TOAST 2026

2nd Edition of Total Overview of Alcohol Sector Trends

UNDER PRESSURE

Fewer. Fragmented. Fought-For.

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UNDER PRESSURE: *FEWER. FRAGMENTED. FOUGHT-FOR.*

Across North America, beverage alcohol is entering a new era of pressure.

Economic uncertainty, health consciousness, changing lifestyles, and an expanding competitive set are fundamentally reshaping how consumers engage with alcohol. What was once habitual is becoming intentional. What was once growing is becoming contested.

The result is a market facing three interconnected challenges:

Fewer drinking occasions.

Fragmented consumer needs.

Fought-For moments of relevance.

Consumers are choosing quality over routine, meaning over habit, and context over category loyalty. Meanwhile, beverage alcohol is facing growing competition not only from within the category, but also from an expanding universe of alternatives competing for the same occasions.

For brands, retailers, and category leaders, the implications are profound. Traditional growth models built on frequency, availability, and broad appeal are under pressure. Success increasingly depends on understanding which occasions remain defensible, which consumer segments are evolving, and where future growth opportunities still exist.

In the **2nd Edition of TOAST (Total Overview of Alcohol Sector Trends)**, Ipsos Alcohol Consumption Tracker (ACT) uncovers how Americans and Canadians are redefining their relationship with alcohol and, what that means for the future of the industry.

This year's report moves beyond what consumers are drinking to examine a more important question:

When every drink must earn its place, who wins?

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What You'll Learn

FEWER: The shrinking pool of drinking occasions.

Consumers are becoming more selective about when, why, and whether they drink alcohol at all. The challenge is no longer simply persuading consumers what to drink, it is understanding whether they will choose alcohol at all.

Key trends include:

- **The Rise of Intentional Drinking**: How moderation, wellness priorities, GLP-1 medications, and changing lifestyles are influencing frequency, consumption rituals, and occasion choice.
- **The Missing Occasion**: Where traditional drinking moments are disappearing, what is replacing them, and why volume growth is increasingly giving way to occasion quality.

Not all occasions are under pressure equally. Understanding which moments remain resilient, and why, will help identify the occasions most worth defending and investing behind.

FRAGMENTED: The death of the average drinker

Today's consumer is moving in multiple directions at once. Broad-based strategies are becoming less effective as drinkers divide across income levels, generations, motivations, and consumption philosophies.

Key trends include:

- **The K-Shaped Consumer**: Why financial pressures, life stages, and economic realities are creating increasingly divergent consumption paths.
- **Competitive Shifts** – How cannabis, functional beverages, energy drinks, and other alternatives are changing the competitive landscape and redefining future category participation.

The future may not belong to brands that appeal to everyone, but to those that understand which fragments of the market matter most, and which are growing fastest.

FOUGHT-FOR: ***The battle for relevance***

As consumers face more brands, formats, flavors, channels, and more claims than ever before, brand loyalty is weakening, decisions are moving closer to the shelf, and every retail channel has become a battleground for relevance. In an environment of declining attention and increasing choice, differentiation is no longer optional, it is survival.

Key Trends Include:

- **The New Rules of Competition** – From high-ABV RTDs to new claims, formats, and propositions, we explore what it takes to justify a brand's place in consumers' lives.
- **Retail & Channel Battles** – How grocery, convenience, delivery, on-premise, and specialty retail channels are competing to own the consumer journey.

The brands that succeed will not necessarily be those with the most innovation or the broadest portfolio. They will be the ones that can clearly answer a simple but increasingly difficult question: Why does this brand deserve a place at this moment?

Why TOAST 2026 Matters

The future of beverage alcohol will not be determined by who has the biggest brands, the largest portfolios, or the most innovation. It will be determined by who understands how consumer behavior is fundamentally changing before the competition does.

TOAST 2026 challenges conventional industry thinking, separates short-term noise from long-term shifts, and identifies the opportunities and risks that will define the next chapter of category growth.

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Main Report Sources

Ipsos ACT (ACT) – The Alcohol Consumption Tracker (ACT) is an online consumption diary that offers a detailed and nuanced understanding of alcohol consumption behaviors in North America since September 2011. ACT covers consumption across all alcohol categories and non-alcohol substitutes, in both on-premise and residential channels. By continuously tracking consumer habits, ACT provides invaluable data on what consumers drink, where and when they consume alcohol, their motivations for drinking, and their social contexts. This data is supplemented by insights into their shopping experiences, lifestyle choices, and attitudes and perception towards alcohol.

Ipsos DRINK – DRINK is a syndicated beverage consumption diary designed to provide a comprehensive understanding of beverage consumption behaviors in the United States. Following a pilot launch in 2026 and full market rollout planned in 2027, DRINK captures consumption across all commercial beverage categories to deliver a true "share of throat" perspective. By continuously tracking beverage occasions, DRINK reveals what consumers drink, when and where they drink it, the needs and occasions driving consumption, and how beverage categories compete, complement, and substitute for one another. This holistic view enables beverage manufacturers to uncover emerging consumption shifts, identify sources of category growth and erosion, and understand the broader competitive landscape beyond category boundaries.

Timelines and Deliverables

Webinar Date: September 28th, 2026

Report Release Date: October 15th, 2026

TOAST 2026 Deliverables Include: Resource PowerPoint report in PDF format (85-90 slides) accompanied by a live one-hour presentation report with some customization (as agreed upon). Additional hours for follow-ups and further queries available upon request.

2026 PACKAGES

Single Country Report*

	In USD	In CAD
ACT Subscribers (Full Service)	Complimentary	Complimentary
ACT Non-Subscribers		
Standard Package	$25,000	$35,000
Early Bird Package#	$19,750	$27,500

** Discounted pricing available on request for a Total North American Report*
 # Early bird discount package is available until September 15th, 2026

For more information contact:

Sam Agarwal
VP | MSU Canada Syndicated

Sam.Agarwal@ipsos.com