**Beer Market 2022**

**Evolving Tastes Cause Domestic Brands’ Decline**

Although the US domestic beer sector has an approximately 60% share of the entire beer market, total sales for the sector decreased 5.2% for the 52 weeks ending 12/26/21, as drinkers are seeking more variety and unique tastes among smaller sectors.

Younger adults are attracted to flavored malt beverages (FMBs) and hard seltzers as well as the convenience of ready-to-drink (RTD) cocktails and other canned alcoholic beverages. An increased interest in the consumption of healthy beverages is also a factor.

With bars, nightclubs and other on-premise venues now open again and offering a great variety of craft beers and new, innovative products, the major domestic brands are introducing new flavors to compete in the rapidly evolving beer market.

**Top 10 Domestic Beer Brands, by Dollar Sales, 2021\***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Domestic Brand | Dollar Sales | % Change | Domestic Brand | Dollar Sales | % Change |
| #1: Bud | $6.77 B | -7.0% | #6: Natural | $1.34 B | -8.5% |
| #2: Michelob | $3.32 B | +4.4% | #7: Bud Specialty | $680.1 M | -12.7% |
| #3: Coors | $2.65 B | -2.5% | #8: Keystone | $428.5 M | -13.2% |
| #4: Miller Lite | $2.13 B | -5.5% | #9: Miller High Life | $400.7 M | -11.3% |
| #5: Busch | $1.73 B | -0.3% | #10: Yuengling | $376.5 M | -1.3% |
|  |  |  | Total† | $26.49 B | -5.2% |

*Beverage Industry* (IRI), March 2022 \*52 weeks ending December 26, 2021 †includes brands not listed

**Craft Beer and Hard Cider Improves Among Competitive Headwinds**

Total sales for the craft beer market for the 52 weeks ending 12/26/21 decreased by 4.6%. Nonetheless, new products continue to be introduced, which are expected to be a boost.

Industry analysts suggest the popularity of RTD cocktails and other canned alcoholic beverages is providing stiff competition for craft beers.

Total sales for the much smaller hard cider category decreased by 2.4% for the 52 weeks ending 12/26/21. Seasonal (+31%) and standard ciders (+17%) have increased by double-digits, but semi-sweet (-61%) and dry ciders (-12.2%) have decreased by double-digits.

**Top 10 Craft Beer Brands, by Dollar Sales, 2021\***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Craft Beer Brand | Dollar Sales | % Change | Craft Beer Brand | Dollar Sales | % Change |
| #1: Blue Moon | $370.9 M | -7.8% | #6: Shiner | $141.8 M | -6.1% |
| #2: New Belgium | $351.8 M | +14.9% | #7: Firestone | $121.2 M | +3.3% |
| #3: Sierra Nevada | $317.7 M | -2.4% | #8: Founders | $121.1 M | -10.5% |
| #4: Samuel Adams | $234.3 M | -2.6% | #9: Elysian | $119.8 M | -0.9% |
| #5: Lagunitas | $182.8 M | -12.2% | #10: Bell’s | $108.9 M | -6.4% |
|  |  |  | Total† | $4.99 B | -4.6% |

*Beverage Industry* (IRI), March 2022 \*52 weeks ending December 26, 2021 †includes brands not listed

**A Demand for Variety Drives Import Category**

Import beers have been a bright spot for traditional beers, as total sales increased by 4.8% for the 52 weeks ending 12/26/21; however, 2022 sales are forecast to decline slightly primarily because of a depreciation of the US dollar in the global currency market.

The proliferation of many new flavors, styles and brands, especially FMBs, is a competitive factor. The popularity of premium brands and Mexican imports, which more Latinx American consumers are purchasing, are positive growth signs.

Mexican imports account for almost 70% of the import category. Brands from The Netherlands, Belgium and Ireland are also maintaining strong market positions.

**Top 10 Import Beer Brands, by Dollar Sales, 2021\***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Import Brand | Dollar Sales | % Change | Import Brand | Dollar Sales | % Change |
| #1: Modelo | $3.35 B | +14.0% | #6: Pacifico | $208.2 M | +3.2% |
| #2: Corona | $2.85 B | +2.2% | #7: Guinness | $184.1 M | +2.5% |
| #3: Heineken | $916.2 M | +0.2% | #8: Labatt | $148.7 M | -5.8% |
| #4: Dos Equis XX | $463.9 M | +5.7% | #9: Tecate | $145.2 M | -14.1% |
| #5: Stella Artois | $434.3 M | -3.7% | #10: Foster’s | $78.3 M | -2.7% |
|  |  |  | Total† | $9.24 B | +4.8% |

*Beverage Industry* (IRI), February 2022 \*52 weeks ending December 26, 2021 †includes brands not listed

**The Health and Wellness Trend**

Health and wellness is a major focus of more Americans. Nielsen reports a 49% increase in the plant-based food and beverage category during the past two years and alcohol-free beverage sales increased by 131% for the 52 weeks ending 11/27.21.

Hard seltzers brands are benefiting from consumers’ demand for low-calorie, low-sugar and low-carb alcoholic beverages. Industry analysts expect more brands to introduce hard tea, hard kombucha and fruit-flavored FMBs.

Total sales in the beer seltzer-centric category increased by 16.8% for the 52 weeks ending 12/26/21 and led by Truly’s 35.6% increase while the FMB category’s sales increase 5.5% during the same period, with Twisted driving the category with an increase of 31.9%.

