



# **Low/Non- Alcoholic Beer**

# Agenda


- **Non-Alcoholic Beer Overview**
- **Growth in the NAB Space**
- **Competition in the NAB Space**
- **Awareness of Molson Coors NAB Brands**
- **Opportunities for Molson Coors NAB Brands**

# Non-Alcoholic Beer Overview

# Two Main Factors of NAB Growth



**Rise of health  
and wellness  
trends**



**Technological  
advancements  
in brewing**

# Why Is the Category Growing?

- It's trendy to be healthy
  - Increased consumer awareness of effects of alcohol and preference for healthier lifestyle options
  - Shift towards moderation due to alcohol-related health
  - Rise in the “sober curious” movement
- Improved taste and quality of NAB
  - More product variations and flavor profiles available for NAB



Source: [Brandsmen](#)

5 ARC CONFIDENTIAL. DO NOT SHARE.

# Most Popular NA Beers

Beer	Parent Company	Avg. Price Per 6 Pack (Chicago)
Heineken 0.0	Heineken N.V.	\$10.99
Guinness 0.0	Diageo	\$9.99 (4 pack)
Athletic Brewing Run Wild IPA	Keurig Dr Pepper Inc	\$10.99
Samuel Adams Just the Haze	Boston Beer Company Inc	\$10.99
Athletic Brewing Free Wave IPA	Keurig Dr Pepper Inc	\$10.99
Athletic Brewing Upside Dawn Golden Ale	Keurig Dr Pepper Inc	\$10.99
Budweiser Zero	Anheuser-Busch Inbev SA	\$12.49 (12 pack)
O'Doul's Amber NA	Anheuser-Busch Inbev SA	\$7.99
Blue Moon Non-Alcoholic*	Molson Coors	\$10.99
Peroni 0.0%*	Molson Coors	\$11.99

\* Not in the statistic.

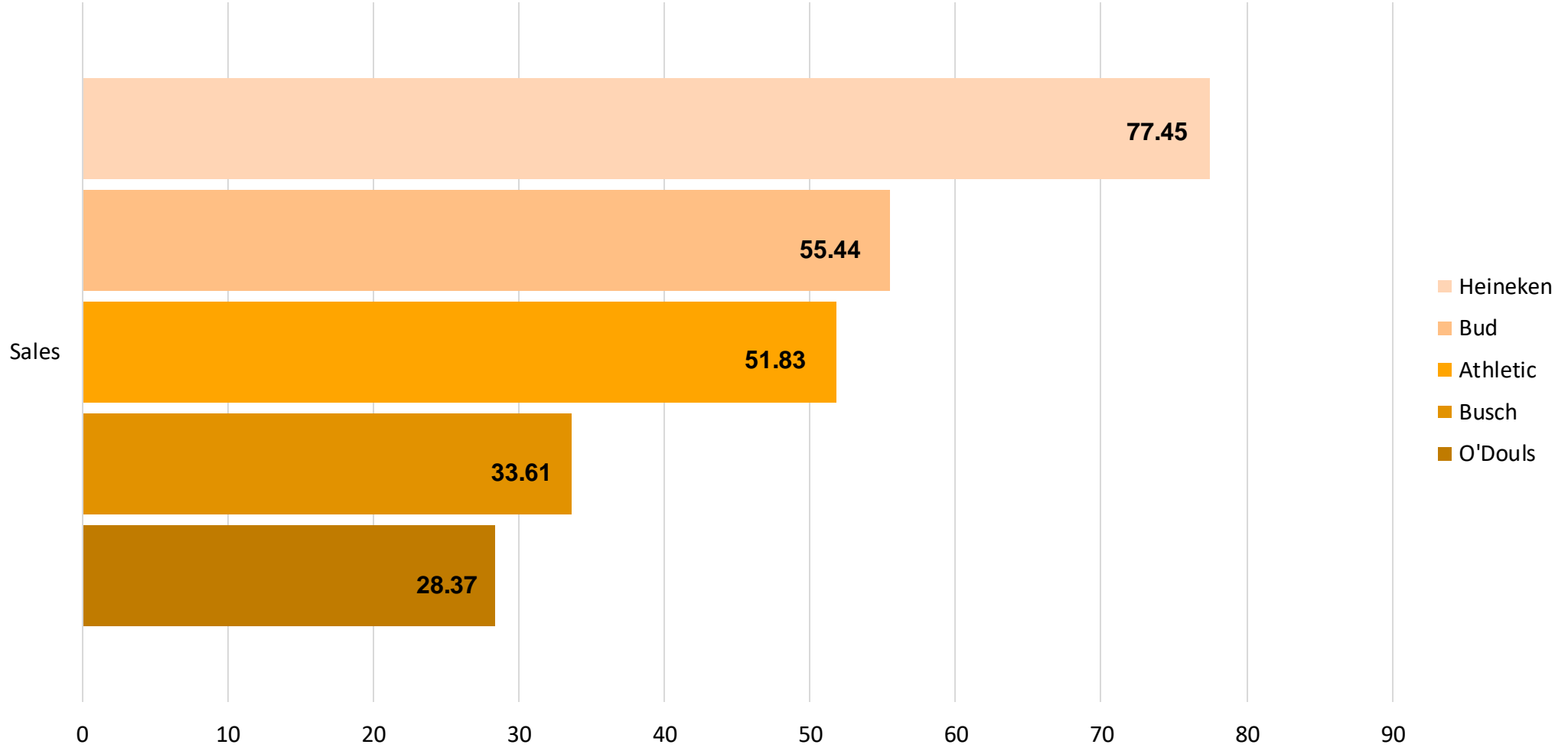
Source: The Street

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# US NAB Sales in 2023

In millions (USD)



Source: [Statista](#)

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# Who's Buying the “Beer?”

