

U.S. ALCOHOL BEVERAGE TREND ANALYSIS

2017 EDITION (Published May 2017. Data through 2016.)
More than 30 PowerPoint slides, with extensive charts, data and infographics.

This market report delivers observations and insights on trends affecting the adult beverage market via a colorful, data-filled PowerPoint presentation designed to bring busy executives up to date while providing food for thought and discussion. Based on a presentation by Beverage Marketing's alcohol consulting group, it offers beer, wine and spirits market data through 2016 as well as observations on the trends that are re-shaping the alcohol market in the United States.

Set against a backdrop of the total alcohol vs. non-alcohol market, this timely report examines key market drivers impacting consumers' alcohol choices. In addition to highlighting effect of these factors on various alcohol beverage segments and sub-segments, the report offers insight on key trends relating to wine and spirits, beer, craft beer, hard ciders flavored malt beverages and prepared cocktails.

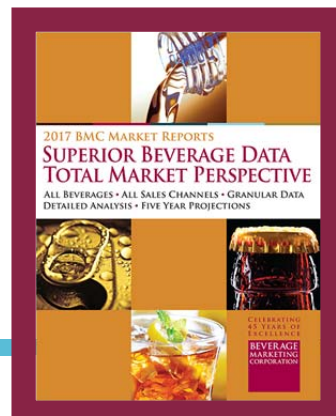
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**HAVE
QUESTIONS?**

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THE ANSWERS YOU NEED

This data and insight-rich PowerPoint presentation offers insights on the alcohol market against the backdrop of trends in the overall U.S. beverage market and is the perfect kickoff to brainstorming meetings. Questions answered include:

- How did the U.S. beer, distilled spirits and wine markets perform in 2015?
- What are the key trends impacting various wine segments?
- How are various FMB brands and hard cider brands performing?
- How did craft beer and imports perform?

THIS REPORT FEATURES

This graphically impactful PowerPoint presentation uses the total U.S. beverage market as the jumping off point for an in-depth analysis of trends in the beer, wine and distilled spirits sectors, with looks at everything from volume and growth to market drivers and expectations for high interest alcohol sectors. In this report, Beverage Marketing examines a wide range of trends, category results and issues including but not limited to:

- Volume and growth statistics for beer, wine and spirits sectors and discussion of the year's key category performance drivers for each sector
- Trends driving high interest categories including FMBs, alternative beverage alcohol, craft beer and ciders
- A look at the evolution of the alternative beverage alcohol segment

U.S. Alcohol Beverage Trend Analysis

May 2016



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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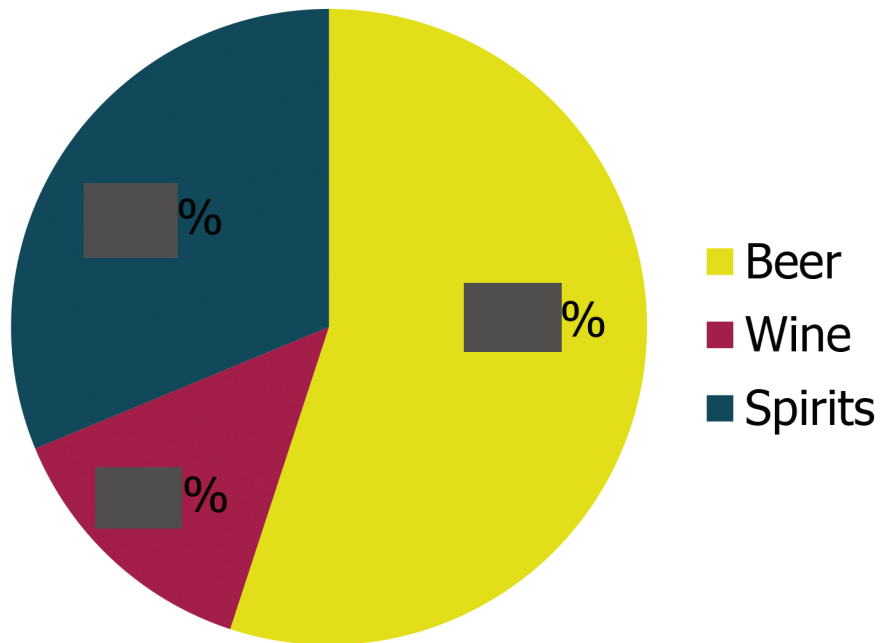
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Beverage Alcohol On Premise Category Share by Servings

