DRYATLAS

The State of Alcohol Alternatives

October 2026 Edition

EXECUTIVE SUMMARY

Roughly one in five U.S. adults drank an alcohol alternative in the past six months. Most of them also drank alcohol.

The State of Alcohol Alternatives is a quarterly report on the U.S. market for non-alcoholic beer, wine, spirits, ready-to-drink cocktails, and THC-infused beverages. Dry Atlas, the market intelligence company focused on alcohol alternatives, publishes it. The October 2026 Edition is the first in the series. It is built on two consumer surveys fielded in October 2026 and on the Dry Atlas Product Database. The first survey, fielded by YouGov, is a nationally representative sample of 1,149 U.S. adults 21+. The second, fielded by Prodege Insights, is a sample of 1,003 U.S. adults 21+ who drank an alcohol alternative in the past six months and make or share household purchase decisions. The product database records 3,812 alcohol-alternative products on the market from 1,093 brands as of September 30, 2026. Category dollar sales come from NIQ: $1.11 billion through U.S. off-premise retail in the 52 weeks ending September 26, 2026, up 13%.

The two surveys are kept apart in the language. In the YouGov survey, "U.S. adults 21+" means the full sample and "participants" means adults who drank at least one alcohol alternative in the past six months. In the Prodege Insights survey, "buyers" means its respondents. The two surveys are never combined. This summary carries the headline findings and the methodology. The full report carries the detail: 36 exhibits, six predictions, and recommendations for brands, retailers, and investors.

Six key findings

1 Roughly one in five U.S. adults drank an alcohol alternative in the past six months, and most of them also drank alcohol.

18% of U.S. adults 21+ say they drank at least one of the five sub-segments between April and October 2026. 10% of all adults drank both alcohol and an alternative, 8% drank alternatives only, and 41% drank neither. Participation is highest among adults 21–34 (33%, against 8% of those 55 and older) and in cities (28%, against 9% in rural areas). (YouGov, n=1,149 U.S. adults 21+, fielded October 14–15, 2026; participation figures on n=1,123, excluding 26 who preferred not to say.) Among buyers the overlap is near-total: 93% drank alcohol in the past six months, and among buyers who have ever drunk alcohol, more use alternatives alongside alcohol (49%) than instead of it (41%). The category is not built on abstainers. It is built on drinkers who also choose a second option. (Prodege Insights, n=1,003 buyers, fielded October 8–16, 2026; the 49% and 41% are among the 982 who have ever drunk alcohol.)

2 Non-alc wine is the largest sub-segment on the shelf and the weakest with its buyers; non-alc spirits is the reverse.

Non-alc wine is 28% of the 3,812 products on the market, the largest share of any sub-segment, and last among the five sub-segments on every engagement measure the buyer survey provides:

17% of its buyers drink it weekly and 52% have drunk it in the past three months. Among those asked about it in detail (one of their two most-used sub-segments), 7% spend $50 or more a month on it, 44% would stop buying at a price increase of 5% or less, and its net expected consumption for the next six months is +8 (the share expecting to drink more, minus the share expecting less or none). Non-alc spirits is 18% of products and leads the analog sub-segments on expected consumption (+21), taste (82% of its buyers rate it as good as or better than spirits), and spend. (Product shares: Dry Atlas Product Database, September 30, 2026. Buyer figures: Prodege Insights, as above; sub-segment bases in the full report.)

3 Buyers drink alternatives for the taste, then for the morning after; health is fourth.

Asked why they drink alcohol alternatives, buyers named enjoying the taste first (35%), avoiding hangovers second (31%), driving third (28%), and physical health fourth (26%). 46% have no goal to reduce their drinking at all. Yet 65% agree that alcohol alternatives are "mainly for people who don't want to drink alcohol." The category's buyers describe it in terms that do not match their own behavior. (Prodege Insights, as above; up to three reasons per buyer.)

4 Inside the category the barrier is price; outside it the barrier is not seeing the point.

Price is the most-cited limit on drinking more alcohol alternatives among buyers (46%), ahead of selection, taste, and availability; social stigma is last (13%). Among adults who know the category and have not bought in the past six months, 38% would rather have water or a soft drink and 33% see no point in a non-alcoholic version; cost is cited by 16% and not being sold where they shop by 3%. (Buyers: Prodege Insights, as above. Adults: YouGov, as above, n=769 aware non-participants.)

