

Draft Still Soft for March Madness Opening Wknd, Per BeerBoard

Draft Down 6% for March Madness Opening Weekend, Per BeerBoard Data

Before it gets any better, draft beer (and total industry) trends appear to be getting worse. After draft beer posted a near 13% decline during St Patrick's Day weekend (see [Mar 19 issue](#)), draft declined 5.8% for opening weekend of the 2025 Men's College Basketball Tournament vs 2024. Revenue slipped at a steeper rate in these channels, -6.6%, suggesting some combo of lower prices and mix shift toward lower-priced options. Indeed, "domestic beer maintained its position as the #1 draft category, marking a nominal 0.9% increase [in share] YoY" to 47.6%, wrote BeerBoard. Recall, BeerBoard ropes in superpremium, premium and subpremium into its total "domestic beer" segment. Those segments collectively gained 0.4 share pts for the weekend. But gaining share when total draft is down 6% ain't nothin' to write home about. Craft draft share dipped 1.3 pts to 35.3, suggesting even steeper volume decline for the weekend. IPA style was extra soft. Import segment was the main share gainer, up 0.7 pts to 16% of volume. And beyond beer rose 0.2 pts off a tiny base to 1.1 share of draft.

Mich Ultra Top Draft Share Gainer for Opening Wknd; Modelo Especial Surpassed Bud Light, #4 Overall

Lookin' at top brands, Mich Ultra was the #1 gainer for the weekend, up 1.1 share to 13.9 in BeerBoard data (which skews more heavily toward TX stronghold). While it's been soft off-premise, Modelo Especial share of draft rose at an even faster rate than Ultra in BeerBoard data, gaining 0.6 pts to 6.8 share. That was enough to surpass Bud Light to become the #4 draft beer brand in this dataset, as Bud Light draft lost 0.5 share pts to 6.4 total. Coors Light and Miller Lite were the #2 and #3 draft brands for opening weekend of March Madness, with Coors Light gaining 0.2 share to 11.2 and Miller Lite losing 0.2 share to 10.5. So Coors Light trended slightly better than natl avg (-6%) while Miller Lite trended slightly softer.