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BeerBoard Shares Who It Sees Winning the RTD War On-Premise in Q3

On last week's earnings call, as it has said previously in various iterations, Boston Beer said that Sun Cruiser is the leading RTD spirits tea and lemonade brand in bars and restaurants, citing Nielsen.

But the on-premise is well known as a moving target for quantification. To wit, Stateside Brands brass told BBD this week that its sources show them as significantly ahead of their close competitor in the on-premise.

Cue BeerBoard's Q3 '25 on-premise review, measuring the period of July 1 – September 30 (looking at same store sales vs. the period year ago), which says that Surfside is second to only High Noon in terms of top RTD Cocktails by volume share in the on-premise. That's followed by Sun Cruiser, NUTRL and Stateside Urbancraft Vodka — owned by Stateside Brands, as with Surfside. (BeerBoard covers more than \$1 billion in on-premise alcohol sales, with a footprint that covers national concepts, casual dining, sports bars, regional and independent concepts. Tabulated beverages had to be in at least 25 locations to make the cut.)

Among RTD Cocktails, BeerBoard ranks High Noon Sun Sips Pineapple as the single top on-premise player for Q3 '25 by volume share, at 30 volume share of RTD cocktails, and 1.7% share (also volume) of total on-premise. That's followed by Surfside Iced Tea and Lemonade + Vodka, at 17.7% share, and 1% share, respectively; Sun Cruiser Iced Tea & Vodka, at 11% share and 0.60% share; and Nutrl Vodka Seltzer Watermelon, at 7.2% share of RTD, and 0.4% share of on-premise overall.

But Surfside Strawberry Lemonade + Vodka ranks tops for rate of sale, at 42.93, followed by High Noon Sun Sips Pineapple, at 22.96, and then Surfside Vodka Tea, at 17.02, and Sun Cruiser Pink Lemonade, at 16.57.

More from BeerBoard on-premise details later this week.