4 Weeks Ending 02/01/2025

Macro Minute

Beverage Alcohol Scorecard Briefing

NIQ Beverage Alcohol Vertical
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4 Weeks Ending 02/01/2025

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Summary *Commentary*

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Time Period Callouts:

This update includes Dry January timing.

This update includes the latest Liquor Open State Channel & Convenience Channel enhancement.

- ***Beer*** – Dollar sales for **Total Beer** products **(-3.4%)** and volume **(-5.4%)** facing declines in the latest 4 weeks. **Super Premium and FMBs** all built on positive momentum while **Imports** are starting to face declines. **Dom Premium** and **Craft** impacting category growth. Shoppers continue to move their repertoires to non-alcohol versions of their favorite brands as well as RTD's from Wine and Spirits.

- ***Wine*** – **Wine** experienced declines in both dollars **(-5.7%)** and volume **(-6.8%)**. The Top 10 brand families are majority declining, with two growing dollars during the latest period. Growth changes in wine will no doubt have headwinds throughout the year and beyond depending on tariffs and price subsidies.

- ***Spirits*** – **Spirits** is also facing declines in the latest period **(-2.4%)** with declining volume **(-0.8%)**. **RTD** is the core positive driver **(+19.8%)**, with traditional Spirits like **Tequila (+4.6%)** and **Ready to Serve (+5.3%)** are still showing positive momentum for the time being.

- ***RTD*** – When viewed as its own mega category, RTD is growing **(+3.1%)** in dollar sales, though facing declines **(-1.4%)** in volume. **Spirits based** products are thriving, as well as **Wine based (+13.9%)** and **FMBs (+0.7%).** Innovation beyond flavors will be needed in RTD this year to keep consumers engaged.

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Toplines – *By Category*

4 Weeks Ending 02/01/2025

Total Alcohol
-3.6% dollars vs YA

RTD
+3.1% dollars vs YA

Beer/FMB/Cider
-3.4% dollars vs YA
-5.4% EQ volume vs YA

Wine
-5.7% dollars vs YA
-6.8% EQ volume vs YA

Spirits
-2.4% dollars vs YA
-0.8% EQ volume vs YA

Source: NielsenIQ Discover; ALC INTEGRATED Database; Total US xAOC + Liquor Open State + Conv; 02/01/2025

Total Alcohol Overview

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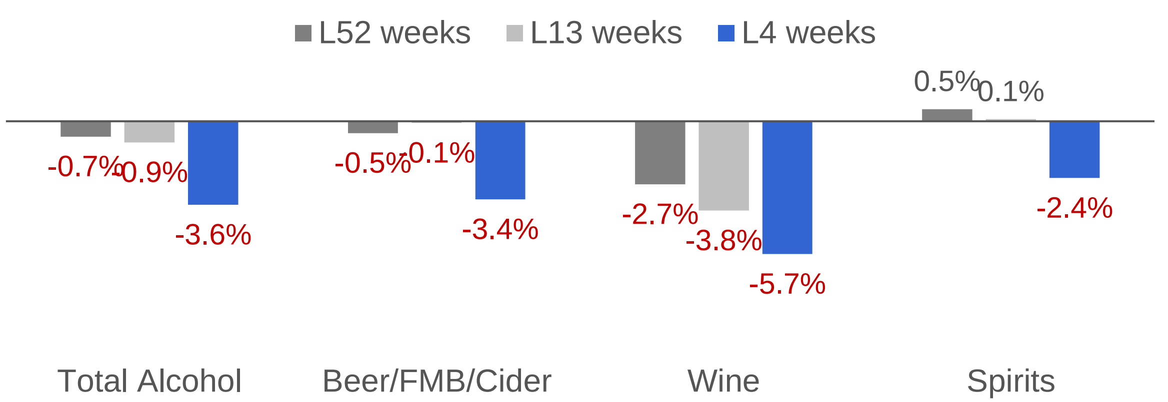
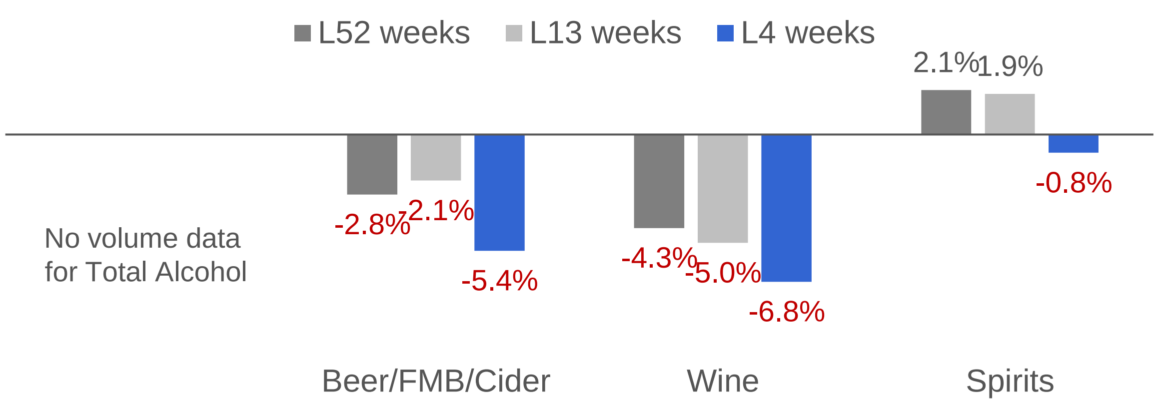
Dollar Sales % Change



