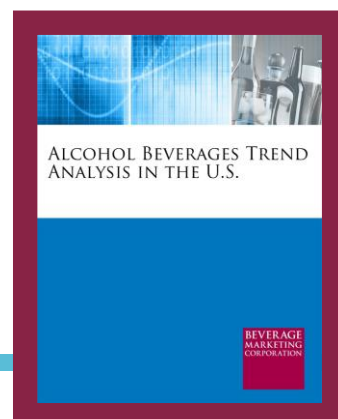


ALCOHOL BEVERAGES TREND ANALYSIS IN THE U.S.

2024 EDITION (Published May 2024. Data through 2023.) More than 20 PowerPoint slides, with extensive charts, data and infographics.



This insight-filled report from Beverage Marketing's Focus Report series delivers observations and analysis of 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 consulting group S&D Insights (formerly BMC Strategic Associates), it offers beer, wine and distilled spirits market data through 2023 as well as observations on the trends that are re-shaping the beverage alcohol market in the United States.

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 and market drivers relating to wine and spirits and beer. It looks at the blurring of alcohol and no-alcohol segments, alliances between companies from the alcohol and no-alcohol worlds, emerging trends including canned wines and prepared cocktails. The report also discusses traditional beer, wine and spirits segment growth, the implications of various paradigm shifts in ingredients, distribution, corporate partnerships and other areas. It also looks at shifts in consumer consumption patterns that are impacting the wine market in particular.

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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, and is the perfect kickoff to brainstorming meetings. Questions answered include:

- How did the U.S. beer, distilled spirits and wine markets perform in 2023?
- What are the key trends affecting various wine segments?
- How did alternative adult beverages affect conventional beer, spirits and wine performance in 2023?

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.



ALCOHOL BEVERAGES TREND ANALYSIS IN THE U.S.

BEVERAGE
MARKETING
CORPORATION

Alcohol Beverages Trend Analysis in the U.S.

May 2024



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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Current Key Beer Market Trends & Activity

Beer

- The total U.S. Beer market **continued to suffer on a volume basis in 2023**, driven most by the fallout of the **ABI/Bud Light** controversy and the ongoing **rise of RTD Spirits**, leading to a depletion decline of █%, with shipments falling even further, by █%
- ABI losses (██████████) **were not offset by gains from other major suppliers** (primarily MolsonCoors & Constellation)
 - Select brands which saw outsized gains at the behest of Bud Light losses included Coors Light, Coors Banquet, & Pabst Blue Ribbon
- **Hard Seltzer** segment is **evolving** into a stable market after boom/bust cycle of initial craze, with **White Claw diverging from other brands**, holding with only low single digit declines, while the likes of Truly & Beer branded extensions such as Bud Light Seltzer Corona Seltzer etc. declined at elevated double digits
- Overall **innovation pace in Beer market has slowed** following Craft Beer and subsequent Hard Seltzer growth periods, with limited major launches from leading suppliers in 2024
- **Price increases at outsized levels mostly subsided in the second half of 2023**
- **Twisted Tea was strongest performing** among all scaled brands across **entire market**, driving investment and innovation in other **challenger Hard Tea brands**

Only Non-Alcoholics & Imports experienced growth in 2023 among beer segments, with middling performance from Craft, Value (PBR resurgence) & FMBs (Twisted Tea), with sustained declines for domestics/mainstream

