

HARD SELTZER IN THE U.S.

2021 EDITION (Published September 2021. Data through 2020. Market projections through 2025.) More than 35 pages, with extensive text analysis, graphs, charts and tables



This 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.

FOR A FULL
CATALOG OF
REPORTS AND
DATABASES,
GO TO
bmcreports.com

AVAILABLE FORMAT & PRICING



Direct Download
Word & PDF

\$1,995

*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:

REPORT OVERVIEW

A brief discussion of key features of this report. **2**

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. **6**

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. **8**



**HAVE
QUESTIONS?**

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

**BEVERAGE
MARKETING
CORPORATION**

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

THE ANSWERS YOU NEED

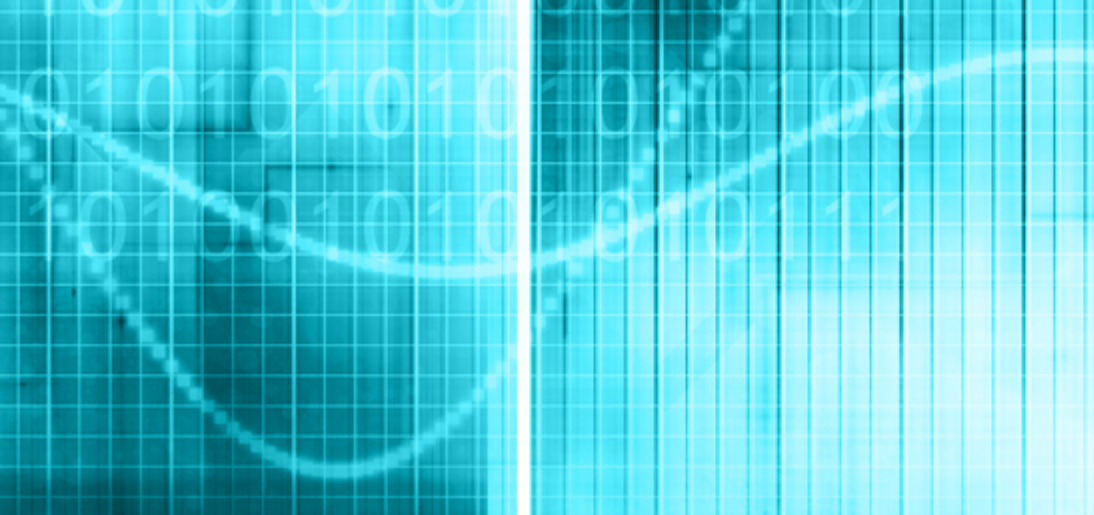
In addition to volume data on the leading brands and discussion of their makers' strategies, the report quantifies the category as a whole and charts its growth. It also provides data on per capita consumption and growth. Get answers to questions such as:

- 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.
- Volume projections through 2025.
- Brands covered include: White Claw, Truly, BON V!V, Bud Light Seltzer, Corona, Pabst Blue Ribbon Stronger, Vizzy and Michelob Ultra Organic Seltzer.



HARD SELTZER IN THE U.S.

BEVERAGE
MARKETING
CORPORATION

Hard Seltzer in the U.S.

September 2021



RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

Copyright © 2021 Beverage Marketing Corporation of New York, P.O. Box 2399, Wintersville, OH 43953, (212) 688-7640.
All rights reserved. Reproductions in any form prohibited by law.

Contents

Table of Contents

Hard Seltzer in the U.S.

TABLE OF CONTENTS

TABLE OF CONTENTS	i
INTRODUCTION	iii

Summary

THE HARD SELTZER MARKET

Hard Seltzer	1
• Overview & Issues	1
• Special Note on Coronavirus	2
• Hard Seltzer and Alternative Adult Beverages	4
• Volume	12
• Per Capita Consumption	13
Hard Seltzer Brands	14
• Overview & Issues	14
• Volume	15
• AriZona Sun Rise Hard Seltzer	16
• BON VIV	17
• Bud Light Seltzer	18
• Cacti Agave Spiked Seltzer	20
• Clear Coast Fresh Hard Seltzer	21
• Corona	22
• Henry's Hard Sparkling Water	23
• Michelob Ultra Organic Seltzer	24
• Natural Light Seltzer	25
• Nauti Seltzer Premium Hard Seltzer	26
• Pabst Blue Ribbon Stronger Seltzer	27
• Smirnoff Spiked Sparkling Seltzer	28
• Social Club Seltzer	29
• Sparkling ICE Spiked	30
• Svedka Spiked Premium Seltzer	31
• Topo Chico	32
• Truly Hard Seltzer	33
• Vizzy	35
• White Claw Hard Seltzer	36
Hard Seltzer Projections	38
• Overview & Issues	38
• Volume	39

