



Euromonitor
International

Spirits in the US

August 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Spirits Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Spirits

INDUSTRY PERFORMANCE

Economic Pressure Drives Polarisation between Value and Premium Choices

White Spirits Remains Dominant as Tequila Gains Ground through Innovation

Chart 2 - Producers Leverage Heritage to Justify Premium Pricing

Mindful Drinking and Heritage Branding Reshape Consumption Patterns

Chart 3 - Volume Sales 2020-2030

Chart 4 - Volume Sales by Category 2025

WHAT'S NEXT?

Agave-Based Brands Leverage Provenance to Offset Declining Volumes

Non Alcoholic Spirits Attracts Health-Focused Consumers with Rapid Growth

Packaging Innovation and Compliance Shape Future Brand Strategies

Chart 5 - Forecast Volume Sales 2020-2030

Chart 6 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Tito's Outpaces Smirnoff as Diageo Loses Ground to Sazerac and Value Offerings

Chart 7 - Analyst Insight for Spirits

Chart 8 - Company Shares 2025

Chart 9 - Brand Shares 2025

CHANNELS

Food/Drink/Tobacco Specialists Channel Retains Lead

E-Commerce Attracts Premium and Non Alcoholic Spirits Shoppers Despite Barriers

PRODUCTS

Celebrity Partnerships and New Launches Expand Premium and Mindful Options

Chart 10 - Almave Humo Targets Mindful Drinking and Premiumisation Trends

ECONOMIC CONTEXT

Chart 11 - Economic Context for Spirits

Chart 12 - Real Gdp Growth 2020-2030

Chart 13 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 14 - Consumer Context for Spirits

Chart 15 - Population 2020-2030

Chart 16 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 17 - Key Industry Trends for Alcoholic Drinks

INDUSTRY PERFORMANCE

Buzzballz and Michelob Ultra Shape Polarised Spending Patterns

Chart 18 - Premium and Value Segments Outperform the Pressured Middle Market

Bero and Freixenet 0,0% Fuel Nolo Expansion among Younger Adults

Chart 19 - Nolo Beverages Broaden the Alcoholic Drinks Consumer Base in the Us

The Zero Proof Leverages Wellness Trends to Expand Occasions

Chart 20 - Volume Sales 2020-2030

Chart 21 - Volume Sales by Category 2025

WHAT'S NEXT?

Nolo Innovators Capture Growth as Moderation Reshapes Demand

Chart 22 - Forecast Volume Sales 2020-2030

Chart 23 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Anheuser-Busch and Millercoors Defend Positions as Rtds Drives Portfolio Shifts

Chart 24 - Analyst Insight for Alcoholic Drinks

Anheuser-Busch Acquisition of Beatbox Spurs Rtd Growth and Portfolio Diversification

Chart 25 - Company Shares 2025

Chart 26 - Brand Shares 2025

CHANNELS

Distribution Varies across Product Categories

Premium Products Drive Gradual Gains for E-Commerce in a Store-First Landscape

PRODUCTS

Nolo Launches Attract Younger Adults and Broaden Occasions

MARKET BACKGROUND

Legislation

Legal Purchasing Age and Legal Drinking Age

Drink Driving

Advertising

Smoking Ban

Opening Hours

On-Trade Establishments

TAXATION AND DUTY LEVIES

OPERATING ENVIRONMENT

Contraband/Parallel Trade

Duty Free

Cross-Border/Private Imports

ECONOMIC CONTEXT

Chart 27 - Economic Context for Alcoholic Drinks

Chart 28 - Real Gdp Growth 2020-2030

Chart 29 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 30 - Consumer Context for Alcoholic Drinks

Chart 31 - Population 2020-2030

Chart 32 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/spirits-in-the-us/report.