

Non-Alcoholic Spirits Market - Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Product Type (Whisky, Vodka, Rum, Gin, Others), By Sales Channel (Offline, Online), By Region & Competition, 2021-2031F

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Abstracts

The Global Non-Alcoholic Spirits Market is projected to expand significantly, rising from USD 435.82 Million in 2025 to USD 750.03 Million by 2031, reflecting a CAGR of 9.47%. These beverages are engineered to mimic the intricate aromas and flavor profiles of traditional liquors like whiskey or gin, despite containing little to no alcohol. The market is primarily propelled by a growing consumer focus on health and wellness, which favors moderation, alongside shifting social norms that prioritize inclusivity for non-drinkers in hospitality environments. Consequently, retailers and on-premise venues are increasingly stocking premium alcohol-free alternatives, enabling consumers to engage in social drinking rituals while maintaining their physical well-being.

Data indicates a rapid acceleration of this category within the wider beverage industry. According to the Adult Non-Alcoholic Beverage Association, sales of non-alcoholic spirits in off-premise channels surged by 86% year-over-year for the period ending December 2024. Despite this strong commercial growth, the sector encounters a major obstacle in attaining sensory equivalence with full-strength spirits. The technical challenge of mimicking the viscosity and thermal mouthfeel provided by ethanol remains a significant barrier, potentially hindering widespread adoption among consumers who expect the specific texture of traditional alcoholic drinks.

Market Driver

Consumption habits among Gen Z and Millennials are fundamentally transforming the

Global Non-Alcoholic Spirits Market. These younger demographics are prioritizing mental clarity and physical wellness, driving the rapid growth of the sober-curious movement. Unlike previous generations, these consumers actively demand sophisticated, alcohol-free options that support their moderation goals while ensuring social inclusion. This shift represents a structural lifestyle change rather than a fleeting trend, compelling brands to innovate with complex flavors and functional ingredients. According to a January 2025 report by Beverage Industry, over 65% of Gen Z consumers intend to reduce their alcohol intake in 2025, a statistic that is heavily influencing product development toward premium, health-focused offerings.

The expansion of retail availability and integration into on-trade menus are equally vital for market growth. Leading retailers and hospitality venues are validating the category by allocating premium shelf space and creating exclusive non-alcoholic cocktail lists, effectively normalizing abstinence in social environments. This improved accessibility transforms alcohol-free options from niche items into standard staples alongside traditional spirits, directly meeting the demand for inclusivity. As noted by the Adult Non-Alcoholic Beverage Association in February 2025, 42% of on-premise consumers expressed a likelihood of participating in Dry January 2025, highlighting the need for diverse hospitality options. This strategy is delivering commercial success; Ocado Retail reported in January 2025 that sales of non-alcoholic spirits rose by 13% year-on-year, proving the effectiveness of increased availability.

Market Challenge

A primary obstacle to the sustained growth of the global non-alcoholic spirits market is the technical complexity of reproducing the viscosity and thermal mouthfeel associated with ethanol. Ethanol provides a specific weight and warming sensation that establishes the expected texture of traditional spirits. When this structural element is absent, the beverage often fails to provide the sensory depth consumers anticipate from a premium product. As a result, this deficiency fosters a perception of lower value, as the liquid appears thinner and less substantial than alcoholic equivalents, which deters repeat purchases among those looking for a genuine liquor alternative.

The lack of sensory parity poses a significant risk to customer retention, which is essential for market maturity. According to the Adult Non-Alcoholic Beverage Association, the percentage of drinkers in the United States consuming non-alcoholic products increased to 13% in 2024. Although this rise indicates successful consumer acquisition, the inability to replicate mouthfeel restricts the industry's capacity to convert these initial trials into enduring habits. Without the tactile satisfaction provided by

ethanol, the category faces the threat of high consumer churn, potentially stalling the transition from growing curiosity to stable market volume.

Market Trends

The rise of Ready-to-Drink (RTD) cocktail formats is significantly transforming consumption occasions by eliminating the complexities of mixology. While the market's initial growth was driven by full-sized bottles for home use, the current momentum favors convenient, pre-mixed options that offer the same portability as traditional canned drinks. This shift in format is essential for normalizing alcohol-free choices at casual social events, such as festivals or picnics, where mixing ingredients is inconvenient. According to Ocado Retail in January 2025, sales of no- and low-alcohol ready-to-drink cocktails rose by 31% compared to the same month the previous year. This increase highlights a consumer preference for professionally balanced, consistent beverages that offer immediate gratification without requiring extra garnishes or mixers.

Simultaneously, the emergence of non-alcoholic agave and tequila alternatives marks a sophisticated evolution in flavor preferences, moving past the early dominance of botanical gin substitutes. Innovation within this segment targets the replication of specific peppery, earthy, and vegetal notes found in agave, catering to the demand for functional palomas and margaritas central to modern cocktail culture. This diversification is crucial for retaining consumers who may experience palate fatigue from standard herbal profiles and desire the distinct "bite" of agave spirits. As reported by The Spirits Business in August 2025, regarding Waitrose sales data, purchases of non-alcoholic tequila substitutes increased by 69% year-on-year. This sharp rise suggests that shoppers are actively expanding their collections to include complex, region-specific alternatives that enable a broader range of cocktail applications.

Key Market Players

Diageo plc

Celtic Soul Drinks Limited

Spiritless LLC

Drink Monday Inc.

Fluere Drinks B.V

ArKay Beverages Ltd.

Ritual Beverage Company

Lyre's Spirit Co

Three Spirit Drinks Ltd

Berkshire Labels Ltd.

Report Scope

In this report, the Global Non-Alcoholic Spirits Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Non-Alcoholic Spirits Market, By Product Type

Whisky

Vodka

Rum

Gin

Others

Non-Alcoholic Spirits Market, By Sales Channel

Offline

Online

Non-Alcoholic Spirits Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Non-Alcoholic Spirits Market.

Available Customizations:

Global Non-Alcoholic Spirits Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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