

2022

BEER INDUSTRY UPDATE

SAMPLE

By:



**BEER
MARKETER'S
INSIGHTS**

LEADING SOURCE OF BEER INDUSTRY INFORMATION
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1| 2021 Highlights

INDUSTRY OVERVIEW - 2021

With another year operating under pandemic constraints and challenges, the US beer industry managed to post its best shipments gain in a decade, albeit with plenty of shifting dynamics and complicating factors. On-premise recovery coupled with off-premise volume ahead of pre-Covid levels netted out to sizable shipments growth. That's even as hard seltzer markedly slowed, especially from a shipments perspective. Imports, namely Mexican imports, returned as the largest single growth driver in 2021. Constellation posted the top gain among companies. Both of the top 2 brewers continued to lose share, but total AB shipments eked out growth (including exports), as did top MC brands, each shipping well ahead of depletions. Those factors, coupled with solid craft beer recovery and continued expansion beyond beer, fueled shipments growth further. Depletions, however, slipped in the US, according to Beer Institute.

Table 1.1 US Beer Industry Shipments, 2021

Shipments	Bbls (000)		Change	
	2020	2021	bbls	%
Taxpaid	169,720	169,175	-545	-0.3
No Alcohol	527	685	158	30.0
Cider+	3,354	3,500	146	4.4
Import	<u>36,803</u>	<u>39,867</u>	<u>3,064</u>	<u>8.3</u>
US Shipments	210,404	213,227	2,823	1.3
Tax-free	<u>3,974</u>	<u>4,308</u>	<u>334</u>	<u>8.4</u>
Total Shipments	214,378	217,535	3,157	1.5

Cider+ includes perry, mead and not elsewhere specified or included (NESOI) imports. No alcohol imports are included in imports total.

Per usual, 2021 shipments figures will be revised by TTB and Beer Institute as more data comes in during 2022. Late-reporting small brewers will push totals upward, and TTB traditionally "adds bbls" to prior-year totals. In fact, TTB already added upwards of 1 million barrels to 2020 totals. An unprecedented restatement that technically puts the reported bbl-gain in 2020 at an even larger

Table 2.5 Import Shipments by Month, 2019-2021

(Total)	Bbls (000)			Trend (% Chg)		
	2019	2020	2021	2019	2020	2021
January	2,516	2,844	3,175	-11.4	13.0	11.6
February	2,578	2,698	2,524	-1.8	4.7	-6.4
March	3,367	3,209	3,061	11.3	-4.7	-4.6
April	3,507	2,729	3,446	8.9	-22.2	26.3
May	3,589	2,049	3,571	2.9	-42.9	74.3
June	3,337	2,838	3,800	4.4	-15.0	33.9
July	3,563	3,506	3,599	5.6	-1.6	2.7
August	3,025	3,542	3,642	-6.9	17.1	2.8
September	2,875	3,358	3,313	2.4	16.8	-1.3
October	3,098	3,524	3,432	9.3	13.8	-2.6
November	2,838	3,561	3,324	10.8	25.5	-6.7
<u>December</u>	<u>2,263</u>	<u>2,945</u>	<u>2,980</u>	<u>-12.2</u>	<u>30.1</u>	<u>1.2</u>
Total	36,556	36,803	39,867	2.1	0.7	8.3

	Imported Beer Bbls (000)			Imported No Alcohol Bbls (000)		
	2019	2020	2021	2019	2020	2021
January	2,493	2,816	3,144	23	28	31
February	2,561	2,661	2,489	17	36	35
March	3,345	3,180	3,035	22	30	26
April	3,489	2,698	3,426	18	31	21
May	3,574	2,018	3,542	15	31	29
June	3,320	2,817	3,768	17	21	32
July	3,535	3,482	3,571	28	24	28
August	2,975	3,512	3,607	50	30	35
September	2,852	3,318	3,273	23	40	40
October	3,077	3,472	3,389	21	52	43
November	2,820	3,500	3,286	18	61	38
<u>December</u>	<u>2,231</u>	<u>2,905</u>	<u>2,951</u>	<u>32</u>	<u>38</u>	<u>29</u>
Total	36,272	36,378	39,481	284	423	386

4| Regional Trends

MAJOR BREWERS' REGIONAL TRENDS

Please note: our report focuses on 42 "reporting states" where top suppliers' shipments data is available. But "Other" in the region tables now includes 8 non-reporting states and DC only. Taxfree/export totals have been excluded each year.

