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China’s national spirits consumption fell 12% in the first half of 2026

IWSR data showed Indian whisky rose 4%, highlighting a widening split in Asia’s two largest alcohol markets

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Consumption of national spirits in China fell 12% in the first half of 2026 from a year earlier, while Indian whisky consumption in India rose 4%, according to new market data released by IWSR on Tuesday, November 10. The figures point to sharply different

paths in two major Asian spirits markets at a time when the global alcohol industry is dealing with weaker demand in some large economies and continued growth in others.

The data came from IWSR's first-half 2026 review of 21 key markets that the company said account for 76% of global beverage alcohol consumption. The figures cited for China and India refer to changes in consumption volume from the first half of 2025 to the first half of 2026. IWSR did not publish absolute volumes in liters or cases for those categories, and it did not provide pricing or revenue data.

In China, the decline in national spirits was one of the steepest category drops identified in the report. IWSR said China's total beverage alcohol consumption fell 3% in the first half, with declines led by beer, down 2%, still wine, down 9%, and national spirits, down 12%. The company used the term national spirits for the category but did not equate it with all Chinese spirits or with the entire baijiu market.

In India, by contrast, total beverage alcohol consumption increased 10% in the same period. IWSR said that expansion was led by full-strength beer, up 16%, ready-to-drink products, up 12%, and Indian whisky, up 4%. The India figures suggest that spirits demand remained resilient even as consumption patterns shifted across other large markets.

The contrast between the two countries fits a broader pattern in the report. Across all 21 markets combined, total beverage alcohol consumption slipped 1% from the first half of 2025. When the United States and China are excluded, however, overall consumption for the remaining markets rose 1%, supported by gains in countries including India, Brazil, Colombia, South Africa and the United Kingdom.

That split matters because China and the United States are the world's two largest beverage alcohol markets. IWSR said their weakness is masking stronger performance elsewhere. In the United States, total beverage alcohol consumption also fell 4% in the first half, with beer down 4%, still wine down 6% and ready-to-drink products down 4%.

IWSR said several category trends were visible across the full group of markets. Full-strength beer declined by less than 1%, still wine fell 4%, and national spirits dropped 11%. Categories that grew included no-alcohol beer, up 8%, Indian whisky, up 4%, and

prosecco, up 3%.

The company said the first-half 2026 results still reflect a difficult market for alcohol producers, but they were better than the previous year’s performance. From the first half of 2024 to the first half of 2025, total beverage alcohol consumption across the same 21 markets fell 2%. IWSR said the smaller 1% decline in the latest period was helped by seven markets that posted growth and six others that reported smaller declines than a year earlier.

For spirits producers, the divergence between China and India is likely to draw close attention because it affects where growth may come from in Asia. A 12% drop in a major Chinese spirits category suggests continued pressure in a market that has long been central to global drinks companies. A 4% gain for Indian whisky, while more modest than India’s broader gains in beer and ready-to-drink products, still indicates ongoing expansion in a category with strong domestic importance and international interest.

IWSR linked the global slowdown in alcohol consumption to several pressures, including moderation trends and the spread of GLP-1 drug use. But the company said those factors do not fully explain the larger declines in the United States and China. It pointed to weaker economic conditions in China, including slower growth expectations, a prolonged property crisis and an aging population. For the United States, it cited tariffs, inflation pressure and broader economic uncertainty.

Marten Lodewijks, IWSR’s president and managing director, said in the release that global beverage alcohol consumption became more divided by both market and category in the first half of 2026. He said moderation is becoming a structural feature of the market, while growth is continuing in countries such as India and Brazil. He also said larger, established categories such as still wine and full-strength beer continued to weigh on total beverage alcohol volumes, even as growth in ready-to-drink products and no-alcohol beer helped offset some of the decline in many markets.

The report did not offer a quarterly breakdown for China’s national spirits or India’s whisky, and it did not compare the first half of 2026 with the immediately preceding six-month period. Its comparisons were made only against the same period a year

earlier, which makes the Chinese and Indian figures directly comparable on that basis.

The data underscore how uneven the alcohol market has become. In China, one of the industry’s most important countries by scale, a double-digit drop in national spirits added to broader weakness in beer and wine. In India, where overall beverage alcohol demand rose strongly, whisky continued to advance alongside faster growth in beer and ready-to-drink products. For producers, distributors and investors, the message from IWSR’s first-half figures is that Asia’s two large consumer markets are moving in different directions, and category-level performance can diverge sharply even within the same region.