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Alcohol consumption rose 1% outside the U.S. and China in the first half of 2026

IWSR data showed a 1% decline across 21 major markets after demand fell 4% in the U.S. and 3% in China

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Alcohol consumption in 21 major markets fell 1% in the first half of 2026 from a year earlier, but the picture changed sharply once the United States and China were removed from the total, according to data released by IWSR on Tuesday, November 10.

IWSR said its first-half 2026 dataset covers 21 markets that account for 76% of global beverage alcohol consumption. Across that group, total beverage alcohol volumes declined 1% from the first half of 2025 to the first half of 2026. Excluding the U.S. and China, however, consumption rose 1%, supported by growth in Brazil, India, Colombia, South Africa and the United Kingdom.

The report points to a widening divide between the world's two largest alcohol markets and many other countries. In the U.S., total beverage alcohol consumption fell 4%, led by declines in beer, down 4%, still wine, down 6%, and ready-to-drink products, down 4%. In China, total beverage alcohol consumption fell 3%, with beer down 2%, still wine down 9% and national spirits down 12%.

Outside those two markets, several countries posted stronger results. India recorded 10% growth in total beverage alcohol volume, led by full-strength beer, up 16%, RTDs, up 12%, and Indian whisky, up 4%. Brazil grew 3%, with gains in full-strength beer, up 3%, non-alcoholic beer, up 11%, and RTDs, up 9%. Colombia rose 9%, driven by full-strength beer, up 8%, non-alcoholic beer, up 11%, and RTDs, which jumped 110%.

South Africa posted 5% growth, supported by full-strength beer, up 5%, RTDs, up 4%, and still wine, up 3%. The U.K. grew 2%, helped by full-strength beer, up 2%, non-alcoholic beer, up 22%, and RTDs, up 25%.

At the category level, the data showed that global alcohol demand remained under pressure in some of the industry's largest segments. IWSR said three categories accounted for much of the volume decline across the 21 markets: full-strength beer, which was down by less than 1% but had an outsized effect because of its scale; still wine, down 4%; and national spirits, down 11%.

Some categories still expanded. Non-alcoholic beer grew 8% across the 21 markets. Indian whisky increased 4%, and prosecco rose 3%. Those gains suggest that consumers are not moving in one direction across all types of alcohol, but are shifting spending among categories and price points.

For wine producers, the still wine data was among the clearest signs of pressure. The category fell 4% across the 21 markets, with sharper declines in the U.S. and China. That contrast with prosecco's 3% growth may add to questions for the drinks sector about where demand is holding up and where producers may need to adjust product mix, export plans and commercial forecasts. Beer and spirits companies may face similar decisions as weakness in the U.S. and China continues to diverge from trends in parts of Latin America, Africa and Asia.

IWSR said the first half of 2026 was still weak in absolute terms, but better than the same period a year earlier. The 1% decline in total beverage alcohol volume was an improvement from the 2% drop recorded from the first half of 2024 to the first half of 2025.

Seven markets reported year-over-year growth in the latest period: Brazil, Mexico, India, the U.K., South Africa, Colombia and Thailand. Six markets posted smaller declines than they had a year earlier: Germany, Japan, Italy, France, Poland and Australia. Spain, Taiwan and the U.S. declined at roughly similar levels to the prior year, while China, Russia, Canada, the Philippines and the Netherlands saw steeper declines.

IWSR said broader moderation trends and the growing use of GLP-1 drugs are weighing on alcohol consumption globally, but it argued that those factors alone do not explain the larger drops in the U.S. and China. The group pointed to slower economic growth and structural pressures in China, including a prolonged property crisis and an aging population. In the U.S., it said tariffs, inflation pressure and broader economic uncertainty had weighed more heavily on consumers.

In a statement released with the data, IWSR President and Managing Director Marten Lodewijks said moderation was becoming a structural feature of the market, even as growth persisted in countries such as India and Brazil. He also said the latest figures showed a growing disconnect between consumers in the U.S. and China and those in the rest of the world.

Because the U.S. and China remain the industry's largest markets by volume and value, the split matters well beyond those two countries. For beverage companies, suppliers and distributors, the divergence may influence where they direct investment, which

categories they prioritize and how they plan for 2027. The data also suggests that weakness in still wine and national spirits is not being mirrored evenly across all alcohol segments, with RTDs, non-alcoholic beer and some sparkling products showing more resilience in several markets.