The regions reviewed include the following states:

New England = Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Mid-Atlantic = New Jersey, Pennsylvania

Southeast = Alabama, Florida, Georgia, Mississippi, S Carolina, Tennessee, W Virginia

East North Central = Illinois, Indiana, Michigan, Ohio, Wisconsin

West North Central = Iowa, Kansas, Minnesota, Missouri, Nebraska, N Dakota, S Dakota

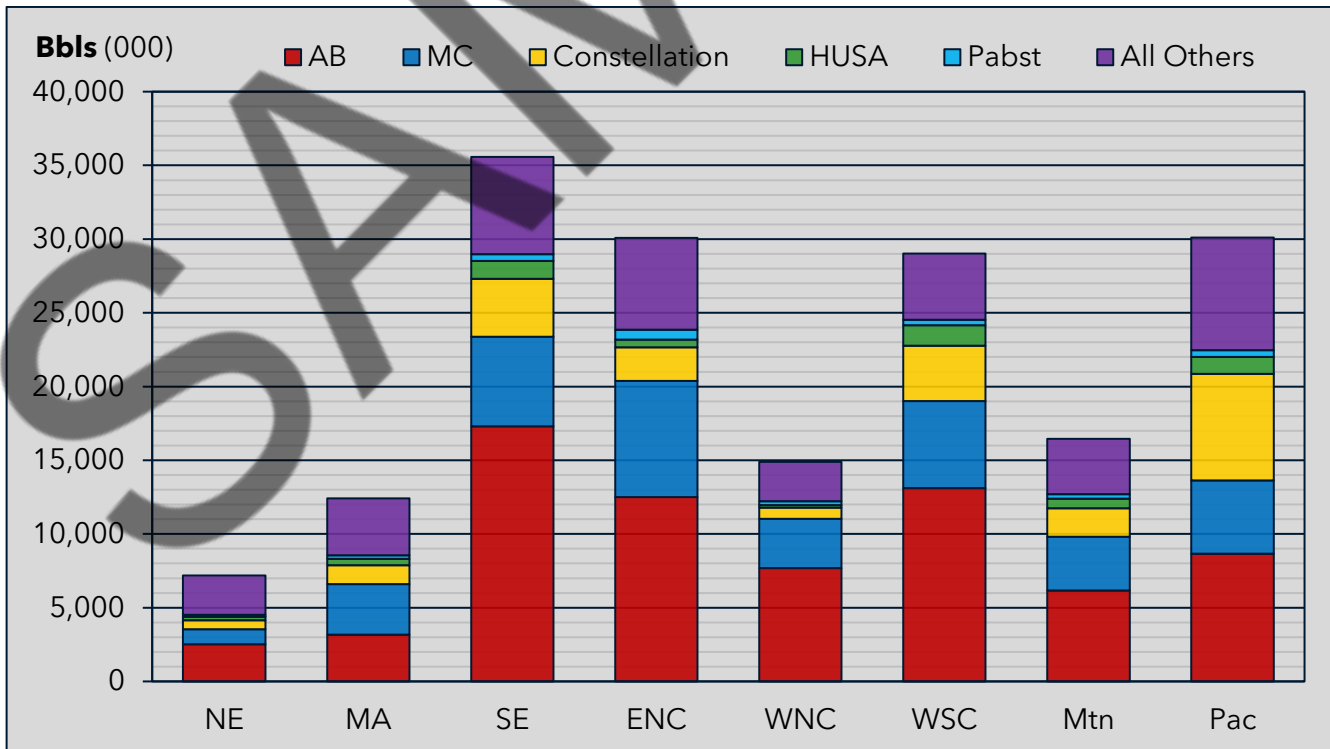
West South Central = Arkansas, Louisiana, Oklahoma, Texas

Mountain = Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming

Pacific = California, Hawaii, Oregon, Washington

Other = Alaska, Connecticut, District of Columbia, Delaware, Kentucky, Maryland, North Carolina, New York, Virginia and Tax-free (including exports)

