FMB relatives, they are treated accordingly here. Their rapid growth attracted brewers large and small to the sub-segment.

- In addition to A-B, Molson Coors, Constellation Brands, Mark Anthony Brands, Boston Beer, Diageo Beer Company USA and numerous smaller, regional beer companies developed or acquired spiked/hard seltzer brands.
- Also in early 2019, Boston, Massachusetts-based Harpoon Brewery announced it was teaming up with Worcester, Massachusetts-based Polar Beverages to release a hard seltzer line called Arctic Summer.
- Other regional beer companies, like Longmont, Colorado-headquartered Oskar Blues and Covington, Kentucky-based Braxton Brewing Company, also entered the sparkling seltzer arena in early 2019. Grand Haven, Michigan-based Odd Side Ales launched a 20-flavor line of hard seltzers in 2020.
- Additional new brands or line extensions continued to roll out in 2020, including some carrying major beer brand names. Molson Coors, for instance, early in the year announced plans for a summer release of Coors Seltzer, which it pushed back to the fall due to the coronavirus crisis.

Given that major brewers' conventional beers have struggled to grow in recent years, it's no surprise that they would seek growth opportunities from hard seltzers or other FMBs for which consumers seemed enthusiastically receptive. What is somewhat surprising is that a company known for its no-alcohol beverages like Coca-Cola would enter the hard seltzer game as well.

- In July 2020, Coca-Cola announced that it was extending the Topo Chico brand of sparkling mineral water that it acquired in 2017 into hard seltzer.
- The company plans to introduce Topo Chico Hard Seltzer first in Latin American markets later in 2020.
- It aims to enter the crowded U.S. market in 2021.
- Also outside the brewing sector, Jose Cuervo Playamar Tequila Hard Seltzer arrived in select markets in summer 2020 with a national rollout planned for 2021.
- In October 2020, Heineken USA (HUSA) and Hornell Brewing Company (which is affiliated with AriZona Beverages), are partnering on the launch of AriZona Sun Rise Hard Seltzer in the first quarter of 2021. The product will include real fruit juice for a splash of color, and will be distributed via the HUSA distribution network.



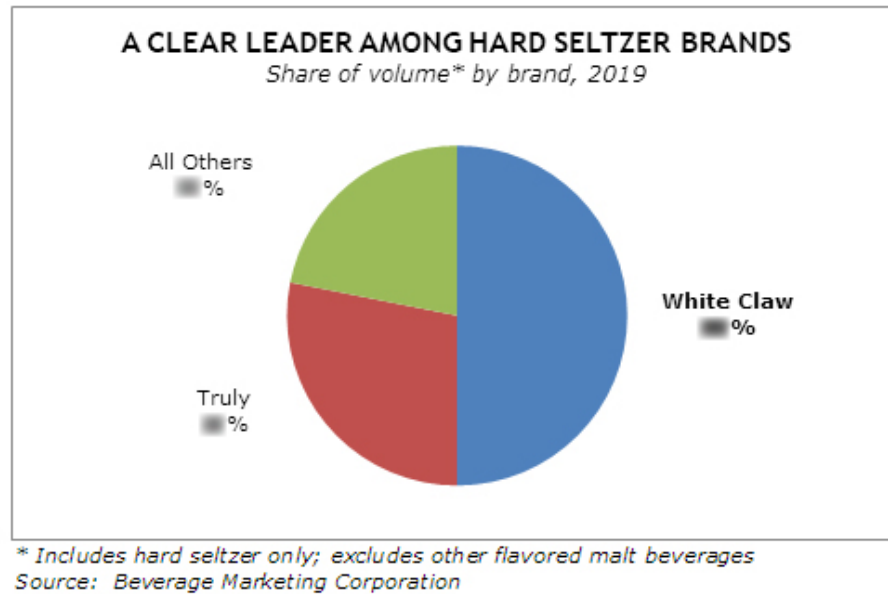


Exhibit 5

**U.S. HARD SELTZER MARKET  
CHANGE IN VOLUME BY BRAND  
2016 – 2019**

| Brand                    |         |         |         |         | CAGR    |
|--------------------------|---------|---------|---------|---------|---------|
|                          | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2015/19 |
| White Claw               | 100%    | 100%    | 100%    | 100%    | 100%    |
| Truly Spiked & Sparkling | 100%    | 100%    | 100%    | 100%    | 100%    |
| Bon & Viv Spiked Seltzer | 100%    | 100%    | 100%    | 100%    | 100%    |
| Smirnoff Spiked          | 100%    | 100%    | 100%    | 100%    | 100%    |
| All Other Hard Seltzers  | 100%    | 100%    | 100%    | 100%    | 100%    |
| <b>TOTAL</b>             | 100%    | 100%    | 100%    | 100%    | 100%    |

CAGR: compound annual growth rate

Source: Beverage Marketing Corporation