

Beer and Craft Beer - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Dollar sales of beer, craft beer, and cider are estimated to reach \$112 billion in 2018, up 1.1% over 2017 totals. Dollar sales of beer will level, with very small year-over-year gains projected through 2023. Volume sales are declining at a higher rate (with an estimated dip of just under 1% in 2018), due to a higher percentage of consumers reducing beer consumption than report drinking more."

Beth Bloom, Associate Director - Food & Drink

This report looks at the following areas:

- Dollar sales growth of beer, craft beer, and alcoholic cider slows
- A quarter of beer drinkers have reduced consumption
- Expanding legalization of recreational cannabis can challenge beer

Leading reasons for reduction include personal health improvement and drinking less alcohol in general. Larger dollar declines are prevented by the growth in higher price point segments, including craft and imported beer.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Beer and Craft Beer - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Dollar sales growth of beer, craft beer, and alcoholic cider slows

Figure 1: Total US sales and forecast of beer, craft beer, and alcoholic cider, at current prices, 2013-23

A quarter of beer drinkers have reduced consumption

Figure 2: Reasons for drinking less beer, August 2018

Expanding legalization of recreational cannabis can challenge beer

Figure 3: Cannabis statements – Alcohol, June 2018

The opportunities

Beer drinkers are open to exploration within the category

Figure 4: Beer statements – Habits, August 2018

Engage through increased consumption

Figure 5: Reasons for drinking more beer, August 2018

Restaurants and breweries are key trial locations for “true-craft” drinkers

Figure 6: Beer purchase location, by craft consumption, August 2018

What it means

The Market – What You Need to Know

Dollar sales growth of beer, craft beer, and alcoholic cider slows

Struggles of dominant light beer, overshadow imported and craft growth

Beer leads alcohol choice, but loses sales share to other categories

On-premise volume sales decline 4.5% from 2013-17

Expanding legalization of recreational cannabis can challenge beer

Market Size and Forecast

Dollar sales growth of beer, craft beer, and alcoholic cider slows

Figure 7: Total US sales and forecast of beer, craft beer, and alcoholic cider, at current prices, 2013-23

Figure 8: Total US sales and forecast of beer, craft beer, and alcoholic cider, at current prices, 2013-23

Figure 9: Total US sales and forecast of beer, craft beer, and alcoholic cider, at inflation-adjusted prices, 2013-23

Volume sales decline slows

Figure 10: Total US volume sales and forecast of beer and craft beer, 2013-21

Figure 11: Total US volume sales and forecast of beer and craft beer, 2013-21

Market Breakdown

Imported and craft segments continue strong growth

Figure 12: Total US volume sales and forecast of beer and craft beer, by segment, 2015-21

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Beer and Craft Beer - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 13: Share of total US volume sales and forecast of beer and craft beer, by segment, 2016-18

On-premise volume sales decline 4.5% from 2013-17

Figure 14: US volume sales of beer, craft beer, and FMBs, by channel, 2013-17

Cider sees overall upward trend, despite recent slowdown

Figure 15: Total US volume sales of alcoholic cider, 2013-17

Market Perspective

Consumers diversifying routine, reaching for wine and spirits

Figure 16: Alcohol consumption, August 2018

Figure 17: Year-over-year change of US beer volume sales as compared to US volume sales of beverage alcohol, 2014-17

Figure 18: Top Ingredients for "Beer" & "FAB – Seltzer," January 2017-October 2018

Expanding legalization of recreational cannabis can challenge beer

Figure 19: Cannabis statements – Alcohol, June 2018

Market Factors

Positive economic outlook favors increased discretionary spending

Figure 20: Consumer sentiment index, January 2007-August 2018

Aging population will challenge alcohol sales

Figure 21: Population by age, 2013-23

Key Players – What You Need to Know

A-B InBev continues to lead MULO sales in the category

Cans surpass bottles among 2018 launches

Light Lagers continue to lead, but lose share to IPAs

Lower alcohol options can appeal to consumers' desire for moderation

Company and Brand Sales of Beer and Craft Beer

A-B InBev continues to lead MULO sales in the category

Sales of beer and craft beer by company

Figure 22: Share of multi-outlet sales of beer, craft beer, and alcoholic ciders, by leading companies, 52-weeks ending Aug. 12, 2018

Figure 23: Multi-outlet sales of beer, craft beer, and alcoholic ciders, by leading companies, rolling 52 weeks 2017 and 2018

What's Working?

