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Five brands captured 66% of growth in U.S. adult non-alcohol beverages

Brewbound said the figures show an expanding category whose gains are flowing mainly to scaled brands with broad distribution

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The five largest brands in the U.S. adult non-alcohol beverage market accounted for 66% of the category's year-over-year retail growth, according to a Brewbound report published on Tuesday, November 24, underscoring how heavily expansion is concentrated among a small group of players.

Brewbound reported that the finding points to a market that is growing, but not evenly. Outside the top five brands, more labels are losing ground than gaining it, a sign that the segment's momentum is not lifting the full field in the same way. That matters for companies across beer, wine, spirits and related beverages that are looking to diversify into alcohol-free products, because the headline growth of the category may not translate into broad-based opportunity for every operator.

The report described the category's gains as part of a wider shift in consumer preferences toward beverages seen as healthier and lower in alcohol. It said leading brands have been able to benefit by improving flavor and presentation and by appealing to consumers who want sophisticated alternatives without giving up the social aspect of drinking. In that view, the strongest performers are not only selling abstinence or moderation, but also trying to match the experience and image that consumers associate with traditional adult beverages.

Brewbound also said the largest brands have strengthened their position through wider availability at key retail outlets and through established visibility in both digital and physical channels. That combination can create advantages that smaller brands struggle to match. Stronger shelf placement, broader distribution and better-known branding can make a major difference in a category where many consumers are still discovering products and deciding which ones are worth repeat purchases.

The concentration of growth among a handful of brands adds a note of caution to the optimism that has surrounded the adult non-alcohol segment. The market has drawn attention from brewers, distillers and other beverage companies as consumers increasingly embrace moderation, but the new figures suggest that simply entering the category is not enough to secure meaningful growth. The leaders appear to be capturing a disproportionate share of consumer attention and retail sales, while many smaller or newer brands face a harder path.

The report did not suggest that demand for alcohol-free options is weakening overall. Instead, it pointed to a market in which consumers continue to move toward moderation, but are doing so selectively. Brands that have invested in taste, packaging, distribution and a clear identity appear to be benefiting the most from that shift. For beverage companies weighing product extensions or acquisitions in the space, the data suggests that the opportunity may be real, but also increasingly concentrated in brands with scale, visibility and the resources to stand out.

Brewbound said the trend is expected to continue as more consumers adopt lifestyles that put a greater emphasis on moderation. If that pattern holds, the adult non-alcohol category may keep expanding in the United States, even as competition within it remains uneven and growth continues to flow mainly to a small number of established brands.