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Draft Beer Gains Market Share in US Bars and Restaurants Amid Shifting Consumer Preferences

Growth in draft sales outpaces packaged beer as imports on tap rise and younger, more diverse drinkers enter the market

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Draft beer is gaining ground in bars and restaurants across the United States, according to new data from CGA by NIQ. The company’s latest On Premise Draft Opportunity report shows that draft beer has increased its share of total on-premise beer sales over

the past year. If current trends continue, draft could soon surpass packaged beer in value per outlet.

The report, released this week, combines outlet counts, sales velocity, and consumer research to analyze where draft beer is performing well and where it still lags. Over the last 12 months, draft beer accounted for 52.3% of total on-premise beer sales by volume, up nearly one percentage point from the previous year. This growth comes at a time when overall beer sales are under pressure, with U.S. shipments down so far in 2025 according to Beer Institute data.

CGA's findings indicate that more beverage alcohol venues now offer beer, with notable growth in neighborhood bars, sports bars, casual dining restaurants, and even quick service restaurants. While most venues that sell beer have draft options, there are still more outlets that only offer packaged beer. This gap represents a significant opportunity for both brewers and operators.

Jennifer Hauke, founder and CEO of Draftline Technologies, emphasized the importance of quality in draft beer. "We all realize there is no substitute for quality, and that as an industry we strive to dispense the 'best of the brewer's art.' This is what makes draft beer unique as we know that dispensing quality delivers the ultimate sampling tool and the most satisfying on-tap experience," she said in a statement on CGA by NIQ's website.

The report also highlights changes in consumer preferences within the draft segment. Imports on tap have seen strong value growth, with sales up 13.7% over the past year. In contrast, packaged imports declined by 1%. Consumers who are interested in imported brands are increasingly choosing to try them on tap rather than in bottles or cans.

Craft beer remains the largest segment for draft sales but experienced a 4% decline year-over-year as some drinkers shifted toward domestic super premium brands, which grew by 7.1%. The report suggests that this shift is not a retreat from draft itself but rather a sign that operators should carefully curate their tap lists by segment and style.

Demographic data from CGA shows that while draft beer drinkers still skew male and older, there is growing diversity among consumers. Women and people aged 21 to 34 have increased their share among draft drinkers. Younger guests are influenced by clear tap lists and branded touchpoints within venues.

A closer look at California reveals that the state outpaces national averages for draft volume share. In markets with a strong draft culture, well-managed tap programs can deliver higher sales velocity than comparable packaged offerings.

Despite these positive trends for draft beer in bars and restaurants, broader industry data points to ongoing challenges. The Beer Institute reports that U.S. beer shipments remain down year-to-date in 2025, with only brief monthly increases. The National Beer Wholesalers Association’s Beer Purchasers’ Index also remains low for craft beers and shows softer momentum for imports this summer. Distributors are carrying higher inventories heading into fall.

CGA’s report does not dispute these broader market challenges but points out that growth opportunities still exist within the on-premise channel—specifically for draft beer programs that are well-executed and properly maintained.

For operators looking to capitalize on these trends, CGA recommends adding taps strategically across craft, import, and domestic premium segments; following consumer interest in imports on tap; maintaining clean lines to ensure quality; pricing pints for value rather than just low cost; using clear tap lists to attract younger guests; and curating craft selections to focus on fresh core offerings.

The full On Premise Draft Opportunity report includes detailed year-over-year share changes by format and segment, dollar velocity comparisons when both formats are stocked together, rankings of effective in-venue marketing touchpoints, demographic breakdowns of draft drinkers, and state-level benchmarks such as those from California.

For breweries and distributors navigating a challenging market environment, CGA’s findings suggest that a strong presence on tap can help offset slower packaged sales and build brand loyalty among consumers who frequent bars and restaurants. As younger and more diverse drinkers show increased interest in draft options—and as

imports gain traction—operators who invest in quality tap programs may be best positioned to capture future growth.