

SAZERAC

Beverage Concepts

May 24, 2022



BECAUSE
REAL
WORKS™



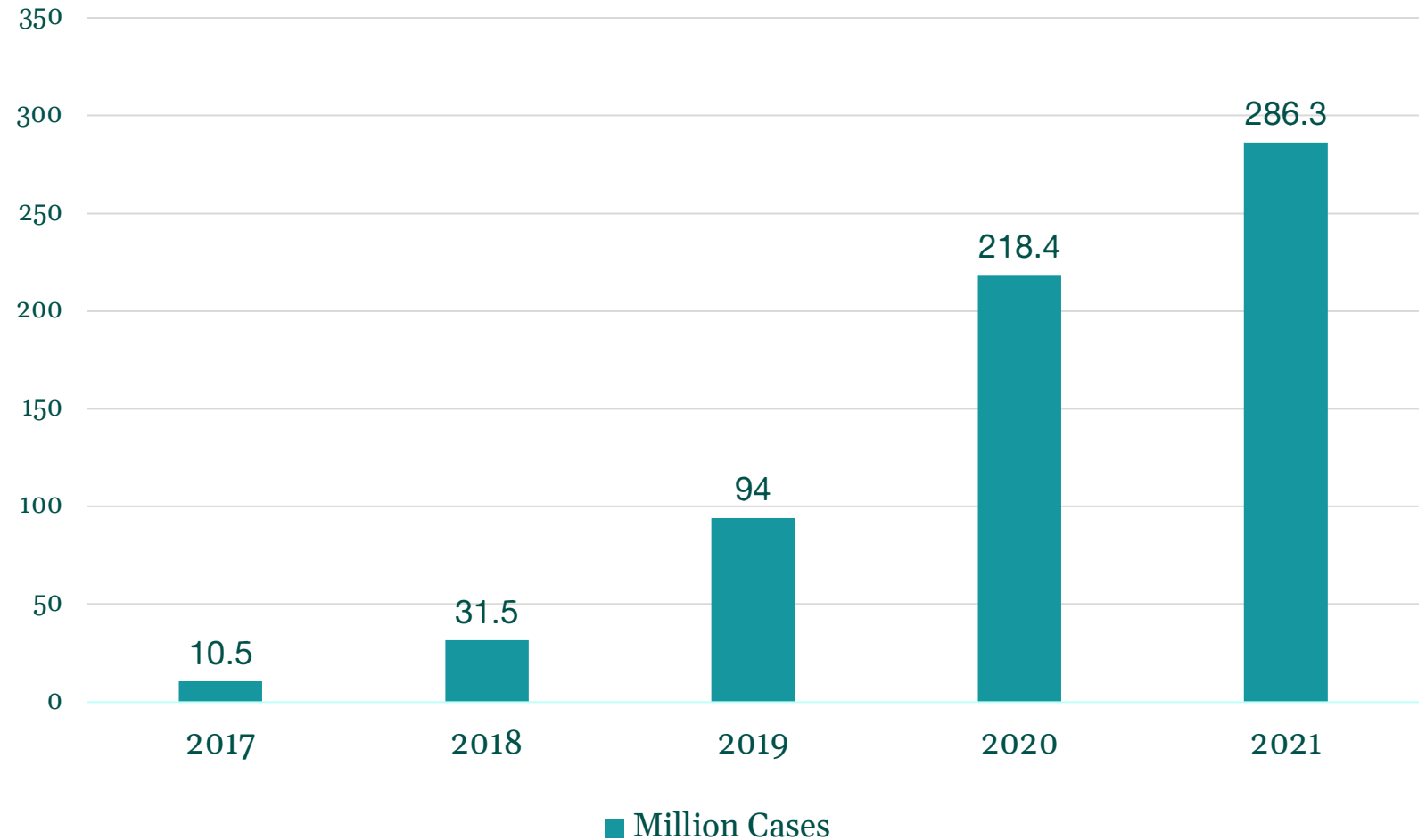
Hard Seltzer
Cocktails
High Proof

AAB – *Hard Seltzers*

Hard seltzer, particularly malt-based products slowed in 2021, yet it still providing **the largest scaled growth** for AAB market.

