4 Weeks Ending 02/22/2025

Macro Minute

Beverage Alcohol Scorecard Briefing

NIQ Beverage Alcohol Vertical
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4 Weeks Ending 02/22/2025

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Summary *Commentary*

4 Weeks Ending 02/22/2025

Time Period Callouts:

This update includes Super Bowl and Valentine's Day timing.

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

- ***Beer*** – Dollar sales for **Total Beer** products **(-4.1%)** and volume **(-5.8%)** facing declines in the latest 4 weeks. **Super Premium** is built on positive momentum while **FMBs & Imports** are starting to face declines. **Dom Premium** and **Craft** are negatively impacting category growth. Shoppers continue to move their repertoires to non-alcohol versions of their favorite brands as well as Wine & Spirits RTDs.

- ***Wine*** – **Wine** experienced declines in both dollars **(-4.8%)** and volume **(-5.8%)**. The Top 10 brand families are majority declining, with three 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 **(-2.6%)** with declining volume **(-0.4%)**. **RTD** is the core positive driver **(+18.0%)**, with traditional Spirits like **Tequila (+4.6%)** and **Ready to Serve (+9.3%)** are still showing positive momentum for the time being.

- ***RTD*** – As its own mega category, RTD is growing **(+2.1%)** in dollars, though facing volume declines **(-2.5%)**. **Spirits RTDs** are thriving, as well as **Wine RTDs (+15.3%)**. **FMBs (-1.5%)** are facing declines in the L4 weeks. Trends will likely improve as summertime approaches with an influx of new innovative flavors.

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Toplines – *By Category*

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Total Alcohol
-3.8% dollars vs YA

RTD
+2.1% dollars vs YA

Beer/FMB/Cider
-4.1% dollars vs YA
-5.8% EQ volume vs YA

Wine
-4.8% dollars vs YA
-5.8% EQ volume vs YA

Spirits
-2.6% dollars vs YA
-0.4% EQ volume vs YA

Source: NielsenIQ Discover; ALC INTEGRATED Database; Total US xAOC + Liquor Open State + Conv; 02/22/2025

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Total Alcohol Overview

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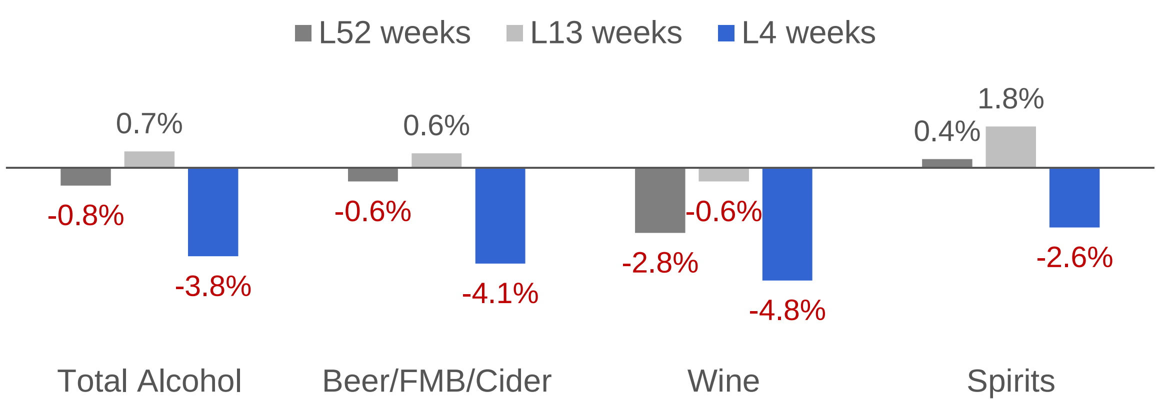
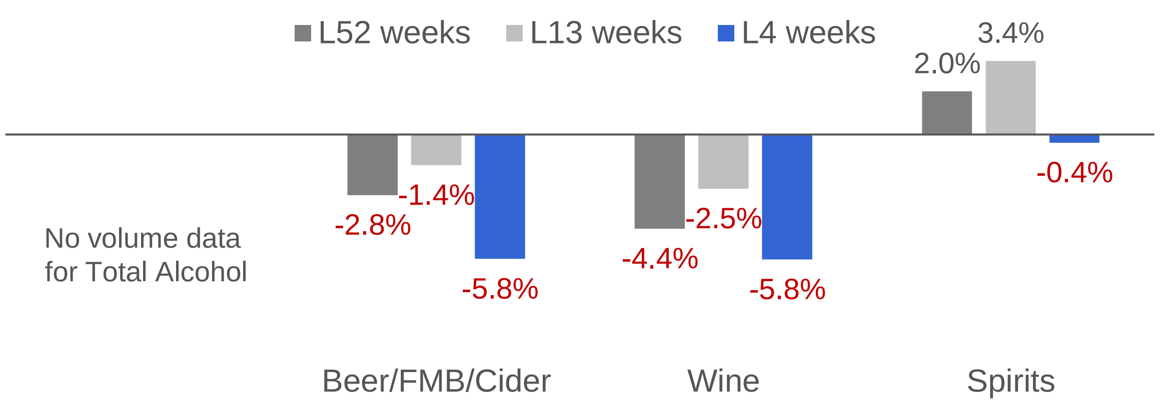
Dollar Sales % Change



