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BeerBoard: Memorial Day Weekend Flops in the On-Premise

Justin Kendall June 2, 2025 at 1:01 PM

Memorial Day weekend (May 23-26) and the kick off of the summer selling season in bars and restaurants started slow, with year-over-year (YoY) total bev-alc dollar sales declining 4.4%, according to on-premise retail data tracker BeerBoard.

Draft declined 3.9% YoY, with volume losses across:

- Domestic: -3.2% poured kegs, +0.9% volume share;
- Craft: -6.1% poured kegs, -3.4% volume share;
- Imports: -1.2% poured kegs, +4.7% volume share;
- Beyond beer: -4% poured kegs, -4.7% volume share.

Anheuser-Busch InBev's (A-B) Michelob Ultra was the top draft brand by volume, followed by:

- Molson Coors' Miller Lite, which leapfrogged into the No. 2 spot;
- Constellation Brands' Modelo Especial;
- A-B's Bud Light, which posted a 17.4% volume increase and bumped up to No. 4;
- And Molson Coors' Coors Light.

BeerBoard called out the performance of Diageo's Guinness (+17.3% volume YoY, +5.6% rate of sale) and Constellation Brands' Pacifico (+28.9% volume, +23.9% rate of sale).

Packaged products declined 6% YoY over the weekend, although beyond beer packaged offerings increased in number of units sold (+5.3%) and volume share (+12.5%). Beyond beer also grew volume share 7.9%.

Ready-to-drink cocktails (RTDs) increased units sold (+21.3%) and volume share (+29.2%) double-digits, as did non-alc beverages (+18.5% units sold, +20.4% volume share).

Constellation's Corona Extra led the way as the best-selling packaged product, despite a 13.8% decline in units sold.

Mark Anthony Brands' White Claw Black Cherry Hard Seltzer was the top-performing "non-beer" item (+2.9% volume share). Gallo's vodka-based High Noon Sun Sips Pineapple posted double-digit gains in units sold (+20%) and volume share (+27.3%).

Other standout brands included A-B's Busch Light (+16.4% units sold, +16.2% volume share) and Heineken 0.0 (+7.2% units sold, +14.2% volume share).

Also of note, total spirits sales declined -13.7% YoY over the holiday weekend, with volume sales of whiskey (-5.7%) and tequila (-19.3%) declining.