+173%

Average annual growth of hard seltzers (Global, CAGR 2017 – 2021)



Top Brands Dedicated to Hard Seltzer



Anheuser-Busch investing \$50M
in St. Louis brewery to expand
seltzer, packaging capabilities
Completion date: Spring 2022



AAB – Hard Seltzers



Ingredients: Filtered carbonated water, alcohol, **natural flavors**, citric acid, honey, **brewed black tea**, sodium citrate, stevia sweetener



WHITE CLAW® HARD SELTZER ICED TEA

100 calories, 5% alcohol, 1g sugar per 12oz can



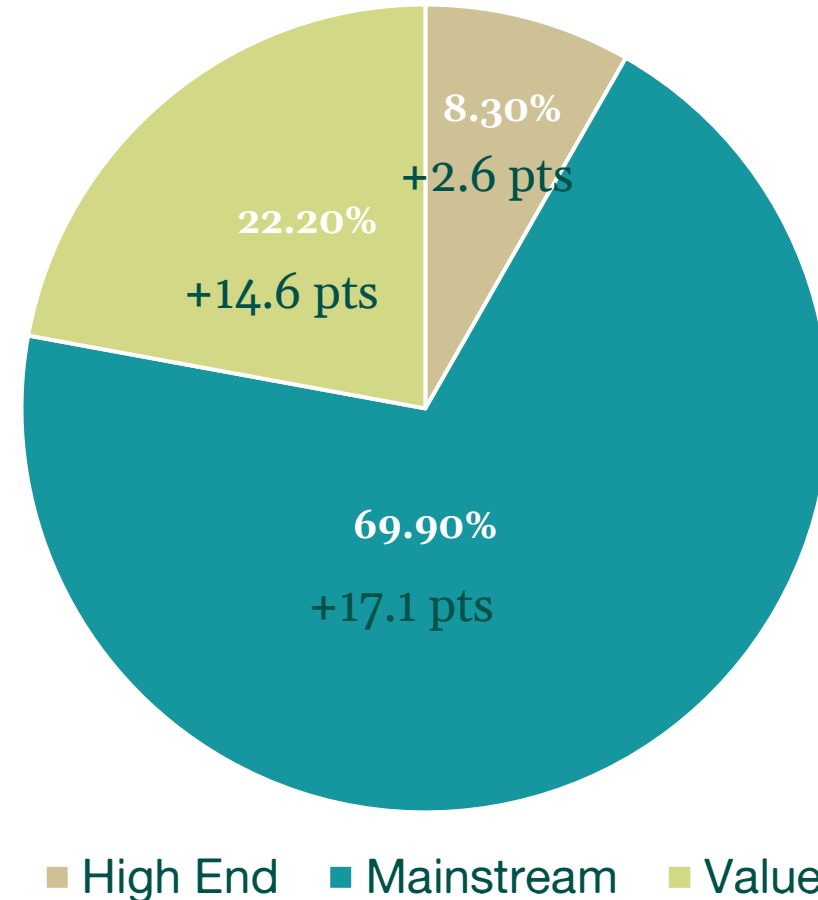
Ingredients: Purified carbonated water, alcohol, **natural flavors**, **brewed black tea extract**, cane sugar, citric acid, natural lemon juice concentrate, citric acid, sodium citrate.

AAB – Hard Seltzers

High Noon, which is vodka based rather than FMB, is driving high end seltzer share growth



Hard Seltzer Market Value by Price Point



FMB – Top Brands

Item	Dollars	Growth from Yago
1. WHITE CLAW	\$892,064,556	-13.9%
2. TRULY SPIKED & SPARKLING	\$657,067,763	-1.9%
3. MIKES HARD	\$205,419,559	-5.1%
4. SMIRNOFF ICE	\$195,475,397	-1.7%
5. BUD LIGHT	\$175,295,499	-13.9%
6. SEAGRAMS ESCAPES	\$175,046,579	0.2%
7. TWISTED TEA	\$153,243,646	23.6%
8. VIZZY	\$95,194,557	46.7%
9. CAYMAN JACK	\$84,460,721	41.1%
10. CORONA HARD SELTZER	\$80,297,310	-31.4%
11. MICHELOB ULTRA	\$79,092,887	223.1%
12. TOPO CHICO	\$73,269,881	1,031.4%
13. MIKES HARDER	\$61,616,257	-0.8%