Volume Sales % Change



Top 10 Segment Change

L4 weeks

	Dollar Growers	$ % Chg	Case % Chg
1	Non Alc Spirits	+70.4%	+98.0%
2	Wine Cockails	+35.1%	+30.8%
3	Non Alc Wine	+20.6%	+16.6%
4	Spirits RTD	+19.8%	+19.3%
5	RTS	+5.3%	+1.2%
6	Tequila	+4.6%	+4.2%
7	Super Prem	+1.5%	+1.2%
8	FMBs	+0.7%	-1.4%
9	Cordials	-0.9%	-1.2%
10	Imports	-1.8%	-3.6%

	Dollar Laggers	$ % Chg	Case % Chg
1	Whiskey	-5.2%	-5.6%
2	Hard Seltzers	-5.7%	-8.9%
3	Gin	-6.5%	-7.5%
4	Dom Prem	-6.7%	-8.3%
5	Grain Alc	-7.2%	-6.6%
6	Brandy	-7.5%	-7.1%
7	Still Wine	-7.5%	-8.5%
8	Rum	-7.6%	-7.2%
9	Malt Liquor	-8.0%	-11.9%
10	Cognac	-14.9%	-12.2%

Top 10 Dollar Value Brand Family Change

L4 weeks

	Beer/FMB/Cider			Wine			Spirits	
1	Budweiser	-8.9%	1	Barefoot	-7.6%	1	Tito's	-0.9%
2	Modelo	-1.2%	2	Josh	+0.8%	2	Crown Royal	+6.6%
3	Michelob	+3.7%	3	Bota	-1.7%	3	Jack Daniel's	-6.0%
4	Coors	-2.3%	4	Sutter Home	-4.7%	4	Fireball	-5.5%
5	Corona	-4.4%	5	Franzia	-7.7%	5	Don Julio	+40.5%
6	Miller	-6.2%	6	Black Box	-3.3%	6	Hennessy	-13.4%
7	Busch	+1.0%	7	Woodbridge	-9.2%	7	Smirnoff	-4.5%
8	White Claw	+2.8%	8	Stella Rosa	-16.1%	8	Jim Beam	-2.4%
9	Natural	-5.0%	9	Lamarca	+4.6%	9	Jose Cuervo	+0.5%
10	Twisted Tea	+1.0%	10	Yellow Tail	-12.2%	10	New Amsterdam	-0.6%
	All Other	-4.2%		All Other	-5.8%		All Other	-3.6%

Source: NielsenIQ Discover; ALC INTEGRATED Database; Total US xAOC + Liquor Open State + Conv; 02/01/2025