Figure 4.1 Major Brewer Shipments by Region, 2021



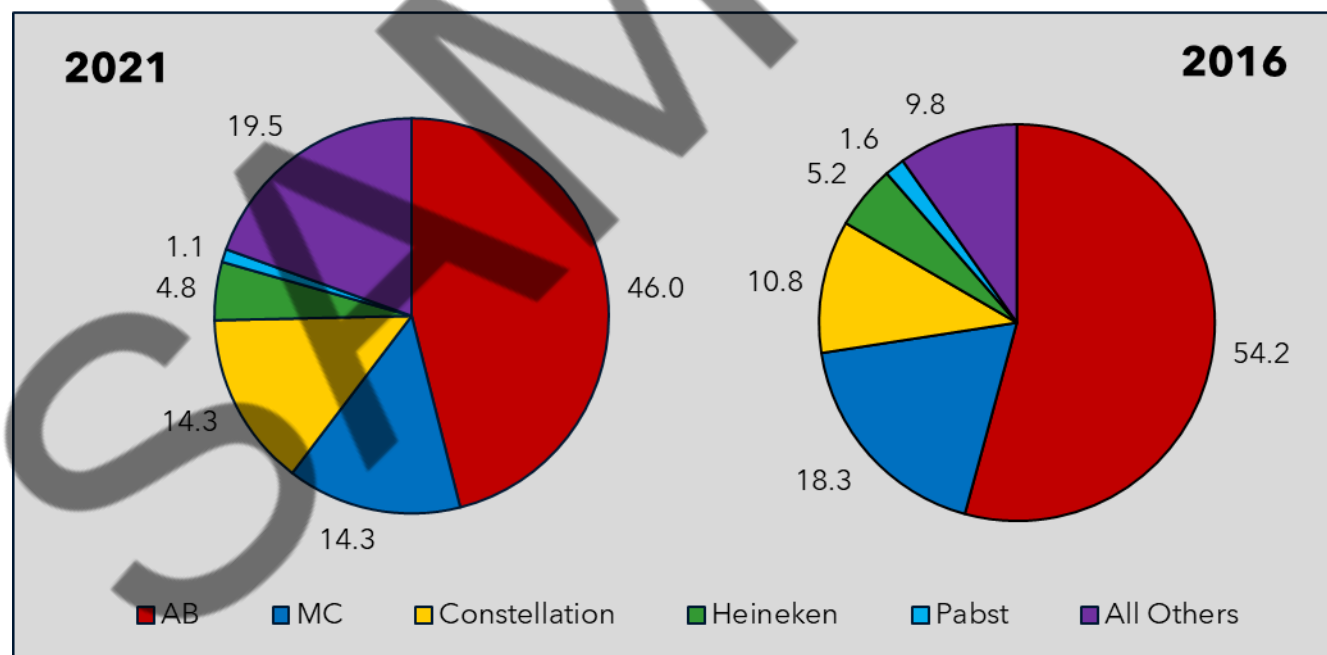
FLORIDA

Table 4.19 Shipments, Trends & Share by State, 2017-2021: Florida

	Bbls (000)				
	2017	2018	2019	2020	2021
AB	7,353	6,998	6,882	6,468	6,767
MC	2,370	2,363	2,235	2,112	2,106
Constellation	1,650	1,811	1,855	1,981	2,100
Heineken	736	663	637	635	700
Pabst	225	193	179	144	158
<u>All Others</u>	<u>1,325</u>	<u>1,440</u>	<u>1,609</u>	<u>2,389</u>	<u>2,869</u>
Total	13,659	13,468	13,397	13,729	14,700

	Trend (% Chg)					Market Share				
	17	18	19	20	21	17	18	19	20	21
AB	-0.8	-4.8	-1.7	-6.0	4.6	53.8	52.0	51.4	47.1	46.0
MC	-5.3	-0.3	-5.4	-5.5	-0.3	17.4	17.5	16.7	15.4	14.3
Constellation	11.5	9.8	2.4	6.8	6.0	12.1	13.4	13.8	14.4	14.3
Heineken	3.7	-9.9	-3.9	-0.3	10.2	5.4	4.9	4.8	4.6	4.8
Pabst	0.4	-14.2	-7.3	-19.6	9.7	1.6	1.4	1.3	1.0	1.1
<u>All Others</u>	<u>-1.0</u>	<u>8.7</u>	<u>11.7</u>	<u>48.5</u>	<u>20.1</u>	9.7	10.7	12.0	17.4	19.5
Total	-0.1	-1.4	-0.5	2.5	7.1					

