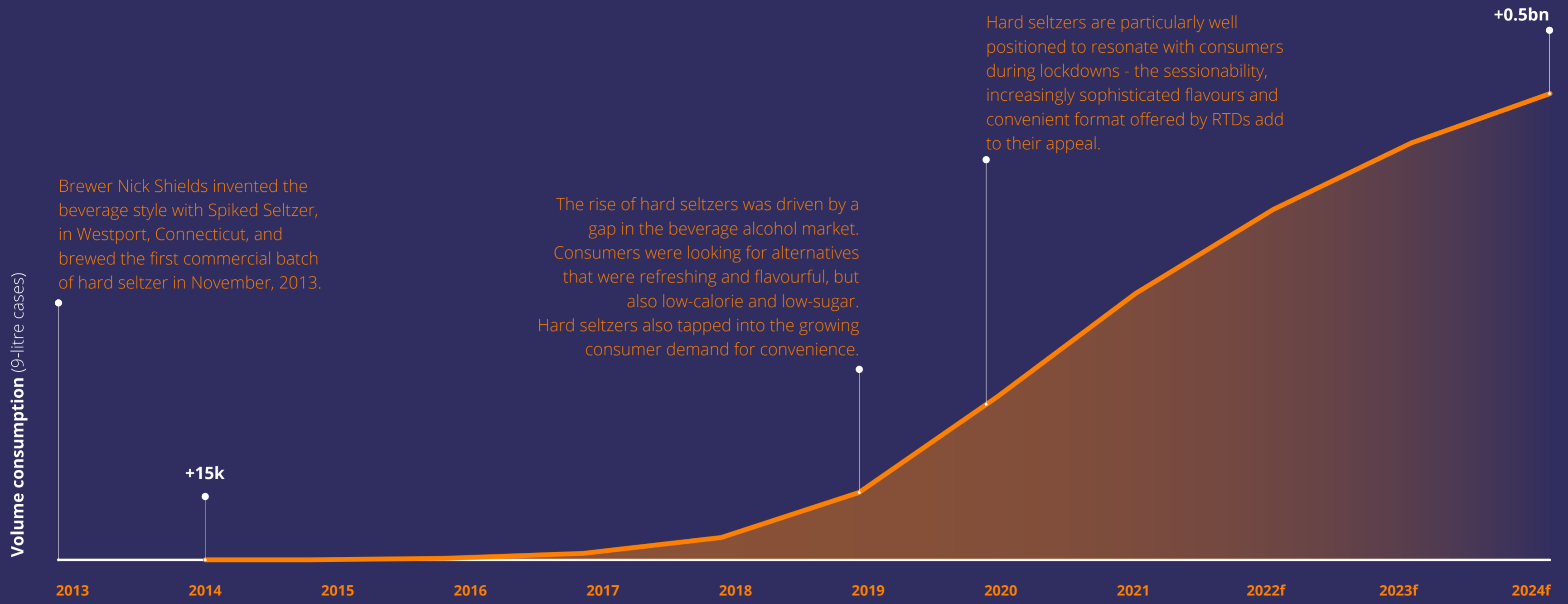


Evolution of Hard Seltzers in the US

Driven largely by the growth of hard seltzers, the overall ready-to-drink (RTD) category is the fastest growing beverage alcohol category in the US market, and its trajectory is looking strong for the years to come. IWSR takes a deeper look at the evolution of hard seltzers in the US.



Brewer Nick Shields invented the beverage style with Spiked Seltzer, in Westport, Connecticut, and brewed the first commercial batch of hard seltzer in November, 2013.

The rise of hard seltzers was driven by a gap in the beverage alcohol market. Consumers were looking for alternatives that were refreshing and flavourful, but also low-calorie and low-sugar. Hard seltzers also tapped into the growing consumer demand for convenience.



March

MA-based Boston Beer launches Truly Spiked & Sparkling



June

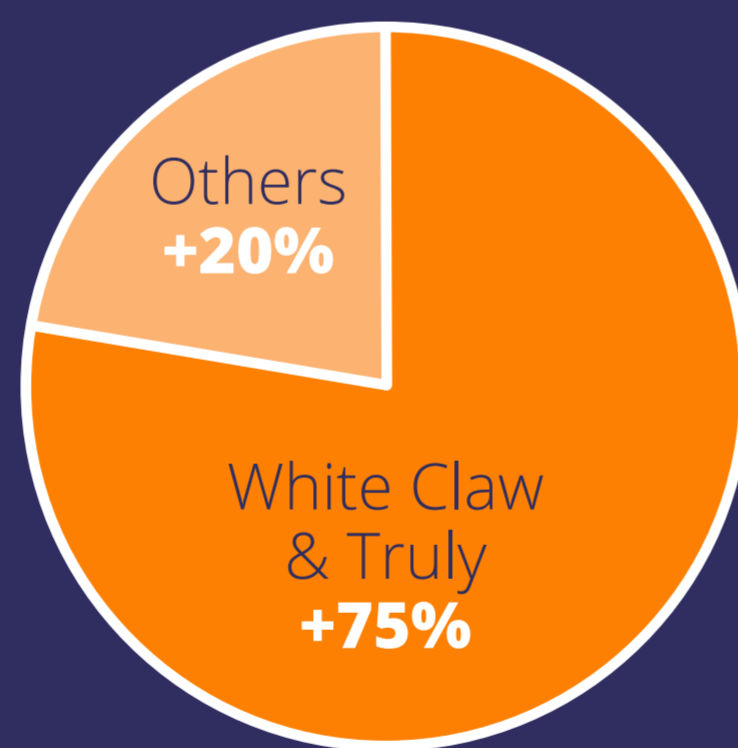
Mike's Hard Lemonade, owned by Mark Anthony Brands, launches White Claw



September

AB inBev buys Boathouse Beverage's SpikedSeltzer brand (the first hard seltzer brand in the US) and renames it Bon & Viv

Market share in the US



While Truly and White Claw lead the US hard seltzer market, other brands have continued to enter the competitive landscape, with both craft producers as well as larger multi-national brand owners across beer, wine, spirits and even soft drinks, entering the hard seltzer market.

Evolution

- **Sophisticated flavours**
Consumers cite flavour as the number 1 reason they choose a ready-to-drink beverage.
- **Spirit-based RTDs**
Hard seltzers that use a spirit base offer a trade up opportunity for consumers looking for a premium experience.
- **Celebrity-backed seltzers**
As the hard seltzer category proves its staying power, influencers will increasingly tap into the hard seltzer lifestyle.
- **Cocktail seltzers**
Cocktail seltzers mimic an easy cocktail experience for consumers who want the on-premise offering on-the-go.
- **Punchier packaging**
Fuller flavoured, higher ABV products with punchier packaging are increasingly coming to market.

Dominant Flavours



New hard seltzer SKU launches in the US were dominated by fruit-flavoured ingredients, especially lemon and other citrus flavours.