YTD 2026 Beverage Performance and Trends

Presented by 3 Tier Beverages

June 2026

BEVNET & NOSH INSIDER

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Year-to-date beverage performance summary

- **Alcohol remains challenged**, with dollar sales declining across beer, wine, and spirits. Wine continues to see the steepest declines. Beer remains challenged overall, but there are bright spots with the super premium and cider segments. Spirits is outperforming beer and wine, delivering +3.9% volume growth driven almost entirely by prepared cocktails and RTDs.

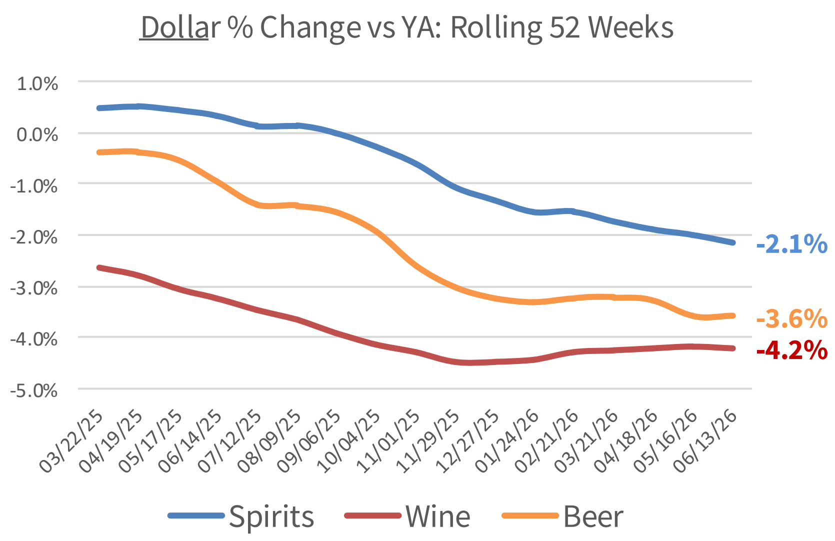
- **RTDs continue to reshape the alcohol landscape, surpassing $14B in sales**, with spirits- and wine-based RTDs driving category expansion and share gains.

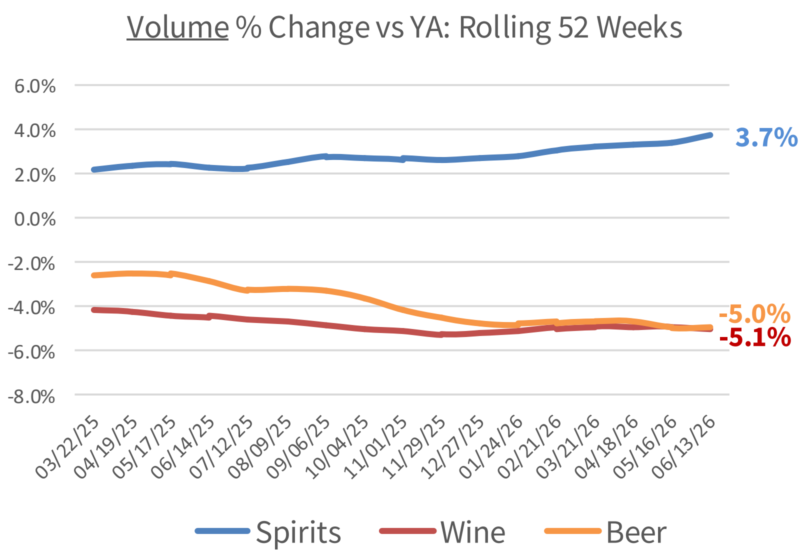
- **The broader beverage market is substantially outperforming alcohol**, with sales growing roughly **+3.8%**, supported by convenience, food, and Hispanic channels. Energy drinks, sports drinks, soft drinks, and coconut water are leading category growth, with energy drinks gaining more than one share point of total beverage dollars.

