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## BeerBoard: Volume of Draft and Packaged Beer Decline On-Premise in Q3

**Jessica Infante** October 30, 2025 at 3:59 PM

Consumers' on-premise spending may be strong, but volumes of draft beer and packaged goods declined at bars and restaurants during Q3, according to on-premise insights firm BeerBoard.

Draft beer volume declined 1.8% between July 1 and September 30 year-over-year (YoY). Cans and bottles fared even worse, dropping 5.1% compared to Q3 2024.

"Lager and light lager styles (domestic and import) continued to dominate both draft and packaged sales, while IPAs remained the No. 3 draft style poured," BeerBoard wrote.

Anheuser-Busch InBev's (A-B) Michelob Ultra was the top draft brand by volume, followed by No. 2 Molson Coors' Miller Lite, No. 3 Molson Coors' Coors Light, No. 4 Constellation Brands' Modelo Especial and No. 5 A-B's Bud Light.

While those are the largest brands, only two of them gained meaningful amounts of draft volume share in the quarter. Coors Light was the second largest share gainer, with a 15% increase. Michelob Ultra was the fifth largest (+5%).

The top volume share gainer was Constellation's Pacifico (+18%), followed by No. 3 Molson Coors' Blue Moon Belgian White (14%) and No. 4 A-B's Busch Light (+8%).

The top five traditional beer brands in package were nearly the same as the top-five draft brands, with Constellation's Corona Extra in the top spot and Bud Light bumped from the list:

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

In beyond beer packaged trends, flavors dominated across both spirits-based, ready-to-drink (RTD) canned cocktails and malt- or sugar-based hard seltzers or flavored malt beverages (FMB). Notably, none of the fruit flavors in any of the top-five products overlapped across both segments.

The top RTD brands sold in the on-premise by volume include:

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

The top hard seltzers and FMBs sold in the on-premise by volume include:

- No. 1 Mark Anthony Brands' White Claw Hard Seltzer Black Cherry
- No. 2 Boston Beer's Twisted Tea Original
- No. 3 White Claw Hard Seltzer Mango
- No. 4 Boston Beer's Truly Hard Seltzer Wild Berry
- No. 5 Molson Coors' Topo Chico Hard Seltzer Strawberry Guava