



## NIQ Full View: Total Alcohol Pulse – August 2026

Latest 4 weeks w/e 08.08.26

### Alcohol's lackluster trends persists as summer selling season nears its end

During the four weeks ending August 8th, **Total Alcohol** sat behind YA. **Dollar sales** reached \$8.5B, down -3.6% vs YA, while case volume totaled 167.7M, declining -5.4% vs YA. On a weekly basis, dollar sales generally held flat, reaching \$2.1B, down -0.1% from the week ending August 1st. As summer winds down, early August's subdued performance represents the overarching theme of pressure that has defined the industry this year, leaving just a handful of key seasonal weeks to support category trends.

### Prepared Cocktails slip into declines as traditional categories fragment further

- Prepared Cocktails** missed the mark on delivering much needed growth, with sales decreasing -0.8% while case volume fell -5.2%. Although the segment remains well positioned for current consumer preferences, the glimpse at declines reflects the category's building saturation and the competitive environment for growth.
- Beer** usurped Wine as the top decliner, as dollar sales dropped -4.5% and volume slipped -5.5%. After previously showing more resilient performance, Beer shows an increasing drag as summer drinking occasions narrow.
- Wine** followed in showing consistent weakness, as dollar sales fell -3.8% and volume dropped -5.1%. Wine's softness throughout summer has been largely steady, with minimal seasonal support shown.
- Spirits** experienced the slowest losses, posting dollar sales declines of -3.7% and volume losses of -3.9%. While category results continue to underperform, Spirits recent status as the most resilient traditional segment offers optimism for upcoming trends.
- Overall, latest category performance highlights both the volatile and divergent features characterized by alcohol. **Prepared Cocktails** lost some footing as the crucial industry growth engine. **Beer** is losing the traction it had established throughout early and mid Summer. **Wine** continues to face muted performance, while **Spirits** remains the most resilient of the core categories, sustaining its position as the most stable decliner.

### Ohio and Massachusetts standout as broad nationwide underperformance draws on

- Alcohol sales displayed soft performance across all key markets in the latest period, with nearly every top 10 state experiencing dollar and volume declines. **Ohio** showed to be the most resilient state, with dollar sales slipping -2.4% and volume down -4.9%. In contrast, **Massachusetts** saw the deepest decline, with sales down -7.6% while volume grew +0.7%.
- Volume results painted a different picture. **Massachusetts** offered the strongest results, as volume increased but sales fell (+0.7% in volume, -7.6% in dollars), while **Washington** held the largest volume declines (-9.5% in volume, -4.8% in dollars).
- All in all, the industry's mediocre results continue to span across the country. **Ohio** emerged as the strongest market in dollar sales, whereas **Massachusetts** holds this role in terms of volume. General underperformance in both dollars and volume is seen most concentrated in **Washington**.

### Channel-wide alcohol slowdown continues as Mass loses recent ground

- Retail channel results shared Total US pressure, as each key channel faced dollar declines. Club led declines at -5.2%, this was followed by Food at -4.2%. Convenience -3.9%, Liquor -3.3%, and Mass -2.7%. All Other continued to see the best results, up +1.5%.
- Volume performance generally followed dollar sales, with some different rankings. Convenience topped declines losses at -6.8%, followed by Food -5.8%, Liquor -4.3%, Mass -4.0% and Club -3.4%, while All Others once again saw growth (+3.4%).
- Compared with the prior L4W period (w/e August 1st), **Mass** experienced the sharpest swing in performance, after its previous dollar (-0.2%) and volume (-1.8%) trends.



# NIQ Full View: Spirits Pulse – August 2026

Latest 4 weeks w/e 08.08.26

## Spirits

### Spirits seek next occasion-driven lift as summer tailwinds fade

During the four weeks ending August 8th, **Spirits** saw declines, with dollar sales down **-3.7%** and volume down **-3.9%**. A lack of consumer engagement and ongoing macro impacts remain as the key category drag (**91% of decline**), overshadowing positive contributions from strong product availability and promotions. On a weekly basis, Spirits sales totaled **\$509.2M**, down **-0.7%** from the week ending August 1st. The slowdown of momentum is to be expected as summer demand continues to wane. Overall, the category must look forward to labor day for the next spark for drinking occasions.