- **Consumer innovation trends converge around convenience, flavor, and wellness**, with new products across beer and spirits emphasizing RTDs, flavor-forward profiles, and lower-calorie/lower-sugar formulations. Winning innovation differs some across categories, with high ABV drinks and margarita-inspired products rising in the beer/malt category, while lemonade and limeade flavors are more popular in spirits.

Beer and wine face deeper volume losses, as RTDs drive spirits volume growth

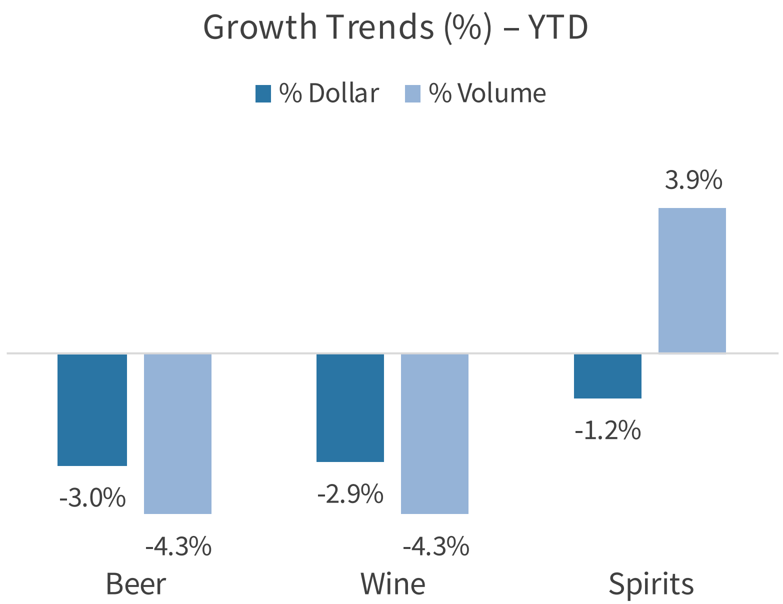
- Dollar declines across all 3 categories
- While RTDs drive spirits volume growth, lower price points pressure dollar sales for the category





