



Alcoholic Drinks in the US

June 2024

Table of Contents

Alcoholic Drinks in the US

EXECUTIVE SUMMARY

Alcoholic drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Summary 1 - Number of On-trade Establishments by Type 2017-2023

TAXATION AND DUTY LEVIES

Summary 2 - Taxation and Duty Levies on Alcoholic Drinks 2023

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

MARKET DATA

Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 6 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 10 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 11 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 12 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 3 - Research Sources

Beer in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

AB InBev struggles as historic category trends accelerate
Independent and acquired craft beer reconcile with maturity and ubiquity
Non alcoholic beer continues its ascent

PROSPECTS AND OPPORTUNITIES

THC beverages pose an existential threat to beer at all ABVs
On-trade recovery still at the whim of the changing occasions landscape
Variety, exploration, and consumer confidence pose a larger threat than sobriety

CATEGORY BACKGROUND

Lager price band methodology
Summary 4 - Lager by Price Band 2023
Table 17 - Number of Breweries 2018-2023

CATEGORY DATA

Table 18 - Sales of Beer by Category: Total Volume 2018-2023
Table 19 - Sales of Beer by Category: Total Value 2018-2023
Table 20 - Sales of Beer by Category: % Total Volume Growth 2018-2023
Table 21 - Sales of Beer by Category: % Total Value Growth 2018-2023
Table 22 - Sales of Beer by Off-trade vs On-trade: Volume 2018-2023
Table 23 - Sales of Beer by Off-trade vs On-trade: Value 2018-2023
Table 24 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 25 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023
Table 26 - Sales of Beer by Craft vs Standard 2018-2023
Table 27 - GBO Company Shares of Beer: % Total Volume 2019-2023
Table 28 - NBO Company Shares of Beer: % Total Volume 2019-2023
Table 29 - LBN Brand Shares of Beer: % Total Volume 2020-2023
Table 30 - Forecast Sales of Beer by Category: Total Volume 2023-2028
Table 31 - Forecast Sales of Beer by Category: Total Value 2023-2028
Table 32 - Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028
Table 33 - Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

Cider/Perry in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fragmented performance as regional brands take share from national stalwarts
An appetite for complexity and new product development continue to jump regulatory hurdles
Education and consumer outreach seek opportunities for on-trade growth

PROSPECTS AND OPPORTUNITIES

Share growth possible, but a long game
Alcohol consumption reduction trend could benefit cider
Wine serves as a template for growth and premiumisation in cider

CATEGORY DATA

Table 34 - Sales of Cider/Perry: Total Volume 2018-2023

Table 35 - Sales of Cider/Perry: Total Value 2018-2023
Table 36 - Sales of Cider/Perry: % Total Volume Growth 2018-2023
Table 37 - Sales of Cider/Perry: % Total Value Growth 2018-2023
Table 38 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023
Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023
Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023
Table 42 - GBO Company Shares of Cider/Perry: % Total Volume 2019-2023
Table 43 - NBO Company Shares of Cider/Perry: % Total Volume 2019-2023
Table 44 - LBN Brand Shares of Cider/Perry: % Total Volume 2020-2023
Table 45 - Forecast Sales of Cider/Perry: Total Volume 2023-2028
Table 46 - Forecast Sales of Cider/Perry: Total Value 2023-2028
Table 47 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028
Table 48 - Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

Rtds in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

A tough year at the top line, with mixed narratives below
New offerings are constant, but a mix of innovation and imitation
Non alcoholic RTDs struggle for relevance

PROSPECTS AND OPPORTUNITIES

Maturity gradually approaching in RTDs
Legislation, consumers, and the future of RTDs
THC beverages pose an existential threat to RTDs