### Tequila tiptoes closer to growth while other core categories slip further behind

Across the top Spirits categories, (**Vodka**, **Whiskey**, and **Tequila**), results were bifurcated. **Whiskey** drifted the farthest into negative territory, with dollar sales down **-5.0%** and volume falling **-5.8%**. **Vodka** followed with similar but slower losses, as dollar sales declined **-4.0%** and volume slipped **-4.3%**. In contrast, **Tequila** held onto its recent stability, with dollar sales decreasing just **-1.3%** while volume grew **+1.5%**, inching closer to positive territory. **Non-Alcoholic Spirits** remained as the strongest performing segment, with dollar sales up **+23.4%** and volume rising **+26.1%**. Meanwhile, all other Spirits segments were a broad detriment, with dollar sales down **-3.7%** and volume declining **-4.6%**.

#### Top 5 Manufacturers by Dollars

- No. 1 Diageo (-7.6% dollars, -99.5K cases)
- No. 2 Sazerac (+4.2% dollars, +35.6K cases)
- No. 3 Bacardi (-1.5% dollars, -13.1K cases)
- No. 4 Fifth Generation (+3.9% dollars, +5.2K cases)
- No. 5 Suntory Global Spirits (-6.5% dollars, -45.0K cases)

#### Top 5 Manufacturers by Dollar Growth

- No. 1 Sazerac (+4.2% dollars, +35.6K cases)
- No. 2 Fifth Generation (+3.9% dollars, +5.2K cases)
- No. 3 Constellation (+28.0% dollars, +6.7K cases)
- No. 4 Heaven Hill (+0.6% dollars, -22.6K cases)
- No. 5 Trinchero Family (+13.5% dollars, +628 cases)

#### Top 5 Brands by Dollars

- No. 1 Tito's Vodka (+1.7% dollars, -350 cases)
- No. 2 Crown Royal (-9.6% dollars, -22.2K cases)
- No. 3 Don Julio (-6.9% dollars, -7.7K cases)
- No. 4 Jack Daniel's (-4.9% dollars, -12.6K cases)
- No. 5 Fireball (-6.0% dollars, -17.4K cases)

#### Top 5 Brands by Dollar Growth

- No. 1 W.L. Weller (+124.8% dollars, +11.4K cases)
- No. 2 Lunazul Tequila (+24.4% dollars, +17.5K cases)
- No. 3 Lalo Tequila (+47.7% dollars, +5.5K cases)
- No. 4 Svedka (+14.0% dollars, +32.4K cases)
- No. 5 Cazadores (+22.7% dollars, +10.7K cases)

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 08/08/26  
 Total Spirits Excluding Prepared Cocktails  
 All Other includes: Brandy, Cognac, Cordials, Gin, Grain Alcohol, and Rum

**Please note the following guidelines for publishing weekly segment performance:**  
 Segment performance data must include all five brands in the category list and should not be selectively curated. Approval is required for individual brand data to be used on its own. As such, we ask that you avoid our data out of context while positioning industry participants in a poor light or suggest favoritism or endorsement of any brand. By adhering to these guidelines, NIQ can continue to provide you with valuable industry insights while maintaining fairness, credibility, and client trust. Thank you.



# NIQ Full View: Wine Pulse – August 2026

Latest 4 weeks w/e 08.08.26

## Wine

### Challenged Wine trajectory continues despite slight week-over-week (WoW) bump

In the four weeks ending August 8th, [Wine sustained underperformance](#), with dollar sales down **-3.8%** and volume declining **-5.1%**. Category drivers behind this weakness include a reduction in distribution (**23%** of declines), less effective promotions (**12%**), and less consumer demand (**65%**). On a weekly basis, results improved slightly, with dollar sales reaching **\$365.0M**, up **+0.4%** from the prior week. The category continues to reside in an environment of muted momentum.

### Still Wine weighs on Total Wine results while Sparkling and Non-Alc offer stability

During the four weeks ending August 8th, [Still Wine](#) drove category declines, with dollar sales decreasing **-4.5%** and volume declining **-5.6%**. By comparison, [Sparkling Wine](#) built on its recent strength, with dollar sales down just **-0.1%** and volume down **-0.4%**. On the opposite end, Non-Alcoholic Wine maintained its gains, with dollar sales increasing **+16.9%** and volume rising **+13.3%**, operating ever present as Wine's fastest growth driver albeit a small contribution.