Source: NIQ Total US xAOC + Liquor Open State + Conv; YTD 06/13/2026

YTD alcohol dollar sales decline, with volume gains for spirits

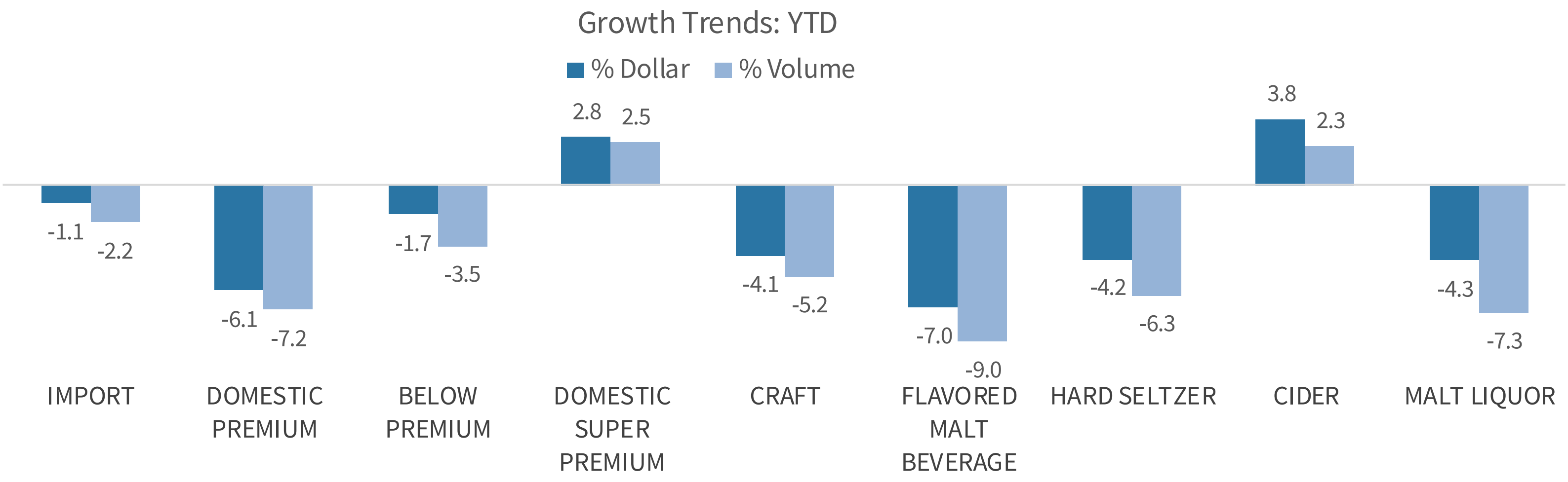


All categories essentially flat in dollar share change, with a very slight increase for spirits

Source: NIQ Total US xAOC + Liquor Open State + Conv; YTD 06/13/2026

Super premium and cider are bright spots in the category

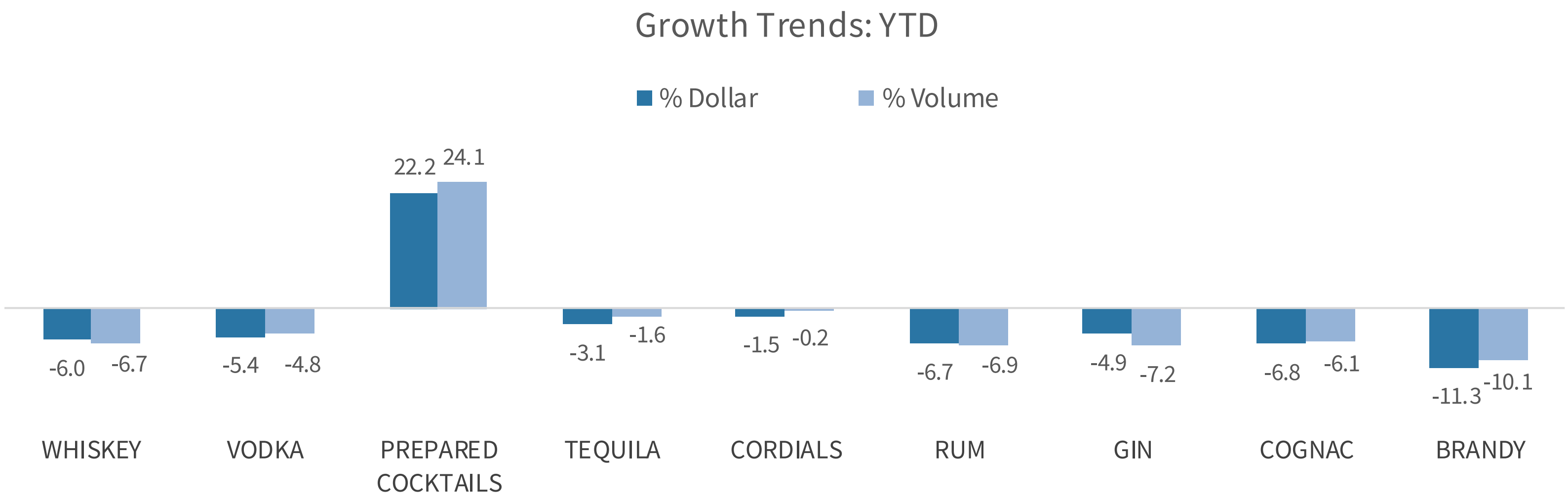
Slight dollar decline for imports, but still gaining share of category dollars



