

May 9, 2025

Mexican Draft Brands, Non-Alc, Spirits RTDs Won Derby de Mayo Weekend, Per BeerBoard

Also yesterday, BeerBoard released its performance report tracking bev alc trends on-premise for the recent two-fer “holiday” weekend that included Kentucky Derby and Cinco de Mayo. It compared the periods of May 2-5 2025 (Friday-Monday) to the “same” period last year (May 3-6), noting that Cinco de Mayo fell on a Sunday last year, vs. Monday in '25.

The result? Overall, bev alc sales were down 7.3% for this Derby De Mayo extended weekend, as spirits saw major declines (with volumes down 17.5% year over year) and packaged beer sagged similarly, down 17% in volumes.

MEXICAN LAGERS/MODELO ESPECIAL GAIN SHARE OF DRAFT YOY. Draft, however, fared a lot better, down “only” 1.6% overall. Modelo Especial was a standout here, having surged to the “no. 2 position” in draft brands, up from no. 4 YA. The brand saw a 9.5% increase in “poured kegs” (units) and a +11.5% hike in volume share of draft. Mexican Lagers overall “were a standout” in this data set (natch, driven by Modelo), up 4.3% in “poured kegs”/units and +6% volume share.

Michelob Ultra took the top draft spot for the weekend; Coors Light was no.3 , Miller Lite no. 4, and Bud Lite no. 5.

BEYOND BEER FARE MUCH BETTER (EXCEPT FOR SELTZER). Unsurprisingly, and on a smaller base, “beyond beer” (which BeerBoard categorizes as canned cocktails, hard seltzers and non-alc) did well, with RTD cocktail volumes up 6.3% and non-alc volumes up 19.6%. Hard seltzer volumes were down 17.5%, however— though BeerBoard noted that White Claw Black Cherry “bucked the trend,” up “nearly +9% in volume share.”

Other “top packaged performers” included Heineken o.o, with volumes up more than 4%, and Surfside Iced Tea + Lemonade + Vodka, up almost 4% in volumes.

SPIRITS. It’s not totally clear why spirits had such a poor showing in this data set. Appropriately for the Derby weekend, however, bourbon volumes were up 6.2%, and +28% share of spirits volumes for the weekend. Surprisingly, however, tequila volumes were down 26% “but only a -11% drop in volume share, indicating fewer but higher-value pours.”