



Tap Optimization

Anheuser-Busch

Getting the Basics of Draught Right

Assortment



**Assortment to meet
consumer needs and
maximize sales**

Quality



**Consumers choose
draught for the quality
they expect**

Serve



**Proper beer serve
increases profits and
improves taste**

Let's focus on Assortment

Assortment



**Assortment to meet
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Assortment



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Serve



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Draught is must win for On-Premise Operators



54% Beer volume consumed in the ONP is draught, *75% for Chains*

35%

Beer Consumers typically drink only draught beer in ONP

#1

Reason consumers choose draught beer is freshness and taste

12 Tap Handles is most efficient

12 Handles



most efficient and
preferred by
consumers

12

Items make up 80% of draught sales.
ROS is 2.4x higher

68%

Of the consumers state less than
15 draught options is ideal

5

Items is the minimum number
of draught handles to carry

In the On-Premise, there are three macro styles

American Lagers




**Vol
Share**

46%

Import Styles



25%

Craft Styles



28%

Share varies by geography

And each has a distinct role to play in the category

American Lagers *Volume Drivers*



Role

**DRIVING VOLUME
& REACH**



Price

Value, Core, Core+



Import Styles *Premiumization*



**TRADING INTO MORE
PREMIUM OPTIONS**

Premium



Craft Styles *Variety*



**STYLE VARIETY
& CONT. TRADE UP**

Super Premium



With a few different sub-segments within each style

American Lagers

Volume Drivers

Import Styles

Premiumization

Craft Styles

Variety

Sub-Segments

Price Tier



Origin & Style



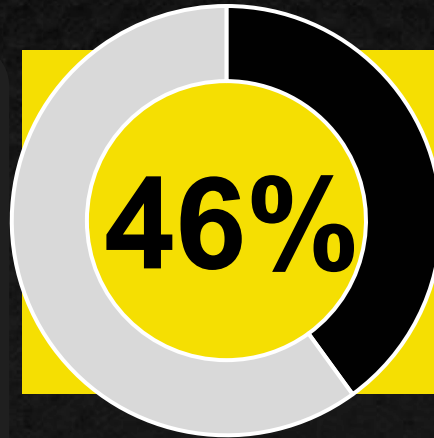
Style



Sub-styles

not all sub-styles shown

American Lagers are the workhorses for beer



Of ONP beer volume comes from American Lagers, ~50% more than Craft or Import Styles

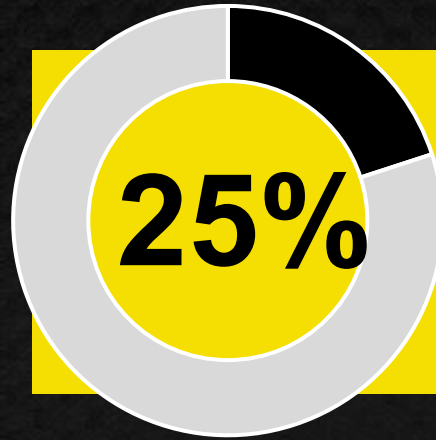
#1

American Lagers reaches the most consumers out all beer segments

3

Price points and styles, giving an option for every consumer

Import Styles provide trade up options for consumers



Import Styles is a \$10B segment and growing year over year

+30%

Consumers are willing to pay 30% more for a pint over American Lagers

83%

Of Import Styles Consumer are loyal to a specific sub-style

Nielsen L52W 10/25, Numerator Cross-Purchase, OPUS Spring 2025

Variety of Import Styles increases consumer reach

Mexican-style Lagers



Euro-style Lagers



Stouts



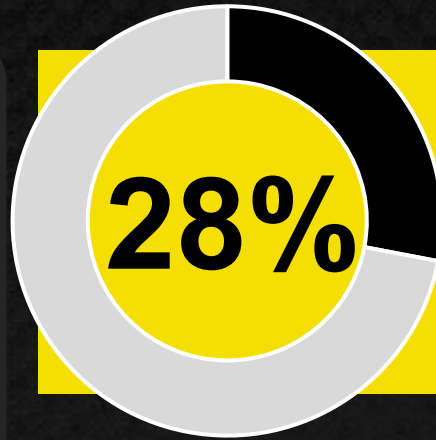
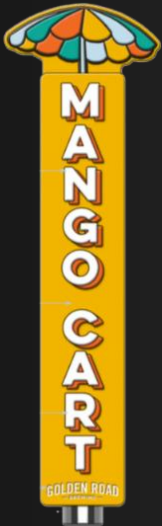
83% of Consumers are loyal to one sub-style



Assortment across segments increases reach



Craft Styles provides consumers premium variety



Of ONP Beer volume comes from the craft segment

150+

Styles providing variety to consumers

~60%

Of craft volume comes from top 3 styles of IPA, Wheat, and Easy Drinking Ale

Nielsen 15W 8/9/25, Brewer's Association Style Guidelines

Craft is top heavy, and National brands outperform



Voice of the Consumer

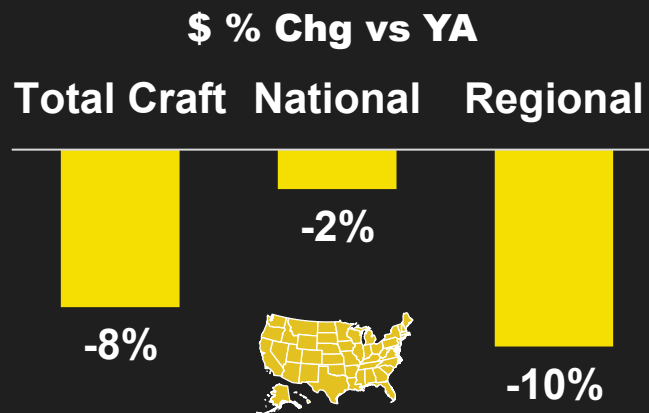
Craft is about creativity and innovation and re-defined brewing methods and process with options and flavors. These products are a more creative approach to beer."

Styles are top heavy

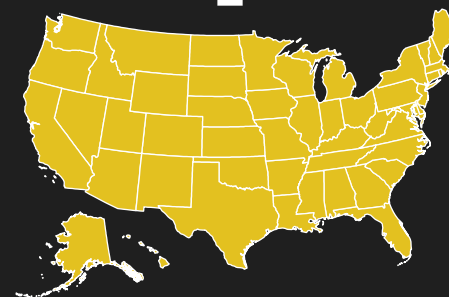


~60% of Craft volume comes from three Styles

National brands outperform



Assortment Focus





Focus the draught
assortment to drive
**sales and better the
consumer experience**

Tap Optimization

powered by lead by style



Anheuser-Busch Proprietary Assortment Optimizer

Anheuser-Busch has a proprietary assortment tool!



**Store Level
On-Premise Data**



**Scale of
Volume**



Circana.

Closes Data Gaps



Decision Analyst

**Custom Consumer
Choice Research**



Recommended Draught Lineup



Output: Tap Optimization Recommendations: Pennsylvania

**Reach out to your Anheuser-Busch contact for
recommendations on what to carry!**

***Alternate
Styles***

