

THE MULTIPLE BEVERAGE MARKETPLACE IN THE U.S.

2017 EDITION (Published June 2017. Data through 2016. Market projections through 2021.) More than 275 pages, with extensive text analysis, graphs, charts and more than 80 tables.

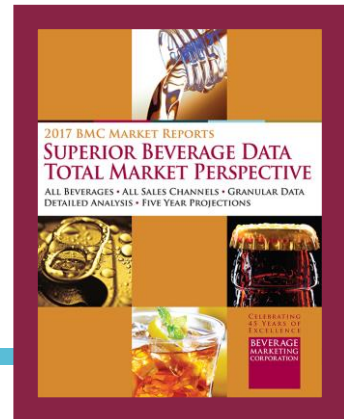
If you need the big picture, this U.S. multiple beverage industry overview from Beverage Marketing Corporation is for you. This comprehensive market research report covers the entire U.S. commercial beverage industry and includes data on retail and wholesale sales as well as volume, growth, per capita consumption and share of stomach across eleven U.S. alcohol and non-alcohol beverage types.

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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. **12**



HAVE QUESTIONS?

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THE ANSWERS YOU NEED

In addition, BMC's market research also offers key trends and statistics, discusses new products and contains exclusive projections for each category. The report provides an all-channel-inclusive picture, capturing 100% of volume, wholesale and retail dollars for each beverage category it covers. If you need cross-category perspective, you won't want to miss the wealth of information contained in this industry report. Get answers to questions including:

- How did the main beverage categories perform in the U.S. market in 2016? What share of stomach do they hold?
- What are the trends and developments in the latest alcohol and non-alcohol segment growth rates? How do market drivers and results differ between LRBs and adult beverages?
- How does each category's volume, growth and market share compare to their respective wholesale dollar sales and retail dollar sales results?
- How do various categories stack up in an all-sales-channel-inclusive, cross-category comparison?
- How have the different groups' market shares shifted over time? Which categories have exhibited consistent share erosion? Which categories are gaining share?
- How are these categories projected to grow over the next five years?

THIS REPORT FEATURES

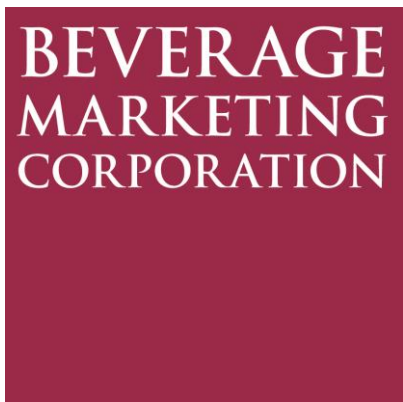
Highlights of *The Multiple Beverage Marketplace in the U.S.* include:

- An overview of development in the major categories, including a bird's eye view of the industry as a whole and discussion current industry trends.
- Concise discussions of eleven beverage categories: beer, bottled water, carbonated soft drinks, coffee (including break-out for ready-to-drink), distilled spirits, energy drinks, fruit beverages, milk, sports beverages, tea (including break-out for ready-to-drink) and wine. Also includes data for value added water.
- A breakdown of the industry by both volume, producers' sales and retail sales by beverage category, providing historical and current data, each beverage category's market share as well as growth trends.
- Per capita consumption figures.
- Bottled water data by segment including domestic non-sparkling retail premium PET, retail 1 - 2.5 gallon, direct delivery bulk, sparkling waters and others.
- A look at share of market held by tea bags vs. RTD tea, iced tea mix and loose tea as well as volume and growth statistics for each segment.
- Distilled spirits supplier sales, wholesale sales and retail sales by segment including vodka, rum, cordials and liqueurs, rum, straight whiskey, tequila, Canadian whiskey, Scotch, brandy & cognac, gin, blended whiskey, prepared cocktails and Irish whiskey.
- Consumption statistics for a broad range of adult beverages

- An executive summary of the U.S. wine market trends by segment including historical and current consumption for subcategories including domestic and imported table wine, domestic and imported champagne/sparkling wine, and domestic and imported vermouth/aperitif, plus a look at trends for domestic vs. imported wine consumption.
- Growth forecasts through 2021 are a key component of this report, allowing you to compare growth potential across beverage industry segments. Included are Beverage Marketing's five-year projections for volume, sales, market shares, per capita consumption and compound annual growth projections for each beverage group and analysis of the forces determining each category's future.