Constellation sees strong growth at MULO

Figure 24: Multi-outlet sales of imported beer/ale, by leading companies and brands, rolling 52 weeks 2017 and 2018

Cider seeing strong growth at MULO

Figure 25: Multi-outlet sales of alcoholic ciders, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 26: Cider launches, by leading claims, 2014 and 2018*

Figure 27: Cider launches, by fastest growing claims, 2014-18*

Cans surpass bottles among 2018 launches

Figure 28: Beer launches, by pack type, 2014 and 2018*

Figure 29: Cider launches, by pack type, 2014 and 2018*

Environmentally friendly packaging claims skyrocket in among beer launches

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Beer and Craft Beer - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 30: Beer launches, by leading claims, 2014 and 2018*

Figure 31: Beer launches, by fastest growing claims, 2014-18*

Citrus flavors lead among flavored beer launches

Figure 32: Beer launches, by leading flavors, 2014 and 2018*

Figure 33: Beer launches, by fastest growing flavors, 2014-18*

Figure 34: Cider launches, by leading flavors, 2014 and 2018*

Figure 35: Cider launches, by fastest growing flavors, 2014-18*

Light Lagers continue to lead, but lose share to IPAs

Figure 36: Beer appearance on restaurant menus, by style share, Q3 2014 and Q3 2018

What's Struggling?

Domestic beer stagnates at MULO

Figure 37: Multi-outlet sales of domestic beer/ale, by leading companies and brands, rolling 52 weeks 2017 and 2018

What's Next?

Milkshake IPAs put the focus on mouthfeel

Botanical flavors extend food and drink ingredient trends to beer

Lower alcohol options can appeal to consumer desire for moderation

The Consumer – What You Need to Know

60% of beer drinkers are men

A quarter of beer drinkers have reduced consumption in the past year

Craft-style outpacing true-craft consumption

Bottles still lead despite uptick in cans

Brand leads beer purchase decision

Slightly more than half of beer drinkers explore the range

Beer Consumption

60% of beer drinkers are men

Figure 38: Share of alcohol consumption, by gender, August 2018

Beer is not as popular among new drinkers

Figure 39: Share of alcohol consumption, by age, August 2018

Beer may benefit from affordability

Figure 40: Share of alcohol consumption, by household income, August 2018

Hispanics are more likely than average to drink beer

Figure 41: Alcohol consumption, by Hispanic origin, August 2018

Consumption frequency

Three in 10 beer drinkers do so multiple times per week

Figure 42: Beer statements – Frequency, August 2018

Men are more likely to be frequent beer drinkers

Figure 43: Beer statements – Frequency, by gender, August 2018

Craft beer drinkers do so with greater frequency

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Beer and Craft Beer - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 44: Beer statements – Frequency, by craft consumption, August 2018

Types of Beer Consumed

Bottles/cans

Bottled options still outpace canned, despite introduction surge

Figure 45: Types of beer consumed – Format, August 2018

Younger drinkers embrace cans

Figure 46: Types of beer consumed – Format, by age, August 2018

Domestic/imported

A higher percentage of beer drinkers drink domestic varieties

Figure 47: Types of beer consumed – Domestic/imported, August 2018

Hispanic interest in imports helps segment thrive

Figure 48: Types of beer consumed – Domestic/imported, by Hispanic origin, August 2018

Craft

Craft-style surpasses true-craft consumption

Figure 49: Types of beer consumed – Craft, August 2018

Craft continues to fall under radar of Hispanics

Figure 50: Types of beer consumed – Craft, by Hispanic, August 2018

Light/flavored

Light/low-cal variety engagement low, can use refresh

Figure 51: Types of beer consumed – Other types, August 2018

Women are more likely to reach for a light option

Figure 52: Types of beer consumed – Other types, by gender, August 2018

Young drinkers have the fever for the flavor

Figure 53: Types of beer consumed – Other types, by age, August 2018

Change in Beer Consumption

A quarter of beer drinkers have reduced consumption in the past year

Figure 54: Beer statements – Change in consumption, August 2018

22-34s show most erratic consumption behavior

Figure 55: Beer statements – Change in consumption, by age, August 2018

“Craft-style” drinkers are more likely to have increased consumption in the past year