**Top 5 Beer Seltzer-Centric and Top 5 Flavored**

**Malt Beverage Brands, by Dollar Sales, 2021\***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Beer Seltzer-Centric Brand | Dollar Sales | % Change | FMB Brand | Dollar Sales | % Change |
| #1: White Claw | $1.93 B | -2.6% | #1: Twisted | $678.1 M | +31.9% |
| #2: Truly | $1.26 B | +35.6% | #2: Smirnoff | $474.1 M | +3.0% |
| #3: Bud Light | $407.6 M | +8.1% | #3: Mike’s Harder | $420.2 M | +6.5% |
| #4: Corona | $143.4 M | -14.5% | #4: Mike’s Hard | $314.9 M | -1.1% |
| #5: Vizzy | $139.5 M | +87.9% | #5: Seagrams Escapes | $205.4 M | +4.8% |
| Total† | $4.57 B | +16.8% | Total† | $3.19 B | +5.5% |

*Beverage Industry* (IRI), March 2021 \*52 weeks ending December 26, 2021 †includes brands not listed

**The Return of Entertainment Benefits On-Premise Sales**

CGA Strategy reported “value velocity” of alcoholic beverages sales at on-premise establishments in the five states it measures (California, Florida, Illinois, New York and Texas) increased by 16% for the week of 4/9/21 and the check value increased by 13%.

Analysis of five representative 2021 consumer/market surveys conducted by The Media Audit found the average age of adults 18+ who visited a bar or nightclub during the past four weeks was 44.1 and their average household income was $72,800.

Unsurprisingly, Gen Z adults over-indexed the most, on average, for visiting a bar or nightclub at 145 and Millennials second at an average of 113.

**Indices of Adults 18+ Who Visited a Bar or Nightclub\* by Their**

**Attendance at Selected Events and Venues, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Event/Venue | Tampa-St. Petersburg | Pittsburgh | Des Moines, IA | Colorado Springs, CO | Monterey-Salinas, CA |
| Movie theater\* | * 131 | * 190 | * 278 | * 168 | 214 |
| Country music concert† | * 452 | * 378 | * 216 | * 232 | * 669 |
| Rock/Pop music concert† | * 457 | * 284 | * 328 | * 176 | * 274 |
| Opera/Symphony/Theater† | * 320 | * 189 | * 130 | * 113 | * 366 |
| Frequent restaurant diner‡ | * 176 | * 146 | * 60 | * 220 | * 191 |
| 3+ college/professional games† | * 214 | * 290 | * 230 | * 269 | * 169 |

Based on The Media Audit’s 2021 surveys \*past 4 weeks †past 12 months ‡4+ times during past 2 weeks

**Beer Drinkers’ Insights**

According to The Media Audit’s same five 2021 surveys, the average age of adults 18+ who had one beer during the past week was 47.8 and 2–4 beers was 47.1, but those who had 5–9 beers and 10–15 beers were slightly younger, or 45.4 and 46.0, respectively.

There was a bit more disparity by average household income, with those drinking 2–4 beers having the largest, on average, of $79,800, followed by 10–15 beers at $73,800, 1 beer at $73,200 and 5–9 beers at $71,700.

**Percentages of Adults 18+ Who Drank One or More Beers During the Past**

**Week by Their Preferred Beer or Hard Cider, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Preferred Beer/Hard Cider | Tampa-St. Petersburg | Pittsburgh | Des Moines, IA | Colorado Springs, CO | Monterey-Salinas, CA |
| Ale | * 24.2% | * 23.0% | * 17.5% | * 30.7% | 26.4% |
| Craft | * 26.2% | * 31.2% | * 38.1% | * 35.5% | * 34.8% |
| Fruit beer | * 12.5% | * 8.8% | * 11.2% | * 12.0% | * 14.3% |
| Hard Cider | * 18.1% | * 13.2% | * 21.7% | * 16.5% | * 20.1% |
| India Pale Ale (IPA) | * 8.2% | * 11.4% | * 9.9% | * 15.2% | * 16.7% |
| Lager | * 29.1% | * 33.0% | * 28.3% | * 27.6% | * 24.9% |
| Malt | * 9.3% | * 8.1% | * 5.6% | * 12.9% | * 20.5% |
| Stout | * 13.7% | * 11.2% | * 15.4% | * 11.6% | * 19.0% |
| Wheat | * 10.9% | * 12.8% | * 18.9% | * 20.0% | * 15.0% |

Based on The Media Audit’s 2021 surveys

**More Valuable Insights**

According to the National Beer Wholesaler Association (NBWA), the top 10 beer holidays are:

|  |  |
| --- | --- |
| Holiday | Holiday |
| #1: Fourth of July | #6: The Super Bowl |
| #2: Memorial Day | #7: Cinco de Mayo |
| #3: Labor Day | #8: Halloween |
| #4: Christmas | #9: St. Patrick’s Day |
| #5: Thanksgiving | #10: NCAA Basketball |

National Beer Wholesaler Association, April 2022

The NBWA also publishes a monthly Beer Purchasers’ Index (BPI), which is a forecast of distributors’ beer purchases one month in advance. The BPI for March 2022 was in positive territory at 52, a slightly higher average index for March, and is similar to pre-pandemic BPIs.

**Beer Purchasers’ Index by Category, March 2022 vs. March 2021**

|  |  |  |
| --- | --- | --- |
| Beer Category | March 2022 | March 2021 |
| Imports | 67 | 60 |
| Craft | 47 | 46 |
| Premium lights | 51 | 44 |
| Premium regular | 39 | 38 |
| Less than premium | 41 | 37 |
| FMB/Seltzer | 42 | 85 |
| Cider | 36 | 36 |

National Beer Wholesaler Association, April 2022

*Sources:* *Beverage Industry* Website, 4/22; Progressive Grocer Website, 4/22; The Media Audit Website, 4/22; National Beer Wholesaler Association Website, 4/22.

*Updated*: April 2022

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**Local Market and Station Information**