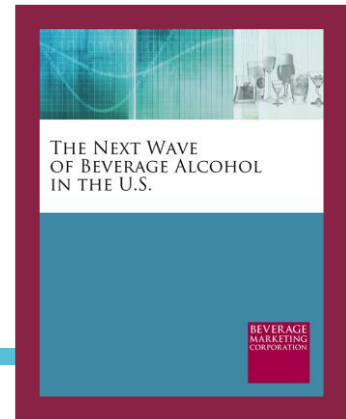


# THE NEXT WAVE OF BEVERAGE ALCOHOL IN THE U.S.

2019 EDITION (Published June 2019. Data through 2018. Market projections through 2023.) More than 60 pages, with text analysis and tables



*The Next Wave of Beverage Alcohol in the U.S.* endeavors to elucidate the trends and market developments giving rise to new variants on the fundamental three beverage alcohol types (beer, wine, distilled spirits) as millennials continue to make their mark on the industry. It profiles fast-growing emerging segments and the brands comprising them, documenting their performance (providing volume, growth and market share data) and indicating what makes them noteworthy.

Emerging adult beverage sectors covered include: hard/spiked seltzers, hard/spiked still waters, sports beers, hard ready-to-drink tea, hard ready-to-drink coffee, hard kombucha, ready-to-drink “mocktails”, on-premise/craft “mocktails”, “healthier” cocktails and no-alcohol wine.

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## INSIDE:

### REPORT OVERVIEW

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

### TABLE OF CONTENTS

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

### SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. **9**



HAVE QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962  
[charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)

BEVERAGE  
MARKETING  
CORPORATION

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

## THE ANSWERS YOU NEED

This report offers insights on trends such as the move, especially among younger adult consumers, toward no- and low-alcohol alternatives to conventional cocktails. It also explores developments like the emergence of new-style categories like hard kombucha and hard seltzer. Questions answered include:

- What are the top hard seltzer brands?
- What gave rise to the hard kombucha segment, and what are its growth prospects?
- What distinguishes the emerging “next wave” hard ready-to-drink teas entering the market from those that came earlier?
- What are issues with positioning certain adult drinks as “healthy”?

## THIS REPORT FEATURES

*The Next Wave of Beverage Alcohol in the U.S.* features analysis of trends behind emerging and niche beer, wine and spirits segments as well as segments that do not fit easily into those categories. It profiles key brands and companies. It assesses the prospects as well as some challenges and implications for each.

Emerging new brands and entries from traditional players covered include: BON & VIV Spiked Seltzer, Clear Coast Fresh Hard Seltzer, Henry’s Hard Sparkling Water, Nauti Seltzer Premium Hard Seltzer, Smirnoff Spiked Sparkling Seltzer, Truly Spiked & Sparkling, Svedka Spiked Premium Seltzer, White Claw Hard Seltzer, Pura Still, Anheuser-Busch, Athletic Brewing Company, Avery Brewing Company, Beech Mountain Brewing Company, Boston Beer, Endo Brewing Company, Omission Brewing Company, Sufferfest Beer Company, ZēLUS Beer Company.



# THE NEXT WAVE OF BEVERAGE ALCOHOL IN THE U.S.



# The Next Wave of Beverage Alcohol in the U.S.

June 2019

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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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# Contents

## Table of Contents

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# TABLE OF CONTENTS

TABLE OF CONTENTS .....	i
INTRODUCTION .....	iv

## Chapter

### 1. EMERGING BEVERAGE ALCOHOL SEGMENTS

The Up-and-Coming Adult Drinks .....	1
• Overview & Issues .....	1
• Emerging & Niche Beers .....	6
• Emerging & Niche Distilled Spirits .....	9
• Emerging & Niche Wines .....	9
• Other Emerging & Niche Beverage Alcohol Segments .....	10

### 2. THE NEXT WAVE OF EMERGING BEVERAGE ALCOHOL

#### HARD/SPIKED SELTZERS

• Overview .....	11
• BON & VIV Spiked Seltzer .....	13
• Clear Coast Fresh Hard Seltzer .....	14
• Henry's Hard Sparkling Water .....	15
• Nauti Seltzer Premium Hard Seltzer .....	16
• Smirnoff Spiked Sparking Seltzer .....	17
• Truly Spiked & Sparkling .....	18
• Svedka Spiked Premium Seltzer .....	19
• White Claw Hard Seltzer .....	19

#### HARD/SPIKED STILL WATERS

• Overview .....	20
• Pura Still .....	20

#### SPORTS BEERS

• Overview .....	22
• Anheuser-Busch .....	23
• Athletic Brewing Company .....	24
• Avery Brewing Company .....	25
• Beech Mountain Brewing Company .....	26
• Boston Beer .....	26
• Endo Brewing Company .....	27
• Omission Brewing Company .....	28
• Sufferfest Beer Company .....	29
• ZēLUS Beer Company .....	30

