

HARD SELTZER IN THE U.S.

2024 EDITION (Published February 2025. Data through 2023. Market projections through 2028.) More than 35 pages, with extensive text analysis, graphs, charts and tables



Beyond the hard seltzer hype. This report describes and measures the hard seltzer sub-segment of the flavored malt beverage market and also provides added perspective of its role in the context of the larger adult alternative beverage market. It includes data on the numerous brands comprising this key component of the brewing business and offers Beverage Marketing Corporation's exclusive five year forecasts on the future prospects of the category.

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**HAVE
QUESTIONS?**

Contact Charlene Harvey: 212-688-7640 x 250
charvey@beveragemarketing.com

**BEVERAGE
MARKETING
CORPORATION**

BEVERAGE MARKETING CORPORATION
P.O. Box 2399 | 143 Canton Road, 2nd Floor
Wintersville, OH 43953
Tel: 212-688-7640 Fax: 740-314-8639

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 segment 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 beverage type.
- Per capita consumption figures.
- Volume projections through 2028.
- Brands covered include: White Claw, Truly, BON V!V, Bud Light Seltzer, Corona, Pabst Blue Ribbon Stronger, Vizzy, Michelob Ultra Organic Seltzer, Mike's Hard Seltzer and many more.



HARD SELTZER IN THE U.S.

**BEVERAGE
MARKETING
CORPORATION**

Hard Seltzer in the U.S.

February 2025



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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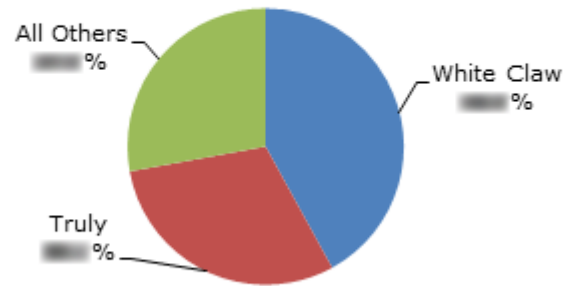
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In essence, hard seltzer is a variation on the FMB theme, which in turn makes them a variety of beer. However, since they are positioned slightly differently, and perceived differently than their FMB relatives, they are treated accordingly here. Their 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.

TWO BRANDS CONTINUE TO LEAD HARD SELTZER MARKET

Share of Volume* by Brand, 2023



* Includes hard seltzer only; excludes other flavored malt beverages
Source: Beverage Marketing Corporation

**U.S. HARD SELTZER MARKET
CHANGE IN VOLUME BY BRAND (r)
2019 – 2023**

Brand	2018/19	2019/20	2020/21	2021/22	2022/23	CAGR 2018/23
White Claw	100%	100%	100%	100%	100%	100%
Truly Hard Seltzer	100%	100%	100%	100%	100%	100%
Bud Light Seltzer	100%	100%	100%	100%	100%	100%
Topo Chico	100%	100%	100%	100%	100%	100%
Michelob Ultra Seltzer	100%	100%	100%	100%	100%	100%
Corona Hard Seltzer	100%	100%	100%	100%	100%	100%
Lone River Ranch Water	100%	100%	100%	100%	100%	100%
Smirnoff Spiked	100%	100%	100%	100%	100%	100%
Bud Light Platinum Seltzer	100%	100%	100%	100%	100%	100%
Mike's Hard Seltzer	100%	100%	100%	100%	100%	100%
Natural Light Seltzer	100%	100%	100%	100%	100%	100%
Vizzy	100%	100%	100%	100%	100%	100%
All Other	100%	100%	100%	100%	100%	100%
TOTAL	100%	100%	100%	100%	100%	100%

(r) Revised

CAGR: compound annual growth rate

Source: Beverage Marketing Corporation