Brewbound Quarterly

CGA by NIQ

Q3 2025

OPM

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Summary

- The On Premise universe was in growth, with both Dining and Drinking outlets witnessing openings, led by QSR in Dining and Sports Bars in Drinking. In contrast, premium outlets such as Fine Dining and Premium Bars experienced notable declines, as consumers increasingly prioritize value options amid ongoing economic headwinds.
- Beer declined by -0.5pp in share of $ sales in the On Premise over the L52 weeks, while Spirits and RTD's gained at its expense.
- Despite declining distribution, RoS growth allowed Imported Beer to gain the largest share of volume sales in the On Premise among competing subsegments, followed by Domestic Super Premium.
- Draft Beer's superior trends were seen across almost all subsegments with the exception of Craft, where the Packaged format gained.
- Non-Alcoholic Beer's double-digit growth persisted. Oregon featured within the top-5 ranking on volume share held by Non-Alcoholic Beer over the L12 weeks, thanks to a combination of wider distribution and organic sales growth.
- Non-Alcoholic Beer gained share across all states; unlocking further upside may hinge on accelerating distribution in slower-growth markets.

On Premise Overview

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Total Beer/FMB/Cider Highs and Lows

Domestic Premium and Craft held the highest share of Beer in the Total US over the L52 weeks, despite registering $ (-4.2%, -7.9%), volume (-6.4%, -10.1%), and RoS (-4.9%, -10.9%) decline. Craft saw marginal distribution improvement over the period (+0.9%)

The number of outlets selling Beer saw the largest rises in Nevada (+1.2%) and Tennessee (+0.3%) over the L12 weeks, yet RoS in these markets remained down following wider Beer trend (-9.5% and -8.6%, respectively).

Irish Imports lead over Mexican (+14.8%, vs +1.0%) with $ % chg vs YA. Additionally, Irish Import's documented a more resilient distribution trend.

Despite marginal distribution decline, Irish Imports recorded +12.6% RoS growth across the Total US over the L52 weeks.

Non-Alcoholic Beer grew in both volume and value (+30.7%, +35.0%, respectively) over the last L52 weeks, thanks to the double digit RoS and distribution increase in New England.

Stout was the only leading Beer style to register volume uplift over the L52 weeks (+7.6%) driven by strong RoS growth in the Middle Atlantic highlighting rising demand for Stout.

Both RoS and distribution decline impacted Draft & Packaged Beer from $ sales growth over the L52 weeks across the Total US, signalling a slowdown in the market.

Source: CGA by NIQ OPM w/e 07/12/2025

The Structure of the On-Premise Universe

No. of restaurants, bars & nightclubs:
July 2025 vs. YA

- 304,115 +0.6%
  - Eating 220,961 +0.7%
    - Casual Dining 161,048 +0.8%
      - Fast Casual 36,372 +0.5%
      - Polished Casual 6,560 -3.4%
    - QSR 8,149 +11.3%
    - Fine Dining 8,832 -5.7%
  - Drinking 83,154 +0.3%
    - Neighborhood Bar 60,053 +1.6%
    - Sports Bar 10,875 +2.8%
    - Casual Nightclub 4,637 -1.9%
    - Premium Bar 3,645 -17.3%

Key Takeaways:

- Openings increased across both Dining and Drinking channels vs YA, led by QSR in Dining and Neighborhood Bars in Drinking.
- In contrast, premium outlets such as Fine Dining and Premium Bars experienced notable declines, as consumers increasingly prioritize value options amid ongoing economic headwinds.

NB TD Linx analysis does not include Lodging, Recreation or Other

TDLINX

- Other On Premise 88,663 +2.6%
  - Recreation 54,070 +1.5%
  - Lodging 23,328 +2.9%
  - Other 11,265 +7.6%

NB Total Other On Premise includes Lodging, Recreation, Transportation, Caterer and Military On Premise Totals

Source: TDLinx On Premise Data – 07/16/2025 vs YA

According to consumer sentiment, more consumers are spending more than last year than less

THINKING ABOUT YOUR TYPICAL VISIT TO BARS RESTAURANTS OR SIMILAR VENUES IN THE PAST 3 MONTHS, WHICH OF THE FOLLOWING BEST APPLIES TO YOUR AVERAGE SPEND COMPARED TO A YEAR AGO?

