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Top U.S. cordial and liqueur brands posted 1% growth through September

The increase stood out in a slowing spirits market after gains from 99, Aperol, Cointreau and Soonhari offset declines elsewhere

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The largest cordial and liqueur brands in the United States are performing better than the broader spirits business as 2026 moves toward its final months, according to data published Tuesday, November 24, by Shanken News Daily.

Citing NABCA and Impact Databank figures, the report said the 10 biggest cordial and liqueur brands sold in U.S. control states posted a combined 1% volume increase in the nine months through September. Together, the group accounted for about 9.4 million 9-liter cases based on 2025 U.S. depletion volumes. The gain was modest, but it stood out in a spirits market that has been under pressure.

The improvement was not broad-based. Growth from a smaller group of labels, including 99, Aperol, Cointreau and Soonhari, offset declines at several larger brands. 99, owned by Sazerac, remained the category leader by size at 1.89 million cases in 2025 and posted 7.9% growth in control states this year through September. Soonhari Soju, sold by Spirit of Gallo, showed the fastest growth rate in the top 10 at 30.9%, with U.S. volume of 467,000 cases in 2025.

Other high-volume brands lost ground in the same control-state measure. DeKuyper, the second-largest brand in the segment with 1.73 million cases in 2025, was down 4.7%. Baileys, at 1.28 million cases, fell 3.0%. Grand Marnier declined 4.0%, and RumChata posted the steepest drop in the top 10 at 12.1%.

Part of the recent strength has come from cocktail trends that continue to support specific styles of liqueurs. Aperitivo drinking and Spritz cocktails have lifted demand for Aperol, Campari Group’s flagship Italian brand. In the United States, Aperol grew 5% to 633,000 cases in 2025, and it added another 3.2% in control states this year through September. Shanken News Daily said the brand is approaching 10 million cases globally and generates more than $3 billion in annual retail sales worldwide.

Campari, another brand in the same portfolio, has also benefited from interest in classic cocktails such as the Negroni. Its U.S. volume rose 1.8% to 246,000 cases in 2025. Campari Group has also introduced Sarti, a sweeter aperitif positioned for the Spritz occasion, a sign that suppliers are trying to build on demand rather than treat it as a short-lived trend.

Cointreau has gained from its place in Margaritas, one of the most widely ordered cocktails in the U.S. market. The French orange liqueur reached 476,000 cases in 2025 and posted 6.7% growth in control states this year through September, putting the half-million-case level within reach. Its parent company, Rémy Cointreau, has also pushed

into ready-to-serve products. This year it expanded Cointreau Citrus Spritz nationally in Orange and Blood Orange and Lemon and Lime versions, both at 10.5% alcohol by volume and priced at $20 for a 750-milliliter bottle.

Coffee-flavored liqueurs have held on to their place in cocktail culture as the Espresso Martini remains popular. Kahlúa, owned by Pernod Ricard, rose 1.1% to 933,000 cases in 2025. Even so, the brand was down 1.7% in control states this year through September, showing the uneven nature of the category's recovery. Pernod Ricard has tried to widen Kahlúa's appeal with extensions such as Kahlúa Dunkin' Caramel Swirl Cream.

Jägermeister presents a similar split between recent national growth and this year's control-state data. The German herbal liqueur climbed 8% in U.S. volume in 2025 to 950,000 cases after a sharp drop in 2024, but it was down 1.2% in control states through September. Mast-Jägermeister US has added Jägermeister Orange to broaden the brand beyond its traditional ice-cold shot occasion and into mixed drinks.

At Diageo, Baileys has focused on product development aimed at consumers looking for dairy-free options. Last spring, the company rolled out oat milk-based versions in Coffee Toffee and Cookies and Creamy flavors, adding to a non-dairy lineup that already included Almande. Diageo also launched a new Baileys advertising campaign in October across digital and social channels tied to the holiday season.

Outside the top 10 by volume, St-Germain has become one of the sharper growth stories in the segment. Bacardi's elderflower liqueur surged 43% to 256,000 cases in 2025, according to the report, helped by the popularity of the Hugo Spritz. Disaronno, at 345,000 cases in the U.S., has refreshed its packaging with a taller, lighter bottle and updated label colors while remaining above its pre-pandemic volume level.

For producers, distributors and retailers across the beverage business, the data points to where consumer demand is still expanding even as the larger spirits market slows. Brands tied to specific cocktails and drinking occasions appear to be gaining the clearest traction, which could shape assortment, shelf space and promotional spending in coming months for liqueurs and other alcohol categories that compete for the same occasions.