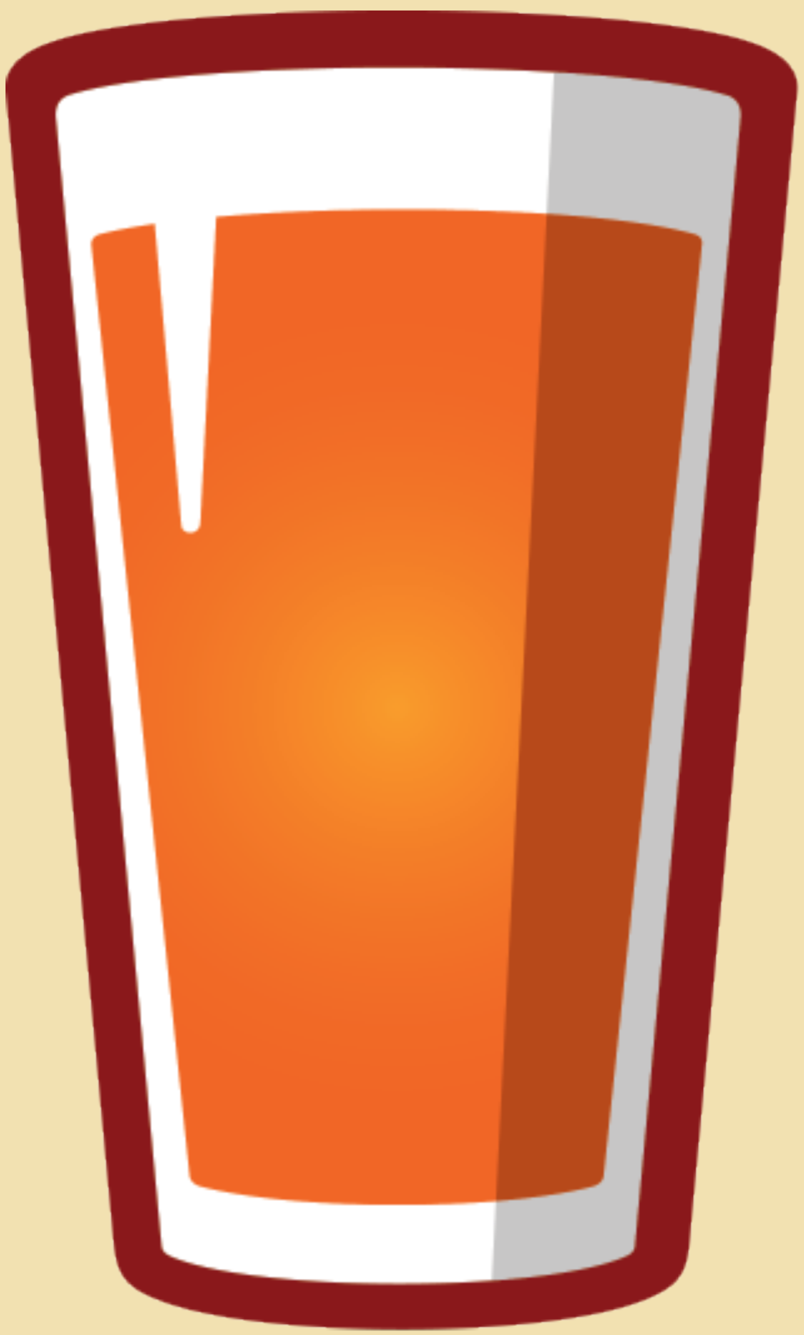
BEERBOARD

2018 Year in Beer

A Look Back at Style and Brand Performance



2018 Year in Beer by BeerBoard

A Look Back at Style and Brand Performance

In our 2018 Year in Beer, we take look back at the on-premise performance of styles and brands through the course of the year.

BeerBoard manages over $1 billion in retail draft beer sales and 45,000 products through its industry-leading data and insights platform. We work with the largest operators and brewers to help them sell more beer and make more money. This generates incredible amounts of data and gives great insight to style and brand trends within the beer industry.

