

## June 2025 US Beverage Alcohol Review

BW166 tracks the total beverage alcohol market in the US by analyzing 100% of the domestic tax-paid shipments into the US market, as well as all imports into the US market. We maintain monthly or annual data files back to prohibition. This is the only way to truly track the entire market as opposed to other services that may only represent 50% to 60% of the market.

The table below presents key facts from the past five years in the US market. Spirit-based RTDs have been the key driver of growth in the industry. Other than RTDs, the market has been flat to down in the low single digits on an annual basis over the past five years. The rate of growth of Spirits-based RTDs is slowing. Volume growth over the past 12 months has been 6.4 million cases compared to 25.6 million cases in the prior 12 months.

US Beverage Alcohol Market Trends					
	Beer Barrels	Wine 9L	Total Spirits 9L	Spirits ex RTDs 9L	RTD Share of Spirits
12 Months to June 2025	182.9	365.2	307.4	230.0	25.2%
12 Months to June 2019	203.3	411.6	235.3	224.0	4.8%
% Change Last 12 months	-5.1%	-0.7%	3.3%	1.5%	
5 Year % CAGR	-2.1%	-2.4%	5.5%	0.5%	

The chart below shows the rolling 12-month growth rates from June 2015 to June 2025. Prior to the Pandemic, growth rates varied from negative in the low single digits to positive in the mid-single digits. The pandemic disrupted supply chains, causing significant fluctuations in market trends. Tariffs are now disrupting trends, but the market is likely finding a new equilibrium. Overall trends for beverage alcohol are expected to be down in the low single digits moving forward.