5 Brand recall belongs to the large brewers' 0.0 lines, and a quarter of buyers did not name a single brand.

Asked to name alcohol-alternative brands unprompted, buyers named Heineken roughly twice as often as any other brand; Athletic Brewing was the only independent at comparable salience, ahead of Budweiser, Corona, and O'Doul's. Ghia, the next independent, was named by 3% of buyers and Diageo's Ritual by 4%. 26% did not name a brand. (Prodege Insights, as above; unaided, up to 10 brands per buyer, spelling variants combined.)

6 Half of buyers plan to bring alternatives to the holiday table, and nearly one in five adults plans a Dry January after it.

53% of buyers expect to bring or serve alcohol alternatives at a holiday gathering between now and the end of the year (57% of those attending one). Holidays and family celebrations are the third most common occasion for alternatives (41%), and nearly one in five buyers first tried one at someone else's home. (Prodege Insights, as above.) Looking past the holidays, 19% of U.S. adults 21+ plan to go without alcohol for January 2027, and 41% of those planners expect to drink alcohol alternatives during the month. The plan is a young adult's plan: 32% of adults 21–34 against 12% of adults 55 and older. (YouGov, as above; planners n=207.)

Four questions the category keeps asking, and what the data shows.

1. *Abstainer or drinker.* Mostly drinkers: more U.S. adults 21+ drank both alcohol and an alternative (10%) than an alternative alone (8%), and 93% of buyers also drank alcohol in the past six months.
2. *Which generation.* Participation concentrates among young drinkers, not young abstainers; adults 55 and older are at 8% incidence.
3. *Wellness or pleasure.* Taste is the first reason among all buyers, new and established; physical health is fourth overall.
4. *Functional as a pillar or as a credibility problem.* Interest in adaptogens and nootropics is high and trial is low; trial concentrates in THC and CBD.

Sources as cited above: items 1 and 2, YouGov (U.S. adults 21+); items 1, 3, and 4, Prodege Insights (buyers).

EXHIBIT 1

U.S. adults 21+ by whether they drank alcohol, an alcohol alternative, both, or neither in the past six months



Alternatives only, 8% · Both, 10% · Alcohol only, 41% · Neither alcohol nor an alternative, 41%

YouGov, n=1,123 U.S. adults 21+ (excludes 26 who preferred not to say), fielded October 14–15, 2026.

EXHIBIT 2

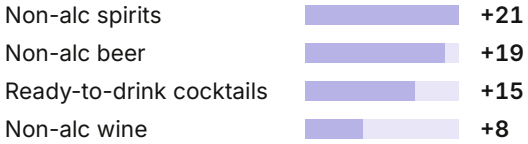
The shelf and the buyer: product share beside buyer intent, by sub-segment

Share of products on the market (3,812)



Dry Atlas Product Database, products on the market as of September 30, 2026.

Net expected consumption among each sub-segment's buyers, next six months



Prodege Insights, October 8–16, 2026; buyers asked about each sub-segment in detail (n=189–468). Share expecting to drink more, minus share expecting less or none.

EXHIBIT 3

Dry January 2027 plans among U.S. adults 21+



Dry January with alternatives, 8% · Dry January without, 11% · Drinking less, 5% · Not participating, 27% · Not sure, 15% · Do not drink, 31% · Prefer not to say, 4%

Among adults planning a Dry January (n=207), 41% expect to drink alcohol alternatives during the month.

YouGov, n=1,149 U.S. adults 21+, fielded October 14–15, 2026.

Methodology

The national survey. Five questions placed on YouGov's U.S. omnibus, fielded October 14–15, 2026. 1,149 U.S. adults 21+, drawn from YouGov's online panel and weighted to be representative of U.S. adults 21+. Figures are weighted percentages; groups derived from the consumption question exclude 26 respondents who preferred not to say (n=1,123). Minimum reported base 50.

The buyer survey. An online survey of 1,003 U.S. adults 21+ who drank at least one alcohol-alternative sub-segment in the past six months and are the primary or shared purchase decision-maker for alcohol alternatives in their household, fielded by Prodege Insights October 8–16, 2026. Entrants were balanced to the U.S. general population by age, gender, and region; completes are unweighted and describe buyers, not the adult population. 1,692 respondents completed the questionnaire and 689 were removed before analysis: 564 under the quality rule agreed with Prodege before fielding and 125 under Prodege's standard checks. Minimum reported base 100.

The Dry Atlas Product Database. A hand-maintained record of alcohol-alternative products. Counts in the report are stated as of September 30, 2026: 3,812 products on the market from 1,093 brands, excluding products that have left the market and products announced but not yet available.

