

July 8, 2025

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

BeerBoard Q2 '25 data has come out, and the results may surprise you. The report saw draft and packaged beer volume declines in Q2 '25 vs. Q2 24, but beyond beer trends also dipped year over year. (The data compared trends from April 1 – June 30, 2025 vs. exact dates prior year, in the same stores.)

Specifically, Q2 draft beer volumes were down 5.7%, an improvement on the Q1 trend of -8.5%. Meanwhile, the Q2 packaged beer trend deteriorated. It was down 9.3% vs. YA in the BeerBoard data, despite having been up the prior quarter (+6.4% in Q1).

But again, perhaps most surprisingly, while beyond beer (seltzer, RTDs and NA beer) grew volume share of the packaged category by 10% in the Q2 data, their volumes were down 0.5% YOY. That surprised us a little, so we dug in with the company, who told BBD that beyond beer's rate of sale was actually down 4.6% in the quarter.

BeerBoard did not share what drove declines in packaged or draft beer, nor for RTDs.

But they did say that Michelob Ultra, Kona Big Wave, Pacifico and Coors Banquet were the "biggest gainers in draft volume."

Meanwhile, the top performing brands for beyond beer in volume share were White Claw Hard Seltzer Black Cherry, High Noon Sun Sips Pineapple, Surfside Iced Tea & Lemonade + Vodka, White Claw Hard Seltzer Mango and Nutrl Vodka Seltzer Watermelon.

`Also in the quarter, spirits volumes were down 7% vs YA. Wine volumes were flat.