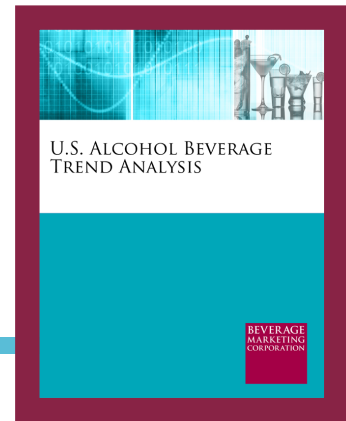


U.S. ALCOHOL BEVERAGE TREND ANALYSIS

2021 EDITION (Published May 2021. Data through 2020.)
More than 30 PowerPoint slides, with extensive charts, data and infographics.



This title from Beverage Marketing's *Focus Report* series 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 distilled spirits market data through 2020 as well as observations on the trends that are re-shaping the alcohol market in the United States, including the covid-19 pandemic sweeping the nation and world.

This timely report examines key market drivers impacting consumers' alcohol choices, highlighting the effects of these factors on various beverage alcohol segments and sub-segments, while offering insights on key trends relating to wine and spirits and beer.

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HAVE QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

BEVERAGE
MARKETING
CORPORATION

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

THE ANSWERS YOU NEED

This data and insight-rich PowerPoint presentation offers insights on the alcohol 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 2020?
- What are the key trends affecting various wine segments?
- How did alternative adult beverages impacted beer, spirits and wine performance in 2020?

THIS ALCOHOL BEVERAGE INDUSTRY REPORT FEATURES

This graphically impactful PowerPoint presentation uses the total U.S. beverage market as the jumping off point for an analysis of trends in the beer, wine and distilled spirits sectors, from volume and growth to market drivers and expectations for high interest alcohol sectors.



U.S. ALCOHOL BEVERAGE TREND ANALYSIS



U.S. Alcohol Beverage Trend Analysis

May 2021

BEVERAGE
MARKETING
CORPORATION

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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Two beverage alcohol trends that we expect will continue in 2021:

Continued growth of the ready-to-drink (RTD) segment

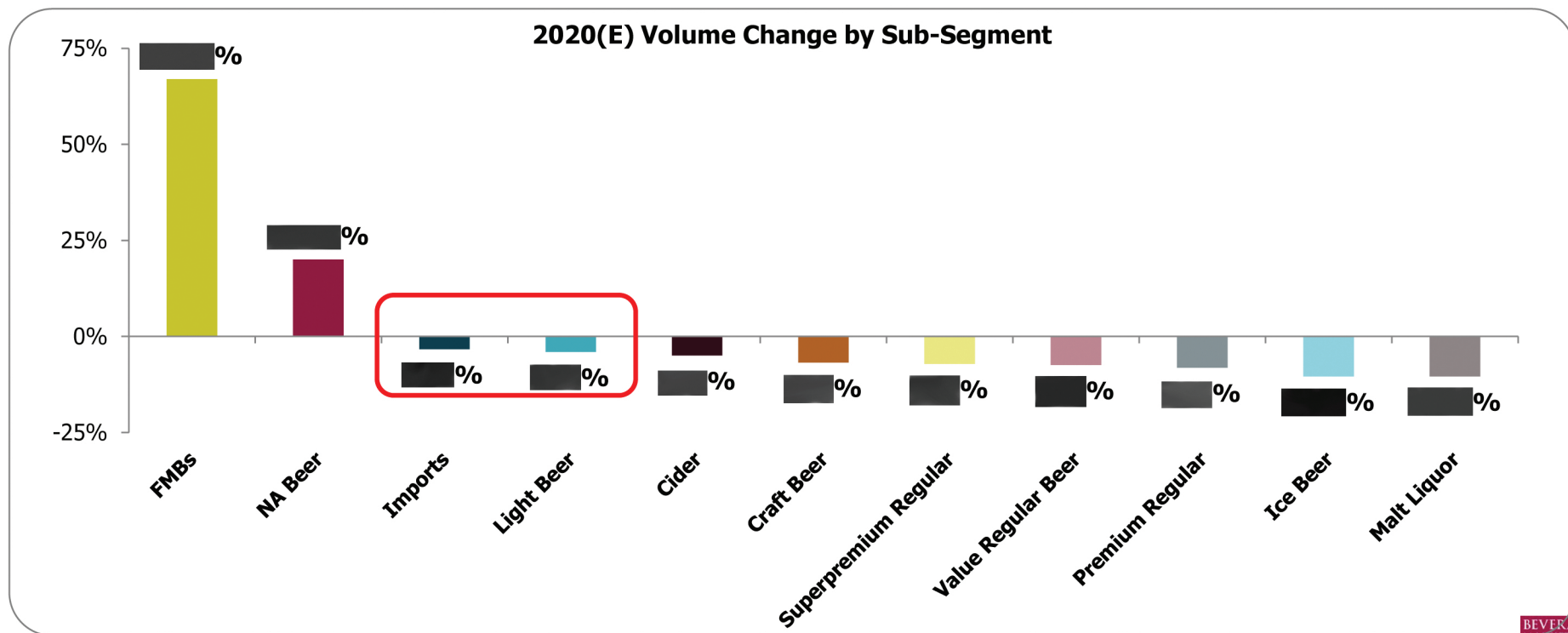
- Single-serve RTD beverages across malt, wine and spirits will continue to grow dramatically
 - Popularity further driven by convenience & variety seeking during Covid on-premise shutdown
- Spirits-based RTDs are reshaping the market landscape, despite still limited scale
 - Products range from seltzers (High Noon) to craft cocktail expressions
 - Beer distributors are rapidly adding to portfolio where license permits
- Malt-based RTDs will continue to be driven by the hard seltzer segment, even as new variants such as ranch water expand the segment
- Wine-based RTDs, including flavored wines and wine cocktails will grow
- Hemp/CBD RTDs strive for nationwide expansion, as legislation marches forward with opportunity

E-commerce builds on an epic 2020

- The Covid-19 pandemic set up an epic shift of alcohol sales from on-premise to off-premise, e-commerce and DtC channels, as volumes spiked early in the pandemic while consumers stayed in and stocked up, then settled into sustained growth.
 - It is estimated that total e-com penetration experienced 10 years of growth in three months (March — May 2020)
- This change in consumer behavior has introduced many to a new way to purchase alcohol, and this will only expand as companies/brands build out their online offerings.

The majority of segments across the U.S. beer market saw declines in 2020, some directly due to the pandemic, yet the total market was flat on the back of hard seltzer's continued growth

Beer Market Major Sub-Segments



(E) Estimated
Source: Beverage Marketing Corporation