Volume Sales % Change



Top 10 Segment Change

L4 weeks

	Dollar Growers	$ % Chg	Case % Chg
1	Non Alc Spirits	+68.6%	+90.9%
2	Wine Cockails	+36.2%	+30.4%
3	Spirits RTD	+18.0%	+16.5%
4	Non Alc Wine	+21.0%	+14.3%
5	RTS	+9.3%	+5.6%
6	Tequila	+4.6%	+5.0%
7	Super Prem	+1.1%	+1.1%

	Dollar Laggers	$ % Chg	Case % Chg
1	Sparkling Wine	-4.4%	-5.9%
2	Brandy	-6.6%	-6.0%
3	Rum	-7.4%	-6.5%
4	Craft	-5.5%	-7.1%
5	Still Wine	-6.6%	-7.4%
6	Dom Prem	-7.3%	-8.5%
7	Hard Seltzers	-6.1%	-9.0%
8	Grain Alc	-9.9%	-10.1%
9	Malt Liquor	-9.6%	-13.0%
10	Cognac	-16.5%	-13.2%

Top 10 Dollar Value Brand Family Change

L4 weeks

	Beer/FMB/Cider			Wine			Spirits	
1	Budweiser	-9.3%	1	Barefoot	-5.1%	1	Tito's	+0.0%
2	Modelo	-2.7%	2	Josh	+1.0%	2	Crown Royal	-11.5%
3	Michelob	+3.2%	3	Bota	+1.1%	3	Don Julio	+38.7%
4	Coors	-3.2%	4	Sutter Home	-4.3%	4	Jack Daniel's	-5.1%
5	Corona	-5.4%	5	Franzia	-6.6%	5	Fireball	-4.3%
6	Miller	-6.8%	6	Black Box	-0.9%	6	Hennessy	-14.3%
7	Busch	+0.3%	7	Stella Rosa	-16.3%	7	Smirnoff	-4.2%
8	White Claw	+2.1%	8	Lamarca	+5.0%	8	Jim Beam	+0.6%
9	Natural	-4.1%	9	Woodbridge	-10.4%	9	Jose Cuervo	+1.5%
10	Twisted Tea	-1.3%	10	Kendall-Jackson	-3.2%	10	New Amsterdam	+0.6%
	All Other	-5.0%		All Other	-5.1%		All Other	-3.1%

Source: NielsenIQ Discover; ALC INTEGRATED Database; Total US xAOC + Liquor Open State + Conv; 02/22/2025