Any associated beer data is based on pour volumes generated from BeerBoard clients.

Based on our ability to monitor and capture ACTUAL pour volumes through our technology, the **2018 Year in Beer** will provide great insight on what's trending and assist operators with ordering, inventory and merchandising,

As we close 2018, we look back fondly on a great year and raise a pint to a healthy and prosperous 2019 for all.

Cheers!
The BeerBoard Team

What Trended

2018 Year in Beer by BeerBoard

Category Trends
As we reported last year, **Domestics** had dipped below 50% share for the first time since we started recording draft beer data. In 2018, the segment checks in at 51.5%, taking back the two percentage points it handed over to Craft in 2017. **Craft** comes in 33.7% and **Imports** stayed steady at 14.7%.

Tap Distribution
Whether it's a shift in consumer preference or more attention by retailers to better align tap sets with what is actually turning over, there was a shift in tap distribution in 2018. **Domestics** pour that 51.5% share from 20.2% of tap-handle distribution, +3% over 2017. **Craft** saw its tap-set share fall four points this year, but dominate the landscape at 62.1%. **Imports** checked in with 17.6% of taps to produce its 14.7% share.

Tap Turnover

2018 Year in Beer by BeerBoard

As we close the year, we take a look at the velocity of categories and styles for the prior **30-DAY PERIOD (2018)** as compared to the **same period in 2017**:

CATEGORY (30-DAY PERFORMANCE)

DOMESTIC: 2017 = 5.61 / 2018 = 6.48
- Increase of 0.87 (+15.5%)

CRAFT: 2017 = 1.55 / 2018 = 1.45
- Decrease of 0.1 (-6.5%)

IMPORTS: 2017 = 2.20 / 2018 = 2.14
- Decrease of 0.06 (-2.7%)

TOP 5 STYLES (30-DAY PERFORMANCE)

LIGHT LAGER: 2017 = 6.64 / 2018 = 8.04
- Increase of 1.40 (+21.1%)

LAGER: 2017 = 2.63 / 2018 = 2.44
- Decrease of 0.19 (-7.2%)

IPA: 2017 = 1.35 / 2018 = 1.32
- Decrease of 0.03 (-2.2%)

WHEAT / HEFEWEIZEN: 2017 = 2.76 / 2018 = 3.03
- Increase of 0.27 (+9.8%)

EURO LAGER: 2017 = 1.49 / 2018 = 1.57
- Increase of 0.08 (+5.4%)

Style Performance

2018 Year in Beer by BeerBoard

The top five styles for 2018 are: #1 Light Lager, #2 Lager, #3 IPA, #4 Wheat/Hefeweizen, #5 Euro Lagers.

When breaking down the styles, some interesting trends were revealed:

- The explosive growth of **IPAs** is at a halt. After growing 15.5% in 2017 to 8.8% share, the popular style was relatively flat in 2018 (8.6%).
- Coming off a big decline last year, **Ciders** made a comeback in big way in 2018. The style grew 7.1% in 2018 and reclaimed its #7 position after falling to #9 in 2017.
- In its two-year climb as a style, **Wheat/Hefeweizen** has gone from #8 (2016) to #6 (2017) and now checks in at #4 as we close 2018. It grew 149.2% in the year and claimed a 7.9% share.
- Heavy beers, or those perceived to be heavy, are falling. **Stouts / Porters** fell a precipitous 22.3% in 2018. It remains as the #9 overall style and the leader in the group is none other than Guinness, with a healthy 75.9% of the style share.

Light Lager

2018 Style Performance

Light Lager enhanced its position as the #1 style overall, grabbing 45.3% of the pour share (a +2.4% uptick over 2017).

- The top three brands within the style remain unchanged with #1 **Bud Light**, #2 **Miller Lite** and #3 **Coors Light**.

