

# WINE & SPIRITS DAILY

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## BeerBoard: What Consumers Drank On-Premise in Q2

Yesterday BeerBoard released its Q2 2025 On-Premise Insights Report, finding that wine performed better in the channel compared to both beer and spirits. Indeed, wine volumes were flat in Q2, while spirits volumes were down 7%, draft beer volumes were down 5.7% and packaged beer was down 9.3%.

White wine accounted for the majority of category volume share on-premise in Q2 at 54.4%, with volumes down 1.2% compared to the same period a year ago. Red wine volumes were down 0.8% at 29.8% share. Sparkling wine and sangria saw volumes increase in Q2, up 0.3% and 2.3%, respectively. Meanwhile, rose, which has the lowest share of volumes for the wine category at 3.3%, was down 0.6% year over year.

Turning to spirits, even though total category volumes were down 7% in Q2, the top categories by share were up or flattish for the period. Whisky volumes were up 1.4%, tequila was up 0.3%, and vodka was down just 0.4%.

The top spirits brands in Q2 were:

1. Tito's
2. Lunazul Blanco Tequila
3. Sauza Gold Tequila
4. Jameson
5. Jack Daniel's

As for RTDs, BeerBoard groups them in the 'beyond beer' segment, which increased overall volume share of the packaged category by +10%, while volumes were down 0.5% in Q2.

The top RTD brands on-premise were:

1. High Noon Pineapple
2. Surfside Iced Tea and Lemonade + Vodka
3. Nutrl Watermelon
4. Sun Cruiser Iced Tea & Vodka
5. High Noon Peach