- Health-conscious individuals (mainly Millennials and Gen Z)
- Sober people
- Those questioning their relationship with alcohol
- Pregnant women
- Athletes
- Individuals with health restrictions
- People who abstain from alcohol for religious reasons



# NAB Buyers and Their Lifestyle

**81% of NAB  
drinkers are  
under the  
age of 44**

**64% of NAB  
drinkers are  
men**

**65% of NAB  
drinkers have  
\$1000+ monthly  
disposable  
income**

**~ 75% of NAB  
drinkers  
workout more  
than once a  
week**

# Why They're Buying the "Beer?"

- Ability to go out and "fit in" socially without being obligated to drink
- Wanting to avoid hangover/dread
- Lower calories than regular beer

<b>Serving Facts</b>	
Serving size 12 fl. oz. (355mL)	
<b>1 Serving per container</b>	
<hr/>	
Amount per serving	
<b>Calories</b>	<b>168</b>
<b>Carbohydrate</b>	14.1g
<b>Fat</b>	0g
<b>Protein</b>	1.9g
<b>ALC./VOL.</b>	5.4%

Blue Moon Belgian White

<b>Serving Facts</b>	
Serving size 12 fl. oz. (355mL)	
<b>1 serving per container</b>	
<hr/>	
Amount per serving	
<b>Calories</b>	<b>80</b>
<b>Carbohydrate</b>	17g
<b>Fat</b>	0g
<b>Protein</b>	1g
<b>ALC./VOL.</b>	<0.5%

Blue Moon NAB Belgian White

# Growth in the NAB Space

**In 2023, non-alcoholic beer had the lowest growth among drinks in the non-alcoholic beverage sector within the US; however, sales still grew by 32%**

**NAB market in the US is expected to grow to a volume of \$5 billion by 2028.**

# Competition in the NAB Space

# What Are Our Competitors Doing?

- Brand messaging:
  - Emphasizing the same great taste
  - Lifestyle inclusivity
- Packaging labels and advertisements:
  - Clear labeling of non-alcoholic content
    - Noting their beverages have 0.0% alcoholic content
  - Bring forth unique selling points of the product



Targeting one audience.

Baby On Board?  
Cheers.

Now, enjoy the original Heineken taste with 0.0% alcohol.





**A call out to the audience.**



# Maintaining brand rituals.



**NEW**  
**0.0% ALCOHOL**  
**BREWED WITH 100% INGREDIENTS OF NATURAL ORIGIN\***

*\*Koolzuurgas toegevoegd na brouwen / Gaz carbonique ajouté après brassage  
Bier met liefde gebrouwen, drink je met verstand / Une bière brassée avec savoir se déguste avec sagesse*

Corona Cero  
0.0%  
33 cl / 330 ml e

Corona Cero

# What Are MC NAB Brands Doing?

IT'S NOT NOT DRINKING





# Blue Moon



**NON-ALCOHOLIC**  
CONTAINS LESS THAN 0.5% ABV

**NEW**

**BLUE MOON**  
ESTD 1995  
BLUE MOON BREWING CO.

**NON-ALCOHOLIC  
BELGIAN  
WHITE**  
BELGIAN-STYLE WHEAT BREW



**ONLY 80 CALORIES\***

**BLUE MOON**  
ESTD 1995  
BLUE MOON BREWING CO.

**NON-ALCOHOLIC  
BELGIAN  
WHITE**  
BELGIAN-STYLE WHEAT BREW

**CELEBRATE RESPONSIBLY®**  
©2024 BLUE MOON BREWING CO., GOLDEN, CO - NON-ALCOHOLIC MALT BEVERAGE  
CONTAINS LESS THAN 0.5% ALC/VOL  
\*PER 12 OZ SERVING: <0.5% ALC/VOL, 80 CALS, 17G CARBS, 1G PROTEIN, 0G FAT

**PERONI** **0.0%**  
SUPERIOR ITALIAN TASTE  
NOW WITH 0.0% ALCOHOL



# Opportunities for MC Brands



## Two Main Areas of Focus



**Trial**



**Conversion**

# What Can MC Brands Do to Drive Purchases?

- Enhanced visibility and awareness
  - Invest in displays and endcaps at high-sale times (seasonal placements)
  - Co-branded promotions with retailers
    - Host tasting events and in-store samplings (grocery and liquor stores)
  - Presence in convenience stores
  - Leverage dry January
- More on-premise activations
  - Cater to “sober curious” social people
  - Increase on-premise assets
  - On-tap possibility



# Brand Messaging and Tone

- Brand messaging and tone
  - Educate consumers on non-alcoholic options
  - Clearly state alcohol content percentage
  - Targeted audiences (designated drivers of the group, pregnant women, etc)
- Occasional messaging
  - “A night you will remember.”
  - ”Have a beer in between beers.” (Heineken)
  - “Enjoy the flavor and drive safe.”
  - “Keep the flavor. Skip the alcohol.”
  - Summer: “The same taste of summer without the buzz.”
  - Game days: “Cheer for your team with a clear head.”
    - ”Remember the game’s big moments.”