- While Bud Light (-6.6%) and Miller Lite (-3.4%) were both down for the year, Coors Light saw a healthy increase of +15.5% in on-premise pour volume and is creeping closer to that #2 position in both within the style and overall.

- For the second straight year, **Busch Light** was largest mover in the category. Enjoying a massive year (+140.1%), it now checks in at #6 for the style.after climbing from #12 in 2016.

Lagers

2018 Style Performance

Lagers continue to hold the second spot on the style list, claiming 19.3% share, a 6% increase over 2017.

- The big news in Lagers is **Modelo Especial** has overtaken Budweiser as the #2 brand within the style. Modelo grew 49.7% for the year and now enjoys a 17.8% share among Lagers (3.4% of total pour volume).

- **Dos Equis Especial** remains the clubhouse leader, positioned as the #1 Lager with 25.6% share for the style and a healthy 4.4% overall. On the year, the brand was +11.8%.

- Coming off sluggish performance the past two years, **Samuel Adams Boston Lager** saw a healthy bump in 2018 (+12.4%) and closes the year as the #5 Lager.

- Among the biggest movers within the style, **Coors Banquet Beer** grew +301.5% and claims a 2.6% share of Lagers. It is the #8 brand among the style.

IPA

2018 Style Performance

IPA remains the dominant style among craft, but its hold on the #3 overall style is tenuous, at best. Wheat/Hefeweizen (#4 style) is creeping ever-closer, with the margin between the two only 0.61% (IPA = 8.56% and Wheat/Hefeweizen = 7.95%).

- **Lagunitas IPA** remains as the #1 IPA, claiming 22.8% of the share within the style.

- **Ballast Point Sculpin IPA** grew +350% in 2018 to rise up to the #2 brand in the style. It is claiming just a tick below 5% of the style share, coming in at 4.98%.

- **Bells Two Hearted** now checks in as the #4 brand, its second consecutive year dropping spots. The brand was down 56.5% for the year.

- Following its launch **Stone Scorpion Bowl IPA** enjoyed a great year, rocketing into the style as the #7 overall brand with a 3.3% share of IPAs.

Wheat / Hefeweizen

2018 Style Performance

In a two-year climb as a style, Wheat/Hefeweizen has gone from #8 (2016) to #6 (2017), and now checks in at #4 as we close 2018. It grew 149.2% in the year and claimed a 7.9% share.

- **Blue Moon Belgian White** continues to dominate this space, claiming 73.4% of the W/H style and was +5.1% for 2018.
- **Lagunitas** enjoyed a nice year with its **A Little Sumpin' Sumpin' Ale.** The brand was +334.5% for the year, climbing to the the #10 brand within the style.
- If you've ever listened to the [Dan Patrick Show](), you know the guys love their beers from **Golden Road**. The Milford, CT-based show may be on to something. **Golden Road's Mango Cart** rocketed up to the #17 overall brand in the style, a healthy 305.6% increase over 2017.

About BeerBoard

BeerBoard manages over $1 billion in retail draft beer sales and 45,000 products through its industry-leading data and insights platform. It works with the largest operators and brewers to help them sell more beer and make more money.

Installed at thousands of client locations, BeerBoard's services include **SmartBar**, which generates pour data and trend-driven analytics, **BeerBoard Display**, a consumer-facing digital menu display, **BeerBoard Menu**, automated print and website menus, and a consumer mobile application.

The company services high profile independent groups and major chain clients throughout North America, including Buffalo Wild Wings, Hooters, Twin Peaks and BJ's Restaurant & Brewhouse, Applebees and Mellow Mushroom. It also provides data and insights to major brewers Lagunitas, Stone Brewing, Founders, Labatt USA, Genesee, Pyramid and Magic Hat.

Thirsty For More?
Whether a retailer or brewer, BeerBoard's data can take you and your brand to new heights. Contact us at info@beerboard.com or 888.298.3641.

We always love talking beer!