



NIQ Full View: Total Alcohol Pulse – October 2026

Latest 4 weeks w/e 10.17.26

Alcohol sales lose weekly momentum, as mid-October demand softens

During the four weeks ending October 17th, **Total Alcohol** continued under pressure. Dollar sales reached **\$8.1B**, down **-2.4% vs YA**, while case volume totaled **155.5M**, declining **-4.4% vs YA**. Weekly dollar sales totaled **\$2.0B**, down **-0.9%** versus the week ending October 10th. The latest weekly pullback interrupts the modest improvement seen in the prior period, leaving the industry in search of sustained momentum as October progresses.

Prepared Cocktails hold onto growth as traditional alcohol categories lose ground

- Prepared Cocktails Beer, Wine, and Spirits (BWS)** continued to outperform the broader industry, posting dollar sales growth of **+1.8%**, despite volume declining **-2.2%**. Although Prepared Cocktails remain the only major category posting dollar gains, recent volume softness indicates that momentum continues to moderate.
- Beer** remained the largest source of industry declines, with dollar sales down **-3.3%** and volume falling **-5.0%**. Fall demand has yet to improve Beer's trajectory, with persistent volume softness signaling that underlying demand remains challenged and price/mix continues to cushion dollar performance.
- Wine** recorded similar losses, with dollar sales slipping **-3.3%** and volume dropping **-4.9%**. Seasonal demand offered slight weekly relief amid persistent four-week declines. Closely aligned dollar and volume trends indicate limited price/mix support against continued weakness in underlying demand.
- Spirits** continued outperforming traditional alcohol peers, with dollar sales declining **-2.4%** and volume down **-2.3%**. While performance remains under pressure, Spirit's cocktail versatility may strengthen its perceived value as consumers become more selective with Alcohol purchases.
- The latest results through mid-October reinforce the increasingly divergent Alcohol landscape. **Prepared Cocktails (BWS)** continue to stand apart as the industry's source of growth, **Spirits** holds as the most stable traditional category, while **Beer** and **Wine** face firm pressure as the developing Fall performance remains below expectations.

Ohio and California strengthen their position, while declines spread across major markets

- Regional trends continued to reflect nationwide industry softness, with all of the top ten state markets posting declines despite improving performance in select markets.
- Ohio** and **California** led as strongest major state markets, with dollar sales declining **-0.6%** and **-0.8%**, respectively. California also recorded the most resilient volume trend at **-0.7%**, while Ohio declined **-3.0%**. Both markets saw improved results compared to the previous week.
- New Jersey** lost further momentum, with dollar sales declining **-2.0%**, and volume moderating from slight growth to a **-1.0%** decline. Michigan and Illinois showed signs of improvement, the value trend narrowed to **-3.4%** and **-2.7%**, respectively. Texas, however, faced mounting pressure as dollars fell **-4.5%** and volume declined **-7.2%**.
- State-level results continue to reflect uneven momentum across major markets, with opportunities for growth remaining scarce. Ohio and California strengthened their position at the top of the field, with both markets improving from the previous week. Michigan and Illinois also gained ground, signaling pockets of easing pressure beyond the leading markets. However, momentum weakened in New Jersey and Texas, and Massachusetts and Washington continued to post the deepest declines among major markets.

Channel declines persist as momentum is limited across most retail outlets

- Channel results mostly mirrored total US weakness. Club led declines at **-3.9%**, followed by Food **-3.3%**, Convenience **-2.4%**, and Liquor **-2.1%**, and Mass **-1.3%**. Meanwhile, All Others **+2.3%** captured gains.
- Volume trends offered a slightly different story. Convenience **-5.4%** led volumed losses, followed by Food **-4.7%**, Mass **-4.0%**, Liquor **-3.7%**, and Club **-2.4%**. Similar to dollar sales performance, All Others (**+3.5%**) was the sole volume grower.

