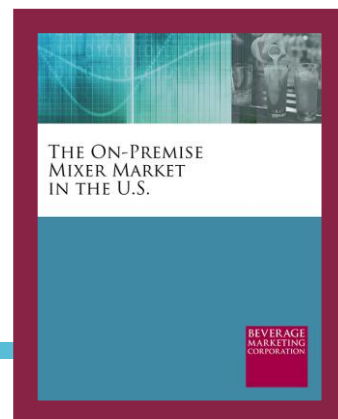


# THE ON-PREMISE MIXER MARKET IN THE U.S.

**2019 EDITION** (Published November 2019. Data through 2018. Market projections through 2021.) 38 PowerPoint slides, with text analysis, graphs and charts



It's no surprise that a broad range of non-alcohol beverages are used as mixers for adult beverages in on-premise settings — and it isn't limited to beverages labeled as mixers. But getting your arms around the breadth and scope of that end-use market has always been a challenge. In this report, Beverage Marketing Corporation raises the bar by sizing the market and giving brand owners and marketers the information needed to grow this somewhat incidental — yet potentially sizeable — sales channel. For a handle on the size of the on-premise market for various types of mixers as well as a look at key players and the potential size of the opportunity, you won't want to miss this new BMC Report: *The On-Premise Mixer Market in the U.S.*

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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. **7**

### SAMPLE TEXT AND INFOGRAPHICS

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



**HAVE  
QUESTIONS?**

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## THE ANSWERS YOU NEED

Beverage Marketing Corporation research shows that as consumers continue to trade up to premium and above-premium spirits in their cocktails, quality in all components, including mixers and other non-alcohol ingredients, has become increasingly important to both operators and consumers.

Who needs this report? If you market - or plan to produce - a branded premium mixer product geared to on-trade, this report is for you. If you manage an all-occasion beverage and are seeking to expand your brand's into the adult on-premise sector and want to better understand the size of the opportunity and assess whether changing trends and preferences might make it worthwhile to partner with an adult beverage manufacturer or create a signature on-premise cocktail featuring your product as a mixer, this report gives you the vantage point to plan your strategy. If you are already marketing your non-alcohol beverage as a mixer to the on-premise sector, this report gives you everything you need to benchmark your progress. If you are an investor considering investing in the mixer segment or an on-premise venue planning your next move in the beverage arena, this report is for you.

To assess the current and future opportunity, this market report explores the competitive landscape, looking at:

- How big is the overall on-premise market for mixers?
- How big are each of the on-premise mixer segments, how fast are they growing and what does Beverage Marketing forecast for each sector?
- What are the key brands used as mixers in on-premise outlets?
- How intense is the competition in each mixer segment? What volume and market share of their particular on-premise mixer segment do each of the key players control?

## THIS REPORT FEATURES

It's no surprise that fruit juices — and energy drinks for that matter — are used as cocktail mixers in on-premise settings. As millennial consumers put their personalized, healthy, high quality twist on the sector, the mixer segment, like many other beverage categories, is ripe for innovation. In an evolving marketplace, truly understanding on-premise adult beverage consumption market opportunities means not only looking at alcohol beverages but at the elements that complete and personalize the mixed drink and cocktail experience: mixers. This report provides:

- An overview of on-premise alcohol beverage consumption and growth trends as a backdrop for the discussion of non-alcohol mixer market trends.
- A look at the size of the on-premise mixer market. The scope of the report is limited to on-premise use of non-alcohol beverage ingredients in mixed drinks/cocktails involving spirits, which will be referred to as "mixers" for the purposes of the report.
- An exploration of consumer drivers
- On-premise market size, growth and share for each mixer segment including:
  - Juices
  - Mixes
  - Syrups/flavorings
  - Purées
  - Tonic water/Club soda/Seltzer
  - Carbonated soft drinks
  - Energy drinks
- An all-outlet inclusive view that quantifies on-premise mixer usage across outlets including casual-dining restaurants, fine-dining restaurants, hotels and drinking establishments including taverns, pubs, lounges, nightclubs, sports bars, music/comedy clubs.

- A review of the competitive landscape within each mixer segment
- On-premise mixer volume and share for leading brands such as Red Bull, Monster, Rockstar, Full Throttle, Amp, Island Oasis, Finest Call, Daily's, Lyon's Maui, Mr & Mrs. T, Minute Maid, Ocean Spray, Dole, Florida's Natural, Tropicana, Monin, DaVinci, Torani, Finest Cal, Fee Brothers, Schweppes, Canada Dry, Q Tonic, FeverTree, Coca-Cola Classic, Diet Coke, Pepsi, Sprite, Canada Dry, Seagrams, Fever Tree and many more.