Item	Dollars	Growth from Yago
14. SMIRNOFF SELTZER	\$25,922,598	3.0%
15. BUD LIGHT LIME RITA	\$22,444,636	-2.9%
16. BUDWEISER	\$22,112,251	-9.7%
17. LONE RIVER	\$19,269,340	-1.5%
18. CORONA REFRESCA	\$15,629,697	-71.2%
19. TRULY	\$15,390,142	-0.3%
20. ARNOLD PALMER SPIKED	\$15,375,990	-15.8%
21. PRESS	\$15,199,152	-5.1%
22. CACTI	\$14,363,358	-1.6%
23. SMIRNOFF SELTZER	\$25,922,598	-3.0%
24. BUD LIGHT LIME RITA	\$22,444,636	-12.2%

FMB



100
CALORIES

4.5%
ALC/VOL

Purified Carbonated Water, Alcohol, Sugar, Natural Flavors, Citric Acid, Sodium Citrate, Magnesium Chloride (Minerals for Taste), Potassium Chloride (Minerals for Taste).



ANTIOXIDANT
VITAMIN C
FROM SUPERFRUIT ACEROLA

GLUTEN FREE

5% ALC/VOL

0G SUGAR

100 CALORIES

<1G CARBS

PER 12 FL. OZ



ALCOHOL

4%

By Volume

CALORIES

90

Per 12 FL. OZ

ADDED SUGAR*

0g

Per 12 FL. OZ



Vodka based Hard Seltzers

5% ABV *with Wheatly Vodka*



Watermelon-Strawberry-Basil Brewed White Tea

Featuring FFP's

Brewed White Tea Extract

Nat Grapefruit WONF #14170

Nat Strawberry WONF #41988

Ingredients: Sparkling water, Vodka, Brewed White tea (with filtered water), Juice blend from concentrates (Watermelon, Strawberry and Lime), Pure cane sugar, Natural flavors and extractives of basil.

Raspberry-Rose Brewed Green Tea

Featuring FFP's

Brewed Green Tea Extract

Nat Rasp Flavor WONF #42082

Ingredients: Sparkling water, Vodka, Brewed Green Tea (with filtered water), Raspberry Juice (from concentrate), Pure cane sugar, Natural flavors and extractives of Rose.

Mango-lime-Mint-Mate

Featuring FFP's

Brewed Yerba Mate Extract

Natural Mango Flavor #39664

Ingredients: Sparkling water, Vodka, Brewed Yerba Mate (with filtered water), Honey, Mango juice (from concentrate), Lime juice (from concentrate) and Natural flavors.



RTD Cocktails – Top Brands

Item	Dollars	Growth from Yago
1. HIGH NOON	\$117,018,086	143.3%
2. JOSE CUERVO	\$98,912,557	-18.9%
3. CUTWATER SPIRITS	\$62,031,886	103.8%
4. DAILYS	\$55,592,737	-5.3%
5. CHI-CHIS	\$33,286,585	31.0%
6. RANCHO LA GLORIA	\$31,437,532	62.6%
7. ON THE ROCKS	\$24,652,693	97.5%
8. 1800	\$23,895,489	28.1%
9. CROWN ROYAL	\$23,702,675	475.5%
10. BACARDI	\$12,516,970	58.2%
11. UNO MAS	\$11,882,384	-13.2%
12. SOUTHERN COMFORT	\$10,570,993	8.7%
13. TROPIC CHILLERZ	\$10,434,387	101.1%

