vinetur

Canadian Whisky Sales Fell 8.5% Across U.S. Control States in July

NABCA said the category was the only major spirits segment to decline in every market it tracked.

Wednesday, September 2, 2026



Canadian whisky sales fell sharply in U.S. control states in July, posting the weakest result of any major spirits category in the National Alcohol Beverage Control Association’s latest monthly data and standing out as the only category to decline across every market in the panel.

NABCA’s figures for July 2026 show Canadian whisky volume down 8.5% from a year earlier in retail sales, measured in nine-liter case equivalents. Value fell 8.4% over the same period. Over the 12 months through July, the category was down 7.4% in volume and 7.9% in value, pointing to a sustained decline that worsened in the most recent month.

The monthly drop was 1.1 percentage points deeper than the rolling 12-month volume decline. That gap suggests the category weakened further during the summer rather than simply continuing at the same pace. The fact that value fell slightly more than volume over the 12-month period also points to pressure on pricing or sales mix, with lower-priced products or heavier discounting likely playing a role. NABCA’s public report does not provide absolute category pricing data, so that shift cannot be measured directly.

The slump came as the broader control-state spirits market was almost flat in volume but weaker in dollars. Across all spirits categories, July sales in the 18 control markets covered by NABCA rose 0.3% in volume to 5,538,845 nine-liter cases, while retail value fell 2.2% to $1.143 billion. That left an implied price and mix effect of about -2.5%, meaning the market sold slightly more product but generated less revenue per case equivalent.

The broader market’s small volume gain did not reflect a rebound in traditional distilled spirits. Growth was driven mainly by the cocktails segment, led by canned ready-to-drink products. That category rose 19.5% in July volume and 18.5% in value, far outpacing the rest of the market and offsetting declines in several established categories.

Against that backdrop, Canadian whisky’s performance was notably weaker than other whiskies and major brown spirits. Scotch whisky posted a 3.2% gain in July volume, while tequila rose 3.1%. Irish whiskey edged up 0.4%. Cordials and cachaça also grew during the month. After Canadian whisky, the next-largest category declines were Cognac and brandy, both down 6.4% in volume and value, followed by gin, rum and American whiskey.

The 12-month picture was also negative for Canadian whisky. NABCA's rolling data show the category lost 7.4% in volume and 7.9% in value through July, a steeper contraction than the overall control-state market, where total spirits volume slipped 0.6% and value declined 2.6%. Only cocktails, tequila and cachaça managed volume growth over the full 12-month period, and only cocktails and cachaça also increased in value.

The data cover states and jurisdictions where alcohol sales are run through public control systems, not the entire U.S. market. That means the results are an important indicator of sales conditions but should not be read as a national total. NABCA also said July results were affected by several market-specific disruptions. Michigan had four fewer selling days than in the same month last year. Utah changed the operating model for package agency stores, shifting from a traditional purchase model to a transfer-based system. At the same time, New Hampshire benefited from strong promotional activity tied to its Summertime Bonus Card Bonanza.

Those local factors had visible effects across the control-state panel. New Hampshire recorded a 21.5% jump in total spirits volume in July and a 21.1% gain in value, with NABCA linking the surge in part to promotions that helped categories such as Scotch and tequila. Michigan moved in the opposite direction, with total spirits volume down 10.5% and value down 11.3%. Utah posted declines of 7.4% in volume and 10.9% in value.

Even with those distortions, Canadian whisky's decline was broad-based rather than concentrated in a few jurisdictions. NABCA said the category fell in every control state in the panel, which makes the result more significant than a decline caused by one market's calendar or inventory issue. The report does not publish absolute Canadian whisky sales volumes or values for all calculations in open access, so the exact number of lost cases and dollars for the category cannot be derived from the public tables.

The broader category rankings help explain the pressure facing Canadian whisky. Vodka remained the largest spirits category in July by both volume and value, despite declines of 2.2% and 3.4%, respectively. American whiskey was the second-largest category by volume and third-largest by value, though it also fell, down 3.6% in volume

and 3.5% in value. Tequila ranked second by value and continued to gain volume, even as its value slipped 1.6%, showing that some categories are still moving more cases while facing their own price and mix pressure.

Scotch showed a similar pattern. Its 3.2% volume increase in July translated into only a 0.1% rise in value. That was still materially better than Canadian whisky, which lost ground in both measures and on a rolling annual basis. Irish whiskey, while growing only modestly in July, also outperformed Canadian whisky by avoiding a monthly volume decline.

The timing of the latest figures comes as trade tensions between the United States and Canada remain part of the wider business backdrop for alcohol producers. Industry coverage has noted that the two countries have imposed new tariffs on a range of goods and that most Canadian provinces removed U.S. alcohol from government-run retail systems beginning in 2025. NABCA's July report does not assign a cause for Canadian whisky's sales decline in U.S. control states, and the available data do not isolate the effect of trade policy from pricing, promotion, consumer demand or competition from other spirits and ready-to-drink products.

What the numbers do show clearly is that Canadian whisky is losing share in a market where growth is narrow and concentrated. Total spirits volume in control states rose only because cocktails expanded rapidly. Without that segment, the market would have shown broader weakness in July. Over the past 12 months, the same pattern held. Traditional spirits categories were mostly flat or down, while ready-to-drink products supplied the strongest source of expansion.

That pattern was visible in dollar terms as well. Cocktails accounted for a meaningful share of total case growth but a smaller share of total revenue, reflecting a lower average value per case than categories such as vodka, tequila and whiskey. For suppliers of Canadian whisky, that creates a difficult environment. The category is not only declining on its own terms, but also competing in a market where much of the growth is coming from products outside the conventional whiskey segment.

NABCA’s on-premise data pointed in the same direction. In bars, restaurants and other licensed venues within the control states, spirits volume rose 0.2% in July, but value fell 2.5%. For the 12 months through July, on-premise spirits volume increased 0.5% while value declined 1.7%. The separation between volumes and dollars in that channel mirrors the wider retail trend and suggests ongoing pricing and mix pressure across the market, including for whiskey categories that are already losing case sales.