	IMPORT	DOMESTIC PREMIUM	BELOW PREMIUM	DOMESTIC SUPER PREMIUM	CRAFT	FLAVORED MALT BEVERAGE	HARD SELTZER	CIDER	MALT LIQUOR
$ Share	26.2	22.0	11.8	11.1	10.9	9.9	6.0	1.2	0.9
$ Share Chg	0.5	-0.7	0.2	0.6	-0.1	-0.4	-0.1	0.1	-0.0

Source: NIQ Total US xAOC + Liquor Open State + Conv; YTD 06/13/2026

Prepared cocktails stand alone as spirits' growth engine



$ Share	31.7	20.5	16.7	12.6	6.2	5.5	2.5	2.3	1.1
$ Share Chg	-1.6	-0.9	3.2	-0.2	0.0	-0.3	-0.1	-0.1	-0.1

Source: NIQ Total US xAOC + Liquor Open State + Conv; YTD 06/13/2026

Wine-based cocktails gained nearly 1 share point of wine dollars

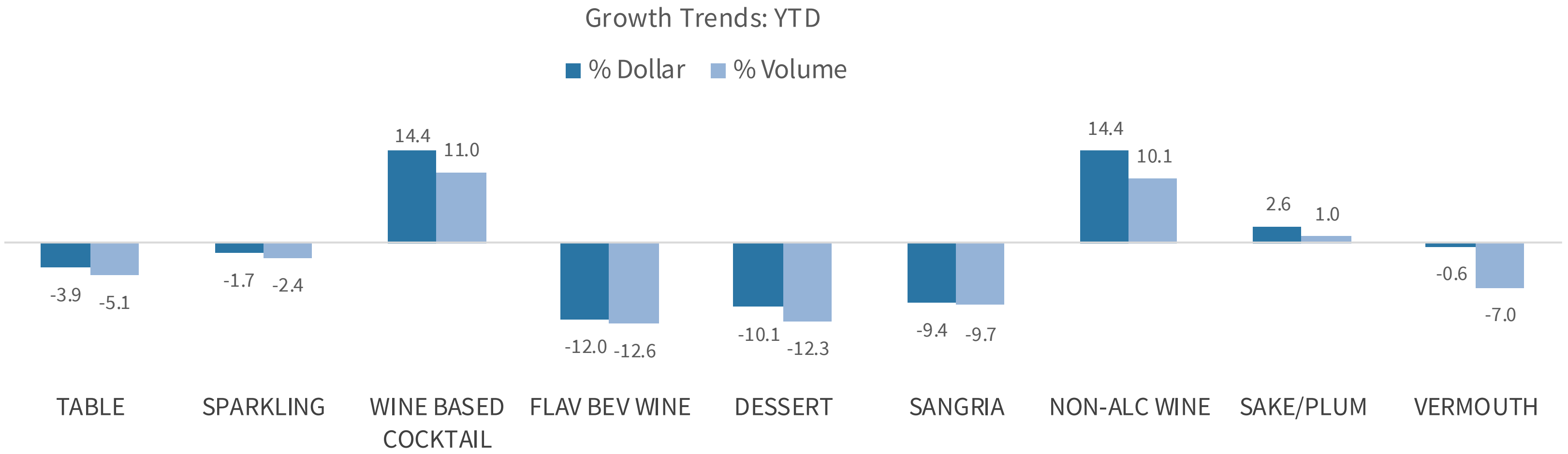
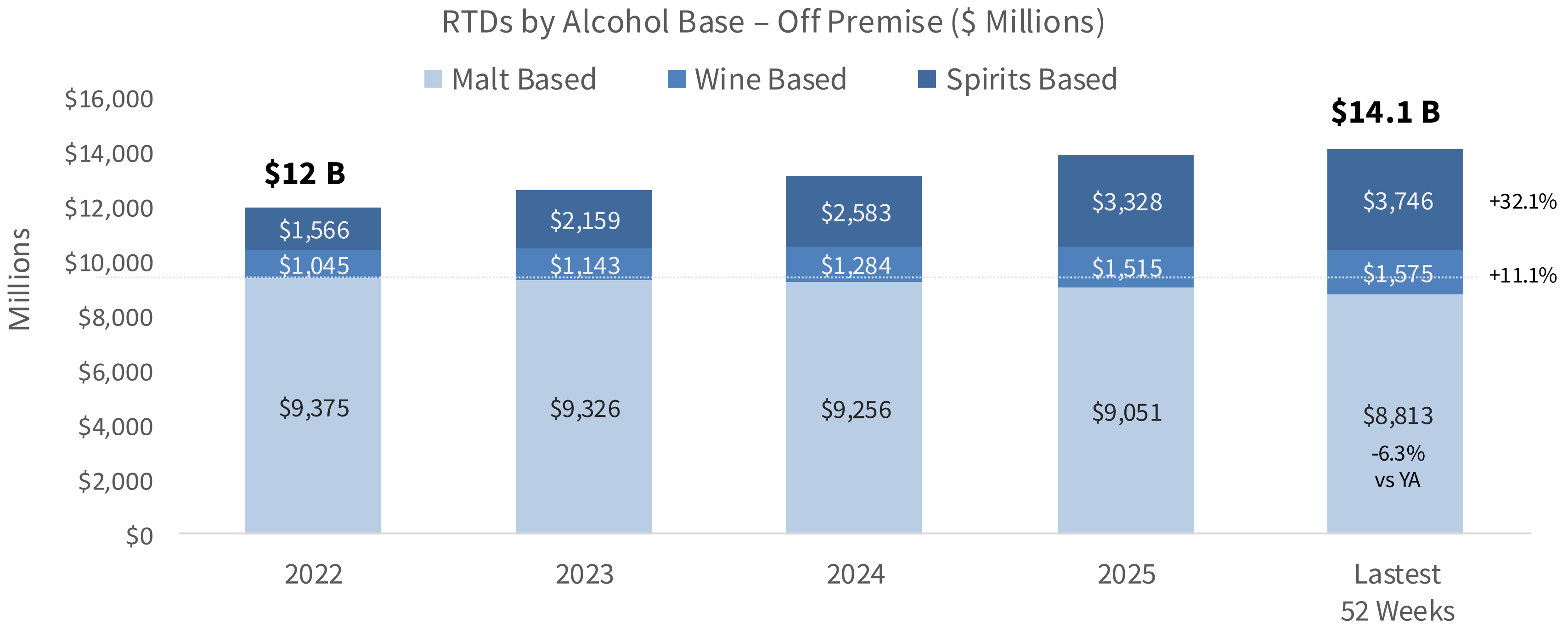


