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Spirits-based canned cocktails became a regular part of U.S. alcohol buying in 2025

The category added more than 10 million cases to nearly 80 million as repeat purchases replaced novelty-driven demand

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Spirits-based ready-to-drink cocktails kept gaining ground in U.S. retail last year and into early 2026, with retailers, distributors and suppliers saying the category is moving from a fast-rising trend into a regular part of how many Americans buy alcohol.

The category grew by more than 10 million cases in 2025 to nearly 80 million cases, according to Impact Databank, as canned and bottled cocktails continued to attract shoppers looking for convenience, portability and familiar flavors. The biggest gains came from products built around simple combinations such as vodka and iced tea, spirit-and-seltzer drinks and packaged versions of classic cocktails.

Retailers in both large and small markets said demand has remained strong. Ian Aker, owner of Summerland Wine & Spirits in Summerland Key, Fla., said spirits-based RTDs rose 27% in sales at his stores in 2025 compared with 2024. In the first quarter of 2026, he said, they were up another 31% from the same period a year earlier. His family also owns Florida Cork and Bottle in Indian Harbour Beach.

In Delaware, Jeff Kreston, co-owner of Kreston Wine & Spirits stores in Wilmington and Middletown, said customers have become more familiar with the category and are buying it more steadily. He said some brands that were hard to keep in stock last year, including Cutwater, have become easier to source, reducing the rush buying seen earlier while keeping repeat purchases intact.

At the distribution level, Southern Glazer's Wine & Spirits said the market is still expanding even as the earliest phase of explosive growth begins to cool. Zach Poelma, senior vice president of commercial intelligence at Southern Glazer's, said household penetration has started to level off after several years of sharp gains, but spending per trip and purchase frequency continue to rise. That pattern suggests RTDs are becoming part of regular drinking habits rather than fading after a novelty phase.

The market remains concentrated. The 32 leading spirits-based RTD brands account for 74 million cases, or 93% of the category. Eleven brands now sell more than 1 million cases each and together represent more than 64 million cases, about 80% of total volume.

High Noon remains the largest spirits-based RTD brand in the country at 24.1 million cases. But after years of uninterrupted growth since its 2019 launch, the brand declined 3% in 2025. Gallo, which owns High Noon, described that result as part of a more disciplined approach as the category matures. The company is continuing to push its message around real spirits, real juice and no added sugar while trying to reach younger legal-age drinkers through social media, influencer campaigns and college sports partnerships.

High Noon recently introduced Transfusion, a limited release tied to golf culture through a campaign with Good Good Golf. Gallo said it is using finite allocations by market to create urgency at retail. The company also plans renewed attention on its

tequila-based High Noon line this year, including a new variety 12-pack.

Even with High Noon slipping slightly, Gallo has found fresh growth elsewhere in RTDs. VMC rose 97% in 2025 to 1.37 million cases and has become the top RTD brand in Hispanic grocery chains, according to the company. Gallo said VMC has helped bring Mexican import beer drinkers into the RTD segment and encouraged trade-up behavior within those stores. The company plans new flavors, new multipacks and updated packaging for VMC through the rest of this year.

Gallo also scored an early hit with Lucky One Lemonade and Tea, a non-carbonated line created with Barstool Sports founder Dave Portnoy. In its first year on the market, Lucky One passed 1 million cases. The brand donates part of sales to dog rescue efforts and uses Portnoy’s rescue dog Miss Peaches as its mascot.

The strongest growth among major brands came from Surfside, owned by Stateside Brands. The vodka-and-iced-tea line climbed 124% in 2025 to 10.5 million cases, making it the second-largest spirits-based RTD brand in the U.S. Stateside said Surfside added 6.2 million cases last year alone. The brand has grown from fewer than 1,000 cases in 2021 to one of the largest labels in beverage alcohol within four years.