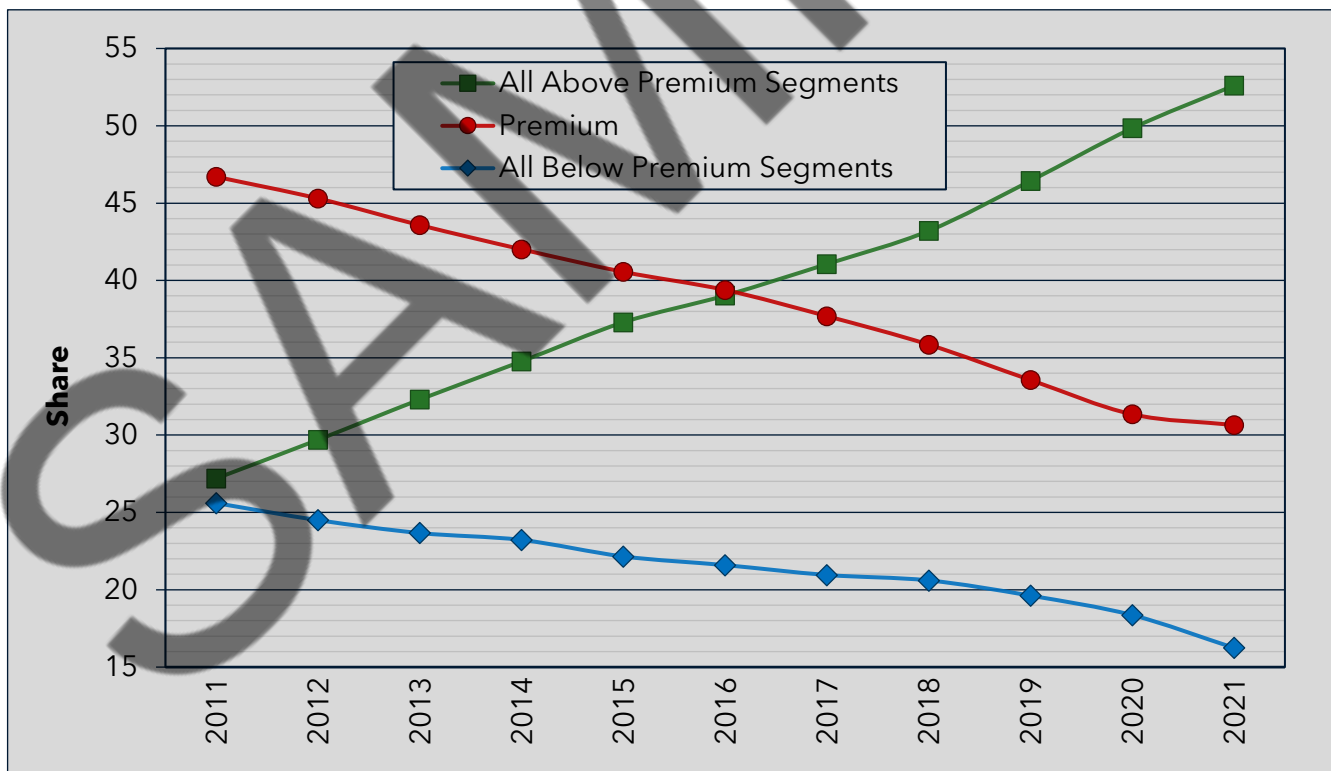
Figure 4.15 Share by State, 2021 vs 2016: Florida



initial pandemic declines, Heineken Original improved for the year, though shipments took a slight step back amid challenging pandemic circumstances. On a smaller scale, Peroni returned to double-digit growth and several smaller import countries grew following steep declines in 2020. Yet Stella began shifting to US production for the US market, negatively impacting import trends last year and likely into 2022.

Craft beer posted the 2d largest shipments gain of any segment last year, up 7%, 1.8 mil bbls in US. Supplier trends varied among top players, as many improved significantly against tough pandemic drops while others continued to slide. Top craft brand families that shipped 100K bbls or more collectively grew 4%, suggesting that all other brand families collectively grew low-double-digits. Meanwhile, FMBs/seltzer shipments slowed markedly amid hard seltzer over-supply, which led to hefty writedowns and steep declines in the 2d half of the year for top brands. Yet FMBs/hard seltzers collectively still grew more than 5% to over 23 mil bbls, we estimate. Again, depletions were much stronger for seltzer and the broader FMB/seltzer category. And Superpremium brands grew 6% to near 20 mil bbls, we estimate, fueled almost entirely by Mich Ultra plus Blue Moon.

