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BeerBoard: Draft Sales Volume Declines -6.6%; Craft Beer Loses -1.6% Share of Tap Handles

Jessica Infante October 26, 2021 at 3:57 PM

Draft beer sales volume declined -6.6% nationwide during the weekend of October 21-24, compared to the weekend of October 7-10, according to BeerBoard, which tracks draft sales at on-premise retailers across the country.

“Coming off four periods of continued growth, volume saw a decline, dropping -6.6% on the weekend,” BeerBoard wrote. “This was after growth of +4.7%, +13.7%, +10.8% and +3.8% in the prior periods tracked.”

Of the 10 key markets BeerBoard highlights in its reports, South Carolina (-11.1%) saw the steepest decline in volume, followed by Texas (-10.5%), Florida (-8.3%), Illinois (-7.7%), Minnesota (-7.3%), Nevada (-6.7%), and Georgia (-4.2%).

Only Michigan (+1.7%), New York (+1.3%) and Tennessee (+1%) posted volume gains compared to the October 7-10 period.

All markets declined by double digits in comparison to the same weekend in 2019, with Nevada (-14%) posting the smallest decline and South Carolina the steepest (-25%).

The 30-day draft rate of sale declined -4.7% during the October 21-24 period compared to October 7-10.

“Tied together with volume, rate of sale fell for the first time after four straight periods of growth,” BeerBoard wrote.

Texas (-10.5%) posted the steepest decline in rate of sale, followed by South Carolina (-9.2%), Florida (-6.9%), Georgia (-6.3%), Minnesota (-5.8%), Illinois (-5.7%), and Nevada (-3.2%). Rate of sale increased in only three states: Tennessee (+2%), Michigan (+0.7%) and New York (+0.5%).

Because the decline in the average number of taps pouring (-50% nationwide compared to 2019) outpaces the decline in draft volume (-18% nationwide compared to 2019), rate of sale has increased in all but two states, a BeerBoard spokesperson told Brewbound. Nationwide, rate of sale nationwide has increased +17.8%, but some markets have posted triple- and double-digit increases:

- South Carolina, +129.5%,
- Georgia, +102.7%,
- Tennessee, +88.5%,
- Florida, +63.6%,
- Texas, +43.5%,
- Michigan, +24.3%,
- Illinois, +20.7%,
- New York, +17.6%.

Rate of sale declined in Nevada (-12.5%) and Minnesota (-11.2%).

The average number of taps per account has remained flat across the last three BeerBoard surveys for almost all markets except Tennessee, where it has declined from 19 to 18, and Nevada, where it has declined from 22 to 21. However, the average number of taps has declined by double digits in all markets compared to 2019.

Craft beer's share of draft lines nationwide has declined -1.6%, to 56.3%, compared to 57.9% during BeerBoard's September 23-26 survey period. Craft's share of volume has remained flat at 33.5% during both periods, but dipped to 33.4% during the October 7-10 period.

Domestic beer has gained +1.4% of draft lines between the September 23-26 and October 21-24 periods, and imports have gained +0.2% of draft lines. During the October 21-24 weekend, domestic beer accounted for 27.5% of draft lines, and 50.4% of draft beer volume. Imports' draft line share (16.2%) and volume (16.1%) are closer to equilibrium than domestic or craft.

The five best-selling styles on draft remain unchanged across BeerBoard's three most recent survey periods:

- Light lager
- Lager
- IPA
- Belgian wit/white ale
- European ales