



# Ready to Dominate? RTDs, Simmering Volatility and Effervescent Trajectories

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## EXECUTIVE SUMMARY

Why read this report?

## INTRODUCTION

Key findings

RTDs: Key facts

## RTDS: CHANGE OR BUST

RTDs are dead, long live RTDs

The story so far: From wine coolers and alcopops to hard seltzers

More than just a boom and bust cycle: From outsider to fourth pillar of the alcohol industry

Ready to deliver: RTDs reinvention, diversification and evolution

RTD snapshot: breaking down the cocktail of drivers , positioning and demographics

RTDs: Volatility baked in, but future remains bright

## EXPLORING THE RANGE OF SUBSEGMENTS

Top line view: Spirit-based, and overwhelmingly off-trade focused

Ready to conquer the world - key markets for RTDs

Fragmentation, brand equity and precarious leadership rankings

Malt-based RTDs: Affordable, American and agile

Other RTDs: The rise and fall of hard seltzers

Wine-based RTDs: Making wine cooler again?

Spirit-based RTDs: Harder, better, faster, stronger?

Non-alcoholic RTDs: Niche presence but intoxicating potential

Packaging: Yes, they can - for now

## IS THERE A SILVER BULLET? CASE STUDIES

Deconstructing the cocktail of innovation: RTDs

Buzzballs : Differentiation, breaking the mould and ready to have a ball

Naked Life: Stripping alcohol out of cocktails

BeatBox : Thinking outside the box

“Not a cocktail. Not a beer. Not a hard seltzer.”; Ready to disrupt?

## CONCLUSION

Conclusions

Recommendations/Opportunities for growth

Evolution of RTDs

Questions we are asking

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