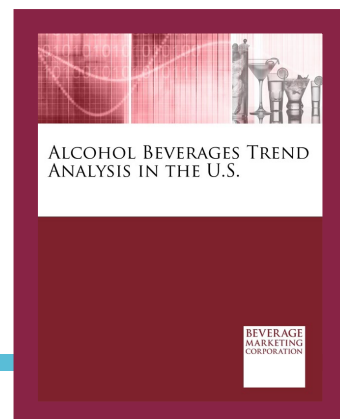


# ALCOHOL BEVERAGES TREND ANALYSIS IN THE U.S.

**2025 EDITION** (Published April 2025. Data through 2024.) More than 20 PowerPoint slides, with extensive charts, data and infographics.



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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 2024 as well as observations on the trends that are re-shaping the beverage alcohol market in the United States. The report also discusses issues impacting the adult beverage market in 2025, including tariffs.

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.

## AVAILABLE FORMAT & PRICING



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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 2024?
- What are the key trends affecting various wine segments?
- How did alternative adult beverages affect conventional beer, spirits and wine performance in 2024?

## 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 2025

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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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### Wine Market Overview

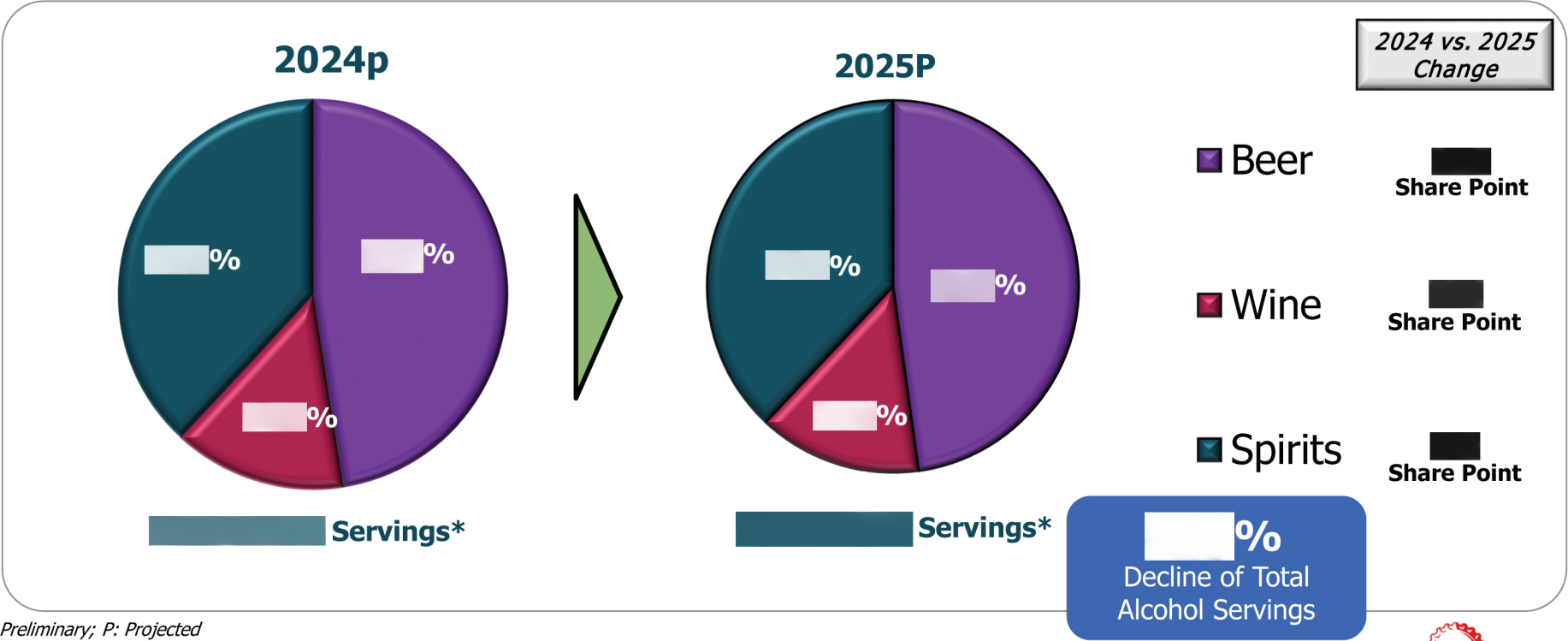
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**Early returns and recent trends in 2025 point to Beer gaining servings share for the first time in over a decade, however total beverage alcohol servings losses will continue at nearly █%**

Beverage Alcohol Category Share by Servings:  
2024p vs. 2025P



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

## Current Key Beer Market Trends & Activity

### Beer

- The total U.S. Beer market **saw slight trend improvement in 2024**, while continuing to decline volumetrically at outsized level to historical norms
  - Depletions declined █% (compared to █% in 2023), while shipments declined █% (compared to █%)
  - This was the first time since pre-pandemic where **Shipments led Depletions**, showing some signs for positivity
- **Major suppliers experienced varying degrees of trend reversal in 2024**, following the anomalous 2023 disrupted by external controversy
  - ABI shipments declined █%, (comp. █% in '23) with Michelob Ultra returning to growth
  - MolsonCoors shipments declined █% (comp. █% in '23, & █% via end of contract Pabst relationship)
  - Constellation shipments increased █%, yet saw major slowdown in Q4
- Some key **bright spots among established brands** in 2024 came from **Coors Banquet, Busch Light, & Guinness**
- **FMB/Hard Seltzer** market overall **closer to growth** following Seltzer Digestion period, however now growth brands are **competing more with RTD Spirit** offerings than Malt products (e.g., White Claw vs. High Noon, Twisted Tea v. Surfside)
- **Non-alcoholic beer market grew significantly** throughout 2024 as concerns about alcohol on health and wellness trends continue to gain consumer focus (NA Beer up █% in 2024)
  - Athletic Brewing became the number one non-alcoholic beer brand by sales in the US
- Overall **innovation pace in Beer market increased in 2024** after slowing down in 2023, due to boom of non-alcoholic beer
- **Price increases mostly subsided in the second half of 2023** and continued to slow in 2024, but are still present

**Only Non-Alcoholics & Imports experienced growth in 2024 among segments, while other segments had brand successes but continued to declining: Craft (New Belgium), Value (PBR & Busch Light resurgence) Light Beer (Ultra) & FMBs (White Claw/Twisted Tea)**

U.S. Beer Market Sub-Segments – Volume Performance 2024

Sub-Segment	2024 Full Year (Preliminary)	CAGR 2019-24p
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> %
Light Beer	<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> %
Premium Regular	<div><div></div></div> %	<div><div></div></div> %
Value Regular	<div><div></div></div> %	<div><div></div></div> %
Malt Liquor	<div><div></div></div> %	<div><div></div></div> %
Superpremium Regular	<div><div></div></div> %	<div><div></div></div> %
Ice Beer	<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