Item	Dollars	Growth from Yago
14. CLUBTAILS	\$10,157,769	46.9%
15. ABSOLUT	\$9,894,948	130.5%
16. CLAFFEYS FROZEN COCKTAILS	\$9,816,595	-13.1%
17. KETEL ONE	\$7,716,850	256.8%
18. MONACO COCKTAIL	\$6,787,386	-11.2%
19. SKINNY GIRL	\$6,772,234	-18.8%
20. CAPTAIN MORGAN	\$5,891,759	24.9%
21. DEVILS BACKBONE	\$5,702,456	576.5%
22. EVAN WILLIAMS	\$5,524,310	3.7%
23. PENNSYLVANIA DUTCH	\$5,316,434	13.3%
24. TWO CHICKS	\$5,188,908	72.3%
25. RITAS	\$5,075,959	89.3%

Canned Cocktails



Ingredients. Sparkling Water, Vodka, Juice, Natural Flavors, Citric Acid, Potassium Citrate, Potassium Sorbate

VODKA MULE - 7.5% ABV

AAB

Cocktail
Concepts

Cocktails

10% ABV



Peach-Ginger-Rooibos *with* Booth's Gin

Featuring FFP's
Brewed Rooibos Herbal Tea Extract
Nat. Ginger flavor #18021
Nat Peach Flavor #31564

Ingredients: Filtered water, Gin, Brewed Rooibos herbal tea (with filtered water), Peach juice (from concentrate), Honey, Key lime juice (from concentrate) and Natural flavors.

Cranberry-Yuzu-Lime-Hibiscus *with* Margaritaville Silver Tequila

Featuring FFP's
Brewed Hibiscus Herbal Tea Extract
Natural Cranberry Flavor #28136
Natural Blueberry Flavor #17850
Natural Lime Flavor #15251

Ingredients: Filtered water, Tequila, Brewed Hibiscus Herbal tea (with filtered water), Agave, Key Lime Juice (from concentrate) and Natural flavors.

Half & Half Black Tea lemonade *with* Buffalo Trace Bourbon

Featuring FFP's
Brewed Black Tea Extract
Natural Lime Flavor #15251
Natural Lemon Flavor #15401

Ingredients: Filtered water, Bourbon, Brewed Black Tea (with filtered water), Lemon juice (from concentrate), Sugar and Natural flavors.

Spirits– Top Brands

Item	Dollars	Growth from Yago
1. TITOS HANDMADE VODKA	\$452,274,844	-1.9%
2. CROWN ROYAL	\$316,934,968	-10.2%
3. JACK DANIELS	\$299,295,021	-11.9%
4. SMIRNOFF	\$238,917,676	-8.1%
5. JIM BEAM	\$198,930,047	-8.6%
6. JAMESON	\$175,263,437	-8.7%
7. CAPTAIN MORGAN	\$171,735,196	-10.4%
8. BACARDI	\$158,743,052	-12.0%
9. FIREBALL	\$144,884,691	7.4%
10. HENNESSY	\$144,624,283	-21.7%
11. PATRON	\$129,389,305	-6.4%
12. JOSE CUERVO	\$117,830,043	-8.7%
13. MAKERS MARK	\$113,924,928	1.8%

Item	Dollars	Growth from Yago
14. NEW AMSTERDAM	\$107,874,860	-8.0%
15. SEAGRAMS	\$107,853,724	-13.2%
16. ABSOLUT	\$104,305,782	-13.1%
17. SVEDKA	\$102,625,869	-14.6%
18. DON JULIO	\$98,772,372	25.6%
19. KETEL ONE	\$95,881,959	-9.5%
20. BAILEYS	\$94,071,719	-11.8%
21. MALIBU	\$85,160,794	-7.3%
22. JOHNNIE WALKER	\$79,565,173	0.0%
23. GREY GOOSE	\$74,663,089	-1.9%
24. WOODFORD RESERVE	\$74,473,649	1.4%
25. EVAN WILLIAMS	\$72,711,861	-8.2%

AAB

High Proof
Concepts

Espresso Bourbon 60 Proof



Espresso Bourbon 60 proof *with* Buffalo Trace Bourbon

**Featuring FFP's
Brewed Coffee extract
Natural Coffee Flavor #40538
Natural Mocha Flavor #39537
Natural Vanilla Flavor #23502**

Ingredients: Bourbon, Brewed coffee (with filtered water), sugar and Natural flavors.