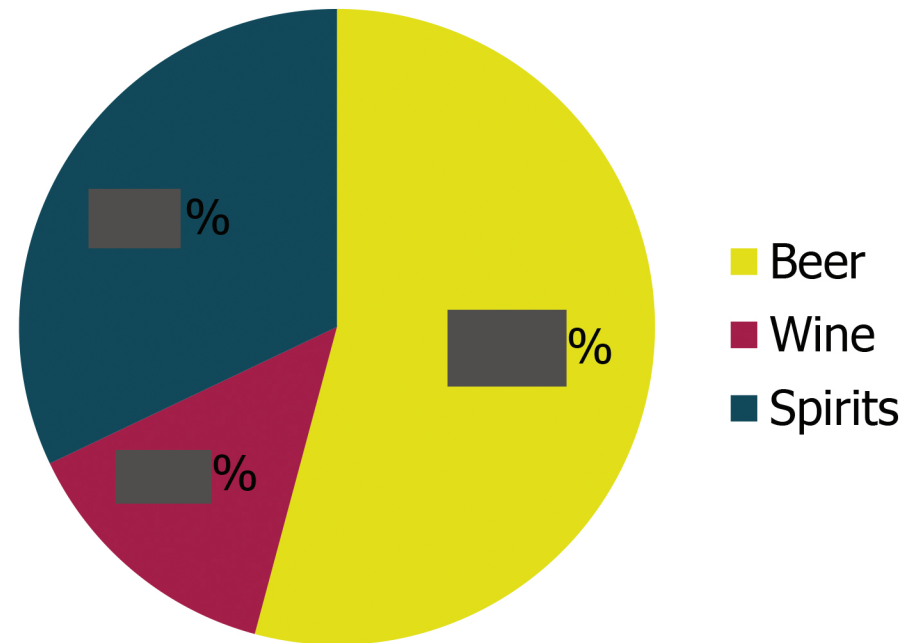
- However beer share lost [] share points in the on-premise while Spirits ([]) and Wine ([]) share gains are both lower in bars and restaurants.

2011



[] Billion Servings*

2016



[] Billion Servings*

*12 oz. beer, 5 oz. wine, 1.5 oz. spirits

Source: Beverage Marketing Corporation

Adult Beverage Consumer Attitudes

Bars and full-service restaurants are top locations for adult beverage occasions

- Bars are top-of-mind when consumers are sourcing beer, mixed drinks, and straight spirits away from home. Restaurants and bars share top-of-mind status when consumers are seeking wine.

Trial on-premise drives off-premise purchase, especially for younger consumers

- Roughly two-thirds of consumers who try and like a beer, wine or spirits drink in a restaurant or bar are likely to purchase the same product at retail. Younger consumers express a higher likelihood of doing so than their older counterparts.