### Top 5 Manufacturers by Dollars

- No. 1 Gallo (-2.5% dollars, -99.1K cases)
- No. 2 The Wine Group (-10.8% dollars, -262.3K cases)
- No. 3 Deutsch Family (+4.6% dollars, +21.5K cases)
- No. 4 Trinchero Family (-3.1% dollars, -28.4K cases)
- No. 5 Delicato Family Wines (-5.1% dollars, -43.0K cases)

### Top 5 Manufacturers by Dollar Growth

- No. 1 Deutsch Family (+4.6% dollars, +21.5K cases)
- No. 2 Constellation (+2.2% dollars, +6.8K cases)
- No. 3 Duckhorn Wine Company (+1.9% dollars, +1.8K cases)
- No. 4 Wagner Family Wines (+3.0% dollars, +1.9K cases)
- No. 5 Kobrand (+2.8% dollars, -938 cases)

### Top 5 Brands by Dollars

- No. 1 Josh (+9.4% dollars, +41.1K cases)
- No. 2 Barefoot (-2.5% dollars, +20.6K cases)
- No. 3 Bota (-4.5% dollars, -33.8K cases)
- No. 4 Sutter Home (-3.7% dollars, -22.5K cases)
- No. 5 LaMarca (+13.0% dollars, +20.6K cases)

### Top 5 Brands by Dollar Growth

- No. 1 Josh (+9.4% dollars, +41.1K cases)
- No. 2 LaMarca (+13.0% dollars, +20.6K cases)
- No. 3 Whitehaven (+19.6% dollars, +7.4K cases)
- No. 4 Clay Creek (+79.7% dollars, +11.7K cases)
- No. 5 Bread & Butter (+15.2% dollars, +12.4K cases)

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 08/08/26  
Total Wine Excluding Wine Based Cocktails

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# NIQ Full View: Beer Pulse – August 2026

Latest 4 weeks w/e 08.08.26

## Beer

### Brief weekly uptick unable to reverse the reality of Beer’s fading seasonal cushion

In the four weeks ending August 8th, Beer fell short of year-ago, with dollar sales declining **-4.5%** and case volume falling **-5.5%**. Category struggles were largely demand-led, with consumer disinterest driving **72%** of total declines, while distribution hurdles accounting for about **25%**. Weekly performance showed a modest boost, with dollar sales reaching **\$922.2M** from **\$918.9M** the prior week, a **+0.4% gain**. As seasonal support from summer winds down, industry headwinds are become more apparent for the category.

### Core beer segment erosion deepens, masking gains from smaller segments

Core segments were the most notable decliners, led by Domestic Premium (**-8.0%** in value, **-8.1%** in volume) and Craft (**-7.2%** in value, **-9.0%** in volume). Import Beer experienced slower losses (**-3.5%** in value, **-4.5%** in volume). Positive contributions were seen elsewhere, continuously limited to select segments, Domestic Super Premium grew, up **+0.3%** in dollar sales and **+0.2%** in volume. Cider increased in value **+2.0%**, with volume also up **+0.4%**. Non-Alc Beer once again widely outperformed all other Beer segments (**+9.3%** in value, **+9.2%** in volume), with it's success driven by a multitude of health and wellness trends.

### Top 5 Manufacturers by Dollars

- No. 1 Anheuser-Busch Inc. (-4.0% dollars, -2.5M cases)
- No. 2 Constellation (-2.4% dollars, -840.1K cases)
- No. 3 Molson Coors Beverage Co (-7.1% dollars, -2.5M cases)
- No. 4 Heineken USA (-9.1% dollars, -437.2K cases)
- No. 5 New Belgium Brewing (+5.7% dollars, +53.1K cases)

### Top 5 Manufacturers by Dollar Growth

- No. 1 New Belgium Brewing (+5.7% dollars, +53.1K cases)
- No. 2 Sapporo Breweries Ltd (+20.2% dollars, +23.6K cases)
- No. 3 Athletic Brewing Co (+3.7% dollars, +11.0K cases)
- No. 4 Diageo (+2.0% dollars, -2.3K cases)
- No. 5 Asahi Beer USA (+40.2% dollars, +6.9K cases)