37%

Spend more per visit than a year ago

49%

Spend the same amount per visit than a year ago

14%

Spend less per visit compared to a year ago

SOURCE: CGA BY NIQ SEPTEMBER 2025 US ON PREMISE IMPACT REPORT SAMPLE (1601)

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Half of visitors whose spend per visit have decreased over the past year have been because they were ordering fewer drinks

WHICH OF THE FOLLOWING IF ANY, ARE REASONS WHY YOU ARE SPENDING LESS PER VISIT TO BARS, RESTAURANTS OR SIMILAR VENUES?

Asked to those who spend less

Ordering fewer drinks	Order fewer food items	Ordering cheaper food items
50%	**34%**	**23%**
Visiting cheaper venues	**Taking part in offers/ promotions**	**Ordering cheaper drink options**
21%	**16%**	**15%**

SOURCE: CGA BY NIQ SEPTEMBER 2025 US ON PREMISE IMPACT REPORT SAMPLE (228)

Having accounted for almost half of dollars generated in the On Premise, Spirts was one of the two share gainers of sales over the L52 weeks

	Spirits	Beer (without Hard Seltzer)	Wine	RTDs	Hard Seltzers
L52 $ Share	46.7%	38.4%	12.7%	1.3%	0.9%
L52 $ Share chg vs YA	+0.3pp	-0.5pp	0.0pp	+0.3pp	-0.1pp
Value % chg vs YA	-0.8%	-2.7%	-1.7%	+34.7%	-12.4%
Volume* % chg vs YA	-4.3%	-4.7%	-4.5%	+28.7%	-14.4%

Source: CGA by NIQ OPM Data – Megacategory, Subsegment, Value, $, Volume, 288oz, 9L EQ, rolling 52 w/e 07/12/2025 vs YA

*Volume % chg is measured in 288oz EQ for Beer/Hard Seltzers and 9L EQ for RTD/Spirits/Wine

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RoS growth allowed Import Beer and Domestic Super Premium to gain share of volume sales in the On Premise over the L52 weeks, despite declining distribution

Beer Subcategory performance over the L52 weeks

	Domestic Premium	Craft	Import	Domestic Super Premium	Below Premium	Hard Seltzer	Cider	Flavored Malt Beverage	Non-Alcoholic Beer*
L52 Vol Share	26.6	26.0	21.7	10.3	7.1	1.9	1.1	0.7	0.7
L52 Share pp chg	-0.4	-1.5	+1.2	+0.6	+0.2	-0.2	0.0	0.0	+0.2
L52 288oz % chg	-6.4	-10.1	+0.8	+1.3	-1.5	-14.4	-5.1	-8.4	+30.7
L52 288oz (million)	92.5	90.5	75.6	35.8	24.6	6.7	3.7	2.5	2.5
L12 288oz % chg	-5.7	-14.8	-3.8	-2.0	-2.9	-13.5	-13.3	-16.5	+45.7
L12 288oz (million)	21.3	21.1	17.9	8.2	5.7	1.5	0.8	0.6	0.7

Source: CGA by NIQ OPM Data – Megacategory, Category, Subsegment, Value, $, Volume, 288oz, rolling 52 & 12 w/e 07/12/2025 vs YA

*Non-Alc beer will also account for small levels within other Subsegments such as Import and Domestic Premium

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Formats and Non-Alcoholic Beer in the On Premise

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RoS and distribution decline in both formats affected the performance of Packaged and Draft Beer over the L12 weeks

Total Beer – Draft and Packaged Volume Sales Breakdown in the On Premise in the L12 weeks

	Total Beer/FMB/Cider	
	Draft	Packaged
288oz EQ Share*	52.7%	47.3%
288oz EQ Share Chg	+0.5pp	-0.5pp
288oz EQ % chg	-6.7%	-8.6%
288oz/TDP	178.4	138.6

Source: CGA by NIQ OPM Data – Megacategory, Format, Volume, 288oz, Distribution, TDP, rolling 12 w/e 07/12/2025 vs YA

* share of total Beer/FMB/Cider

The East North Central region remains the main driver behind distribution and ROS gains, which benefited Draft Domestic Premium Beer's resilience over the quarter

Domestic Premium – Draft and Packaged Volume Sales Breakdown in the On Premise in the L12 weeks

	Domestic Premium	
	Draft	Packaged
288oz EQ Share*	45.4%	55.6%
288oz EQ Share Chg	+1.0pp	-1.0pp
288oz EQ % chg	-3.7%	-7.4%
288oz/TDP	92.1	58.0

Source: CGA by NIQ OPM Data – Subsegment, Format, Volume, 288oz, Distribution, TDP, rolling 12 w/e 07/12/2025 vs YA

* share of Domestic Premium

Draft gained share despite volume losses; targeted distribution in the Middle Atlantic could help lift Draft Craft Beer trends