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Ready to Drink Overview

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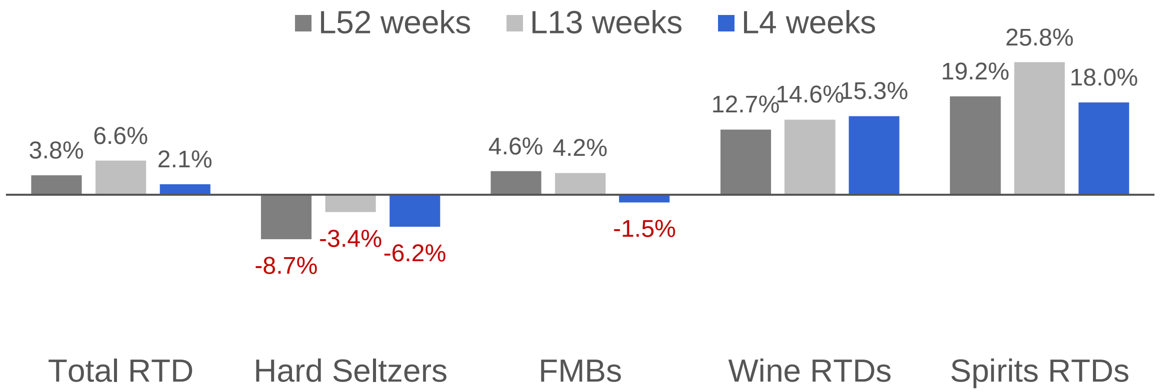
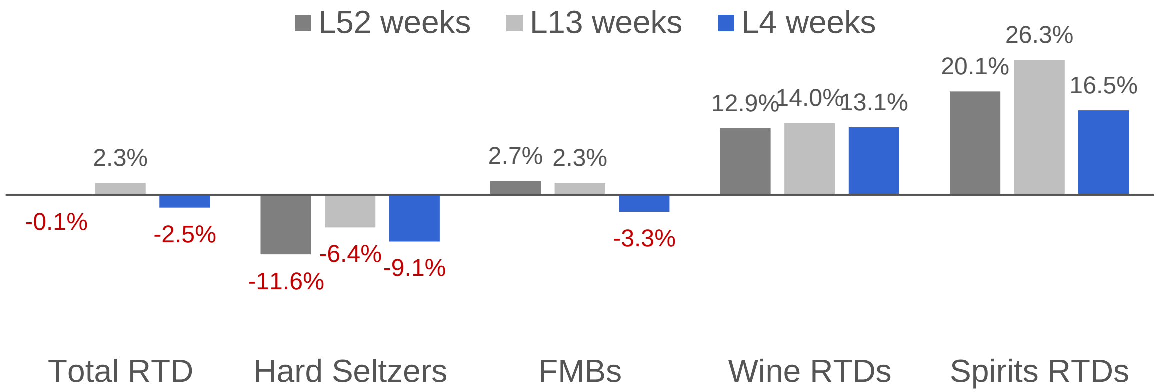
Dollar Sales % Change

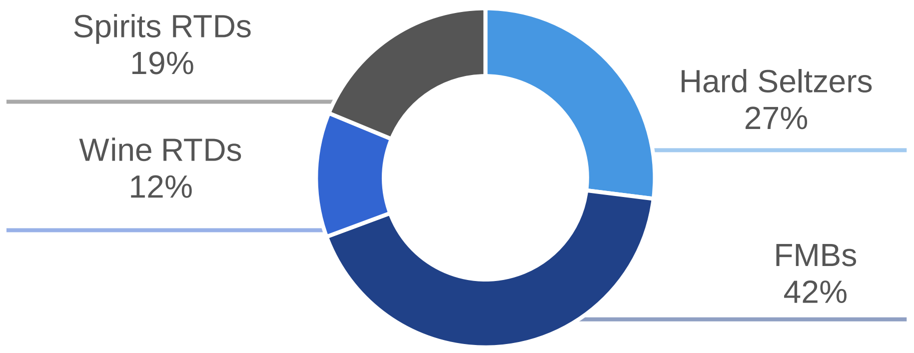


Volume Sales % Change



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	+1.9%	-0.9%	-3.0%
2	Twisted Tea	-1.3%	-3.2%	+0.0%
3	Mike's	-7.9%	-10.2%	-0.1%
4	Smirnoff	-2.4%	-4.3%	+1.8%
5	High Noon	+1.6%	+1.3%	-2.6%
6	Truly	-14.4%	-16.5%	-3.7%
7	Buzzballz	+61.6%	+57.3%	+3.5%
8	Beatbox	+41.6%	+41.4%	+1.3%
9	Cayman Jack	+12.9%	+10.4%	-1.2%
10	Sutter Home	-4.7%	-5.6%	+0.4%
	All Other	+1.4%	-2.5%	+2.5%

