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## BeerBoard: On-Premise Volume Declines for Third Consecutive Period; Imports Get Slight Volume Bump for Cinco de Mayo

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On-premise volume declined for the third consecutive period, decreasing -1.9% over the weekend of May 5-8 compared to the weekend before, according to the market research firm BeerBoard.

The weekend followed a -6.4% decline in volume April 21-24, and -3.5% decline April 7-10.

Compared to the same weekend in 2021, volume for the weekend increased +14.9% year-over-year (YOY). California (+37.1%), Nevada (+27.1%), New York (+25%) and Florida (+21.8%) recorded the largest YOY volume growth. Tennessee (-3.3%) had the only YOY decline.

Rate of sale (ROS) on average for on-premise establishments remained flat nationally over the weekend after two periods of decline, and increased +10.4% compared to the same weekend in 2021. However, each of the 11 states tracked by BeerBoard recorded week-over-week declines in ROS, led by Georgia (-18.9%), Minnesota (-13.9%), California (-9.9%) and Michigan (-9.5%).

ROS for four of the 11 tracked states also declined YOY in the period compared to the same weekend in 2021: South Carolina (-10%), Tennessee (-7.3%), Michigan (-2.1%) and Texas (-1.9%).

The average number of taps per location nationally remained at 19, a +5.6% increase compared to the same weekend in 2021, which had an average of 18 taps per location. Georgia was the only tracked state to add to their average (+5.9% to 17 taps), while Illinois (-5.9%), South Carolina (-5.9%), Florida (-5.3%), Tennessee (-5.3%), Minnesota (-4.5%) and Nevada (-4.5%) each dropped one tap on average.

The percentage of taps pouring per location declined for the third consecutive period, nationally, falling to 72% (down from 73% April 21-24 and 74% April 7-10). All but three states decreased their pouring percentage; Texas, New York and Michigan remained flat.

Domestic beer maintained the highest volume share of beer on-premise, although the segment's share declined -1.4%. Imports claimed the difference (+1.4%) with 18.2% volume share – likely due to the Cinco de Mayo holiday. Craft's volume share was flat at 34.2%.