

July 9, 2025

BeerBoard Q2 On-Premise Report: Beer Down -5.7% on Draft, -9.3% in Package

Jessica Infante Jul. 9, 2025 at 8:30 AM

If recent off-premise scan data has been a bummer lately, don't expect the on-premise to deliver optimism either.

Beer volumes at bars and restaurants have declined mid- to high-single digits on draft (-5.7%) and in package (-9.3%) year-over-year (YoY) during the second quarter of 2025, according to on-premise data firm BeerBoard.

The ready-to-drink (RTD) segment – which includes offerings across beer, wine and spirits – provided the lone bright spot at +10% YoY. However, RTDs' gains are not enough to offset other losses.

Non-RTD spirits' volume declined 7%, and wine was flat, BeerBoard reported.

Within draft beer, the most popular style by volume was light lager, followed by No. 2 lager, No. 3 IPA, No. 4 European ales and No. 5 amber ale.

The top five draft beer brands were

- No. 1 Anheuser-Busch (A-B) InBev's Michelob Ultra
- No. 2 Molson Coors' Miller Lite
- No. 3 Molson Coors' Coors Light
- No. 4 Constellation Brands' Modelo Especial
- No. 5 A-B's Bud Light.

Nearly all of those same brands appeared among the top 5 packaged beer brands in the on-premise:

- No. 1 Constellation's Corona Extra
- No. 2 Michelob Ultra
- No. 3 Modelo Especial
- No. 4 Miller Lite
- No. 5 Coors Light.

The beyond beer segment, which includes RTD cocktails and hard seltzers, increased its share of packaged product volume by 10%, but declined 0.5% in units sold YoY.

Top RTD offerings were all vodka-based:

- No. 1 Gallo-owned High Noon Sun Sips Pineapple
- No. 2 Stateside-owned Surfside Iced Tea and Lemonade + Vodka
- No. 3 A-B's Nütrl Vodka Seltzer Watermelon
- No. 4 Boston Beer-owned Sun Cruiser Iced Tea & Vodka
- No. 5 High Noon Sun Sips Peach.

Mark Anthony Brands' White Claw claimed the top two spots in hard seltzer (Black Cherry and Mango, respectively), followed by No. 3 Boston Beer's Truly Hard Seltzer Wild Berry, No. 4 Molson Coors' Topo Chico Hard Seltzer Strawberry Guava and No. 5 Happy Dad Fruit Punch.

Within the wine category, No. 1 white (54.4% share of volume) recorded the steepest decline at 1.2% YoY, followed by No. 2 red (29.8% share, -0.8% YoY) and No. 5 rosé (3.3% share, -0.6% YoY). No. 4 sangria (4.8% share) posted the largest volume gain (+2.3% YoY), followed by sparkling (7.7% share, +0.3% YoY).

Spirits' top segments outpaced the category's overall 7% volume decline. No. 1 whisky (28% share) increased 1.4% YoY, followed by No. 2 tequila (27% share, +0.4% YoY) and No. 3 vodka (19% share, -0.4% YoY).

Despite vodka being the No. 3 style overall, Tito's Vodka remained spirits' No. 1 brand, followed by No. 2 Lunazul Blanco Tequila, No. 2 Sauza Gold Tequila, No. 4 Jameson Irish Whiskey and No. 5 Jack Daniel's Tennessee Whiskey.

Tequila-based margaritas were the "dominant on-premise choice" among cocktails, BeerBoard reported.