### Top 5 Brands by Dollars

- No. 1 Modelo (-3.3% dollars, -654.5K cases)
- No. 2 Budweiser (-9.9% dollars, -1.8M cases)
- No. 3 Michelob (+3.5% dollars, +399.0K cases)
- No. 4 Corona (-5.9% dollars, -559.3K cases)
- No. 5 Coors (-4.9% dollars, -761.0K cases)

### Top 5 Brands by Dollar Growth

- No. 1 Michelob (+3.5% dollars, +399.0K cases)
- No. 2 Pacifico (+18.0% dollars, +288.4K cases)
- No. 3 Victoria (+15.1% dollars, +71.5K cases)
- No. 4 New Belgium (+6.6% dollars, +44.4K cases)
- No. 5 Garage Beer (+29.9% dollars, +46.4K cases)

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 08/08/26  
Total Beer Excluding FMBs and Hard Seltzer

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# NIQ Full View: Prepared Cocktails Pulse – August 2026

Latest 4 weeks w/e 08.08.26

## Prepared Cocktails

### Prepared Cocktails growth meets gravity as the growth engine stalls in early August

In the four weeks ending August 8th, Prepared Cocktails fell short of its well-earned reputation as the industry’s growth engine, as sales fell **-0.8%** and case volume declined **-5.2%**. On a weekly basis, dollar sales totaled **\$312.8M**, down **-0.7%** from the prior week. The category is navigating a dynamic balance between growth catalysts and market pressures, as strong consumer demand for convenience and flavor competes with brand saturation and significant year ago sales benchmarks.

### RTD growth remains concentrated in Spirits- and Wine-based, while FMB/Seltzer drag intensifies

Prepared Cocktails divergent performance continued across alcohol bases. Spirits-based RTDs maintained its growth edge, although slower, with dollar sales increasing **+16.2%** and volume up **+17.1%**. Wine-based cocktails also grew, up **+7.0%** in sales and **+2.6%** volume. Meanwhile, FMB/Seltzer held as the category detractor, with dollar sales declining **-9.1%** and volume falling **-11.1%**. Latest results emphasize the appetite for Spirits- and Wine-based RTDs, at the expense of Malt-based offerings, however this time positive contributors could not overshadow Malt-based losses.

### Top 5 Manufacturers by Dollars

- No. 1 Mark Anthony Brands (-2.9% dollars, -374.5K cases)
- No. 2 Boston Beer (-7.7% dollars, -614.6K cases)
- No. 3 Anheuser-Busch Inc. (+12.4% dollars, +107.4K cases)
- No. 4 Gallo (-9.6% dollars, -163.1K cases)
- No. 5 Diageo (-0.6% dollars, -57.0K cases)

### Top 5 Manufacturers by Dollar Growth

- No. 1 Stateside Brands (+60.9% dollars, +356.7K cases)
- No. 2 Anheuser-Busch Inc. (+12.4% dollars, +107.4K cases)
- No. 3 Sazerac (+8.2% dollars, +34.4K cases)
- No. 4 Moet Hennessy USA (N/A in dollars, +735.8K cases)
- No. 5 Suntory Global Spirits (+6.9% dollars, +27.3K cases)

### Top 5 Brands by Dollars

- No. 1 White Claw (-1.9% dollars, -173.7K cases)
- No. 2 Twisted Tea (-11.7% dollars, -428.5K cases)
- No. 3 High Noon Cocktail (-13.3% dollars, -183.0K cases)
- No. 4 BuzzBallz (+13.2% dollars, +57.3K cases)
- No. 5 Smirnoff (+1.0% dollars, -3.7K cases)

### Top 5 Brands by Dollar Growth

- No. 1 Cutwater Cocktail (+33.3% dollars, +188.8K cases)
- No. 2 Surfside Cocktail (+41.2% dollars, +236.3K cases)
- No. 3 Sun Cruiser Cocktail (+54.5% dollars, +194.3K cases)
- No. 4 BuzzBallz (+13.2% dollars, +57.3K cases)
- No. 5 Super Lyte Cocktail (N/A in dollars, +121.3K cases)

Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 08/08/26  
 Prepared Cocktails includes: Spirit based Ready to Drink and Ready to Serve, Wine based cocktails, FMBs and Seltzers

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