	TABLE	SPARKLING	WINE BASED COCKTAIL	FLAV BEV WINE	DESSERT	SANGRIA	NON-ALC WINE	SAKE/PLUM	VERMOUTH
$ Share	75.5	12.3	6.0	2.7	0.9	0.7	0.6	0.5	0.4
$ Share Chg	-0.8	0.2	0.9	-0.3	-0.1	-0.1	0.1	0.0	0.0

Source: NIQ Total US xAOC + Liquor Open State + Conv; YTD 06/13/2026

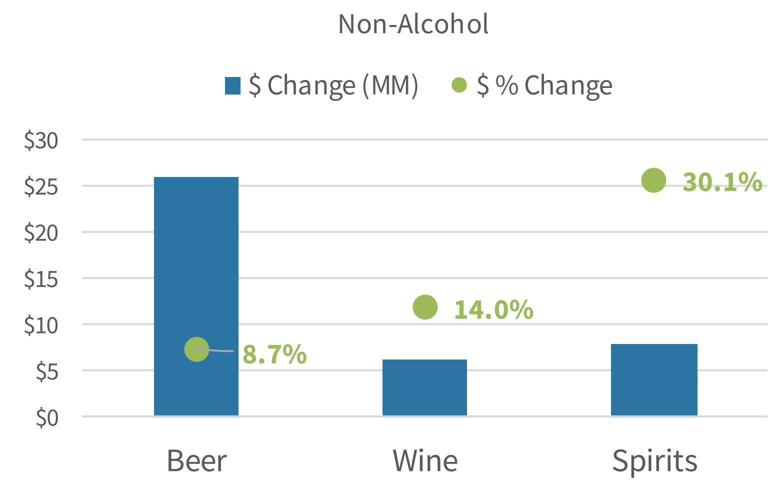
RTDs surpass $14 B, driven by spirits and wine



