

An Overview of the Cordials & Liqueurs Market in the U.S.

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As a highly differentiated category, cordials and liqueurs tend to fly under the radar in comparison to some of the more rigidly defined segments like bourbon or Tequila, but the category accounted for 28.1 million 9-liter cases sold in the U.S. in 2023. Based on volume, it was in the top five of all spirits categories last year, ranking higher than rum, brandy and cognac, and gin.

While the category did see a small -0.6% contraction in volumes year-over-year in 2023, factors including the Aperol Spritz boom and the rising interest in cocktails on-premise presents some optimism for liqueurs and cordials in 2025.

How Big is the Cordials & Liqueurs Market?

Cordials & liqueurs in the U.S. are currently led by mainstay brands such as Fireball, DeKuyper, Baileys, Jagermeister, and Southern Comfort. Out of the top five, Fireball and DeKuyper were the only ones to see growth in 2023 with volumes rising 1.5% and 1.6%, respectively. Aperol was the fastest-growing brand in the top 50 by far, adding 157,000 cases for a growth rate of 40.3%. The states responsible for the highest sales of 9L cases of cordials & liqueurs are:

- California – 2.9 million cases
- Florida – 2.1 million cases
- New York – 1.9 million cases
- Texas – 1.6 million cases
- Massachusetts – 1.3 million cases

The states and territories responsible for selling the most cordials & liqueurs cases per capita included:

- New Hampshire – 368k cases (336 per 1,000 adults)
- Maine – 307k (281 per 1,000 adults)
- Massachusetts – 1.3 million cases (242 per 1,000 adults)
- Nevada – 565k cases (237 per 1,000 adults)
- Wyoming – 100k cases (233 per 1,000 adults)

Trends Behind the Popularity of Cordials & Liqueurs

The Rise of the Spritz

A trend that has boosted cordials and liqueurs is the rising popularity of spritzes, particularly the Aperol Spritz, which has led to over 40% volume growth for Aperol. A recent study reported that the Aperol Spritz is the most popular cocktail in the U.S., with 22 states ranking it as their favorite. The spritz has also benefitted from a consumer shift towards lower-ABV options.

"The request for low and no alcohol beverages has increased exponentially in the last few years," according to ITALICUS Rosolio di Bergamotto and Savoia Founder [Giuseppe Gallo](#). "The number one thing we've noticed in almost all of our on-premise accounts is the increase in low and no alcohol options on their menus. If customers are looking for cocktails that are 5% ABV or lower, the spritz or americano styles are perfect."

Cocktail Innovation

Over the last five years, mixologists in bars across the U.S. have embraced the diversity of the category. This recognition has led to increased experimentation with flavors, allowing bartenders to push the boundaries of traditional cocktail recipes.

As consumers continue to demand new and unique flavors in their cocktails, bartenders have used the diverse range of cordials and liqueurs as a playground for creativity. Offerings within the segment can be used to create colorful and delicious cocktails, easily blended with gins, whiskeys, and rums.

Meanwhile, innovation is continuing within the category itself, potentially offering even more options for experimentation. [Katie Clark](#), Director of R&D at beverage development company Flavorman, feels that the category is one of the most exciting for creating diverse options that meet consumer needs.

"In general, consumers demand more complex and layered flavors in both lower-proof, less-sweet cordials, as well as the higher-proof, very-sweet liqueurs," explained Clark.

"This combination to be flavor forward and multidimensional generates a fun and challenging opportunity in the beverage lab."

At-Home Mixology

During the pandemic, when bars and restaurants were mostly shut down, consumers turned to home bartending as a creative and attainable way to pass the time. This period allowed consumers to experiment with different categories they wouldn't usually purchase, but allowed them to try to recreate their favorite cocktails at home while enjoying a night in.

This trend directly led to a surge in the consumption of cordials and liqueurs, with sales of these products rising by 3.1% in 2020. Even as on-premise establishments reopened, the category continued to flourish, growing by 6.2% in 2021, indicating that the trend of at-home mixology is here to stay. More recently, rising inflation has also prompted consumers to opt for making cocktails at home instead of going out, contributing to the trend's persistence.