



HUMULUS LUPULUS

AND OTHER BITTER TRUTHS

Hard but hoppy

Let's get one thing straight right away: this is not about beer. Nevertheless, it is something that inspires the imagination not only of brewers, but also of spirits and wine producers ... and of the BarthHaas product developers! Hard seltzer has set an incredible pace that everyone is talking about. The drink itself is astonishingly trivial, but as a product it's so well positioned that it has had a meteoric rise to become the new star in the beverage sky.

Global sales of hard seltzers have risen to around 10 billion US dollars in the first five years alone. Some estimates see them growing to 15 billion US dollars worldwide by 2025. The lion's share of the world market is in the USA where the dominant players are the Irish alcohol beverage group Mark Anthony Brands International with White Claw (50%) and the Boston Beer Company with Truly (22%). In Germany, startups such as Holy, Makai and Buzz are being joined by a growing number of established manufacturers. These include Freixenet with a hard seltzer under the Mia brand umbrella, Katlenburger Kellerei with Infusion Fruity and AB Inbev with Mike's. The Krombacher subsidiary Drinks & More imports world market leader White Claw. Even Coca-Cola - for the first time in the company's history - is producing an alcoholic product, Topo Chico, which has been available in Germany since May.

Like a touch of nothing, a hard seltzer is a mix of sparkling water and a dash of alcohol - colourless and clear, and usually characterised by a fruity aroma. Thanks to its low residual sugar, it's not very sweet or heavy. The flavours range from citrus to sweet fruits and berries, including superfoods such as goji and acai berries, through to cucumber. Combinations with herbal aromas such as rosemary appear less often. Internationally, the alcohol content lies between four and six per cent alcohol by volume (ABV). There are also products on the market that contain less alcohol, but also some containing more, such as "Harder" from MAG at 8% ABV, which falls into the broader category of flavoured malt beverages (FMB).

The alcohol is created in very different ways: from fermented sugar (especially in the USA), from wort or wine fermentation, or from distillates. The calorie content of around 25kcal per 100ml is within the range of non-alcoholic and light beers.

BarthHaas has been working on the development of hard seltzers for production in breweries, using hops as the aroma agent. Good results have been achieved with fermentation alcohol that was either wort-based or made from a sugar solution. Enriched hop pellets such as "LUPOMAX®" or single-variety soluble hop oils such as "PHA® Topnotes" have proven to be wonderful aroma agents. The advantages of hops in the production of hard seltzers should be familiar to brewers: depending on the type of product, hops have a natural, protective antibacterial effect. The large number of hop varieties offers a wide range of natural aromas. In addition, hard seltzers made using hops have a fruity flavour with a little more depth, without being too complex to enjoy.

Pivotal when it comes to the market launch of this completely new product are food regulation requirements and excise duty classification. In order to clarify these points for the newly developed products, BarthHaas confers with the responsible authorities. In Germany, for example, different types of excise duty apply to wort-based and sugar-based hard seltzers. Wine-based hard seltzers, on the other hand, are completely exempt from excise duty. As a result, they can be sold at a lower price. Not least for this reason, the BarthHaas product developers are unanimous in advising brewers to position their alcoholic seltzers in the premium segment from the outset. Hard seltzers flavoured with hops are particularly suitable for this: they offer that certain something extra when it comes to flavour, plus the benefits of naturalness.



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Low alcohol, hardly any sugar, few calories – these product properties are being aggressively promoted in the USA and, due to regulations, at least factually and unbiasedly highlighted in Europe. Attributes such as “gluten-free”, “vegan” and “made from natural raw materials” are also frequently added. Thus, hard seltzers appeal to the entire spectrum of social megatrends. These carefree skinny drinks from the can are also being marketed in the context of community, gender neutrality, diversity and integration, as well as that of freedom, social media, naturalness, health awareness, fun and partying.

The success of the new alcoholic miracle water is as surprising as it is insightful: it basically helps us to begin to understand the times we live in. This “wow effect” is probably what makes the hard seltzer phenomenon so fascinating.