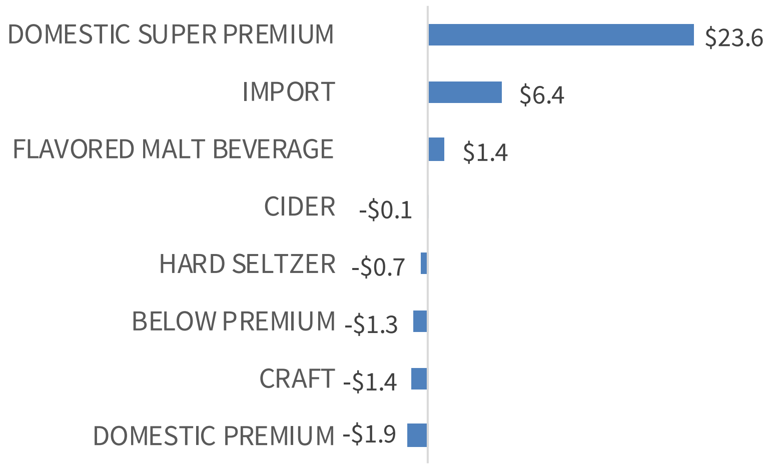
Source: NIQ Total US xAOC + Liquor Open State + Conv, Calendar Years and latest 52 weeks ending 6/13/2026

Beer remains the primary growth engine in non-alc, while wine and spirits grow at a faster rate from a smaller base