CATEGORY DATA

Table 49 - Sales of RTDs by Category: Total Volume 2018-2023
Table 50 - Sales of RTDs by Category: Total Value 2018-2023
Table 51 - Sales of RTDs by Category: % Total Volume Growth 2018-2023
Table 52 - Sales of RTDs by Category: % Total Value Growth 2018-2023
Table 53 - Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023
Table 54 - Sales of RTDs by Off-trade vs On-trade: Value 2018-2023
Table 55 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 56 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023
Table 57 - GBO Company Shares of RTDs: % Total Volume 2019-2023
Table 58 - NBO Company Shares of RTDs: % Total Volume 2019-2023
Table 59 - LBN Brand Shares of RTDs: % Total Volume 2020-2023
Table 60 - Forecast Sales of RTDs by Category: Total Volume 2023-2028
Table 61 - Forecast Sales of RTDs by Category: Total Value 2023-2028
Table 62 - Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028
Table 63 - Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

Spirits in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Spirits volumes flat despite headwinds
Spirits presents a wide spectrum of performances – some shine, some fizzle
Premiumisation significantly reduces amidst economic challenges

PROSPECTS AND OPPORTUNITIES

Spirits will continue to be resilient in the face of generational changes

Premiumisation and value-seeking will be key strategies in spirits

Non alcoholic spirits remains small, but is gaining a foothold

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 5 - Benchmark Brands 2023

CATEGORY DATA

Table 64 - Sales of Spirits by Category: Total Volume 2018-2023

Table 65 - Sales of Spirits by Category: Total Value 2018-2023

Table 66 - Sales of Spirits by Category: % Total Volume Growth 2018-2023

Table 67 - Sales of Spirits by Category: % Total Value Growth 2018-2023

Table 68 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023

Table 69 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023

Table 70 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 71 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023

Table 72 - Sales of Dark Rum by Price Platform: % Total Volume 2018-2023

Table 73 - Sales of White Rum by Price Platform: % Total Volume 2018-2023

Table 74 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023

Table 75 - Sales of English Gin by Price Platform: % Total Volume 2018-2023

Table 76 - Sales of Vodka by Price Platform: % Total Volume 2018-2023

Table 77 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023

Table 78 - GBO Company Shares of Spirits: % Total Volume 2019-2023

Table 79 - NBO Company Shares of Spirits: % Total Volume 2019-2023

Table 80 - LBN Brand Shares of Spirits: % Total Volume 2020-2023

Table 81 - Forecast Sales of Spirits by Category: Total Volume 2023-2028

Table 82 - Forecast Sales of Spirits by Category: Total Value 2023-2028

Table 83 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028

Table 84 - Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

Wine in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Values are up, but volumes are down

Premiumisation persists, benefiting champagne and other sparkling wine

The return of wine clubs, and other channel shifts within wine

PROSPECTS AND OPPORTUNITIES

Demise of on-ramp wine price bands will be centre of attention

Local wines expected to increase fragmentation

Private label wine set to decline as authenticity becomes a concern for consumers

CATEGORY DATA

Table 85 - Sales of Wine by Category: Total Volume 2018-2023

Table 86 - Sales of Wine by Category: Total Value 2018-2023

Table 87 - Sales of Wine by Category: % Total Volume Growth 2018-2023

Table 88 - Sales of Wine by Category: % Total Value Growth 2018-2023

Table 89 - Sales of Wine by Off-trade vs On-trade: Volume 2018-2023

Table 90 - Sales of Wine by Off-trade vs On-trade: Value 2018-2023

Table 91 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 92 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
Table 93 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023
Table 94 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2018-2023
Table 95 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023
Table 96 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2018-2023
Table 97 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 98 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 99 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2020-2023
Table 100 - GBO Company Shares of Champagne: % Total Volume 2019-2023
Table 101 - NBO Company Shares of Champagne: % Total Volume 2019-2023
Table 102 - LBN Brand Shares of Champagne: % Total Volume 2020-2023
Table 103 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 104 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 105 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2020-2023
Table 106 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 107 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 108 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2020-2023
Table 109 - GBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 110 - NBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 111 - LBN Brand Shares of Non-grape Wine: % Total Volume 2020-2023
Table 112 - Forecast Sales of Wine by Category: Total Volume 2023-2028
Table 113 - Forecast Sales of Wine by Category: Total Value 2023-2028
Table 114 - Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
Table 115 - Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/alcoholic-drinks-in-the-us/report.