The Multiple Beverage Marketplace in the U.S.

June 2017



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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Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS ----- i
DEFINITIONS USED IN THIS REPORT----- vii
INTRODUCTION ----- xix

Chapter

1. THE U.S. BEVERAGE MARKET

The National Beverage Market----- 1

- Overview----- 1
- New Products----- 10
- Non-Alcoholic Trends----- 11
- Alcoholic Trends----- 16

The National Beverage Market by Category ----- 19

- Beer----- 19
- Bottled Water----- 19
- Carbonated Soft Drinks ----- 20
- Coffee----- 21
- Distilled Spirits ----- 22
- Energy Drinks ----- 23
- Fruit Beverages ----- 23
- Milk----- 24
- Sports Beverages ----- 25
- Tea----- 25
- Value-Added Water ----- 26
- Wine ----- 27

Exhibits

1.1 U.S. Beverage Market Volume by Category 2011 – 2016----- 28

1.2 U.S. Beverage Market Share of Volume by Category 2011 – 2016----- 29

1.3 U.S. Beverage Market Change in Volume by Category 2012 – 2016 ----- 30

1.4 U.S. Beverage Market Producers’ Sales by Category 2011 – 2016 ----- 31

1.5 U.S. Beverage Market Share of Producers’ Sales by Category 2011 – 2016----- 32

1.6 U.S. Beverage Market Change in Producers’ Sales by Category 2012 – 2016 ----- 33

1.7 U.S. Beverage Market Estimated Retail Sales by Category 2011 – 2016 ----- 34

1.8 U.S. Beverage Market Estimated Share of Retail Sales by Category 2011 – 2016 ---- 35

1.9 U.S. Beverage Market Estimated Change in Retail Sales by Category 2012 – 2016--- 36

1.10 U.S. Beverage Market Per Capita Consumption by Category 2011 – 2016 ----- 37

TABLE OF CONTENTS

Chapter

1. THE U.S. BEVERAGE MARKET (cont'd)	
Exhibits (cont'd)	
1.11 U.S. Beverage Market New Product Introductions by Category 2011 – 2016-----	38
1.12 U.S. Beverage Market Share of New Product Introductions by Category 2011 – 2016 -----	39
1.13 U.S. Beverage Market Change in New Product Introductions by Category 2012 – 2016 -----	40
2. THE U.S. BEER MARKET	
The National Beer Market-----	41
• Overview-----	41
• Volume-----	46
• Per Capita Consumption -----	47
• Growth-----	49
Exhibits	
2.14 U.S. Beer Market Volume 1965 – 2016 -----	51
2.15 U.S. Beer Market Change in Volume 1976 – 2016-----	52
2.16 U.S. Beer Market Per Capita Consumption 1965 – 2016 -----	53
2.17 U.S. Beer Market Compound Annual Growth 1982 – 2016-----	54
3. THE U.S. BOTTLED WATER MARKET	
The National Bottled Water Market-----	55
• Overview-----	55
• Volume-----	57
• Per Capita Consumption -----	58
• Volume by Segment -----	60
• Wholesale Dollar Sales-----	64
• Prices -----	65
Exhibits	
3.18 U.S. Bottled Water Market Volume, Growth and Per Capita Consumption 1976 – 2016 -----	66
3.19 U.S. Bottled Water Market Non-Sparkling, Sparkling and Import Volume 1976 – 2016	67
3.20 U.S. Bottled Water Market Volume by Segment 1976 – 2016 -----	68
3.21 U.S. Bottled Water Market Share of Volume by Segment 1976 – 2016-----	69
3.22 U.S. Bottled Water Market Change in Volume by Segment 1977 – 2016 -----	70
3.23 U.S. Bottled Water Market Estimated Wholesale Dollars 1984 – 2016 -----	71
3.24 U.S. Bottled Water Market Estimated Share of Wholesale Dollars 1984 – 2016-----	72
3.25 U.S. Bottled Water Market Change in Wholesale Dollars 1985 – 2016 -----	73
3.26 U.S. Bottled Water Market Estimated Wholesale Dollars, Volume and Price 2016-----	74