Total Non-Alc – $ Change by Alcohol Base and % Growth
NIQ Off Premise Channels

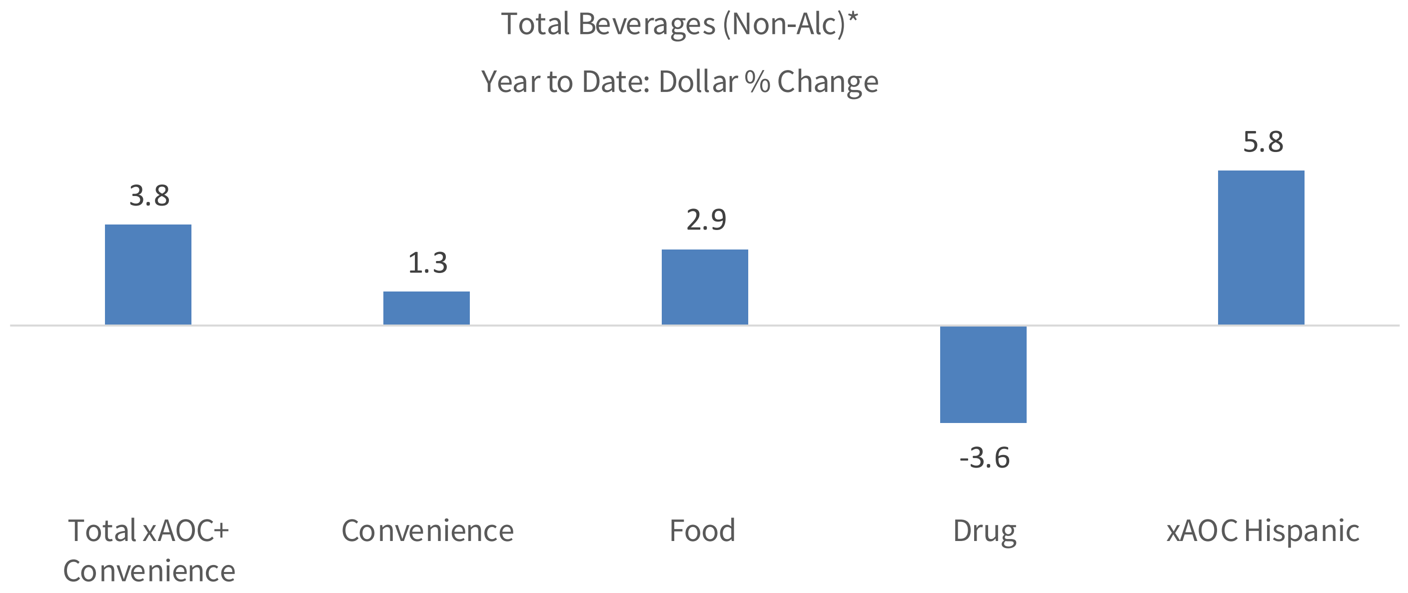


Total Non-Alc Beer - $ Growth by Segment ($MM)
NIQ Off Premise Channels



Source: NIQ Total US xAOC + Liquor Open State + Conv, YTD 05/16/2026

Broader beverages outpacing alcohol, with growth in c-store, food, and Hispanic markets



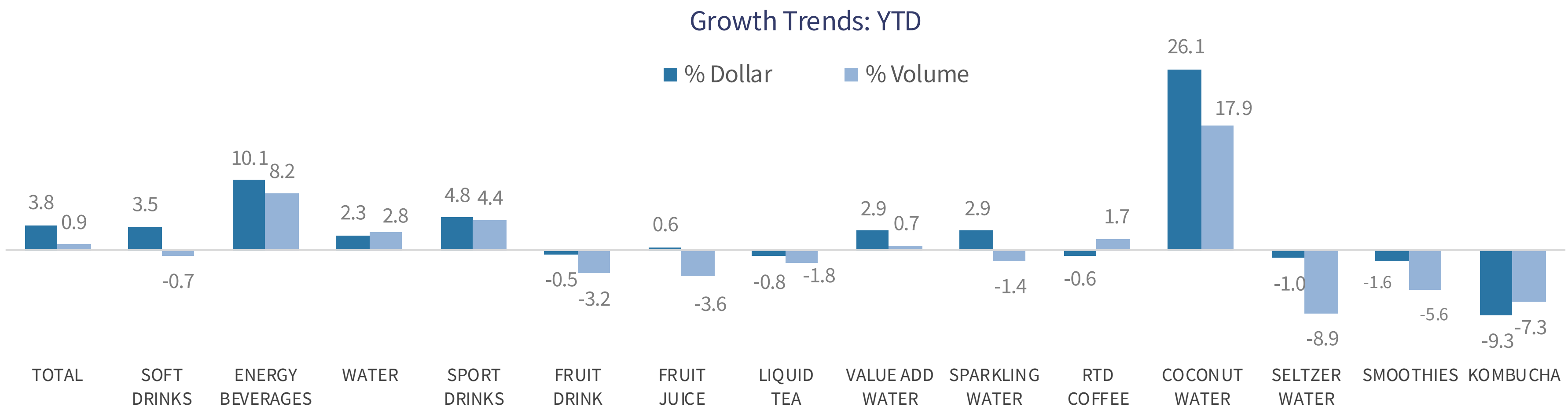
Source: NIQ Total US xAOC + Conv, YTD 06/13/2026

*All beverages excluding adult beverages. Total Beverages (Non-Alc) includes juices, soft drinks, energy drinks, etc.

xAOC includes food, drug, mass, dollar, and military channels

Energy, sports, soft drinks, and coconut water fueling growth

➢ Energy drinks gained 1+ share point, now account for more than 18% of total beverage dollars