**Please note:** Premixed cocktails or ready-to-drink cocktails are specifically excluded from the scope of this report.



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BEVERAGE  
MARKETING  
CORPORATION

# The On-Premise Mixer Market in the U.S.

November 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

### I. Introduction, Objective & Methodology

Introduction .....	4
Objective and Scope .....	5
Mixer Category Descriptions .....	7
Methodology .....	8

### II. On-Premise Mixer Market

On-Premise Adult Beverage: Challenged in recent years .....	10
On-Premise Growth Trend by Segment 2014 - 2019 .....	11
On-Premise Spirits Trends .....	12
On-Premise Mixer Volume Growth 2013 - 2019 .....	13
Category Volume Trend 2018 & 2019 .....	14
Category Share of On-Premise Mixer Volume 2019 .....	14
Fierce Competition .....	15
Leading Mixer Brands by Volume .....	16

### III. Mixer Categories and Trends

On-Premise Mixer Market Trends .....	19
On-Premise Mixer Category Share .....	20
Category Share of On-Premise Mixer Volume 2013 & 2019 .....	21
Competitive Landscape .....	22
Leading Mix Brands .....	24
Leading Brands' Share of Mix Volume 2012 - 2018 .....	25
Leading Juice Mixer Brands .....	26
Leading Brands' Share of Juice Mixer Volume 2012 - 2018 .....	27
Leading Syrup/Flavorings Brands .....	28
Leading Brands' Share of Syrup/Flavorings Mixer Volume 2012 & 2018 .....	29
Leading Purée Brands .....	30
Leading Brands' Share of Purée Mixer Volume 2012 & 2018 .....	31
Leading Tonic/Seltzer/Club Soda Brands .....	32
Leading Brands' Share of Tonic Water/Seltzer/Club Soda Mixer Volume 2012 & 2018 .....	33
Leading Carbonated Soft Drink Brands .....	34
Leading Brands' Share of Carbonated Soft Drink Mixer Volume 2012 & 2018 .....	35
Leading Energy Drink Brands .....	36
Leading Brands' Share of Energy Mixer Volume 2012 & 2018 .....	37

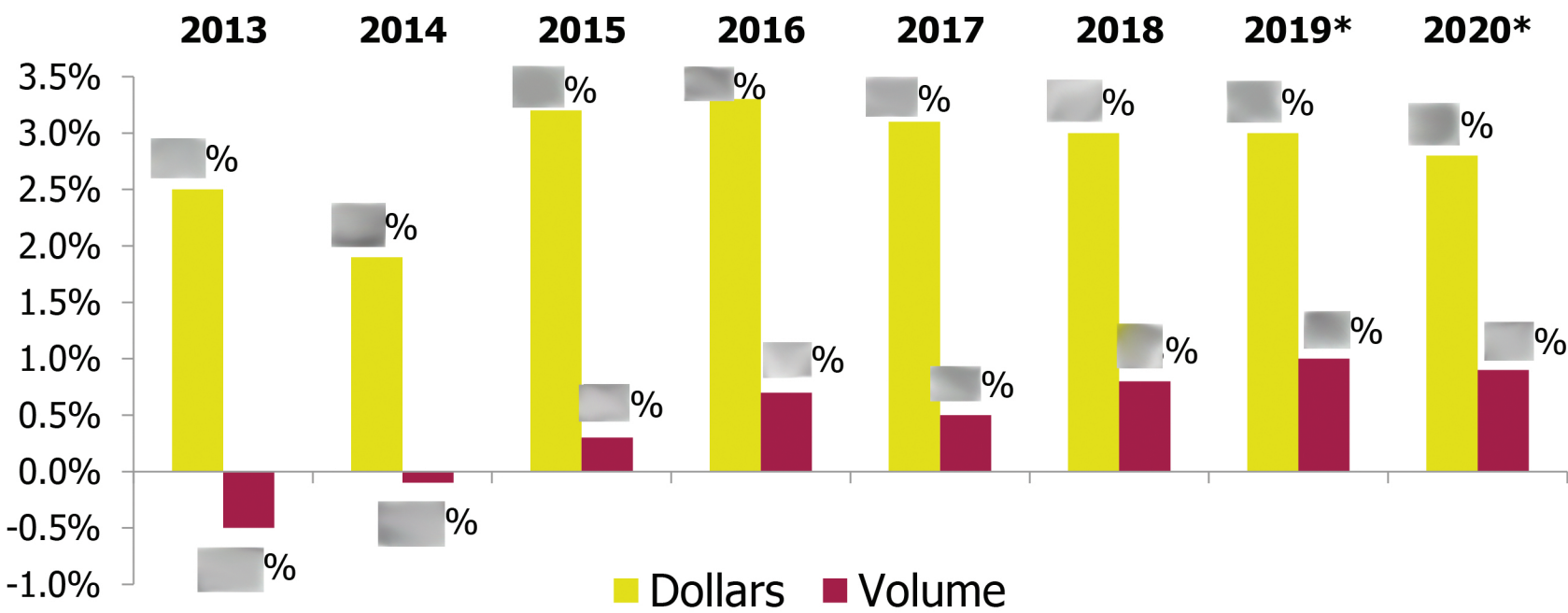
### IV. Outlook and Future

On-Premise Mixer Volume Projection .....	39
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## On-premise spirits trends

