

Sightlines

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## Dollar Share of Chain Retail Alcohol

	2019	2023	Change
Beer	48.76%	45.67%	-3.09%
Wine	23.22%	19.84%	-3.38%
Spirits	19.55%	19.91%	+0.36%
FMBs	3.65%	5.30%	+1.64%
Seltzers / RTD	2.94%	7.49%	+4.55%
Non-Alcoholic	0.68%	1.01%	+0.34%
Cider	0.97%	0.73%	-0.24%

Source: Feel Goods Company / Circana



## Sub-Segments of Top-10 Debut Cider Brands Sorted by Region

	Flavor-Forward	Imperial	Variety Pack	Apple-Forward
Northeast	7	1	2	0
Southeast	2	5	2	1
Great Lakes	5	3	0	2
Midwest	4	5	1	0
South Central	4	6	0	0
West	4	6	0	0

Source: Feel Goods Company/Circana

**2023: Regional cider brands achieve parity with national brands.**

**National brands—Angry Orchard, Ace, Stella Artois, and more—held an almost 3:1 category share advantage three years ago.**

**Today, national and regional brands are evenly split in chain retail volume, with regional SKUs set to collectively move above 50% this year.**

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