**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; 02/22/2025

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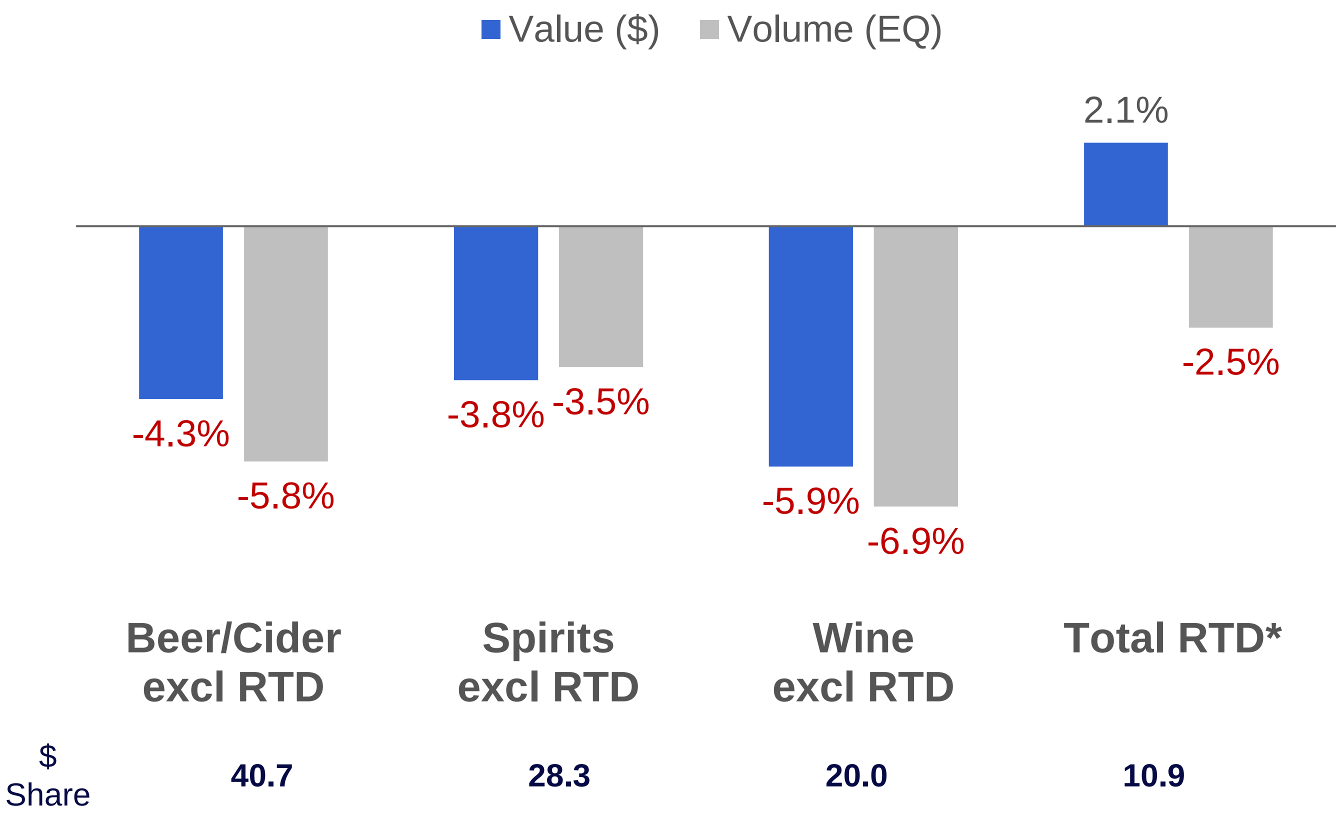
Excluding RTDs view of latest 4 weeks

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; 02/22/2025

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!

NIQ Beverage Alcohol Vertical

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