Beer - US - December 2012

Scope and Themes

"Domestic and imported beer brands continue to dominate the U.S. beer market despite a tumultuous beer period brought on by the economic downturn. While some beer segments have adapted to appeal to consumers throughout the recession, the overall beer market has declined since 2008. In addition, some consumers exchanged loyalty for consumption across beer and alcohol categories, while another portion of adults are cutting back on alcohol overall. To identify the best strategies for growth, brewers need to analyze the strengths of each of their brands and consider adopting new marketing, product innovations, and price point adjustments.

– Jennifer Zegler, Beverage Analyst

In this report we answer the key questions:

- **What can continue to drive sales of flagship beer brands?**
- **How can imported beer brands recapture momentum?**
- **What tactics should be leveraged to encourage trial of new products?**

The U.S. beer market has been plagued by annual volume declines despite profitable sales from brewers and importers. By readjusting prices, brewers have been able to keep dollar sales on the increase even though consumers are not buying more beer. The overall domestic beer market has yet to find its way out of recession-inflicted volume sales declines. Thus far, packaging innovations and mainstream marketing have been unable to inspire consumers to purchase more 12-packs of flagship domestic beer brands. Instead, brewers should focus on new products to appeal to the 88% of domestic beer drinkers who are interested in discovering new beers, according to Mintel research. These new products need not be completely new brands. In 2012, Anheuser-Busch InBev capitalized on consumers' brand awareness with two new line extensions of its Bud Light brand, for example.

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

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Scope and Themes

Unlike their domestic counterparts, imported beer companies have found ways to return to positive volume performance in the wake of the economic downturn. Through innovative marketing and promotion of new brands from abroad, imported beers have tapped into the base of consumers who are curious about new beers. Imported beer's positive sales are particularly noteworthy because consumers have no shortage of options in the U.S. beer market. Due to increased competition, domestic and imported brewers must continue to ensure that their brands remain relevant with consumers of all ages, genders, and backgrounds. Marketing must be inclusive, but also clever. New products need to taste good, but also present a return on investment, whether that's drinkability for value brands or taste for high-end beers. Affordability no longer means low prices because consumers have embraced premium-priced brands like craft and imported beer that are perceived as being worth their price tags.

This report builds on the analysis presented in Mintel's *Craft Beer—U.S., November 2012*, which covered the craft and craft-style segment of the U.S. domestic beer market. It also updates the research presented in *Beer: The Market—U.S., December 2011* and December 2010 and *Beer: The Consumer—U.S., November 2011* and November 2010. Additionally, this report is complementary to Mintel's *Domestic Beer—U.S., November 2009* and previous editions published in November 2008, December 2007, November 2006 and 2005, and May 2004. Mintel also separates the market into imported beer, which was analyzed in the following reports: *Imported Beer—U.S., December 2009* and previous editions in December 2008, 2007, and 2006.

or the purposes of this report, Mintel has used the following definitions:

Domestic beer refers to all beer from suppliers that began producing beer as a domestic institution, regardless of whether the company is owned by a foreign corporation or beer is bottled outside of the U.S. While it will be mentioned as part of the overall domestic beer market, Mintel covered the craft or microbrew beer and corporate-owned craft-style beer subsegment of the domestic beer market in *Craft Beer—U.S., November 2012*.

Imported beer refers to all beer from suppliers that began producing the brand outside of the U.S., regardless of which parent company owns the brand or whether the beer is bottled in the U.S.

This report includes domestic beer purchased for at-home ("off-premise") consumption (products sold primarily in cans and bottles); and "on-premise" consumption in bars, clubs, and restaurants. However, the primary focus on this report is off-premise beer sales and consumption.

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