Stateside plans to expand Surfside further in bars and restaurants this year, with golf courses a key target. The company is also increasing sports partnerships and marketing aimed at Hispanic consumers across the country. It recently introduced Super Lyte, a non-carbonated vodka-based RTD at 4.5% abv sold in sports drink-inspired flavors including Fruit Punch, Orange, Lemon Lime and Blue Chill.

Cutwater, owned by Anheuser-Busch, was another major winner. The canned cocktail brand rose 61% in 2025 to 6.5 million cases, making it the third-largest spirits-based RTD label in the country. Anheuser-Busch said social media attention helped fuel that growth and called Cutwater one of the fastest-growing alcohol brands across beer, wine and spirits last year.

Anheuser-Busch also continues to build Nütrl, its vodka soda brand, which increased 17.5% to 3.2 million cases in 2025. The company has tied Nütrl to the 2026 FIFA World Cup as the tournament’s official hard seltzer sponsor.

Carbliss, one of the few independent companies near the top of the category, grew 50% last year to 4.2 million cases. The brand sells vodka- and tequila-based seltzers in fruit flavors and has expanded into Arizona, New York and Georgia. It is now sold in 22 states. Co-founder Adam Kroener said future innovation will be selective rather than broad, with new products introduced only when they fit both the brand and consumer demand.

Molson Coors' Monaco rounded out the top five with 3.3 million cases, up 6.5%. Monaco has built much of its business through convenience stores and single-can sales. Molson Coors acquired Atomic Brands, Monaco's parent company, and said it sees room to build on Monaco's strength in that channel while using its sales force to widen distribution.

Beyond the top five, several other brands above or near the million-case mark are adding momentum to the segment. The Finnish Long Drink grew nearly 20% to 3.23 million cases in 2025 before Mark Anthony Brands acquired it this spring. Sun Cruiser, a vodka-and-iced-tea cocktail from Boston Beer Co., surged 320% to just under 3.1 million cases.

Sazerac's BuzzBallz spirits-based offerings rose nearly 50% to 2.6 million cases as consumers continued buying portable single-serve cocktails at lower price points. Proximo's Jose Cuervo Margaritas fell 9.5% to 2.1 million cases, showing that not every established player is keeping pace with newer entrants.

Just below that tier are brands still pushing toward scale. Suntory Global Spirits' On the Rocks bottled cocktails rose 21.5% to 963,000 cases last year as the company broadened its canned lineup alongside bottled offerings. Suntory also reported rapid U.S. growth for -196, which increased 218% to more than 500,000 cases off a small base.

Mom Water continued its steady climb as well, reaching nearly 900,000 cases in 2025 from just 38,000 four years earlier. The brand positions itself around unsweetened "spirit water" drinks for consumers seeking lower-sugar options and less sweetness than many mainstream RTDs offer.

Large spirits companies are still active lower down the rankings with extensions tied to established liquor names such as Crown Royal, Jack Daniel’s, Absolut and Jameson. Those products often use simple spirit-and-soda or spirit-and-cola formulas meant to transfer recognition from core liquor brands into convenient packaged formats.

Poelma of Southern Glazer’s said those simpler builds may have staying power because they fit everyday occasions and are easy for consumers to understand and repurchase. He said long-term winners are likely to be brands that combine familiarity with measured innovation rather than chasing novelty alone.

That appears to be where much of the category is heading now: less driven by first-time trial than by repeat buying patterns across grocery stores, liquor shops and convenience outlets. Retailers say shoppers increasingly know what they want when they walk into stores, whether that means tea-based drinks like Surfside and Sun Cruiser, stronger cocktail-style cans like Cutwater and Monaco or lighter spirit-and-seltzer options led by High Noon.

The result is a category that is still growing quickly but is also becoming more settled and competitive. New products continue to arrive, but shelf space is increasingly shaped by velocity, repeat purchases and channel fit rather than novelty by itself. In that environment, suppliers are putting more emphasis on targeted innovation, sports tie-ins, cultural marketing and package formats designed for specific occasions such as golf outings, convenience-store stops or at-home gatherings.