The two surveys are never combined into one sample. Findings describe buyers unless they refer to adults, participants, or non-participants, which come from the YouGov survey. Figures are rounded to whole numbers.

What the full report contains

Section 1, Category. NIQ's read of category dollar sales and growth for the 52 weeks ending September 26, 2026, then the category at the product level from the Dry Atlas Product Database: 3,812 products on the market as of September 30, cut by sub-segment, style, ABV class, format, and brand structure.

- 1.1 Dollar sales and growth by segment, 52 weeks ending September 26, 2026 (NIQ)
- 1.2a The category by product count: 12 taxonomies, ranked by product count
- 1.2b The report's sub-segments mapped to the database taxonomies, with THC-infused products within them
- 1.3a Styles and types ranked within each sub-segment
- 1.3b Can and near-zero share by sub-segment
- 1.3c Products per brand

Section 2, Consumer. 29 exhibits from the two October surveys, organized around questions about who buys alcohol alternatives, why, and how. Every figure carries its firm, sample, and window.

- 2.1a U.S. adults 21+ by whether they drank alcohol, an alcohol alternative, both, or neither
- 2.1b How buyers describe their relationship with alcohol: five statements
- 2.1c Participation by ten-year age band
- 2.1d Sub-segment incidence among U.S. adults 21+, beside sub-segment share among buyers
- 2.1e Non-participants by relationship to the category (U.S. adults 21+)
- 2.2a Why buyers drink alternatives: 11 reasons
- 2.2b Top five reasons by relationship with alcohol
- 2.2c Reasons by age
- 2.2d What buyers want the product to be: seven attributes, top-two-box and must-have
- 2.3a Nine occasions
- 2.3b Instead of alcohol, alongside it, or where alcohol was never part of it: ever and most often
- 2.4a Frequency by sub-segment
- 2.4b Three-month recency by sub-segment
- 2.4c Overlap between the five sub-segments among buyers
- 2.4d Loyalty by sub-segment
- 2.5a Where buyers shop: past six months and most often
- 2.5b What reaches buyers and what influences them: ten sources, from store staff to AI tools
- 2.5c Monthly spend by sub-segment
- 2.6a Most-named brands, unaided
- 2.7a What holds buyers back: any barrier and the single biggest
- 2.7b Top five barriers by sub-segment
- 2.7c Taste against the alcoholic original, by sub-segment
- 2.7d Ease of finding in store and on-premise, by sub-segment
- 2.7e Why aware non-participants have not bought (U.S. adults 21+)
- 2.8a Price tolerance by sub-segment
- 2.9a Expected consumption over the next six months, by sub-segment
- 2.9b Interest and trial for five functional ingredients
- 2.11a Holiday plans among buyers
- 2.11b Dry January 2027 plans among U.S. adults 21+

Section 3, Outlook. What the category data implies when read beside the surveys, including where supply and demand diverge by sub-segment. Six predictions for Q1 and Q2 2027, each with a confidence level:

- Non-alc wine's expected consumption and recency in the January wave
- Whether buyers keep drinking more alternatives in January
- The share who say the category is "mainly for people who don't want to drink alcohol"
- The share of buyers on a temporary break from alcohol in January
- Moderation by season
- Acquisitions by large beverage companies

12 recommendations by reader, each stating what to do, why the data supports it, and the risk of inaction:

- Brands: what to lead the recruitment message with; what a non-alc wine brand should decide this quarter; where a non-alc spirits brand should take the bottle; how a ready-to-drink cocktail should defend its price; where a non-alc beer brand should spend; how to fund discovery
- Retailers: where to place the set; how to allocate facings by sub-segment; where to take price
- Investors: what to underwrite on; how to separate a sub-segment thesis from a brand thesis; how to test pricing power

About Dry Atlas

Dry Atlas is the market intelligence company focused on alcohol alternatives. It collects proprietary data on the category through a hand-maintained product database and quarterly national consumer surveys, publishing analysis built on that data. Its insights reach 7,000+ beverage professionals at 1,000+ companies.

The Product Database holds 4,100+ products across 1,100+ brands as of report publication, counted on and off the market. Emerging beverage brands and large beverage companies use it to track the category at the product level.

The State of Alcohol Alternatives is the quarterly report series, built on the product database and the surveys.

Dry Atlas was co-founded in 2023 by Douglas and Victoria Watters. Before Dry Atlas, they opened Spirited Away, America's first non-alcoholic bottle shop, operating it from 2020 until its acquisition in 2025.

Questions about the report: info@dryatlas.com

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