Craft – Draft and Packaged Volume Sales Breakdown in the On Premise in the L12 weeks

	Craft Beer	
	Draft	Packaged
288oz EQ Share	82.4%	17.6%
288oz EQ Share Chg	+0.3pp	-0.3pp
288oz EQ % chg	-14.5%	-16,4%
288oz/TDP	90.0	19.7

Source: CGA by NIQ OPM Data – Subsegment, Format, Volume, 288oz, Distribution, TDP, rolling 12 w/e 07/12/2025 vs YA

* share of Craft Beer

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Packaged Import Beer's declining sales trend was driven by distribution losses and reduced RoS, contrasting with Draft's growth from a total US perspective

Import Beer – Draft and Packaged Volume Sales Breakdown in the On Premise in the L12 weeks

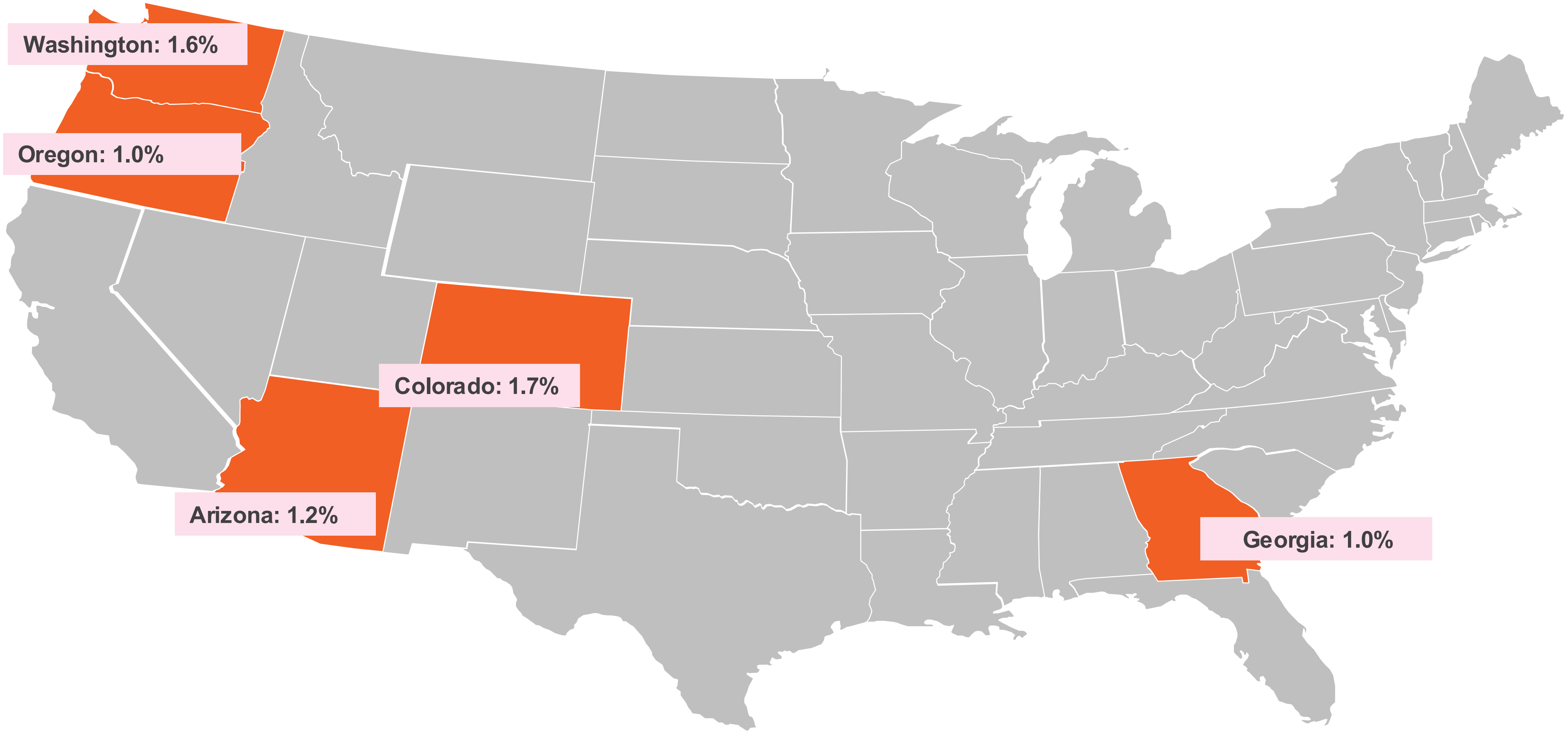
	Import Beer	
	Draft	Packaged
288oz EQ Share	42.6%	57.4%
288oz EQ Share Chg	+3.4pp	-3.4pp
288oz EQ % chg	+4.5%	-9.1%
288oz/TDP	75.8	51.9