Source: NielsenIQ Retail Measurement | Periods ending 10/17/26
 Prepared Cocktails (BWS) includes Spirit based prepared cocktails, Wine based cocktails, Flavored Malt Beverages and Seltzers
 All Other Channels includes: Drug, Military, and Dollar



NIQ Full View: Spirits Pulse – October 2026

Latest 4 weeks w/e 10.17.26

Spirits

Weekly Spirits sales edge higher ahead of seasonal selling opportunities

During the four weeks ending October 17th, **Spirits** sustained losses, with dollars down **-2.4%** and volume **-2.3%**. Softer demand and broader economic headwinds remained the primary drag on performance, driving **89%** of the decline. Spirits sales reached **\$512.8M** in the latest week, up **+1.1%** from the prior week, providing an encouraging lead-in to Halloween and the holiday entertaining season. While Spirits remain more resilient than the broader industry, upcoming celebrations offer an opportunity to translate that relative strength into improved demand.

Tequila retains its modest growth as Non-Alcoholic Spirits gain pace

Performance across the leading Spirits categories (**Vodka**, **Whiskey**, and **Tequila**) remained uneven as the holiday season approaches. **Whiskey's** losses deepened, with dollar sales down **-4.7%** and volume down **-5.2%**. **Vodka** also slipped further, declining **-1.3%** in dollars and **-2.1%** in volume. **Tequila's** dollar gains eased to **+0.7%**, while volume remained strong at **+5.0%**. **Non-Alcoholic Spirits** strengthened across both measures, with dollars rising **+20.5%** and volume increasing **+20.9%**. **All other Spirits** segments collectively fell **-2.3%** in dollars and **-3.0%** in volume, leaving growth concentrated in select areas.

Top 5 Manufacturers by Dollars

- No. 1 Diageo (-6.6% dollars, -75.0K cases)
- No. 2 Sazerac (+5.7% dollars, +54.3K cases)
- No. 3 Bacardi (+2.8% dollars, +9.0K cases)
- No. 4 Fifth Generation (+6.5% dollars, +18.0K cases)
- No. 5 Suntory Global Spirits (-6.0% dollars, -41.1K cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Sazerac (+5.7% dollars, +54.3K cases)
- No. 2 Fifth Generation (+6.5% dollars, +18.0K cases)
- No. 3 Bacardi (+2.8% dollars, +9.0K cases)
- No. 4 Constellation (+27.6% dollars, +6.2K cases)
- No. 5 Heaven Hill (+0.4% dollars, -17.7K cases)

Top 5 Brands by Dollars

- No. 1 Tito's Vodka (+4.7% dollars, +13.1K cases)
- No. 2 Crown Royal (-10.5% dollars, -23.4K cases)
- No. 3 Jack Daniel's (-8.3% dollars, -20.9K cases)
- No. 4 Don Julio (-5.2% dollars, -4.1K cases)
- No. 5 Fireball Whiskey (-7.0% dollars, -24.0K cases)

Top 5 Brands by Dollar Growth

- No. 1 Cazadores (+55.9% dollars, +24.0K cases)
- No. 2 W.L. Weller (+90.2% dollars, +7.4K cases)
- No. 3 Tito's Vodka (+4.7% dollars, +13.1K cases)
- No. 4 Lunazul Tequila (+18.5% dollars, +12.8K cases)
- No. 5 Svedka (+16.5% dollars, +32.5K cases)

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 10/17/26
 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 – October 2026

Latest 4 weeks w/e 10.17.26

Wine

Wine's weekly uptick offers limited relief as four-week declines persist

In the four weeks ending October 17th, [Wine](#) dollar sales declined **-3.3%** versus last year, while volume fell **-4.9%**. Weaker consumer engagement remained the largest contributor to losses (**47%**), followed by reduced product availability (**31%**), while underperforming promotions accounted for a larger share of the decline than the previous week (**22%**, up from **16%**). Weekly dollar sales reached **\$368.6M**, edging up **+0.2%** versus the prior week. The modest weekly increase offers some encouragement, though improving demand and promotional effectiveness remain key to a broader recovery.

Non-Alcoholic Wine accelerates as Sparkling's dollar gains narrow

During the four weeks ending October 17th, [Still Wine](#) underperformance remained, with dollar sales down **-4.0%** and volume declining **-5.3%**. [Sparkling Wine](#) maintained dollar growth of **+1.1%**, though volume slipped **-0.3%**. [Non-Alcoholic Wine](#) also maintained growth, with dollar sales increasing **+19.2%** and volume up **+16.0%**. Growth in these smaller segments continues to provide some support, but Still Wine's persistent weakness limits overall category progress.