TABLE OF CONTENTS

Summary

THE HARD SELTZER MARKET (cont'd)

Exhibits

1	U.S. Alternative Adult Beverage Market Volume, Change and Per Capita Consumption 2000 – 2021 -----	41
2	U.S. Hard Seltzer Market Volume, Change and Per Capita Consumption 2015 – 2021 -----	42
3	U.S. Hard Seltzer Market Volume by Brand 2015 – 2020 -----	43
4	U.S. Hard Seltzer Market Share of Volume by Brand 2015 – 2020-----	44
5	U.S. Hard Seltzer Market Change in Volume by Brand 2016 – 2020 -----	45
6	U.S. Alternative Adult Beverage Market Projected Volume by Sub-Segment 2020 – 2025 -----	46
7	U.S. Alternative Adult Beverage Market Share of Projected Volume by Sub-Segment 2020 – 2025 -----	47
8	U.S. Alternative Adult Beverage Market Change in Projected Volume by Sub-Segment 2020 – 2025 -----	48

In essence, hard seltzer is 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. And then dropped it in mid-2021.
- Topo Chico Hard Seltzer arrived in 2021 via a collaboration between brand-owner Coca-Cola and beer-maker Molson Coors.
- Later in the year, PepsiCo and Boston Beer announced that they'd be launching HARD MTN DEW in 2022, thereby extending what had been another liquid refreshment beverage brand into the flavored malt beverage space.
- AriZona Beverages and Heineken did the same with a brand mostly known for its ready-to-drink iced tea.
- As brewers add flavors like lemonade to their hard seltzer rosters, it may become more difficult to distinguish between the seltzers and other FMBs.

U.S. HARD SELTZER MARKET
CHANGE IN VOLUME BY BRAND (r)
2016 – 2020

Brand	2015/16	2016/17	2017/18	2018/19	2019/20	CAGR 2015/20
Hard Seltzers						
White Claw	--	10000 %	10000 %	10000 %	10000 %	--
Truly Hard Seltzer	--	1000 %	10000 %	10000 %	10000 %	--
Bud Light Seltzer	--	--	--	--	--	--
Natural Light Seltzer	--	--	--	--	10000 %	--
BON VIV	10000 %	10000 %	10000 %	10000 %	10000 %	10000 %
Smirnoff Spiked	--	100000 %	10000 %	10000 %	10000 %	--
Wild Basin Seltzer	--	--	--	--	10000 %	--
Vizzy	--	--	--	--	--	--
Arctic Summer Seltzer	--	--	--	--	10000 %	--
All Other Hard Seltzers	100000 %	10000 %	10000 %	10000 %	10000 %	10000 %
TOTAL	100000 %	100000 %	100000 %	100000 %	100000 %	100000 %

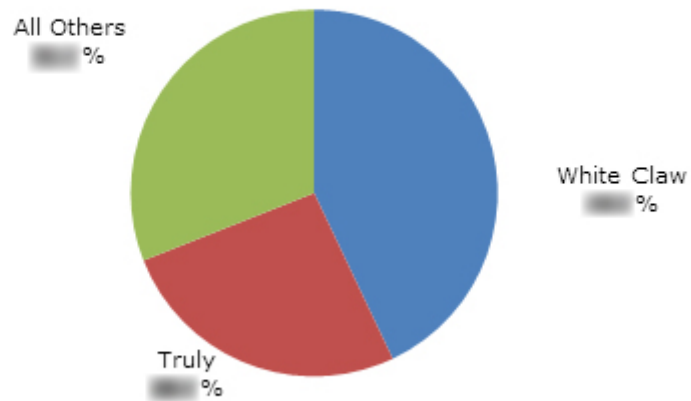
(r) Revised

CAGR: compound annual growth rate

Source: Beverage Marketing Corporation

TWO MAIN HARD SELTZER BRAND CONTENDERS

Share of volume by brand, 2020*



** Includes hard seltzer only; excludes other flavored malt beverages*

Source: Beverage Marketing Corporation