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Prepared Cocktail Sales Slipped 1.0% in Early September

NielsenIQ found spirits-based ready-to-drink cocktails rose 14.4%, cushioning losses from flavored malt beverages and seltzers.

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U.S. prepared cocktails stayed below last year’s levels in the four weeks ending Sept. 5, but the category continued to hold up better in premium ready-to-drink products tied to spirits and wine, according to new NielsenIQ data.

NielsenIQ said dollar sales for prepared cocktails in the beverage alcohol category fell 1.0% from a year earlier, while case volume dropped 5.1%. On a weekly basis, dollar sales reached $315.2M, down 1.2% from the prior week. The report covered spirits-based ready-to-drink and ready-to-serve products, wine-based cocktails, flavored malt beverages and seltzers.

The latest numbers show a market that is cooling after the peak summer selling season, but not evenly across product types. NielsenIQ said consumers are still showing interest in convenience, flavor and variety, though that demand is increasingly concentrated in spirits-based and wine-based ready-to-drink cocktails rather than in traditional flavored malt beverages and hard seltzers.

That split was clear across the latest four-week period. Spirits-based ready-to-drink cocktails remained the main source of growth, with dollar sales up 14.4% and volume up 16.3%. Wine-based cocktails also posted gains, with dollar sales rising 6.2% and volume increasing 2.5%. By contrast, flavored malt beverages and seltzers continued to lose ground, with dollar sales down 8.7% and volume down 10.9%.

The data suggests that consumers are becoming more selective about the alcohol base in ready-to-drink cocktails. Higher-priced spirits-based products have continued to gain traction even as the broader prepared cocktails category softens. Wine-based cocktails also appear to be benefiting from that shift. At the same time, the longer decline in the flavored malt beverage and seltzer segment is still weighing on the total category, limiting gains elsewhere.

Among manufacturers, Mark Anthony Brands remained the largest by dollar sales, despite a 3.2% decline and a loss of 379,400 cases. Boston Beer held the No. 2 position, with dollar sales down 6.4% and volumes down by 522,700 cases. Anheuser-Busch ranked third and was one of the few top players to post growth, with dollar sales up 5.4% and case volume up by 7,200 cases. Gallo, in fourth place, recorded a 12.1% decline in dollar sales and lost 187,900 cases. Sazerac ranked fifth, with dollar sales up 8.2% and case volume up by 39,700 cases.

The fastest-growing manufacturers looked different from the ranking by size. Stateside Brands posted the strongest dollar growth, up 77.1%, with case gains of 430,000. Anheuser-Busch and Sazerac also placed among the top growers. NielsenIQ listed Moet Hennessy USA among the leading manufacturers by dollar growth, though it did not provide a comparable dollar growth figure and instead reported case volume growth of 2.6M. Geloso Beverage Group also made the top five, with dollar sales up 4.0% and case volume up by 20,700 cases.

At the brand level, White Claw remained the largest prepared cocktail brand by dollar sales, though sales fell 2.1% and volumes dropped by 183,800 cases. Twisted Tea was second, with dollar sales down 11.3% and volumes down by 394,300 cases. BuzzBallz ranked third and continued to grow, with dollar sales up 12.3% and case volume up by 55,100 cases. Cutwater Cocktail moved into the fourth spot with a 15.0% increase in dollar sales and volume gains of 89,300 cases. High Noon Cocktail ranked fifth, but its dollar sales fell 15.5% and case volume declined by 193,600 cases.

The brand growth rankings showed where momentum is building inside the category. Surfside Cocktail posted the strongest reported dollar growth at 46.3%, with case gains of 256,300. NielsenIQ also listed Super Lyte Cocktail among the top growth brands, though it did not provide a comparable dollar growth figure and instead reported case growth of 10.7M. Sun Cruiser Cocktail followed with dollar sales up 52.1% and volume up by 188,100 cases. Cutwater Cocktail and BuzzBallz also appeared among the fastest-growing brands, reinforcing the shift toward spirits-based offerings and away from older flavored malt beverage and seltzer products.

The latest report points to a prepared cocktails market that is still moving through a structural change rather than a simple seasonal slowdown. The broad category is shrinking in total dollars and cases, but the losses are being driven largely by weaker flavored malt beverages and seltzers, while spirits-based and wine-based cocktails continue to win share. That pattern is also showing up in the brand rankings, where newer or more premium cocktail lines such as Surfside, Sun Cruiser, Cutwater and BuzzBallz are posting gains even as some of the biggest established names remain under pressure.