TABLE OF CONTENTS

Chapter

4. THE U.S. CARBONATED SOFT DRINK MARKET	
The National Carbonated Soft Drink Market -----	75
• Overview-----	75
• Volume-----	87
• Per Capita Consumption -----	89
• Growth-----	90
Exhibits	
4.27 U.S. Soft Drink Market Volume and Change 1960 – 2016 -----	92
4.28 U.S. Soft Drink Market Per Capita Consumption 1970 – 2016-----	93
4.29 U.S. Soft Drink Market Compound Annual Growth 1970 – 2016 -----	94
5. THE U.S. COFFEE MARKET	
The National Coffee Market -----	95
• Overview-----	95
• Per Capita Consumption -----	116
The National RTD Coffee Market -----	117
• Overview-----	117
Exhibits	
5.30 Global Green Coffee Market Volume and Change 1994 – 2016-----	125
5.31 U.S. Coffee Market Estimated Volume and Change 1983 – 2016-----	126
5.32 U.S. Coffee Market Per Capita Consumption 1983 – 2016 -----	127
5.33 U.S. RTD Coffee Market Wholesale Dollars and Case Volume 1993 – 2016-----	128
5.34 U.S. RTD Coffee Market Wholesale Dollars and Case Volume Growth 1994 – 2016---	129
6. THE U.S. DISTILLED SPIRITS MARKET	
The National Distilled Spirits Market -----	130
• Overview-----	130
• Volume-----	131
• Growth-----	134
• Retail Sales -----	135
• Per Capita Consumption -----	136
Exhibits	
6.35 U.S. Distilled Spirits Market Volume and Change 1950 – 2016-----	137
6.36 U.S. Distilled Spirits Market Volume by Category 2012 – 2016-----	138
6.37 U.S. Distilled Spirits Market Share of Volume by Category 2012 – 2016 -----	139
6.38 U.S. Distilled Spirits Market Change in Volume by Category 2013 – 2016-----	140
6.39 U.S. Distilled Spirits Market Growth 1955 – 2016 -----	141
6.40 U.S. Distilled Spirits Market Retail Sales by Category 2012 – 2016 -----	142
6.41 U.S. Distilled Spirits Market Share of Retail Sales by Category 2012 – 2016-----	143
6.42 U.S. Distilled Spirits Market Change in Retail Sales by Category 2013 – 2016 -----	144
6.43 U.S. Distilled Spirits Market Per Capita Consumption 1950 – 2016 -----	145

TABLE OF CONTENTS

Chapter

7. THE U.S. ENERGY DRINK MARKET

The National Energy Drink Market ----- 146

- Overview----- 146
- Volume and Dollars ----- 167
- Per Capita Consumption ----- 168

Exhibits

7.44 U.S. Energy Drink Market Wholesale Dollars and Volume 1997 – 2016----- 170

7.45 U.S. Energy Drink Market Per Capita Consumption 1997 – 2016----- 171

8. THE U.S. FRUIT BEVERAGE MARKET

The National Fruit Beverage Market----- 172

- Overview----- 172
- Volume----- 178
- Wholesale Dollar Sales----- 180
- Per Capita Consumption ----- 181