	SOFT DRINKS	ENERGY BEVERAGES	WATER	SPORT DRINKS	FRUIT DRINK	FRUIT JUICE	LIQUID TEA	VALUE ADD WATER	SPARKLING WATER	RTD COFFEE	COCONUT WATER	SELTZER WATER	SMOOTHIES	KOMBUCHA
$ Share	33.3	18.4	10.4	7.1	6.9	5.5	4.2	4.0	3.6	2.5	0.8	0.5	0.5	0.5
Pts vs YA	-0.1	1.1	-0.2	0.1	-0.3	-0.2	-0.2	0.0	0.0	-0.1	0.1	0.0	0.0	-0.1

Source: NIQ Total US xAOC + Conv, YTD 06/13/26/26

Winning innovation in beer is centered on RTD, high ABV, and traditional flavors

TOP 15 NEW PRODUCTS IN BEER/MALT (RANKED BY $ GROWTH VS YEAR AGO)	RTD	HIGH ABV	LOW CAL/ LOW SUGAR	FLAVOR FORWARD	MARGARITA INSPIRED
WHITE CLAW HARD SELTZER GRAPE	■			■	
WHITE CLAW CLAWTAILS ASSORTED	■	■		■	
WHITE CLAW SURGE HRD SLZ BLBRY	■	■		■	
BUSCH LIGHT LIME			■	■	
PABST LIGHT			■		
TRULY UNRULY HARD SELTZER LMND ASSORTED	■	■		■	
TOPO CHICO HRD MARG ASSORTED	■				■
CAYMAN JACKED MARG	■	■			■
CAYMAN JACKED MARG STWBRY	■	■			■
SIMPLY SPIKED ASSORTED TROPICAL	■			■	
TWISTED TEA EXTREME ASSORTED	■	■			
FOUR LOKO JACKPOT	■	■			
CAYMAN JACK ZERO SGR MARG ASST	■		■		■
NEW BELGIUM VOODOO RGR G FORCE IMP IPA		■			
BLUE MOON EXTRA BLGN WHITE WHT		■			

Source: NIQ Total US xAOC + Liquor Open State + Conv, 52 weeks ending 6/13/2026
New product defined as $0 sales 2 years ago and more than $1K sales for latest 52 weeks. Top brands ranked by $ growth for latest 52 weeks vs year ago.

Spirits innovation is centered around RTDs, flavors, and low cal/low sugar

TOP 15 NEW PRODUCTS IN SPIRITS (RANKED BY $ GROWTH VS YEAR AGO)	COCKTAIL/ RTD	FLAVORED HANDLE	LOW CAL/ LOW SUGAR	LEMON/ LIMEADE	MARGARITA INSPIRED
FIREBALL BLAZIN APPLE WSKY					
CROWN ROYAL CHOCOLATE CNDN WSKY					
JACK DANIELS TN BLACKBERRY BRB WSK					
SUN CRUISER LEMONADE ASST CK					
LUCKY ONE ASST VODKA LEMONADE CK					
BUZZBALLZ BERRY CHERRY LIMEADE CK					
BUZZBALLZ BIGGIES BERRY CHERRY LIMEADE CK					
CASAMIGOS ASST MARGARITA CK					
BUZZBALLZ PINK LEMONSQUEEZY CK					
OLD FTZGERALD BND 100P 7Y BRB					
THE FINNISH LONG DRINK ZERO SUGAR ASSORTED CK					
SUN CRUISER PINK LEMONADE CK					
HIGH NOON VDK SLTZR TRANSFUSION CK					
BUZZBALLZ BIGGIES PINK LEMONSQUEEZY CK					
SURFSIDE GREEN TEA ASST VODKA CK					

Unlike the beer/malt category, there are few **margarita-inspired** innovation winners in spirits

Source: NIQ Total US xAOC + Liquor Open State + Conv, 52 weeks ending 6/13/2026
New product defined as $0 sales 2 years ago and more than $1K sales for latest 52 weeks. Top brands ranked by $ growth for latest 52 weeks vs year ago.