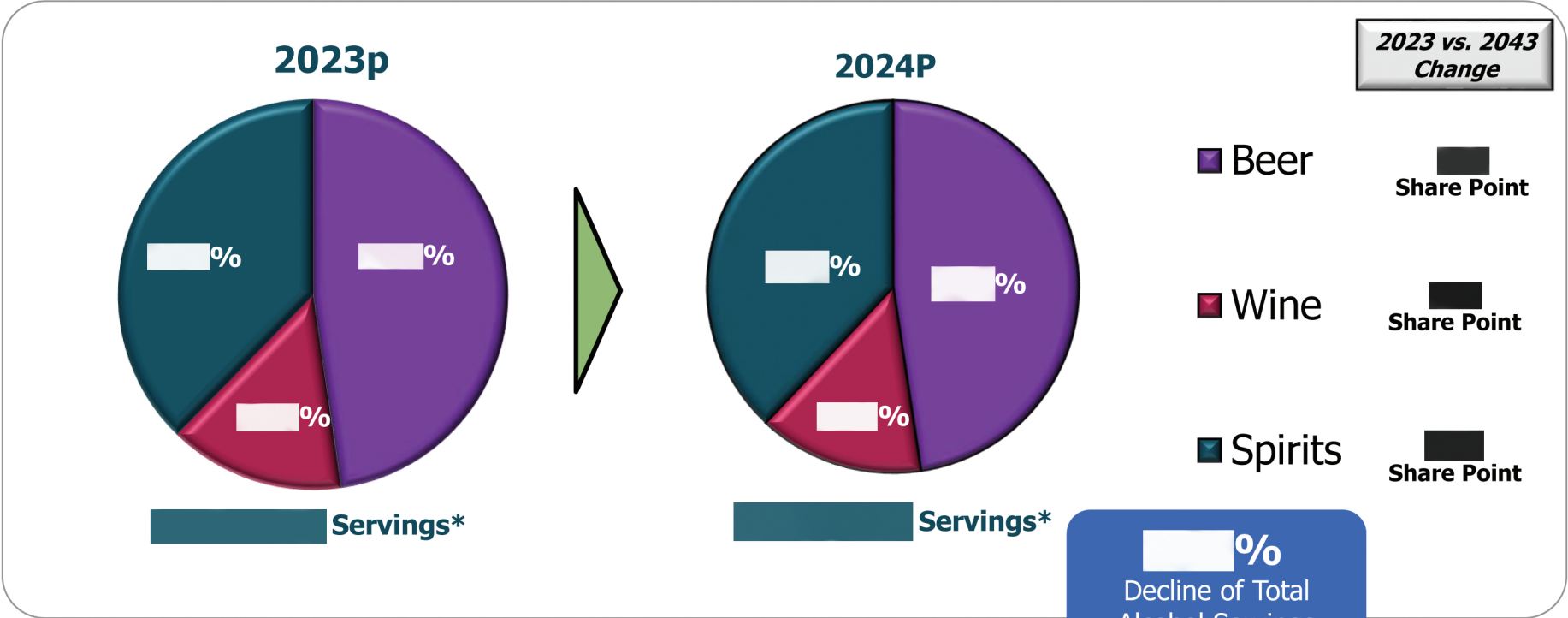
U.S. Beer Market Sub-Segments – Volume Performance 2023

Sub-Segment	2023 Full Year (Preliminary)	CAGR 2018-23p
Non-Alcoholic	<div><div></div></div> %	<div><div></div></div> %
Imported	<div><div></div></div> %	<div><div></div></div> %
Craft Beer	<div><div></div></div> %	<div><div></div></div> %
Value Regular	<div><div></div></div> %	<div><div></div></div> %
FMBs	<div><div></div></div> %	<div><div></div></div> %
Cider	<div><div></div></div> %	<div><div></div></div> %
Light Beer	<div><div></div></div> %	<div><div></div></div> %
Premium Regular	<div><div></div></div> %	<div><div></div></div> %
Malt Liquor	<div><div></div></div> %	<div><div></div></div> %
Ice Beer	<div><div></div></div> %	<div><div></div></div> %
Superpremium Regular	<div><div></div></div> %	<div><div></div></div> %
Total U.S. Beer	<div><div></div></div> %	<div><div></div></div> %

p: Preliminary
Source: S&D Insights, BMC DrinkTell

Beer & Wine are projected to continue to lose servings share at the expense of Spirits, however inter-category share exchange is slowing while total BA servings continue to decline

*Beverage Alcohol Category Share by Servings
2023p vs. 2024P*



**12 oz. beer, 5 oz. traditional wine, 8 oz. ABA wine, 1.5 oz. traditional spirits, 8 oz. RTD Spirits; All Volumes in Depletions
p: Preliminary; P: Projected
Source: S&D Insights, IWSR, Beer Institute*