

December 16, 2019

The Year of Light Beer?

Dear Client:

Were we too early in predicting the inevitable death of 3.2 beer, when folks are drinking lighter and lighter beer? There's been a [plethora](#) of [articles](#) lately about how young people are "sober curious", drinking with a view toward "wellness", and watching calories. Of course, at the top of each article is the hook that hard seltzers — White Claw and Truly — are changing the way Americans drink.

Well, what is not getting as much ink is that this is helping legacy light beers on-premise on tap, where hard seltzers are trailing in physical distribution. It ain't all about seltzers there. The annual report from BeerBoard, which bills itself as the "industry leader in real-time data for the on-premise" managing "over \$1 billion in retail draft beer sales," that shows that beer actually did quite well in the on-premise this year, and it wasn't off the back of hard seltzer.

In fact, hard seltzer never even made an appearance in the report, yet somehow, someway, overall pour volume was up a healthy 7.1% in 2019.

So, to what do we owe this pleasant surprise? A hefty chunk is owed to light lagers, believe it or not.

This style, which accounts for nearly half of the pour volume tracked by BeerBoard, at 48.5%, is "trending upward," topping its 2018 uptick of 2.4%, and growing 3.4% in 2019.

And to no surprise, the top four brands in the light lager style — Bud Light, Miller Lite, Coors Light, and Mich Ultra — just so happen to be the top four brands tracked by BeerBoard, period.

And all four were up at least mid-single digits during the year:

Bud Light, up 5.5%

Miller Lite, up 7.9%

Coors Light, up 10.8%

And Mich Ultra, up 12.8%

Outside of these top four brands, it was really hit or miss in the rest of the top ten brands tracked by BeerBoard.

Out of the three imports in the top ten: Dos Equis (#6) was down 9.1%; Modelo Especial (#7) was up 11.2%; and Stella Artois (#10) was down 10.6%. Overall, imports as a whole were down 0.5% for the year, according to BeerBoard.

Two craft brands also made the top ten: Blue Moon (#5), which was down 2.7%; and Lagunitas IPA, which was up 13%. BeerBoard also noted that Lagunitas IPA is the "one brand" that is "driving the ship" for the IPA style too, up 5.4% during the year. Outside of Lagunitas IPA, "most brands within the style are flat, down, or down significantly." For example, the number two IPA in BeerBoard data, Bell's Two Hearted, was down 10.5% in the year, and the number three brand, Ballast Point Sculpin, was down a whopping 28%.