Source: CGA by NIQ OPM Data – Subsegment, Format, Volume, 288oz, Distribution, TDP, rolling 12 w/e 07/12/2025 vs YA

* share of the Import Beer

Washington featured within the top 5 states for Non-Alcoholic Beer volume share, driven by expanded distribution and organic growth vs YA

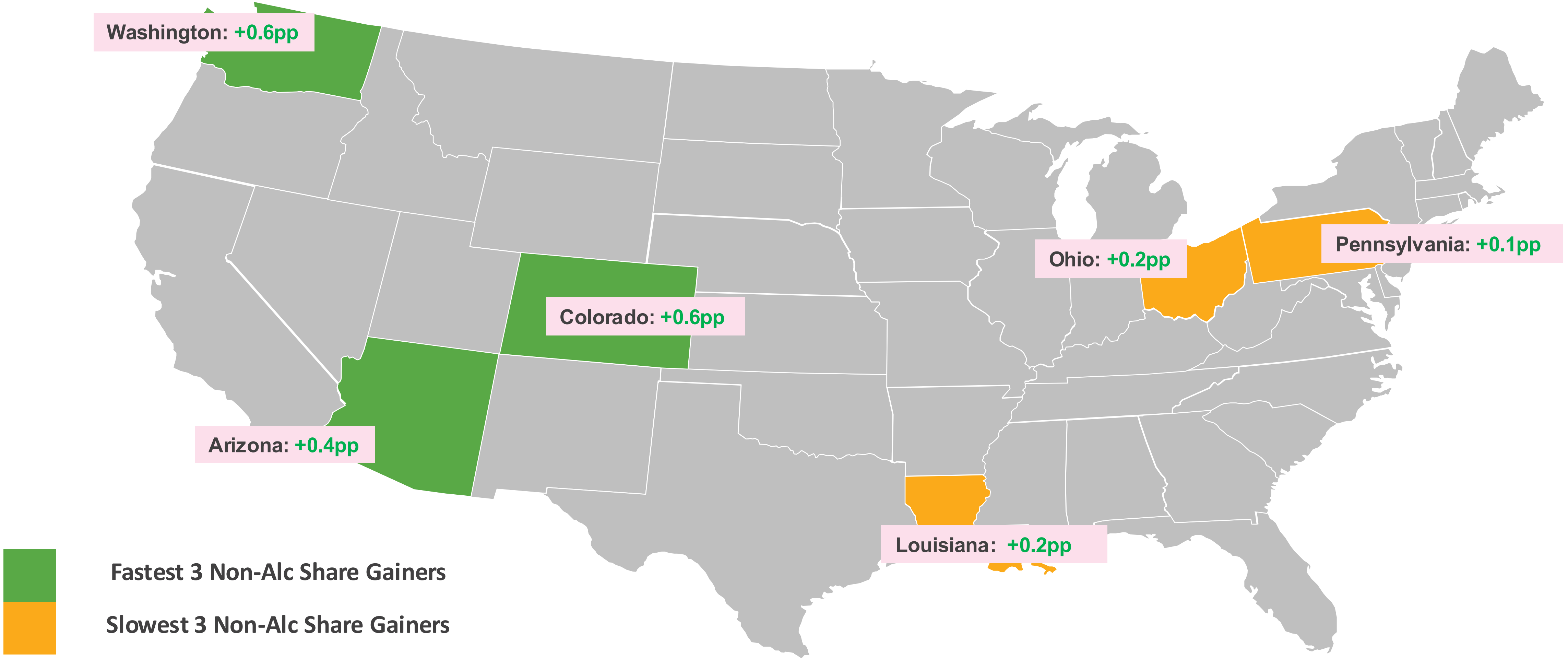
Top 5 States by Volume Share of Non-Alcoholic Beer of Total Beer/FMB/Cider



Source: CGA by NIQ OPM Data – Megacategory, Category, Volume, 288oz, rolling 12 w/e 07/12/2025 vs YA

Non-Alcoholic Beer saw share growth across all states; expanding distribution in slower-growth markets could unlock further upside

States where Non-Alcoholic Beer's volume share-gain of Total Beer/FMB/Cider was greatest/smallest vs YA



Source: CGA by NIQ OPM Data – Megacategory, Category, Volume, 288oz, rolling 12 w/e 10/05/2024 vs YA

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