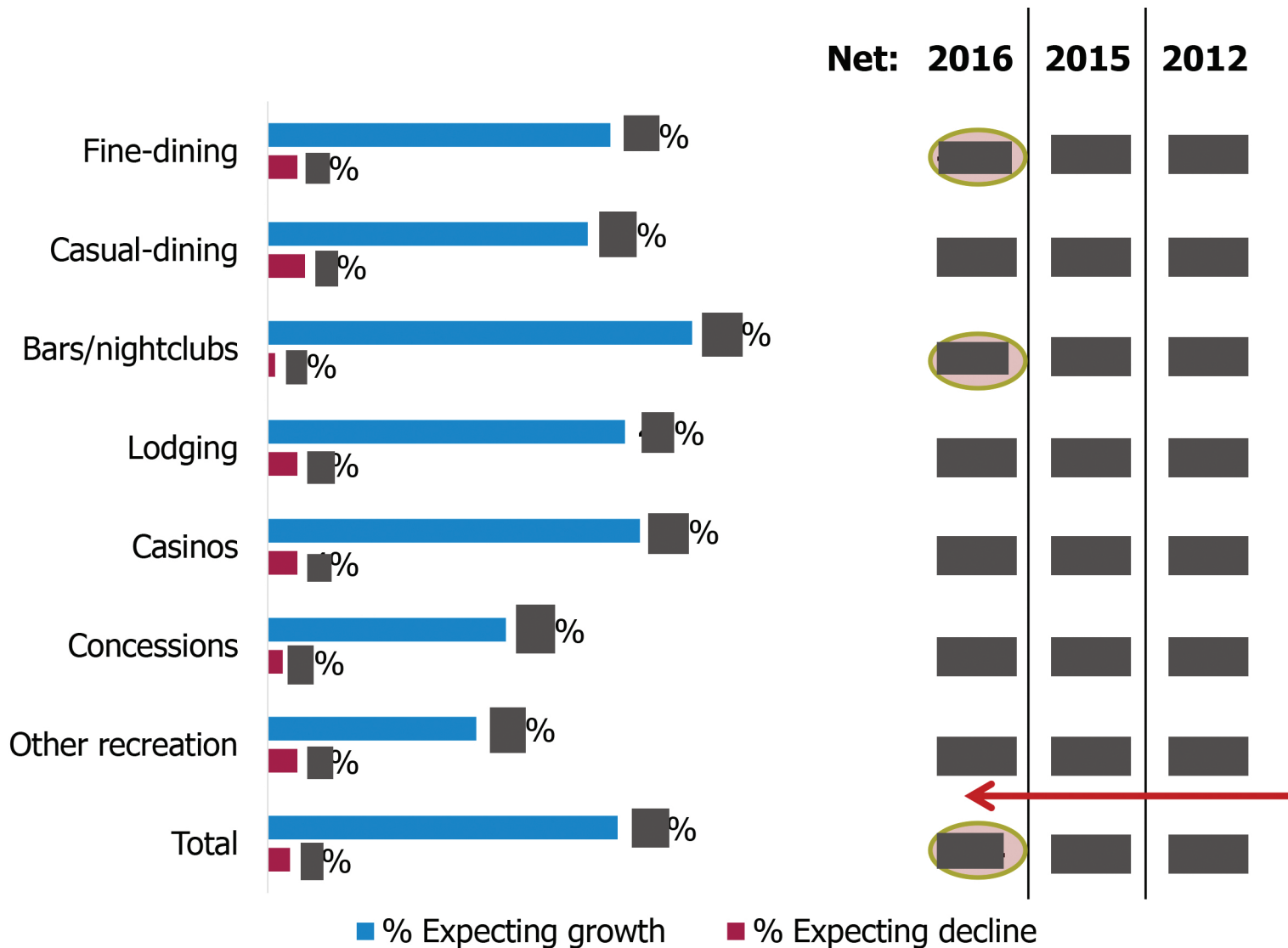
Knowledge is key, bartenders are key gatekeepers

- The majority (■%) of cocktail drinkers believe it is important for servers to be knowledgeable about the spirits offering, and three-quarters (■%) prioritize a variety of spirits selections.

Flavor is driver of cocktail consumption

- The majority of consumers (■%) choose a cocktail based on its flavor profile than by its base spirit; younger consumers are more likely to do so, indicating the importance of flavor.

Spirits Growth Expectations by Segment



- On premise spirits volume grew ██████% in '15 and ██████% in '16
- Operators expectation for spirits growth has increased every year since 2012