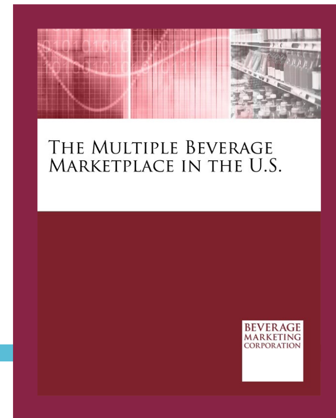
# THE MULTIPLE BEVERAGE MARKETPLACE IN THE U.S.

2025 EDITION (To be published May 2025. Data through 2024. Market projections through 2029.) More than 75 Excel tables plus an executive summary.




As markets shift and the barriers between categories blur, it's more important than ever to keep an eye on the big picture across alcohol and no-alcohol sectors. This comprehensive U.S. multiple beverage industry overview gives you that well-rounded, all-sales channel inclusive view. In this data-driven market research report, Beverage Marketing Corporation (BMC) 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 2025 edition also features an executive summary highlighting developments and trends.

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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 2029. 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 2024? 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 2029?

## This U.S. multiple beverage industry 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 2029 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

**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.

# The Multiple Beverage Marketplace in the U.S.

July 2024

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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## Exhibits

After a couple years of atypical growth, CSDs - which until 2016 ranked as the biggest segment by volume - again ranked 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 before decreasing in 2023. Beer volume decreased for a third year in a row in 2023. Milk and fruit beverages both continued to decline in 2023. Coffee, tea, sports drinks, value-added water and wine also contracted during the year.

- While CSD volume losses resumed in 2023, the categories sales grew forcefully at both the wholesale and retail levels. Indeed, with only a couple exceptions, all the major beverage categories registered increases in producers' sales and retail sales, largely reflecting inflation. The higher prices that boosted sales for most categories likely contributed to the numerous volume declines.
- For example, beer volume dipped for the third year in a row in 2023 but wholesale dollars were steady in each of those years.
- Fruit beverages have been synonymous with volume decline for decades now, and an especially sizeable decrease occurred in 2023. Reflecting the aforementioned higher prices, fruit beverage wholesale and retail dollars nonetheless swelled.
- Milk, also no stranger to volume loss, extended its losing streak for another year in 2023. Milk stood as the sole major beverage category to also see producers' sales decline. (Both milk and beer declined at the retail level.)
- Tea, long buoyed by the RTD segment, enjoyed several years of growth, but saw declines from 2018 to 2023. Coffee also declined in 2023.
- Not only did overall coffee volume decline in 2023; the small, once-reliably vibrant RTD sub-segment also tumbled.
- Like RTD coffee, sports drinks tended to grow from one year to the next, with a few exceptions (such as in 2017). However, in 2023, sport drink volume decline, perhaps in no small part to the higher prices reflected in the surge in producers' revenues.
- Value-added water – water with a hint of flavor or some other sort of enhancement – followed 2022's volume drop with an even larger one in 2023.
- Distilled spirits, the smallest category by volume but one of the biggest when measured in either wholesale or retail dollars, lost volume in 2023 but enjoyed strong sales growth.

**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*