

HARD SELTZER IN THE U.S.

2025 EDITION (To be published September 2025. Data through 2024. Market projections through 2029.) More than 35 pages, with extensive text analysis, graphs, charts and tables

Beyond the hard seltzer hype. This report describes and measures the hard seltzer sub-segment of the flavored malt beverage market and also provides added perspective of its role in the context of the larger adult alternative beverage market. It includes data on the numerous brands comprising this key component of the brewing business and offers Beverage Marketing Corporation's exclusive five year forecasts on the future prospects of the category.

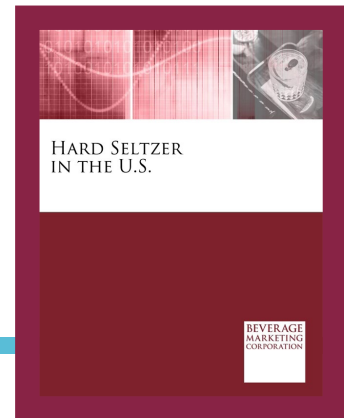
AVAILABLE FORMAT & PRICING



Direct Download
Word & PDF

\$2,295

To learn more, to place an advance order or to inquire about additional user licenses **call: Charlene Harvey +1 212.688.7640 ext. 250** charvey@beveragemarketing.com



FOR A FULL
CATALOG OF
REPORTS AND
DATABASES,
GO TO
bmcreports.com

INSIDE:

REPORT OVERVIEW

A brief discussion of key features of this report. **2**

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. **6**

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. **8**



**HAVE
QUESTIONS?**

Contact Charlene Harvey: 212-688-7640 x 250
charvey@beveragemarketing.com

**BEVERAGE
MARKETING
CORPORATION**

BEVERAGE MARKETING CORPORATION
P.O. Box 2399 | 143 Canton Road, 2nd Floor
Wintersville, OH 43953
Tel: 740-314-8380 Fax: 740-314-8639

THE ANSWERS YOU NEED

In addition to volume data on the leading brands and discussion of their makers' strategies, the report quantifies the category as a whole and charts its growth. It also provides data on per capita consumption and growth. Get answers to questions such as:

- What is the leading hard seltzer brand in the United States?
- Which brands are growing the fastest?
- How much hard seltzer was consumed on a per-person basis?
- How is the segment likely to perform a few years from now?

THIS REPORT FEATURES

Highlights of *Hard Seltzer in the U.S.* include:

- An overview of the relatively new category and a discussion of the latest trends and developments.
- Volume, growth and market share data for the major brands.
- Analysis of the various brewers and their approaches to the beverage type.
- Per capita consumption figures.
- Volume projections through 2029.
- Brands covered include: White Claw, Truly, BON V!V, Bud Light Seltzer, Corona, Pabst Blue Ribbon Stronger, Vizzy, Michelob Ultra Organic Seltzer, Mike's Hard Seltzer and many more.



HARD SELTZER IN THE U.S.

**BEVERAGE
MARKETING
CORPORATION**

NOTE: The 2025 edition of this report has not yet been published. The dates on tables of contents/exhibits and sample data reflect information from last year's edition of this report.

The 2025 edition you receive will have updated data through 2024 and projections through 2029 where applicable.

Hard Seltzer in the U.S. February 2025

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.

Copyright © 2025 Beverage Marketing Corporation of New York, P.O. Box 2399, Wintersville, OH 43953, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

Contents

Table of Contents

Hard Seltzer in the U.S.
TABLE OF CONTENTS

TABLE OF CONTENTS ----- i
INTRODUCTION ----- iii

Summary

THE HARD SELTZER MARKET

Hard Seltzer ----- 1

- Overview & Issues ----- 1
- Hard Seltzer and Alternative Adult Beverages ----- 2
- Volume ----- 10
- Per Capita Consumption ----- 12

Hard Seltzer Brands ----- 13

- Overview & Issues ----- 13
- Volume ----- 14
- AriZona Sun Rise Hard Seltzer ----- 15
- BON V!V ----- 16
- Bud Light Seltzer ----- 17
- Cacti Agave Spiked Seltzer ----- 19
- Clear Coast Fresh Hard Seltzer ----- 20
- Corona ----- 21
- Dos Equis Ranch Water ----- 22
- Henry’s Hard Sparkling Water ----- 23
- Michelob Ultra Organic Seltzer ----- 24
- Natural Light Seltzer ----- 25
- Nauti Seltzer Premium Hard Seltzer ----- 26
- Pabst Blue Ribbon Stronger Seltzer ----- 27
- Smirnoff Spiked Sparkling Seltzer ----- 28
- Social Club Seltzer ----- 29
- Sparkling ICE Spiked ----- 30
- Svedka Spiked Premium Seltzer ----- 31
- Topo Chico ----- 32
- Truly Hard Seltzer ----- 33
- Vizzy ----- 35
- White Claw Hard Seltzer ----- 36
- Wild Basin Hard Seltzer ----- 38