Exhibits

8.46 U.S. Fruit Beverage Market Volume and Change 1980 – 2016 ----- 184

8.47 U.S. Fruit Beverage Market Segments Volume 2011 – 2016 ----- 185

8.48 U.S. Fruit Beverage Market Segments Share of Volume 2011 – 2016 ----- 186

8.49 U.S. Fruit Beverage Market Segments Change in Volume 2012 – 2016 ----- 187

8.50 U.S. Fruit Beverage Market Total Wholesale Dollars and Change 1982 – 2016----- 188

8.51 U.S. Fruit Beverage Market Segments Estimated Wholesale Dollar Sales
1982 – 2016 ----- 189

8.52 U.S. Fruit Beverage Market Segments Share of Wholesale Dollar Sales 1982 – 2016 190

8.53 U.S. Fruit Beverage Market Segments Change in Wholesale Dollar Sales
1991 – 2016 ----- 191

8.54 U.S. Fruit Beverage Market Per Capita Consumption 1980 – 2016----- 192

8.55 U.S. Fruit Beverage Market Segments Per Capita Consumption 1992 – 2016 ----- 193

9. THE U.S. MILK MARKET

The National Milk Market----- 194

- Overview----- 194
- Volume----- 198
- Per Capita Consumption ----- 199
- Growth----- 200

Exhibits

9.56 U.S. Fluid Milk Market Volume, Weight and Change 1975 – 2016----- 201

9.57 U.S. Fluid Milk Market Per Capita Consumption 1975 – 2016----- 202

9.58 U.S. Fluid Milk Market Compound Annual Growth 1980 – 2016 ----- 203

TABLE OF CONTENTS

Chapter

10. THE U.S. SPORTS BEVERAGE MARKET	
The National Sports Beverage Market-----	204
• Overview-----	204
• Volume and Dollars -----	215
• Per Capita Consumption -----	216
Exhibits	
10.59U.S. Sports Beverage Market Wholesale Dollars and Volume 1985 – 2016-----	217
10.60U.S. Sports Beverage Market Change in Dollars and Volume 1986 – 2016-----	218
10.61U.S. Sports Beverage Market Per Capita Consumption 1985 – 2016-----	219
11. THE U.S. TEA MARKET	
The National Tea Market -----	220
• Overview-----	220
• Volume by Segments -----	247
• Per Capita Consumption -----	251
Exhibits	
11.62U.S. Tea Market Estimated Consumption by Segment 2011 – 2016 -----	252
11.63U.S. Tea Market Share of Consumption by Segment 2011 – 2016-----	253
11.64U.S. Tea Market Change in Consumption by Segment 2012 – 2016 -----	254
11.65U.S. Tea Market Per Capita Consumption by Segment 2011 – 2016-----	255
12. THE U.S. WINE MARKET	
The National Wine Market -----	256
• Overview-----	256
• Volume-----	258
• Growth-----	259
• Per Capita Consumption -----	260
Exhibits	
12.66U.S. Wine Market Volume and Change 1950 – 2016 -----	262
12.67U.S. Wine Market Volume by Category 2011 – 2016-----	263
12.68U.S. Wine Market Share of Volume by Category 2011 – 2016-----	264
12.69U.S. Wine Market Change in Volume by Category 2012 – 2016-----	265
12.70U.S. Wine Market Compound Annual Growth 1955 – 2016 -----	266
12.71U.S. Wine Market Per Capita Consumption 1950 – 2016-----	267
13. THE PROJECTED U.S. BEVERAGE MARKET	
The Projected National Beverage Market -----	268
• Overview-----	268
The Projected National Beverage Market by Category -----	274
• Beer-----	274
• Bottled Water-----	274
• Carbonated Soft Drinks -----	275

TABLE OF CONTENTS

Chapter

13. THE PROJECTED U.S. BEVERAGE MARKET (cont'd)

The Projected National Beverage Market by Category (cont'd)

