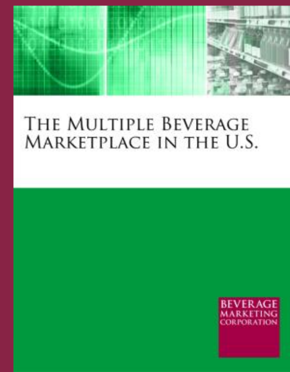
The Multiple Beverage Marketplace in the U.S.

2023 Edition (Published July 2023. Data through 2022. Market projections through 2027.) More than 75 Excel tables plus an executive summary.



If you need the big picture across alcohol and non-alcohol sectors, this U.S. multiple beverage industry overview is for you. This comprehensive data-driven market research report covers the entire U.S. commercial beverage industry and includes statistics on retail and wholesale sales as well as volume, growth, per capita consumption and share of stomach across eleven U.S. alcohol and non-alcohol beverage types. The 2023 edition also features an executive summary highlighting developments and trends, including discussion of the impact of the covid-19 pandemic.

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The answers you need

BMC's market research report on beverages in the United States provides a birds eye view of the American market for eleven beverage categories including beer, bottled water, carbonated soft drinks, coffee, distilled spirits, energy drinks, fruit beverages, milk, sports beverages, tea and wine. It offers key statistics and also contains Beverage Marketing Corporation's exclusive projections for each category through 2027. The report provides an all-channel-inclusive picture, capturing 100% of volume, wholesale and retail dollars for each beverage sector it covers. If you need cross-category perspective, you won't want to miss the wealth of information contained in this industry report. Get answers to questions including:

- How did the main beverage categories perform in the U.S. market in 2022? What share of stomach do they hold?

- How does each category's volume, growth and market share compare to their respective wholesale dollar sales and retail dollar sales results?

- How do various categories stack up in an all-sales-channel-inclusive, cross-category comparison?

- How have the different groups' market shares shifted over time? Which categories have exhibited consistent share erosion? Which categories are gaining share?

- How are these categories projected to grow over the next five years through 2027?

This report features

Highlights of *The Multiple Beverage Marketplace in the U.S.* include:

- An overview of development in the major categories, including a bird's eye view of the industry as a whole.

- Market statistics for eleven beverage categories: beer, bottled water, carbonated soft drinks, coffee (including break-out for ready-to-drink), distilled spirits, energy drinks, fruit beverages, milk, sports beverages, tea (including break-out for ready-to-drink) and wine. Also includes data for value-added water.

- A breakdown of the industry by both volume, producers' sales and retail sales by beverage category, providing historical and current data, each beverage category's market share as well as growth trends.

- Per capita consumption figures.

- Bottled water data by segment including domestic non-sparkling retail premium PET, retail 1 - 2.5 gallon, direct delivery bulk, sparkling waters and others.

- A look at share of market held by tea bags vs. RTD tea, iced tea mix and loose tea as well as volume and growth statistics for each segment.

- Distilled spirits supplier sales, wholesale sales and retail sales by segment including vodka, rum, cordials and liqueurs, rum, straight whiskey, tequila, Canadian whisky, Scotch, brandy & cognac, gin, blended whiskey, prepared cocktails and Irish whiskey.

- Consumption statistics for a broad range of adult beverages.

- U.S. wine market data by segment including historical and current consumption for subcategories including domestic and imported table wine, domestic and imported champagne/sparkling wine, and domestic and imported vermouth/aperitif, plus a look at trends for domestic vs. imported wine consumption.

- Growth forecasts through 2027 are a key component of this report, allowing you to compare growth potential across beverage industry segments. Included are Beverage Marketing's five-year projections for volume, sales, market shares, per capita consumption and compound annual growth projections for each beverage group and analysis of the forces determining each category's future.

The Multiple Beverage Marketplace in the U.S.

BEVERAGE MARKETING CORPORATION

The Multiple Beverage Marketplace in the U.S.: Executive Summary

July 2023

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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For the second time after a long track record of annual declines, CSDs – which until 2016 ranked as the biggest segment by volume – did *not* rank among the contingent of declining categories. CSDs experienced a long-running losing streak and were surpassed in size by bottled water. After an unusually large decline in the first year of the pandemic, CSDs rebounded in 2021 and continued to grow modestly in 2022. After declining for three years in a row, beer volume was essentially unchanged in 2020 but decreased in 2021 and 2022. Milk and fruit beverages both continued to decline in 2022. Coffee, tea and wine also contracted during the year.

- After many years of declining volume, CSDs increased at a faster rate than the overall beverage market in 2021 before cooling down in 2022. CSD wholesale dollars decreased at a much higher rate than the U.S. beverage market overall in 2020 but outperformed the market in 2021 and 2022. The category's retail sales also declined in 2020, but did so more slowly than the overall pandemic-plagued market. Growth resumed in 2021 and accelerated in 2022.
- Beer volume dipped in 2022 but wholesale dollars were steady. Flavored malt beverages (FMBs) – especially hard seltzers – added some action to the beer market (which would have seen volume decline without them). Sales edged up by just 0.2% at the wholesale level and by 1.4% at retail.
- Fruit beverages declined for a dozen consecutive years before increasing by 0.4% in 2016, when Coca-Cola, PepsiCo and Florida's Natural all reported growth for their brands. Significant losses resumed in 2017 and continued for years. A fairly small decrease occurred in 2021, but a nearly 2% drop followed in 2022.
- Milk, also no stranger to volume loss, extended its losing streak for another year in 2022, when it registered a sizeable decline.
- Tea, buoyed by the RTD segment, enjoyed several years of growth, but saw declines from 2018 to 2022. Coffee also declined in 2022.

Some other large segments – including bottled water and the separate but related value-added water category - grew, albeit modestly. Sports drinks and distilled spirits, in contrast, surged.

- Bottled water sustained its lead over CSDs with volume growth of 1.1%.
- Value-added water – water with a hint of flavor or some other sort of enhancement – grew even more slowly, and its volume remained considerably smaller than conventional bottled water's volume.
- Though overall coffee declined slightly, the small but vibrant RTD sub-segment remained strong.
- Sports drinks declined in 2017 but rebounded in 2018 and continued growing in 2019. Growth accelerated in 2020 and remained strong in 2021. Though growth slowed a bit in 2022, sports drinks were the fastest growing no-alcohol type.
- Energy drinks advanced with 1.8% volume growth in 2022.

Exhibit 1.3

U.S. BEVERAGE MARKET
CHANGE IN VOLUME BY CATEGORY (r)
2018 – 2023(P)

Categories	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23(P)
Bottled Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Carbonated Soft Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Coffee	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Beer	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Milk	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
RTD Tea	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fruit Beverages*	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Sports Beverages	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Energy Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Wine	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Value-Added Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Distilled Spirits	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
All Others**	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(r) Revised
(P) Projected
** Includes liquid fruit juice and fruit drinks; excludes powdered fruit drinks and vegetable juices.*
*** Includes vegetable juices, powders and miscellaneous others.*
Source: Beverage Marketing Corporation; Adams Beverage Group; Distilled Spirits Council of the United States; Florida Department of Citrus; International Dairy Foods Association; U.S. Tea Association