Figure 56: Beer statements – Change in consumption, by craft consumption, August 2018

Reasons for drinking less beer

Health improvement and alcohol reduction drive decreased consumption

Figure 57: Reasons for drinking less beer, August 2018

Women are especially interested in calorie-reduction

Figure 58: Reasons for drinking less beer, by gender, August 2018

Younger reducers are particularly health conscious

Figure 59: Reasons for drinking less beer, by age, August 2018

Reasons for drinking more beer

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Beer and Craft Beer - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Category engagement leading to increased consumption

Figure 60: Reasons for drinking more beer, August 2018

Perceptions of Beer Types

Light beer seen as a healthier option

Figure 61: Correspondence analysis – Symmetrical map – Perception of beer types, August 2018

Figure 62: Alcohol consumption, August 2018

“Craft-style” beer finds appeal among both craft and non-crafter drinkers

Figure 63: Perception of beer types – “True craft” beer, by craft beer consumption, August 2018

Figure 64: Perception of beer types – “Craft-style” beer, by craft beer consumption, August 2018

Important Factors

Brand leads beer purchase decision

Figure 65: Important factors, August 2018

Younger drinkers are less likely to be driven by brand

Figure 66: Important factors, by age, August 2018

Frequent drinkers are even more reliant on brand

Figure 67: Important factors, by consumption frequency, August 2018

Style is of utmost importance among “true-craft” drinkers

Figure 68: Important factors, by craft consumption, August 2018

Beer Purchase Location

Supermarkets lead purchase location

Figure 69: Beer purchase location, August 2018

35-44s are target market for online sales

Figure 70: Beer purchase location, by age, August 2018

Restaurants, breweries are key trial locations for “true-craft” drinkers

Figure 71: Beer purchase location, by craft consumption, August 2018

Beer Attitudes and Behaviors

Brand/style loyalty behaviors

Beer drinkers aren’t strongly stuck in their ways

Figure 72: Beer statements – Habits, August 2018

Craft drinkers aren’t necessarily about the brand

Figure 73: Beer statements – Habits, by craft consumption, August 2018

Attitudes about beer

Large manufacturers struggle with craft appeal

Figure 74: Goose Island - Think Big About Beer, April 2018

Figure 75: Beer statements – Other, August 2018

22-34s are most likely to benefit from helping hand from beer brands

Figure 76: Beer statements – Other, by age, August 2018

Craft drinkers have higher-than-average opinions of large manufacturers

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Beer and Craft Beer - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 77: Beer statements – Other, by craft consumption, August 2018

Appendix – Data Sources and Abbreviations

Data sources
Sales data
Fan chart forecast
Consumer survey data
Correspondence analysis methodology
Abbreviations and terms
Abbreviations

Appendix – The Market

Figure 78: Total US volume sales and forecast of light beer, 2013-21
Figure 79: Total US volume sales and forecast of super-premium and premium beer, 2013-21
Figure 80: Total US volume sales and forecast of imported beer, 2013-21
Figure 81: Total US volume sales and forecast of craft beer, 2013-21
Figure 82: Total US volume sales and forecast of popular beer, 2013-21
Figure 83: Total US volume sales and forecast of ice beer, 2013-21
Figure 84: Total US volume sales and forecast of malt liquor, 2013-21
Figure 85: US volume sales of beer and craft beer, by segment, 2016 and 2018
Figure 86: Total US volume sales of alcoholic cider, 2013-17
Figure 87: US volume sales of beer, craft beer, and FMBs, by channel, 2013-17
Figure 88: US volume sales of beverage alcohol, by channel, 2013-17

Appendix – Key Players

Figure 89: Multi-outlet sales of beer, craft beer, and alcoholic ciders, by leading companies, rolling 52 weeks 2017 and 2018
Figure 90: Beer launches, by pack type, 2014 and 2018*
Figure 91: Cider launches, by pack type, 2014 and 2018*
Figure 92: Beer launches, by leading claims, 2014 and 2018*
Figure 93: Cider launches, by leading claims, 2014 and 2018*
Figure 94: Beer launches, by leading flavors, 2014 and 2018*
Figure 95: Cider launches, by leading flavors, 2014 and 2018*
Figure 96: Beer appearance on restaurant menus, by style, Q3 2014- Q3 2018

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com