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Ready to Drink Overview

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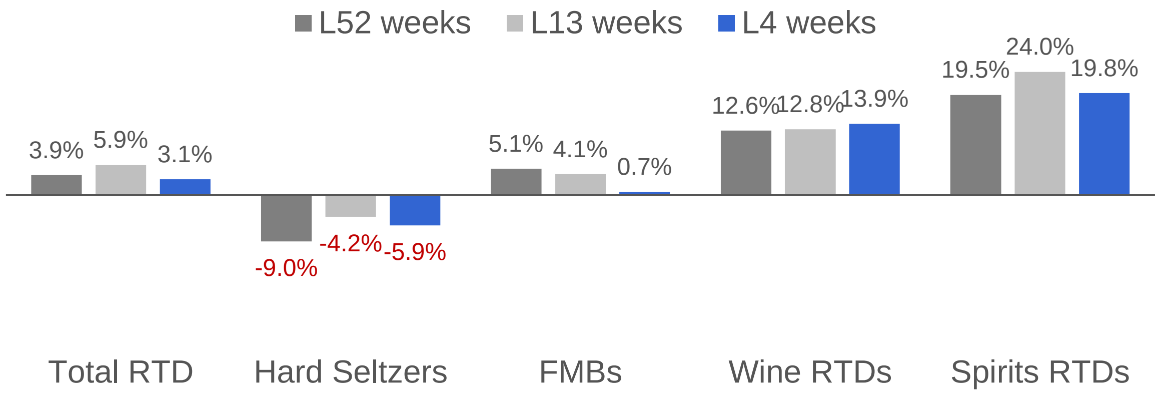
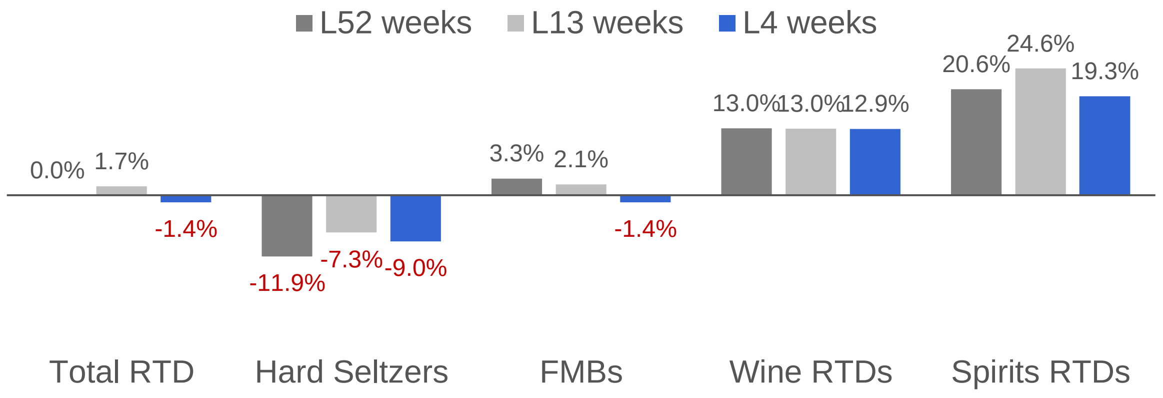
4 Weeks Ending 02/01/2025