- Coffee----- 276
- Distilled Spirits ----- 277
- Energy Drinks ----- 277
- Fruit Beverages ----- 278
- Milk----- 279
- Sports Beverages ----- 279
- Tea ----- 280
- Value-Added Water ----- 281
- Wine ----- 282

Exhibits

- 13.72 Projected U.S. Beverage Market Volume by Category 2016 – 2021----- 283
- 13.73 Projected U.S. Beverage Market Share of Volume by Category 2016 – 2021----- 284
- 13.74 Projected U.S. Beverage Market Compound Annual Growth in Volume by Category
2016 – 2021 ----- 285
- 13.75 Projected U.S. Beverage Market Producers’ Sales by Category 2016 – 2021 ----- 286
- 13.76 Projected U.S. Beverage Market Share of Producers’ Sales by Category
2016 – 2021 ----- 287
- 13.77 Projected U.S. Beverage Market Compound Annual Growth in Producers’ Sales by
Category 2016 – 2021 ----- 288
- 13.78 Projected U.S. Beverage Market Estimated Retail Sales by Category 2016 – 2021 --- 289
- 13.79 Projected U.S. Beverage Market Share of Retail Sales by Category 2016 – 2021 ----- 290
- 13.80 Projected U.S. Beverage Market Compound Annual Growth in Retail Sales by
Category 2016 – 2021 ----- 291
- 13.81 Projected U.S. Beverage Market Per Capita Consumption by Category 2016 – 2021 - 292

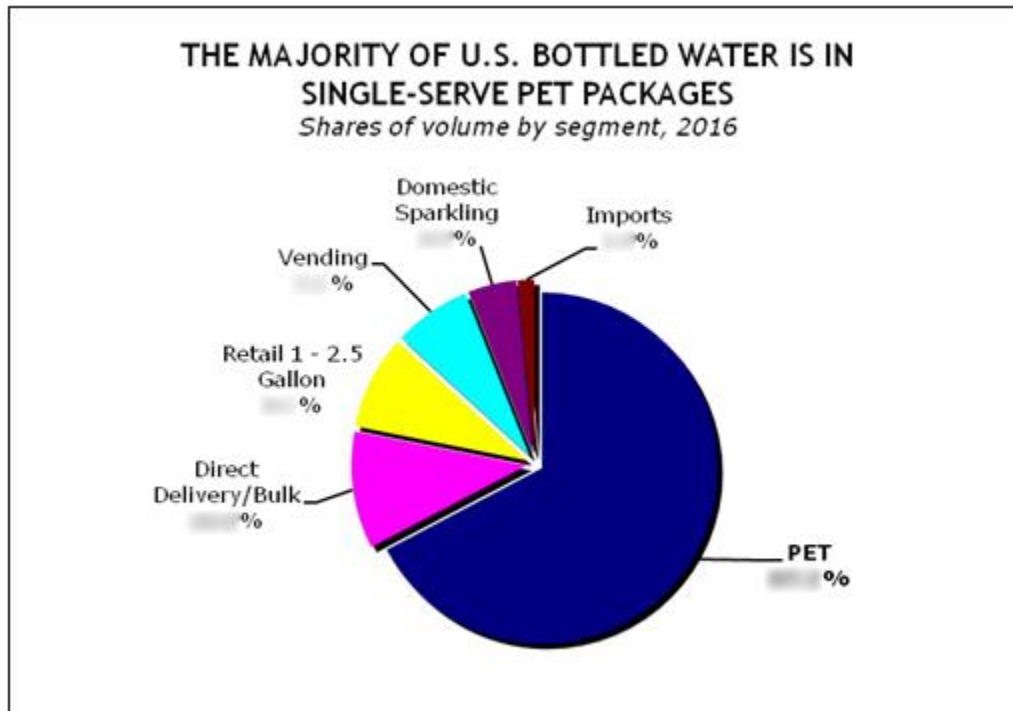
Some of the biggest developments in the industry several years into the 21st century concerned corporate structures rather than volumetric size.

