

May 29, 2025

## **BeerBoard: Memorial Day On-Premise Soft, But Beer Still Shows Some Pop**

Broad trends from BeerBoard's Memorial Day Weekend analysis don't point to a hopping holiday weekend in the on-premise, but a further dig into the data reveals it wasn't all bad news behind the bar for beer.

Let's take a look...

**TOTAL BEV ALC SALES DOWN 4.4%, WITH SPIRITS DOWN 13.7% OVER THE WEEKEND.** While total bev alc sales declined 4.4% this Memorial Day weekend (May 23–26, 2025, Fri–Mon) compared to the same period in 2024 (May 24–27, Fri–Mon), a decent chunk of that looks to be owed to spirits, which saw total sales stumble 13.7% YoY.

**BUD LIGHT, GUINNESS AND PACIFICO ROCK A DOWN WEEKEND IN DRAFT.** Then total draft beer volume came in soft too (down 3.9%), but a number of key brands flew, like: Bud Light, which grew 17.4% over the stretch; or Guinness, which posted similar double-digit volume gains on the weekend (+17.3%); and Pacifico, which recorded a whopping 29.8% jump in volume during the holiday.

Overall, the top five beer brands poured over the weekend ranked like so:

1. Mich Ultra
2. Miller Lite (up one spot from last Memorial Day Weekend)
3. Modelo Especial (down one spot from last MDW)
4. Bud Light (up one spot)
5. Coors Light

**BEYOND BEER BUCKS SOFT PACKAGE TRENDS.** Though packaged bev alc “faced a noticeable drop” in volume over the weekend, down 6%, several bright spots emerged within the beyond beer segment.

Indeed, packaged beyond beer volume grew 5.3% over the weekend, as RTD cocktails jumped 21.3% in units sold, and units of non-alc beverages increased 18.5%. Helping to drive the packaged beyond beer growth was White Claw Black Cherry, which was “the top performing non-beer product” from the weekend and grew volume share by 2.9%; as well as High Noon Sun Sips Pineapple, up 20% in volume; and Heineken 0.0, up 7.2%.

**BAPPLE EFFECT IN THE ON-PREMISE TOO?** Finally, it's worth noting that beyond beer brands weren't the lone bright spots in packaged beer over the weekend, as Busch Light also emerged as a top performer in package over the holiday, up 16.4%, suggesting that the Busch Light Apple effect might have made its way into the on-premise too.