Dollar Sales % Change

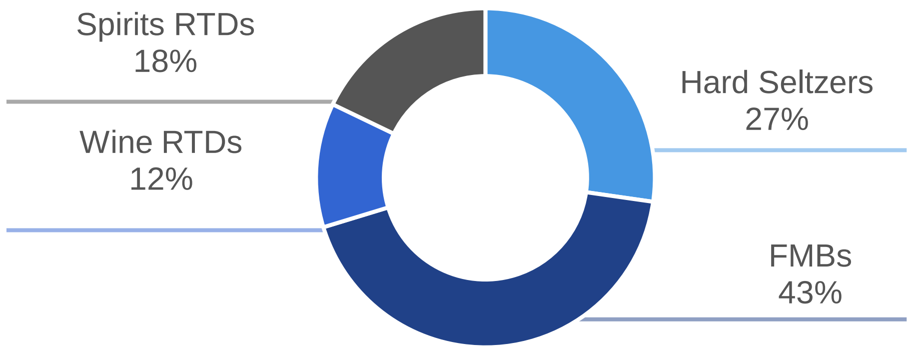


Volume Sales % Change



Segment Dollar Share

L4 weeks



Top 10 Dollar Value Brand Family* Change

L4 weeks

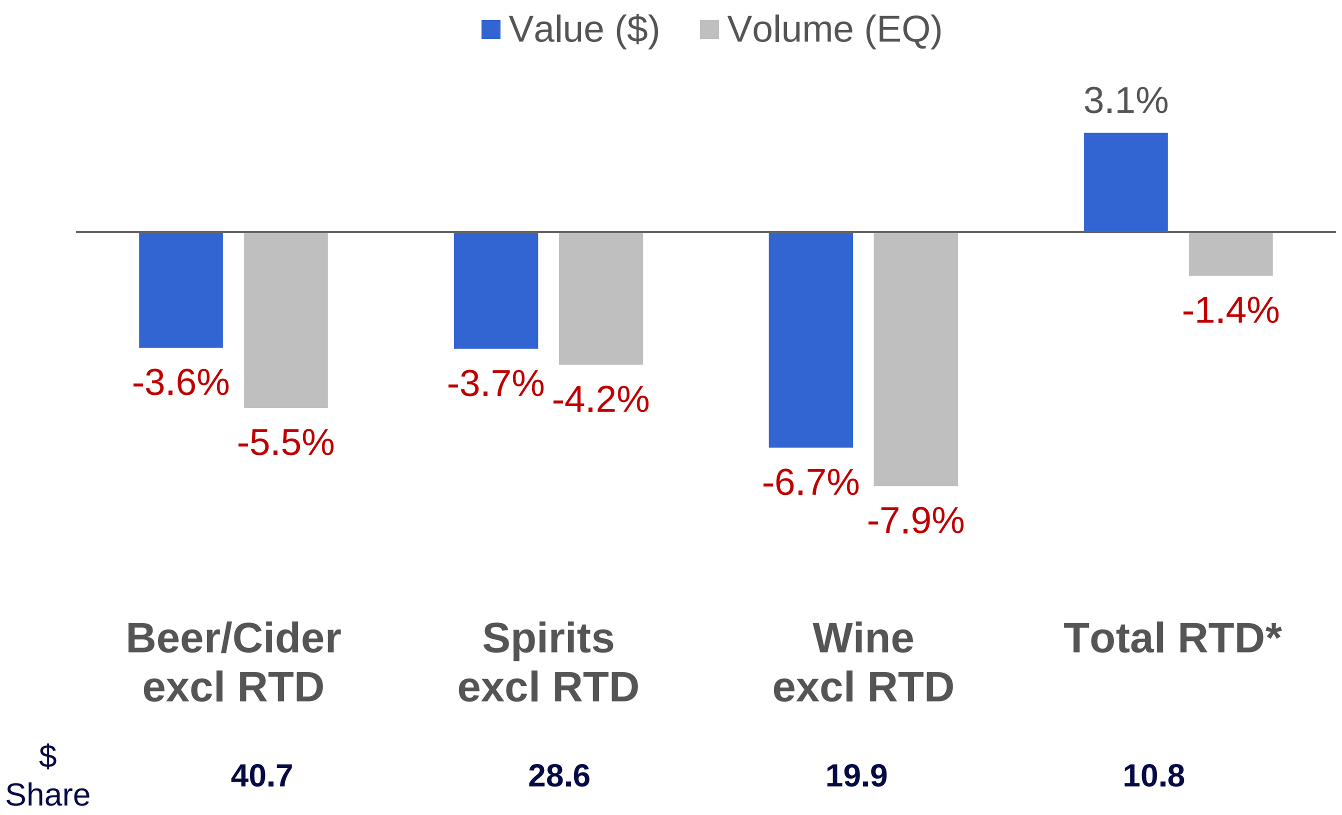
	RTD Brands	$ % Chg	Case % Chg	Unit Price % Chg
1	White Claw	+2.7%	-0.4%	-2.8%
2	Twisted Tea	+1.0%	-1.0%	+0.8%
3	Mike's	-6.6%	-9.2%	+0.0%
4	Smirnoff	-0.9%	-3.9%	+1.7%
5	Truly	-15.5%	-17.6%	-4.1%
6	High Noon	+3.7%	+2.4%	-3.1%
7	Buzzballz	+41.6%	+38.8%	+2.4%
8	Beatbox	+42.1%	+41.9%	+1.4%
9	Cayman Jack	+15.1%	+12.7%	-0.1%
10	Sutter Home	-5.4%	-5.8%	-0.4%
	All Other	+4.0%	-0.2%	+3.2%

**Brand Family will combine alcohol bases. Ex. White Claw will include Malt + Vodka base*

Source: NielsenIQ Discover; ALC INTEGRATED Database; Total US xAOC + Liquor Open State + Conv; 02/01/2025

Excluding RTDs view of latest 4 weeks

Beverage Alcohol by Category (excl RTDs) – Value and Volume Change
NIQ off-premise channels



* Total RTD = Seltzers / FMBs / Spirits RTDs / Wine RTDs

Source: NielsenIQ Discover; ALC INTEGRATED Database; Total US xAOC + Liquor Open State + Conv; 02/01/2025

Viewing RTD as the 4th mega category continues to point out the gravitational pull these products have with consumers.

Value and volume pressures are present across Beer, Wine, and Spirits in this 4-week period, as moderation in Dry January continued.

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Thank you!

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