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Canned cocktails gained 21.8% in control states in May

New NABCA data showed ready-to-drink sales kept rising as overall spirits weakened and Scotch posted a sharp decline

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Canned cocktails kept gaining ground in U.S. control states in May, while Scotch whisky posted one of the sharpest declines among major spirits categories, according to new data from the National Alcohol Beverage Control Association.

The trade group, which tracks 18 control markets where state agencies oversee wholesale or retail alcohol sales, said the cocktails category, which includes canned ready-to-drink products, rose by 21.8% in volume from May 2025 and by 21.7% in value. The increase was still strong, though slower than in April, when both volume and value were up by about one-third.

At the same time, Scotch continued to weaken across nearly all of those markets. NABCA said Scotch sales fell by 8.1% in volume and by 7.9% in value in May. Oregon was the only control state to post growth for the category.

The figures point to a market that is shifting toward convenience-led products even as traditional spirits face pressure. For drinks companies, distributors and retailers, that trend could shape shelf space, pricing and marketing decisions across the broader beverage business, especially as canned cocktails compete more directly with spirits, beer and wine for casual drinking occasions.

Tequila also slipped in May, though by less than Scotch. NABCA reported a 0.2% decline in tequila volume and a 4.2% drop in value. Outside cocktails, cachaça was the only spirits segment to record growth, rising by 10.4% in volume and by 21.5% in value, though it remains the smallest category in the data set.

Among other major segments, Canadian whisky posted the steepest volume decline after Scotch, down by 7.4%. Gin fell by 6.9%, brandy and Cognac by 6.7%, rum by 6.5%, and Irish whiskey by 5.9%. In value terms, Canadian whisky recorded the largest drop of any spirits category, falling by 9.5%. Rum declined by 7.3%, while Irish whiskey and brandy/Cognac each fell by 6%.

Overall spirits sales in control states were lower in May. Total spirits volume dropped by 1.7%, while value fell by 4.4%. Over the 12 months through May 2026, volume was down by 1.1% and value declined by 3.1%.

The weakness was broad across individual states. Only Michigan, Mississippi, Iowa and North Carolina posted growth in total spirits volume during the month. By value, Mississippi was the only state to show an increase, with sales up by 5.6%.

Sales were also softer in bars and restaurants. In the on-premise channel, spirits volume declined by 3.1% in May and value fell by 5.2%, with most states reporting decreases. Idaho, Michigan and North Carolina were the exceptions. Over the past 12 months, on-premise spirits sales edged up by 0.4% in volume, but value slipped by 1.7%.

The latest numbers add to signs that ready-to-drink products remain one of the few clear growth areas in U.S. spirits, even as many established categories lose momentum in state-controlled markets. That matters beyond distilled spirits alone because sustained RTD growth can influence how beverage companies allocate investment across product development, packaging and distribution as consumers continue to shift spending toward portable and lower-effort options.