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BeerBoard's Year in Review: Draft and Packaged Drop, Beyond Beer and NA Beers Pop

BeerBoard released its Year in Review report yesterday, giving us a peek at performance across the $1 billion-plus alcohol sales it tracked in the on-premise channel over 2024.

DRAFT AND PACKAGE BEER DOWN 6% IN '24. Key findings from BeerBoard show that 2024 was a down year for beer (with draft and package volume each down 6%), but bright spots emerged in segments like beyond beer and non-alcoholic beer.

BEYOND BEER A BRIGHT SPOT. Indeed, the rate of sale for beyond beer increased by 69% in 2024, per report, and the segment increased its overall volume share of the packaged category by 13.5%, thanks in large part to RTD cocktails, which grew by 121.5%.

The top brands contributing to beyond beer's volume gains over the year include (in order) Surfside, High Noon, Happy Dad, Nutrl, and White Claw.

All in, beyond beer now holds an 8% share of the packaged category, sitting behind craft, at 9%; imports, at 35%; and domestics, which hold a 48% share.

NA BEER UP "TREMENDOUSLY" TOO. The report also highlighted non-alcoholic beer as a standout in the on-premise this year, noting that NA beer's volume share grew "tremendously" within packaged over the year, overtaking RTD cocktails by volume share and catching up to hard seltzers, per BeerBoard.

DRAFT STILL DOMINATED BY LAGERS. On the draft side of things – where volume fell 6% in total ounces poured – BeerBoard called out that "lager and light lager styles (imported and domestic) led sales" and IPAs were "the third most popular style poured." Top gainers in draft volume during the year (in order) were Modelo, Michelob Ultra, Busch Light, Coors Light, and Pacifico.

EXPECT OPERATORS TO PRIORITIZE TOP BRANDS ON DRAFT IN '25. Looking ahead, BeerBoard posits that draft beer "is a big priority" for suppliers and on-premise operators in 2025, and expects there to be some "prioritizing" of high-performing brands on tap.
They note that "the top four draft brands drive about 2.5 times more sales than the next eleven brands, and 15 times more than the long tail," so "simplifying assortments around a select group of high-velocity brands means more consistent sales, fresher product, and an optimized guest experience."

TOP RANKS IN SPIRITS. Elsewhere, on the wine & spirits side, whiskey ranked as “the top spirits category sold” over the year with 24% volume share, followed by tequila at 21.5% and vodka at 20%. But note that tequila is gaining on whiskey in those rankings, as whiskey declined by 6.7% in the year while tequila grew 6.3%.

Top performing volume spirits brands of 2024 (in order): Tito’s, Jameson, Jack Daniel’s, Sauza and Bacardi.

AND WINE. Turning to wine, the report highlights that white wine held a 50% volume share while red wine snagged 32% volume share. Top overall varietals poured for wine were Chardonnay, Pinot Grigio and Cabernet Sauvignon, and top volume brands in wine for 2024 were (in order) Josh Cellars, Ecco Domani, Chateau Ste. Michelle, La Marca and Chloe.