Hard Seltzer Projections ----- 39

- Overview & Issues ----- 39
- Volume ----- 40

Hard Seltzer in the U.S.
TABLE OF CONTENTS

Summary

THE HARD SELTZER MARKET (cont'd)

Exhibits

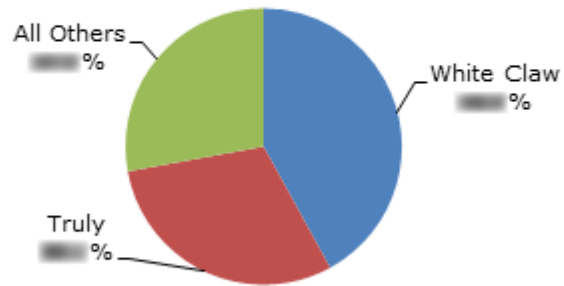
1	U.S. Alternative Adult Beverage Market Volume, Change and Per Capita Consumption 2000 – 2024 -----	42
2	U.S. Hard Seltzer Market Volume, Change and Per Capita Consumption 2015 – 2024 -----	43
3	U.S. Hard Seltzer Market Volume by Brand 2018 – 2023 -----	44
4	U.S. Hard Seltzer Market Share of Volume by Brand 2018 – 2023 -----	45
5	U.S. Hard Seltzer Market Change in Volume by Brand 2019 – 2023 -----	46
6	U.S. Alternative Adult Beverage Market Projected Volume by Sub-Segment 2023 – 2028 -----	47
7	U.S. Alternative Adult Beverage Market Share of Projected Volume by Sub-Segment 2023 – 2028 -----	48
8	U.S. Alternative Adult Beverage Market Change in Projected Volume by Sub-Segment 2023 – 2028 -----	49

In essence, hard seltzer is a variation on the FMB theme, which in turn makes them a variety of beer. However, since they are positioned slightly differently, and perceived differently than their FMB relatives, they are treated accordingly here. Their rapid growth attracted brewers large and small to the sub-segment.

- In addition to A-B, Molson Coors, Constellation Brands, Mark Anthony Brands, Boston Beer, Diageo Beer Company USA and numerous smaller, regional beer companies developed or acquired spiked/hard seltzer brands.
- Also in early 2019, Boston, Massachusetts-based Harpoon Brewery announced it was teaming up with Worcester, Massachusetts-based Polar Beverages to release a hard seltzer line called Arctic Summer.
- Other regional beer companies, like Longmont, Colorado-headquartered Oskar Blues and Covington, Kentucky-based Braxton Brewing Company, also entered the sparkling seltzer arena in early 2019.
- Grand Haven, Michigan-based Odd Side Ales launched a 20-flavor line of hard seltzers in 2020.
- Additional new brands or line extensions continued to roll out in 2020, including some carrying major beer brand names. Molson Coors, for instance, early in the year announced plans for a summer release of Coors Seltzer, which it pushed back to the fall due to the coronavirus crisis. And then dropped it in mid-2021.
- Topo Chico Hard Seltzer arrived in 2021 via a collaboration between brand-owner Coca-Cola and beer-maker Molson Coors.
- Later in the year, PepsiCo and Boston Beer announced that they'd be launching HARD MTN DEW in 2022, thereby extending what had been another liquid refreshment beverage brand into the flavored malt beverage space.
- AriZona Beverages and Heineken did the same with a brand mostly known for its ready-to-drink iced tea.
- As brewers add flavors like lemonade to their hard seltzer rosters, it may become more difficult to distinguish between the seltzers and other FMBs.

TWO BRANDS CONTINUE TO LEAD HARD SELTZER MARKET

Share of Volume* by Brand, 2023



* Includes hard seltzer only; excludes other flavored malt beverages
Source: Beverage Marketing Corporation

**U.S. HARD SELTZER MARKET
CHANGE IN VOLUME BY BRAND (r)
2019 – 2023**

Brand	2018/19	2019/20	2020/21	2021/22	2022/23	CAGR 2018/23
White Claw	100%	100%	100%	100%	100%	100%
Truly Hard Seltzer	100%	100%	100%	100%	100%	100%
Bud Light Seltzer	100%	100%	100%	100%	100%	100%
Topo Chico	100%	100%	100%	100%	100%	100%
Michelob Ultra Seltzer	100%	100%	100%	100%	100%	100%
Corona Hard Seltzer	100%	100%	100%	100%	100%	100%
Lone River Ranch Water	100%	100%	100%	100%	100%	100%
Smirnoff Spiked	100%	100%	100%	100%	100%	100%
Bud Light Platinum Seltzer	100%	100%	100%	100%	100%	100%
Mike's Hard Seltzer	100%	100%	100%	100%	100%	100%
Natural Light Seltzer	100%	100%	100%	100%	100%	100%
Vizzy	100%	100%	100%	100%	100%	100%
All Other	100%	100%	100%	100%	100%	100%
TOTAL	100%	100%	100%	100%	100%	100%

(r) Revised

CAGR: compound annual growth rate

Source: Beverage Marketing Corporation