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U.S. rum sales fell 20.9% since 2021, shedding 4.8 million cases

Producers say aged bottles are proving more resilient than white rum, but premium growth has not reversed the slide.

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The U.S. rum market has lost about 4.8 million cases since 2021, a drop of 20.9%, as the category continues to shrink even while producers of aged rum argue that premium, darker styles are holding up better than mass-volume white rum.

Impact Databank estimates total U.S. rum volume fell from roughly 23 million cases in 2021 to 18.2 million cases in 2025. The decline came during a broader slowdown in spirits demand, but rum has been among the categories under the most pressure. Industry executives say the retreat has been driven largely by weakness in the high-volume white rum business, especially in off-premise sales, while older and more

expensive expressions have shown more resilience.

The available public data do not provide a full national breakout showing exactly how much better aged rum is performing than white rum across the whole market. Still, several companies and distributors point to signs that drinkers are shifting toward darker, more premium bottles even as overall category volume falls.

Southern Glazer’s, one of the country’s largest alcohol distributors, said aged rum declined 6.1% over the past year, compared with a 7% drop for unaged rum. That gap is narrow, but it supports the view that the premium end of the rum business is contracting more slowly than entry-level segments. Executives in the trade say one reason is price. Aged rum often costs less than aged whiskey while still offering a product positioned for sipping, cocktails, and gifting.

That argument is central to how many rum suppliers are now talking about the category. Producers say some consumers are drinking less overall but are willing to spend more when they do buy. In that environment, brands are trying to present aged rum as a value alternative to Bourbon, Scotch, and Cognac, rather than competing only on volume or low price.

Destilería Serrallés, the producer of Don Q, has described the trend as a move toward quality over quantity, with darker rums benefiting from a broader push toward premium spirits. Don Q sells about 240,000 cases in the U.S., according to industry estimates. Other suppliers are making similar arguments as they try to win more attention from retailers, bartenders, and consumers who may not traditionally think of rum as a premium sipping category.

Maison Ferrand, whose Planteray label is one of the leading super-premium rum brands in the U.S., has said it does not plan to chase lower price points even as some shoppers trade down in other categories. Brown-Forman, which owns Diplomático, is also targeting consumers who already buy aged spirits, saying rum can offer similar complexity and sipping appeal. Diplomático sells around 55,000 cases in the U.S. and ranks among the better-known labels in the super-premium rum segment.

The super-premium tier remains small compared with the total rum market, but it is where many companies see room to grow. Other brands in the $25-and-up range include Pernod Ricard’s Bumbu at about 130,000 cases, Diageo’s Zacapa at roughly 60,000, and Bacardi’s Santa Teresa at around 32,000, according to industry estimates. Bacardi is also investing in older expressions such as Reserva Ocho and Gran Reserva Diez as it tries to strengthen rum’s place in the higher-end spirits business.

Campari America is pursuing a similar strategy with Appleton Estate. The company is focusing on age-statement rums and is trying to attract whiskey and Cognac drinkers. Impact Databank put the combined U.S. volume of Appleton Estate, Wray & Nephew, and J. Wray at 245,000 cases in 2025. In the first half of 2026, that portfolio posted 30% growth in control states, where alcohol distribution is run by public authorities. The figure is one of the strongest growth signals cited by rum marketers this year, but it covers only selected brands and only that part of the market. It does not represent total national rum sales.

Even newer brands are being built around the idea that the future of rum in the U.S. lies in higher prices and older stocks. Palm Republic, which launched in 2024, sells both unaged and aged rum and is positioned in the premium tier. Its founders say the most active part of the market is above the $30 retail level, where consumers are more open to experimentation and to blends with clear age or cask-finishing stories.

That strategy reflects a larger effort to change how rum is perceived in the U.S. For years, much of the category’s business came from lower-priced white rum used in mixed drinks. That still matters, but it also leaves the category exposed when off-premise demand weakens or when consumers cut back on routine purchases. By contrast, aged rum brands are trying to build demand around sipping, premium cocktails, and comparisons with other brown spirits.

The challenge is that this repositioning is happening while the overall category is still shrinking. Aged rum may be losing volume more slowly, but it is not immune to the same pressure affecting the rest of spirits. Distributor data still show declines, and the public figures available so far do not support a claim that premium rum is offsetting the market’s overall losses.

What the numbers do show is a category in transition. Between 2021 and 2025, the U.S. rum market gave up nearly one in every five cases it was selling. Within that decline, suppliers are betting that darker and older expressions can take a larger share of what remains, especially if they can persuade consumers that rum belongs in the same conversation as whiskey and other aged spirits. Producers from Bacardi and Campari to Brown-Forman and Maison Ferrand are now directing more of their marketing toward that message as they compete for shelf space and bar placements in a contracting market.