Figure 5.3 Segment Share by Pricing, 2011-2021



6| Retail Trends

RETAIL BEER TRENDS IN KEY OFF-PREMISE CHANNELS

In this year's edition of **Beer Industry Update** we report off-premise trends from the IRI Multi-Outlet Plus Convenience database. These outlets include: grocery, convenience, drug, mass-merchandise, club and dollar stores. Trends and share may differ from prior editions of **Update**. Tables in this section summarize trends in the full multi-outlet + convenience universe as well as in grocery and convenience channels.

OFF-PREMISE SEGMENT TRENDS

Beer volume declined 4.6% in off-premise channels in 2021 as consumers shifted some purchases back to on-premise occasions following a year of inflated off-premise sales during the Covid-19 pandemic. Continued trade-up to higher-end segments and strong price increases of 3-4% among most segments kept dollar sales closer to flat, -0.4%. Above premium segments gained another 2.8 points of volume share to 47.5 and finished the year with over 60 share of dollars in this data. While sub-premium volume declined double-digits and premium volume fell high single-digits, above premium volume grew 1.3%, driven again by hard seltzer's continued (albeit much slower) growth.

Sales of hard seltzer grew 16.8% in 2021, topping 10 share of off-premise beer category dollars, passing the superpremium segment (as defined by IRI) in these channels. Flavored malt beverages (FMBs, ex-seltzer) and imports accelerated during the second half of the year, finishing 2021 up 5.5% and 4.9%, respectively. So imports picked up another 1.1 share of beer dollars to 20.9. The combination of hard seltzer, FMBs and hard cider grew by almost 11% and gained almost 2 full share to 18.6. Craft sales declined by almost 5%, but did not decline as steeply as premium and sub-premium beer. Non-alcoholic beer posted the fastest growth off a very small base. NA sales grew 24% and finished the year at just a half-share of category sales, +0.1 share. The average case of beer cost \$26.99 in these off-premise channels in 2021, an increase of \$1.14 and 4.4%. The average price-per-case for FMBs, cider, and non-alcoholic beer increased by almost 4%, while average craft prices increased 2.2% and average superpremium prices increased just 1.3%.