- Spirits sales growth is due to continue in the on-premise channel, with dollars reaching \$██████████ in 2019, a ██████% increase.
- Dollar growth is attributed both to continued premiumization, wherein consumers explore and trade up to more-expensive categories, segments and brands, and to drink price increases.
- Volume, however, is challenged because of compressed on-premise traffic and increased competition from wine and beer. Spirits volume on-premise is due to increase in 2019 (+█████%) slightly above the growth in 2018, ending the year at ██████████ 9-liter cases.

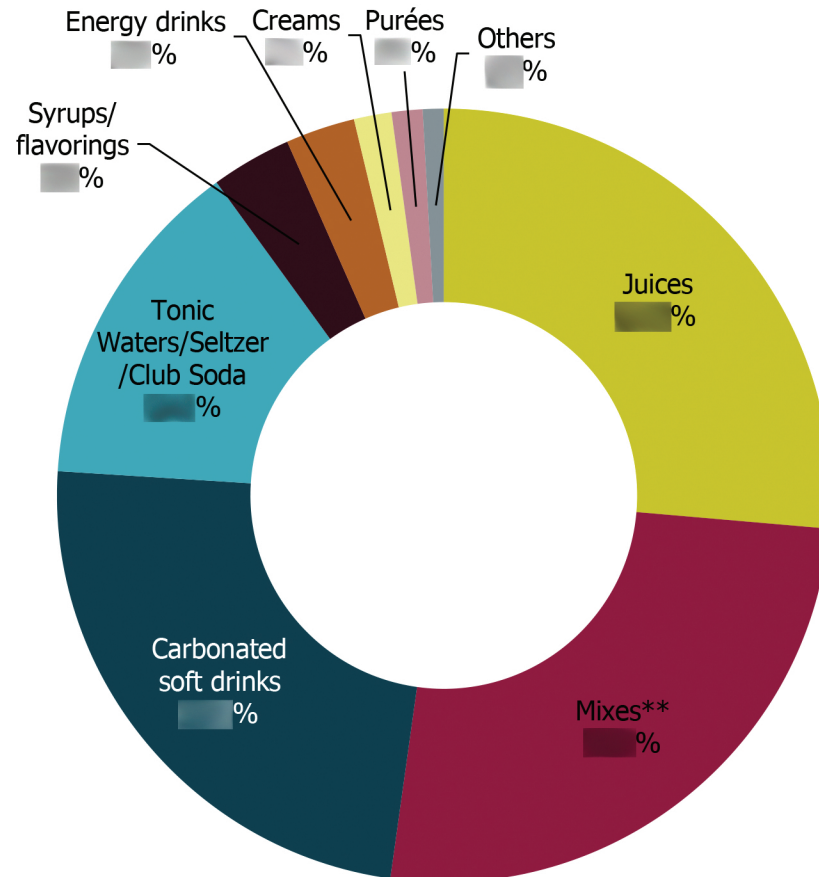
On-Premise Dollar and Volume Growth 2013 – 2020\*



\*Projection  
Source: Beverage Marketing Corporation



## Category share of on-premise mixer volume 2019\*



## Competitive landscape

- ❖ Mixers intended for use in adult beverages include categories that are consumed primarily as non-alcohol beverages, such as carbonated soft drinks, juices and energy drinks, as well as products that are primarily used in bar and/or kitchen applications. Consumer and trade brand awareness in on-premise varies due to individual marketer prioritization of the channel.
- ❖ Carbonated soft drinks, juice, tonic water and energy drink marketers leverage brand equity built at retail when competing for placement behind the bar. Some brands benefit from multi-year beverage contracts with on-premise operators, and many provide promotional support to on-premise partners that yields visibility via menu placement, branded signage and other merchandising programs.
- ❖ Leading brands suppliers in other categories, such as syrup/flavoring and purée, often focus marketing and brand-building efforts on the trade; some also provide promotional support to operator partners. Syrups/flavorings leaders Monin, DaVinci and Torani, however, enjoy strong presence in the coffee café segment, affording them consumer and trade brand recognition.
- ❖ Product innovation around flavor and format is a key driver of every category in the mixer market. Consumer segments, particularly the younger generations, continue to seek out new flavors and are less brand loyal than prior generations. This has spurred on-premise locations to introduce their own original cocktails to entice these consumers.
- ❖ A trend that has taken place of the last few years is the popularity of classic cocktails following the adage “everything old is new again,” although this hasn’t had an overarching effect on the size of the mixer market