Top 5 Manufacturers by Dollars

- No. 1 Gallo (-1.2% dollars, -64.4K cases)
- No. 2 The Wine Group (-9.0% dollars, -247.9K cases)
- No. 3 Deutsch Family (+3.5% dollars, +9.0K cases)
- No. 4 Trinchero Family (-4.2% dollars, -34.5K cases)
- No. 5 Delicato Family Wines (-4.2% dollars, -35.6K cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Deutsch Family (+3.5% dollars, +9.0K cases)
- No. 2 Kobrand (+7.0% dollars, +728 cases)
- No. 3 Delegat USA (+7.3% dollars, +2.6K cases)
- No. 4 Vineyard Brands (+7.3% dollars, +4.9K cases)
- No. 5 Wagner Family Wines (+3.5% dollars, +2.5K cases)

Top 5 Brands by Dollars

- No. 1 Josh (+7.8% dollars, +35.4K cases)
- No. 2 Barefoot (+1.2% dollars, +38.0K cases)
- No. 3 Bota (-3.4% dollars, -28.6K cases)
- No. 4 Sutter Home (-4.1% dollars, -22.2K cases)
- No. 5 La Marca (+14.7% dollars, +21.9K cases)

Top 5 Brands by Dollar Growth

- No. 1 Josh (+7.8% dollars, +35.4K cases)
- No. 2 La Marca (+14.7% dollars, +21.9K cases)
- No. 3 Whitehaven (+23.3% dollars, +8.5K cases)
- No. 4 Art of the Cooper (+299.9% dollars, +13.9K cases)
- No. 5 Made by James (+1,046.0% dollars, +9.2K cases)

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 10/17/26
Total Wine Excluding Wine Based Cocktails

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NIQ Full View: Beer Pulse – October 2026

Latest 4 weeks w/e 10.17.26

Beer

Beer’s dollar declines ease slightly, but weekly sales lose ground

In the four weeks ending October 17th, Beer maintained declines, with dollar sales down **-3.3%** and volume decreasing **-5.0%**. Softer consumer interest accounted for **76%** of declines, with distribution losses contributing **22%**. On a weekly basis, dollar sales totaled **\$856.0M**, down **-2.3%** from **\$876.5M** the prior week. Beer continues to struggle against reduced consumption in its search for momentum ahead of the holiday season.

Cider gains strength as core Beer segments show tentative improvement

Beer’s largest segments remained in decline, though several showed modest improvement. Domestic Premium posted the steepest losses, with dollars down **-7.3%** and volume down **-8.4%**, while Craft declined **-4.9%** in value and **-6.5%** in volume. Import losses narrowed (**-1.6%** in value, **-3.2%** in volume). Previous Domestic Super Premium growth slowed, with dollar sales up **+0.4%**, while volume slipped into decline **-0.1%**. Other positive contributors included Cider and Non-Alcoholic Beer. Cider strengthened to **+5.4%** in value and **+3.9%** in cases, while Non-Alcoholic Beer accelerated **+7.3%** in value and **+6.4%** in volume.

Top 5 Manufacturers by Dollars

- No. 1 Anheuser-Busch Inc. (-3.8% dollars, -2.5M cases)
- No. 2 Constellation (-0.2% dollars, -351.0K cases)
- No. 3 Molson Coors Beverage Co. (-5.5% dollars, -1.8M cases)
- No. 4 Heineken USA (-8.3% dollars, -396.2K cases)
- No. 5 New Belgium Brewing (+6.8% dollars, +58.4K cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 New Belgium Brewing (+6.8% dollars, +58.4K cases)
- No. 2 Sapporo Breweries Ltd. (+15.6% dollars, +18.8K cases)
- No. 3 Schilling Cider (N/A dollars, +7.1K cases)
- No. 4 Asahi Beer USA (+25.3% dollars, +4.5K cases)
- No. 5 Athletic Brewing Co. (+1.4% dollars, +2.3K cases)

