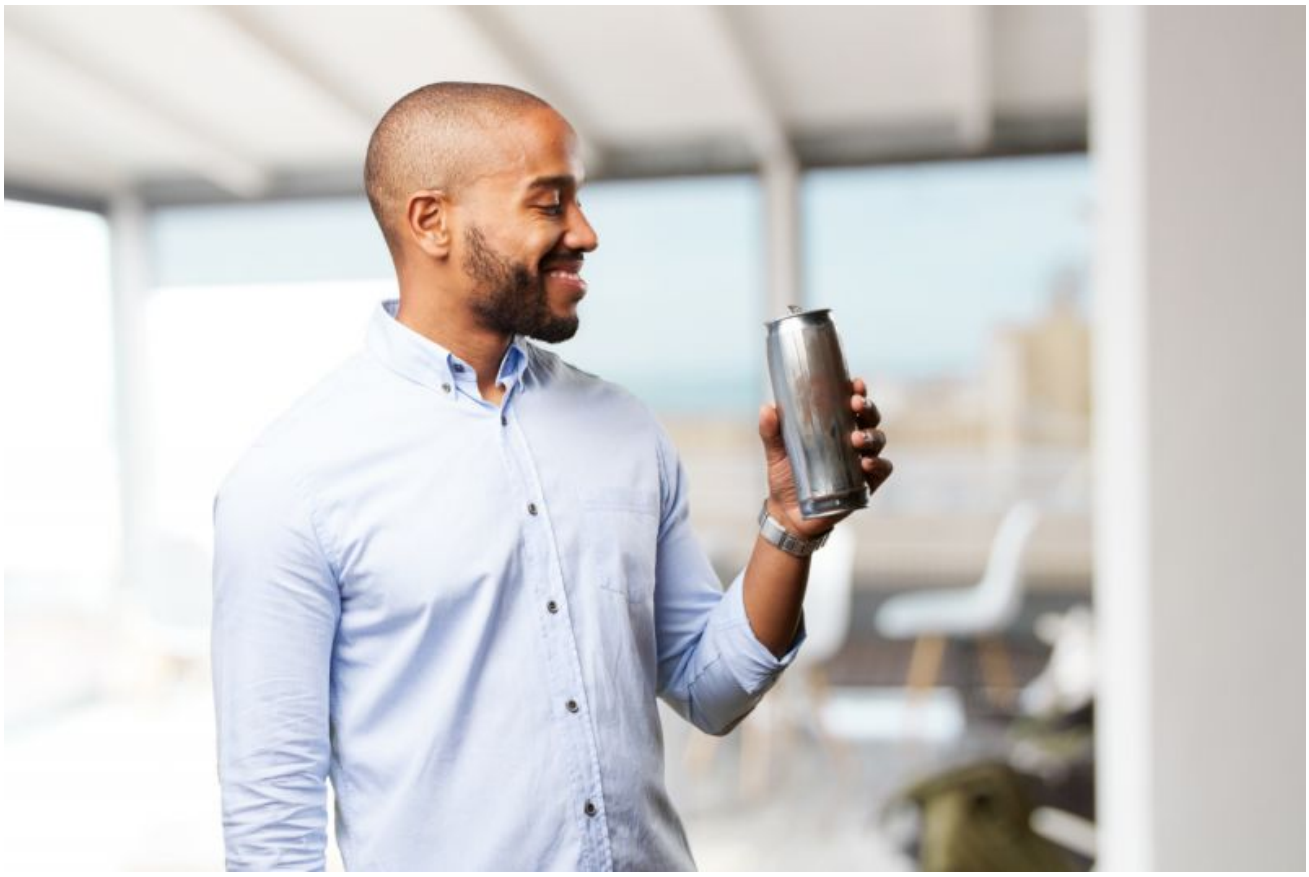
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Spirit-Based RTD Cocktails Added More Than 10 Million Cases in the United States in 2025

Surfside surged 124% to become the nation’s second-largest brand as familiar vodka teas, seltzers and classic cocktails drove demand

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Spirit-based ready-to-drink cocktails added more than 10 million cases in the United States in 2025, pushing the category to nearly 80 million cases, according to new figures from Impact Databank reported by The Drinks Business. The gains show that

RTDs are moving deeper into the mainstream of the American alcohol market, with growth led less by novelty flavors than by simple, familiar drinks such as vodka and iced tea, spirit-and-seltzer combinations and packaged versions of classic cocktails.

The numbers suggest that consumers are treating these products less as a short-term trend and more as a regular part of how they buy and drink spirits. That shift matters across the beverage business because stronger demand for spirit-based RTDs can reshape product mix, margins and sales strategy for suppliers, distributors and retailers in the country’s largest alcohol market. It may also intensify competition for shelf space with beer, wine and other convenience-led drinks.

The market remains heavily concentrated. The 32 leading spirit-based RTD brands accounted for 74 million cases, or 93% of the category, while 11 brands each sold more than 1 million cases. Together, those 11 brands represented more than 64 million cases, or about 80% of total U.S. volume.

High Noon, owned by Gallo, remained the largest brand with 24.1 million cases sold. Even so, its volume fell by 3% last year, showing that leadership in the segment does not guarantee continued growth as more brands compete for consumers looking for easy-to-drink canned cocktails and hard seltzer-style offerings with spirits.

One of the strongest performances came from Surfside, owned by Stateside Brands. Its vodka-and-iced-tea drinks rose 124% in 2025 to 10.5 million cases, making it the second-largest spirit-based RTD brand in the country. The brand’s rise has been especially sharp: it grew from fewer than 1,000 cases in 2021 to one of the biggest labels in beverage alcohol in just a few years.

Cutwater, owned by Anheuser-Busch, increased sales by 61% to 6.5 million cases, ranking as the third-largest spirit-based RTD label in the United States. Anheuser-Busch also posted gains with Nütrl, its vodka-and-soda brand, which rose 17.5% to 3.2 million cases.

Carbliss was another major gainer. Its vodka- and Tequila-based seltzers climbed 50% to 4.2 million cases even though the brand was sold in only 22 states. That performance points to room for further expansion if distribution widens.

Molson Coors’ Monaco reached 3.3 million cases, up 6.5%, placing it among the notable growth brands in the segment. Gallo’s VMC RTD, which has found traction among Hispanic consumers, nearly doubled sales in 2025 to 1.37 million cases.

Packaged cocktails sold in bottles also showed momentum. Sazerac’s BuzzBallz lines rose 50% to 2.6 million cases as consumers continued buying portable single-serve cocktails at lower price points. Not every established product advanced, however. Proximo’s Jose Cuervo Margaritas fell 9.5% to 2.1 million cases.

Another brand to watch is Suntory Global Spirits’ On The Rocks bottled cocktails. Sales rose 21.5% last year to 963,000 cases from a smaller base, suggesting continued interest in premium-positioned prepared cocktails that offer recognizable serves without requiring mixing at home or at gatherings.

The latest figures point to a category being shaped by convenience and familiarity rather than experimentation. Consumers appear to be rewarding products that replicate well-known drinking occasions in portable formats: iced tea with vodka, canned seltzers with spirits and ready-made Margaritas or other classic cocktails. For producers and retailers, that pattern could influence where investment goes next, from line extensions and packaging formats to pricing architecture and distribution priorities as companies try to capture more share in a fast-growing part of the U.S. drinks market.