- In summer of 2008, Anheuser-Busch (A-B) agreed to be bought by Belgian brewing giant InBev, resulting in Anheuser-Busch InBev (ABI).
- The year before the acquisition, A-B and InBev started to become intertwined when the American company gained import rights to InBev's European brands in the United States.
- Around the same time that A-B and InBev were starting to get to know one another, the products of earlier mergers also formed closer bonds. SABMiller and Molson Coors formed a joint venture dubbed MillerCoors, which combined the operations of their respective U.S. subsidiaries, Miller Brewing and Coors Brewing. The entity involving all of the two companies' brands in the U.S. market formally became active almost simultaneously with A-B and InBev's decision to combine.
- To shore up its craft beer credentials, ABI in spring 2011 purchased Goose Island of Chicago. In spring 2013, the brewer initiated nationwide distribution of Goose Island beer. It picked up two more specialty brewers, Blue Point Brewing Company and 10 Barrel, in 2014. In 2015, ABI instituted the High End as the unit operating its craft and imported beers. In May 2017, Asheville, North Carolina-based brewer Wicked Weed joined the High End.

Overview (cont'd)

- In a major move in 2012, ABI made a bid to buy the (nearly) half of Grupo Modelo that it didn't hold already, a deal that would also affect Crown Imports, which formed as a joint venture between the Mexican brewer and Constellation Brands but which would become a Constellation property.
- After the proposed deal was announced, in June 2012, ABI agreed to modify it in order to satisfy U.S. regulators.
- When the reconfiguration was completed – deals closed in summer 2013 – ABI had acquired Grupo Modelo but Constellation Brands acquired the Piedras Negras brewery in Nava, Mexico, and rights to distribute Corona Extra and its stablemates in the U.S. market. Constellation became the sole owner of Crown Imports by acquiring the portion that had been held by Grupo Modelo.
- In spring 2014, ABI repurchased Oriental Brewing, a South Korean brewer it had sold a few years earlier.
- In September 2014, Eugene Kashper, chairman of Russian beer company Oasis Beverages, in conjunction with TSG Consumer Partners acquired Pabst Brewing Company, which the Metropoulos family had purchased a few years earlier.

- ABI continued to add to its collection of craft brewers with the purchase of Seattle, Washington-based Elysian Brewing Company in early 2015 and Los Angeles, California-based Golden Road Brewing later in the year.
- In September 2015, ABI publically acknowledged that it aimed to combine with SABMiller in a potentially massive deal. It began making cash offers to buy SABMiller in October. The first few were rejected, but on 13 October the companies agreed in principle to a tentative \$104 billion deal. In the months that followed, ABI tried to engineer divestments in order to appease regulators in various parts of the world. According to plans announced in 2016, the company intended to sell SABMiller's stake in MillerCoors to the other party in the joint venture, Molson Coors, and to sell off various holdings in Europe and Asia.



Source: Beverage Marketing Corporation

**U.S. BEVERAGE MARKET
SHARE OF VOLUME BY CATEGORY
2011 – 2016**

Categories	2011	2012	2013	2014	2015	2016
Bottled Water	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Carbonated Soft Drinks	28.1%	28.1%	28.1%	28.1%	28.1%	28.1%
Coffee	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
RTD Coffee	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%
Beer	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Milk	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Tea	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
RTD Tea	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%
Fruit Beverages*	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Sports Beverages	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Wine	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Energy Drinks	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Value-Added Water	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Distilled Spirits	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Subtotal	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
All Others**	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
TOTAL	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%

* Includes liquid fruit juice and fruit drinks; excludes powdered fruit drinks and vegetable juices.

** Includes tap water, vegetable juices, powders and miscellaneous others.

Source: Beverage Marketing Corporation; Distilled Spirits Council of the United States; Florida Department of Citrus; International Dairy Foods Association; U.S. Tea Association