Top 5 Brands by Dollars

- No. 1 Modelo (-0.8% dollars, -312.1K cases)
- No. 2 Budweiser (-9.2% dollars, -1.9M cases)
- No. 3 Michelob (+3.3% dollars, +276.6K cases)
- No. 4 Corona (-4.8% dollars, -441.1K cases)
- No. 5 Coors (-3.5% dollars, -565.9K cases)

Top 5 Brands by Dollar Growth

- No. 1 Pacifico (+22.7% dollars, +322.2K cases)
- No. 2 Michelob (+3.3% dollars, +276.6K cases)
- No. 3 New Belgium (+7.8% dollars, +54.6K cases)
- No. 4 Victoria (+15.7% dollars, +70.7K cases)
- No. 5 Angry Orchard (+12.0% dollars, +43.4K cases)

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 10/17/26
Total Beer Excluding FMBs and Hard Seltzer

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NIQ Full View: Prepared Cocktails Pulse – October 2026

Latest 4 weeks w/e 10.17.26

Prepared Cocktails (BWS)

Prepared Cocktails strengthen four-week trends despite a weekly sales pullback

In the four weeks ending October 17th, Prepared Cocktails BWS dollar sales increased **+1.8%** while case volume losses narrowed **-2.2%**. On a weekly basis, dollar sales totaled **\$268.0M**, down **-1.6%** from the prior week. Despite the weekly slowdown, the modest improvement in four-week trends points to continued support from Spirits- and Wine-based offerings, although growth has yet to consistently translate into overall volume gains.

Spirits-based RTDs extend strong gains as FMB/Seltzer losses ease

Performance across Prepared Cocktails BWS continued to vary widely by base. **Spirits-based RTDs** led growth, with dollar sales rising **+18.4%** and volume increasing **+20.6%**. **Wine-based cocktails** maintained gains, though growth moderated to **+6.0%** in value and **+4.1%** volume. Meanwhile, **FMB/Seltzer** remained the primary drag, but declines eased to **-5.3%** in dollars and **-7.6%** in volume. Sustained RTD growth and smaller FMB/Seltzer losses offer an encouraging combination, with further improvement in FMB/Seltzer key to restoring overall volume growth.

Top 5 Manufacturers by Dollars

- No. 1 Mark Anthony Brands (-0.3% dollars, -152.5K cases)
- No. 2 Boston Beer (-4.2% dollars, -360.1K cases)
- No. 3 Anheuser-Busch Inc. (+6.3% dollars, +30.7K cases)
- No. 4 Sazerac (+5.7% dollars, +35.6K cases)
- No. 5 Gallo (-3.7% dollars, -59.8K cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Stateside Brands (+100.6% dollars, +390.5K cases)
- No. 2 Anheuser-Busch Inc. (+6.3% dollars, +30.7K cases)
- No. 3 Sazerac (+5.7% dollars, +35.6K cases)
- No. 4 Moët Hennessy USA (N/A dollars, +5.9K cases)
- No. 5 Constellation (+63.9% dollars, +26.2K cases)

Top 5 Brands by Dollars

- No. 1 White Claw (+1.3% dollars, -26.7K cases)
- No. 2 Twisted Tea (-9.0% dollars, -284.6K cases)
- No. 3 BuzzBallz (+7.4% dollars, +36.2K cases)
- No. 4 Cutwater Cocktail (+15.7% dollars, +83.7K cases)
- No. 5 Smirnoff (+3.0% dollars, +16.2K cases)

Top 5 Brands by Dollar Growth

- No. 1 Surfside Cocktail (+53.8% dollars, +207.7K cases)
- No. 2 Super Lyte Cocktail (N/A dollars, +183.2K cases)
- No. 3 Cutwater Cocktail (+15.7% dollars, +83.7K cases)
- No. 4 Sun Cruiser Cocktail (+56.2% dollars, +134.6K cases)
- No. 5 BuzzBallz (+7.4% dollars, +36.2K cases)

Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 10/17/26

Prepared Cocktails (BWS) includes: Spirit based Ready to Drink and Ready to Serve, Wine based cocktails, FMBs and Seltzers

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