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BeerBoard: Q1 Draft Beer Volume -8.5%, Packaged +6.4%

Zoe Licata April 15, 2025 at 9:09 AM

Beer's Q1 on-premise sales were a mixed bag, according to the latest data report from tech and on-premise data firm BeerBoard.

Craft beer volume declined 8.5% versus the first three months of 2024 at BeerBoard-tracked on-premise establishments.

The beer category's decline would have been even steeper if not for "significant gains" from several brands, including (in order of volume share gains):

- Constellation Brands' Corona Premier;
- Anheuser-Busch InBev's (A-B) Golden Road Mango Cart;
- Constellation's Pacifico;
- Constellation's Modelo Especial;
- And A-B's Michelob Ultra.

The top beer brands by draft volume share were (in order) Michelob Ultra; Molson Coors' Miller Lite and Coors Light; A-B's Bud Light; and Modelo Especial.

The top draft beer styles across both imported and domestic beer (by volume share) were light lager, lager, IPA, European ales and amber ale. Lager and light lager were also the top two styles for packaged beer.

Packaged beer had a more positive Q1 than draft, increasing volume 6.4% versus Q1 2024. The top five packaged beer brands were (in order) Michelob Ultra, Corona Extra, Miller Lite, Coors Light and Bud Light.

Ten NA beer brands accounted for approximately 6.4% of total packaged bev-alc volume:

- Heineken 0.0;
- Athletic Run Wild;
- Athletic Upside Dawn;
- Corona Non-Alcoholic;
- Athletic Free Wave;
- Boston Beer Company's Samuel Adams Just the Haze;
- Diageo's Guinness 0.0;
- Athletic Lite;
- Molson Coors' Blue Moon Belgian White Non-Alcoholic;
- And A-B's Budweiser Zero.

Total NA beer volume increased 27% and dollar sales grew 33% in January 2025 versus January 2024. The segment also recorded a 66% increase in rate of sale this Dry January.

Other beyond beer segments such as hard seltzers and ready-to-drink cocktails (RTDs) “outpaced expectations” in the on-premise for Q1, with the latter recording a “surge” in both volume and rate of sales versus Q1 2024, according to the report.

The top RTDs by volume in Q1 were:

- Gallo’s High Noon Sun Sips Pineapple;
- Surfside Iced Tea & Lemonade + Vodka;
- A-B’s Nütrl Vodka Seltzer Watermelon;
- High Noon Peach;
- And Stateside Vodka Soda Orange;

Mark Anthony took the top two spots for largest hard seltzer brands in the quarter, with White Claw Black Cherry and White Claw Mango, followed by Boston Beer’s Truly Wild Berry; Molson Coors’ Topo Chico Strawberry Guava; and Happy Dad Fruit Punch.

Wine recorded a surprising 27% volume increase in Q1, with notable year-over-year (YoY) volume gains from Pinot Grigio (+6.4%), Sauvignon Blanc (+3.1%) and Sangria (+0.9%).

Spirits increased on-premise volume 2% in Q1, with significant volume gains by the top two spirits segments: Whiskey (volume +3.6%, 27% of on-premise spirits volume) and tequila (+5.5%, 21% of volume).

Vodka, the third largest spirit segment by on-premise volume (16%), recorded a 2.8% decline in Q1 volume, despite Tito’s Vodka taking the No. 1 brand spot by volume growth.

Other top spirits brands by YoY volume growth included Lunazul Blanco Tequila, Sauza Gold Tequila, Pernod Ricard’s Jameson Irish Whiskey and Brown-Forman’s Jack Daniel’s.