Figure 9.1 Brand Share of AB Shipments, 2021 vs 2016

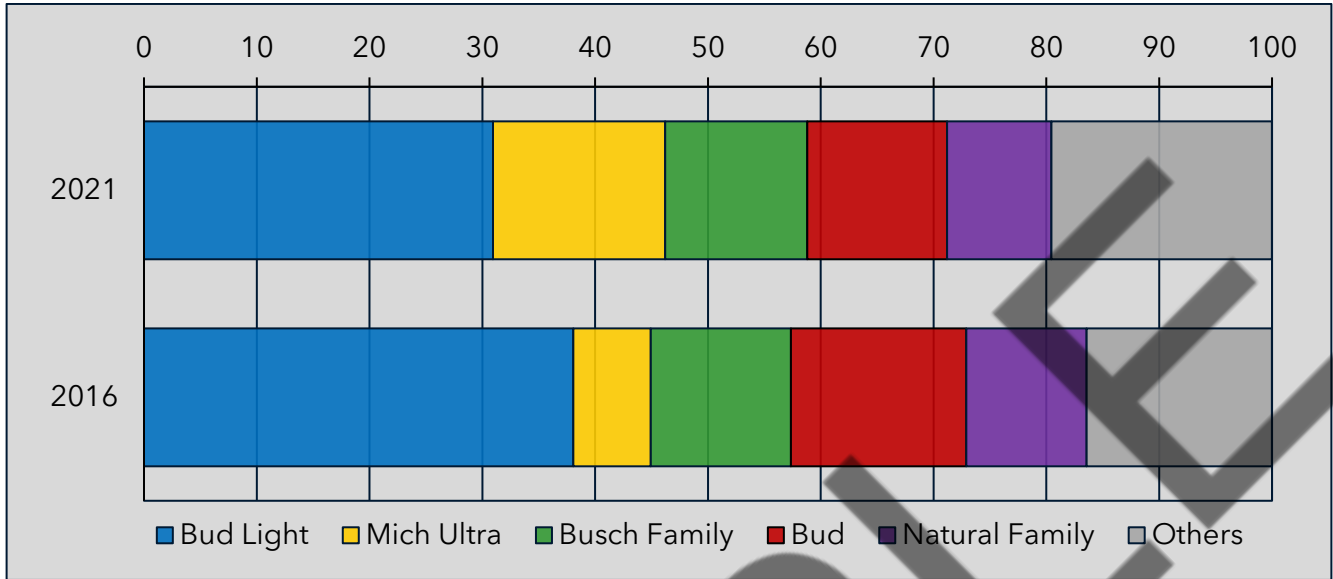


Figure 9.2 AB Brand Trends, 2019-2021

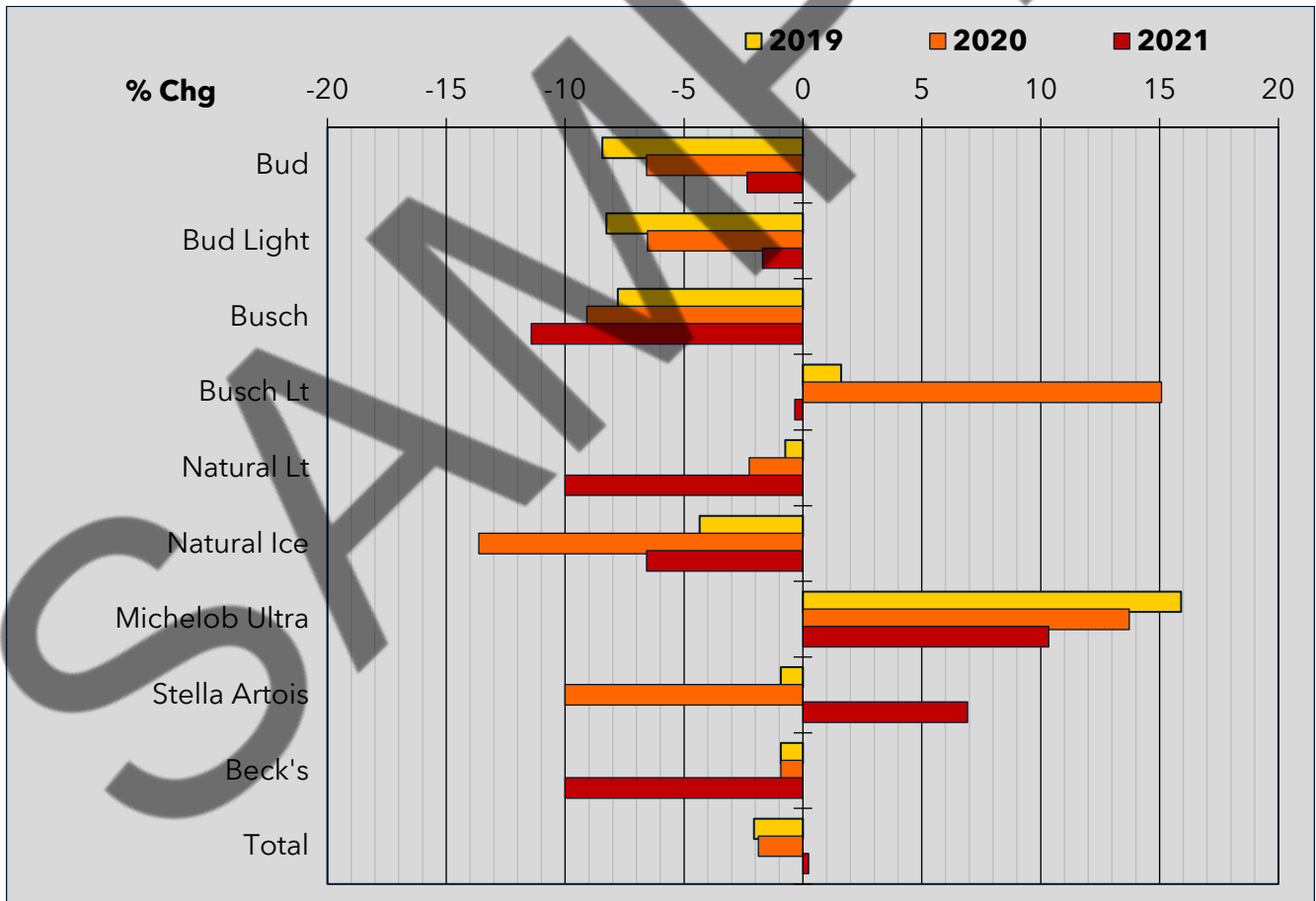