TABLE OF CONTENTS

Chapter

<b>2. THE NEXT WAVE OF EMERGING BEVERAGE ALCOHOL (cont'd)</b>	
<b>HARD READY-TO-DRINK TEA</b>	
• Overview -----	31
• Noveltea-----	32
• Vrai -----	32
<b>HARD READY-TO-DRINK COFFEE</b>	
• Overview -----	34
<b>HARD KOMBUCHA</b>	
• Overview -----	35
• Boochcraft-----	36
• Kombrewcha -----	37
• KYLA Hard Kombucha -----	38
• Unity Vibration -----	39
• Wild Tonic-----	39
<b>READY-TO-DRINK "MOCKTAILS"</b>	
• Overview -----	40
• ArKay Beverages -----	40
• Bar Nøne -----	41
• Ceder's -----	42
• Curious Elixirs-----	42
• Gordon's Ultra Low Alcohol Gin & Tonic-----	43
• Herbie Virgin -----	44
• Mocktails -----	44
• Seedlip -----	45
• Stryyk -----	46
• Surendran & Bownes -----	46
<b>ON-PREMISE/CRAFT "MOCKTAILS"</b>	
• Overview -----	47
<b>"HEALTHIER" COCKTAILS</b>	
• Overview -----	49
<b>NO-ALCOHOL WINE</b>	
• Overview -----	50
• O.Vine Wine Grape Infused Water-----	50
<b>3. THE PROJECTED NICHE BEVERAGE ALCOHOL MARKET</b>	
Emerging Adult Beverages-----	53
• Overview -----	53

TABLE OF CONTENTS

Chapter

**3. THE PROJECTED NICHE BEVERAGE ALCOHOL MARKET (cont'd)**

***Exhibits***

1	Next Wave Adult Beverage Market Estimated Volume by Select Categories 2012 – 2023 -----	56
2	Next Wave Adult Beverage Market Estimated Share of Volume by Select Categories 2012 – 2023 -----	57
3	Next Wave Adult Beverage Market Change in Volume by Select Categories 2014 – 2023 -----	58
4	Next Wave Adult Beverage Market Estimated Per Capita Consumption by Select Categories 2012 – 2023-----	59
5	U.S. Hard/Spiked Seltzer Market Estimated Volume by Brand 2013 – 2018-----	60
6	U.S. Hard/Spiked Seltzer Market Share of Volume by Brand 2013 – 2018 -----	61
7	U.S. Hard/Spiked Seltzer Market Change in Volume by Brand 2014 – 2018-----	62
8	U.S. Sports Beer Market Estimated Volume by Brand 2013 – 2018-----	63
9	U.S. Sports Beer Market Share of Volume by Brand 2013 – 2018-----	64
10	U.S. Sports Beer Market Change in Volume by Brand 2014 – 2018-----	65



A number of paradoxes can be observed at play in the emergence of these alternative styles of drinks. Not the least is the simultaneous yearning among consumers for what has been perceived as attractive qualities of beer, spirits and wine – complexity, say, and grown-up-ness – without what has generally been considered their *sin qua non*, i.e., alcohol.

- While traditionalists or the literal minded might scoff at the idea of alcohol-free “wine” (isn’t that just grape juice?), and connoisseurs of specific distilled spirits might turn up their noses at, say, “rum” or “gin” with little or no alcohol, less convention-bound consumers appear willing to embrace such seemingly unusual beverages. Wine without alcohol might not meet a strict definition of wine, but liquid made from grapes, put in glass bottles and intended to be consumed from standard wine glasses might offer something that grape juice poured from a carton does not, just as those who like the taste of gin and tonic or rum and Coke but don’t want to worry about driving home safely or about how they’ll feel in the morning might see real value in low octane spirits.
- Of course, not all niche and emerging styles of drinks considered here are low- or no-alcohol products. Many hard/spiked seltzers have an alcohol content comparable to conventional light beers. Yet even in this area, these can qualify as relatively low levels if the beverages are selected as alternatives to drinks made with distilled spirits. Suggested serving recommendations for these seltzers resemble those for no-alcohol seltzers, i.e. in a glass over ice. Thus, as a substitute for regular cocktails, hard seltzers do represent a lower-alcohol option. Some seltzers have been presented as precisely for such occasions, sometimes even using distilled spirits brand names (as with Svedka Spiked Premium Seltzer).
- Some – though by no means all – of the brands making up the “sports” beer category highlight their on-the-low-side alcohol content in order to play up their ability to hydrate active consumers. (In general, alcohol can contribute to dehydration, which makes beer an unlikely candidate for a rehydration beverage, but the lower the alcohol content, the less this is a problem.)

Another seeming contradiction is seeking healthier options among beverages required by law to bear health warnings on their labels. While this would not apply to truly alcohol-free products, of course, it would remain the case with those with the same alcohol content, and thus the same need to adhere to labeling rules, as beer.

- Making any sort of overt health claims for beverage alcohol has always been a tricky business.

**U.S. HARD/SPIKED SELTZER MARKET  
SHARE OF VOLUME BY BRAND  
2013 – 2018**

<b>Brand</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
White Claw Hard Seltzer	---	---	---	---	---	---
Truly Spiked & Sparking	---	---	---	---	---	---
BON & VIV Spiked Seltzer	---	---	---	---	---	---
Smirnoff Spiked Sparkling Seltzer	---	---	---	---	---	---
Henry's Hard Sparkling Water	---	---	---	---	---	---
Press Premium Alcohol Seltzer	---	---	---	---	---	---
Nauti Seltzer Premium Hard Seltzer	---	---	---	---	---	---
<b>Subtotal</b>	---	---	---	---	---	---
All Others	---	---	---	---	---	---
<b>TOTAL</b>	---	---	---	---	---	---

Source: Beverage Marketing Corporation