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Ready-to-drink cocktails keep U.S. spirits growing for a 31st consecutive year

The market is projected to reach 313.4 million 9-liter cases in 2026, but full-strength categories are forecast to decline again.

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The U.S. spirits market is still expected to grow this year, but that growth is coming mainly from ready-to-serve and ready-to-drink cocktails rather than from traditional full-strength categories.

According to the 2026 edition of The U.S. Spirits Market: Shanken’s Impact Databank Review & Forecast, total U.S. spirits volume is projected to reach 313.4 million 9-liter cases in 2026. That would mark the industry’s 31st consecutive annual increase. The report, covered by Shanken News Daily, says the headline growth masks continued weakness in the core spirits business. Excluding RTS and RTD products, the market is forecast to decline for the fourth straight year.

That divide is becoming more important across the broader beverage business. Growth in canned and bottled cocktails is reshaping product mix decisions for suppliers, distributors, and retailers, while weakness in core spirits may affect shelf space, pricing, and promotional plans across wine, beer, and liquor channels. The shift also matters because spirits have been taking share in some areas even as consumers face tighter budgets.

Impact Databank said spirits depletions, including pre-mixed cocktails, surpassed the U.S. wine industry's volume last year for the first time since 1979. But the picture changes when RTDs are removed. The report said core spirits have trailed wine in several industry channels so far this year, underscoring how much recent momentum now depends on convenience-oriented cocktail products.

Pre-packaged cocktails are projected to post another double-digit increase in 2026, after surpassing vodka in volume last year. That milestone was significant because vodka has long been one of the largest and most stable categories in the U.S. spirits business. The new ranking suggests that convenience, portability, and lower out-of-pocket price points are continuing to attract drinkers even as inflation and broader economic pressure weigh on household spending.

Retail data cited in the report point to broad softness across major core brands. In NIQ channels through September 19, total spirits excluding RTS and RTDs were down -3.9% year to date. Among the 10 largest spirits brands in the country excluding RTDs, Tito's Handmade Vodka remained the top-selling full-strength brand with 11.83 million 9-liter cases in 2025 and was roughly flat this year at +0.1% in off-premise channels. Most of the other largest labels were down. Fireball fell -4.5%, Smirnoff dropped -8.8%, Crown Royal declined -10.1%, Jack Daniel's was down -4.5%, Bacardi fell -6.6%, Jim Beam slipped -5.3%, New Amsterdam dropped -9.3%, Jose Cuervo declined -5.7%, and Captain Morgan was down -6.3%.

Even in categories that continue to draw investment and consumer interest, the report found growing pressure from price sensitivity. Tito's owner, Fifth Generation, remains the largest seller in full-strength spirits, and its move into tequila through the 2025 acquisition of Lalo has gained traction. Shanken News Daily reported that Lalo grew

247% in Circana channels in the 52 weeks ending September 6. Other tequila brands also posted gains at retail, including Heaven Hill’s Lunazul at +31%, Tequila Ocho at +23%, and Campari’s Espolòn at +12%.

Still, Impact Databank expects the tequila category as a whole to post a slight decline this year. The report attributes that expected drop to inflationary pressure and softness in higher-priced segments. That suggests some consumers are still buying tequila, but are becoming more selective or trading down as discretionary spending remains under strain.

Sazerac, the largest U.S. spirits company by volume, has continued to benefit from the RTD boom through BuzzBallz, which the report said is still delivering strong double-digit growth in 2026. At the same time, the company has also recorded gains in some core brands. Circana data for the 52 weeks ending September 6 showed Svedka up +29%, Buffalo Trace up +21%, Weller up +61%, Eagle Rare up +29%, and Colonel E.H. Taylor up +96%. Those gains, however, have not been enough to lift the bourbon segment overall. Impact Databank projects total U.S. bourbon volume will decline for the fourth consecutive year in 2026.

The report points to a market that is becoming more uneven. Strong growth in a handful of brands and in RTDs is helping offset weakness across large legacy categories, but that balance may become harder to maintain. Impact Databank said RTS and RTDs are expected to decelerate before the end of the decade, which would put more pressure on the industry in the medium term if traditional spirits do not recover.

Tariffs are another risk hanging over the market. The report said imported spirits in the U.S. remain exposed to potential tariff action, with possible effects across producers, distributors, and retailers. It also said retaliatory tariffs are still hurting American spirits exports. For beverage companies planning inventory, assortment, and pricing, that means the current shift toward RTDs is unfolding alongside a trade environment that could add new cost pressure to an already strained core spirits market.