KNOWLEDGE-BASED PUBLICATION

BEER BUSINESS DAILY

NEWS. NUMBERS. MOTIVE.

April 14, 2025

BeerBoard: Q1 Draft Beer Volume Down 8.5%, But Packaged Offerings Grew

Beerboard released its Q1 on-premise report late last week, comparing trends from Jan 1 to March 31 of 2025, to the exact same span the year prior. Note, BeerBoard reports include data from same-store sales "based on an index representative of the industry, including independent locations, regional chains and national operators," per company.

Draft beer volumes plummeted in this data set quarter over quarter, at down 8.5%. Even though draft saw an almost 9% volume dip in Q1, BeerBoard said that Golden Road Mango Cart, Corona Premier, Michelob Ultra, Pacifico, Modelo Especial and saw "significant gains" (listed in order).

However, packaged beer grew, at least, up 6.4%. (Top packaged beer on-premise includes Mich Ultra, Corona Extra, Miller Lite, Coors Light and Bud Light.)

In fact, that was a trend: packaged beer and beer-adjacent offerings did well: Beyond beer, which the company defines as RTDs, seltzers, and non-alc beer, grew almost 25% in volume, and 16% in share, to reach 9% share of overall packaged on-premise offerings.

Top RTD/seltzer brands "contributing to volume gains" in the quarter vs. YA include (in order) High Noon Pineapple, Surfside Ice Tea Lemonade + Vodka, White Claw Black Cherry, Sun Cruiser Iced Tea & Vodka and NUTRL Watermelon.

NA beer was up 33% in dollars year over year, and the top 10 non-alcoholic beer products make up 6.4% of total packaged volume. Heineken 0.0 is the top NA brand on premise, with the rest of the top 10 dominated by Athletic [who has 4] and big brewer offerings. (Also notably, in January of '25 vs. '24, non-alc beer saw a 66% rate of sale increase.)

Wine and spirits also did well. Wine volume, surprisingly, was up 27% in this data set (most likely driven by price and promotion, BeerBoard told BBD). Spirits volumes were up 2%.