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U.S. wine sales will fall below 300 million cases in 2026 for the first time in 20 years

Shanken forecasts a sixth straight annual decline, with wine-based cocktails reaching nearly 11% of volume by 2030.

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The U.S. wine market is on track to contract for a sixth straight year in 2026, with total volume expected to fall below 300 million 9-liter cases for the first time in two decades, according to the latest edition of The U.S. Wine Market: Shanken’s Impact Databank

Review & Forecast.

The report projects a 3.6% decline in total wine depletions this year. Even so, it says the pace of the downturn should ease after 2026, with average annual declines of less than 2% between 2026 and 2030. A main reason is the continued rise of wine-based ready-to-drink cocktails, a segment that the report says is helping offset part of the weakness in traditional wine sales.

That shift points to a broader change in the beverage business. For wineries, importers, distributors and retailers, the forecast suggests that future demand may depend less on conventional bottled wine and more on portable, flavored and convenience-driven products. It also indicates that beer and spirits companies with strong positions in ready-to-drink cocktails could keep gaining ground inside the wine category.

Shanken’s Impact Databank estimates that wine-based RTDs will account for nearly 11% of total U.S. wine volume by the end of the decade, up from 6% last year. The report says these products are finding an audience among younger legal-age drinkers, helped by new flavors, smaller package formats and easier portability. Some newer launches also feature little or no sugar, which producers are using to appeal to consumers looking for lower-sugar options.

The report argues that innovation will remain important because wine-based cocktails still compete in a crowded single-serve market dominated by larger spirits-based RTD brands. That competitive pressure is already drawing major beverage companies deeper into the segment.

Anheuser-Busch, which already holds a strong position in spirits-based RTDs and remains one of the largest brewers in the country, expanded its reach in wine-based cocktails with its acquisition of BeatBox late last year. According to Impact Databank, that deal made Anheuser-Busch the fifth-largest wine marketer in the United States by total volume. BeatBox is also sold in a malt-based version, and the brand’s combined U.S. volume reached 7.6 million cases in 2025, the report said.

BeatBox remains the leading wine-based cocktail brand in the country by volume, according to Impact Databank and NielsenIQ data cited in the report. The wine-based version of the brand sold 6.73 million 9-liter cases in the United States in 2025, and its retail volume was up 8.2% year to date through Sept. 19, 2026, in NielsenIQ-tracked channels.

Sazerac's BuzzBallz is narrowing the gap, the report said, as it continues to post strong double-digit gains this year. BuzzBallz, including its Chillers and Biggies lines, sold 2.25 million cases in 2025 and was up 29.8% year to date, according to the data. The report said Sazerac's mix of wine-based and spirits-based offerings has helped the brand build momentum as consumers continue to move toward RTD cocktails.

Other leading wine-based cocktail brands have shown more mixed performance. Rancho La Gloria, sold by Patco Brands, posted 1.28 million cases in 2025, but retail volume was down 6.8% year to date. Daily's, from American Beverage Corp., sold 0.86 million cases and was down 12.8%. Big Sipz, also from Patco Brands, sold 0.73 million cases, though the report did not provide a standard year-to-date growth figure and instead marked its recent trend as sharply positive.

Beyond the top five brands, Shanken News Daily said several newer products are recording fast growth in 2026. Those include Gallo's Vibe and Beach Juice, Trinchero's Atomic Boss, The Wine Group's Fuel by Franzia and the wine-based version of Molson Coors' Monaco RTDs. The activity shows how producers from across the beverage industry are using the segment to test new formats and attract drinkers who may not be buying traditional wine.

The U.S. wine market's slide below 300 million cases is a notable threshold. Shanken's forecast says it will be the first time industry volume has dropped under that level in 20 years. At the same time, the report suggests that the decline is no longer being shaped only by weaker demand for legacy wine products. It is also being reshaped by where consumers are still willing to spend: in newer RTD formats that blur the line between wine, spirits and flavored malt beverages.

That matters well beyond wineries. Exporters and domestic suppliers that rely on the U.S. market may face a more selective consumer base and a retail environment that favors convenience, flavor variety and single-serve packaging. For beverage companies deciding where to invest, the forecast adds to evidence that the strongest growth in alcohol is increasingly tied to format innovation rather than to traditional category lines.