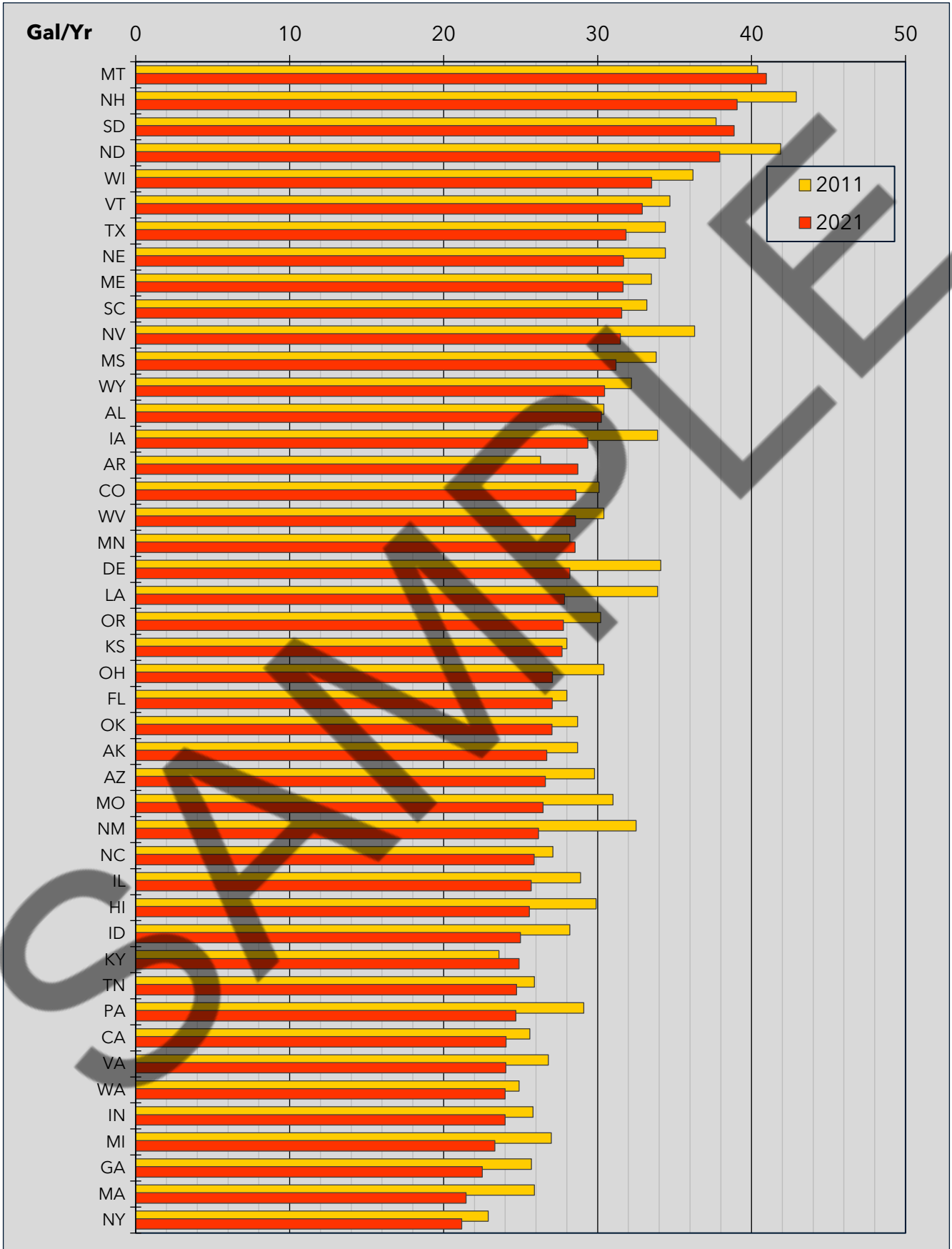


Figure 10.3 Beer Consumption Per 21+ Adult by State, 2021 vs 2011 (by 2020 consumption)



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