



NIQ Full View: Total Alcohol Pulse – September 2026

Latest 4 weeks w/e 09.26.26

As temperatures fall, Alcohol trends continue to cool through the end of September

During the four weeks ending September 26th, **Total Alcohol** continued to trail YA performance. Dollar sales reached **\$8.4B**, down **-0.5% vs YA**, while case volume totaled **164.5M**, declining **-2.5% vs YA**. On a weekly basis, dollar sales totaled **\$2.0B**, down **-1.2%** from the week ending September 19th. As summer-driven occasions give way to Autumn routines, alcohol sales continue to reflect a more measured pace of consumer demand.

Prepared Cocktails pull further ahead as category performance diverges

- Prepared Cocktails Beer, Wine, and Spirits (BWS)** extended their growth streak, with dollar sales increasing **+4.8%**, and case volume returning to growth **+0.7%**. Continued strength from Spirits- and Wine-based RTDs highlights sustained consumer demand for convenience, variety, and modern beverage formats heading into fall.
- Beer** remained under pressure, with dollar sales down **-2.0%** and volume falling **-3.1%**. While losses were less severe than recent periods, the category continues to face demand challenges as it moves further from peak summer consumption occasions.
- Wine** posted softer results, with dollar sales declining **-1.4%** and volume dropping **-3.4%**. The category continues to contend with evolving consumer preferences and ongoing pressure on consumption trends.
- Spirits** came close to returning to growth, with dollar sales down just **-0.1%** and volume slipping **-0.5%**. Compared with other traditional alcohol segments, Spirits remained the most resilient category during the latest period.
- The latest results further emphasize the widening divide across alcohol categories. **Beer** and **Wine** continue to face sustained declines, while **Spirits** is approaching flat performance. Meanwhile, **Prepared Cocktails (BWS)** continue to separate themselves from the pack, strengthening their position as the industry's primary source of growth heading into the end of September.

New Jersey and Michigan build momentum while most top markets remain under pressure

- Key state results remained largely aligned with broader US underperformance, with seven of the top ten state markets posting declines in both dollar sales and volume.
- New Jersey** further distanced itself from the pack, delivering growth in both value and volume. Dollar sales increased **+3.9%**, while volume rose **+5.8%**. **Michigan** also outperformed national trends, with dollar sales growing **+2.0%**, despite volume declining **-0.8%**.
- Washington** remained the weakest-performing key state market, with case volume **-13.2%** and dollar sales falling **-7.1%**. The state continues to face pronounced demand challenges, leading declines among major markets.
- Regional performance remains highly uneven, with only a select group of states generating meaningful growth while most major markets continue to trend lower. New Jersey has strengthened its position as a clear standout, Michigan has emerged as another bright spot, and Washington's prolonged downturn highlights the wide disparity in performance across markets heading into the end of September.

Channel performance improves, though Food and Convenience continue to lag

- Channel performance improved compared to recent periods, with a majority of major retail outlets returning to dollar growth. Food remained the largest decliner at **-1.9%**, followed by Convenience at **-1.7%**. Meanwhile, Club **+1.0%**, Liquor **+1.0%**, Mass **+1.5%**, and All Others **+3.9%** experienced sales gains.
- Volume trends painted a similar picture. **Convenience** (**-4.6%**) and **Food** (**-3.1%**) continued to face the greatest pressure, while **Liquor** (**-0.2%**) remained nearly flat. In contrast, **Mass** (**+0.1%**), **Club** (**+3.2%**), and **All Others** (**+5.2%**) generated volume growth.



NIQ Full View: Spirits Pulse – September 2026

Latest 4 weeks w/e 09.26.26

Spirits

Spirits inch toward positive ground as weekly trends stabilize in late September

During the four weeks ending September 26th, **Spirits** declines slowed notably, with dollar sales down **-0.1%** and volume declining **-0.5%**. Category struggles remain largely tied to numerous macro impacts and waning consumer engagement (**78%**). From a weekly perspective, Spirits sales totaled **\$502.7M**, a slight increase of **+0.3%** compared to the previous week. The hint at category resurgence comes as we enter fall, leaving the demand associated with warm weather drinking occasions, and instead embrace a cooler period where football serves as a seasonal tailwind.

Vodka joins Tequila on the rebound journey, while Whiskey continues to trail behind

Across the top Spirits categories, (**Vodka**, **Whiskey**, and **Tequila**), results remained divergent. **Whiskey** recorded the steepest decline, yet slower than recent periods, with dollar sales down **-2.8%** and volume falling **-4.0%**. **Vodka** broke into growth territory after previous losses, up **+0.2%** in value and **-0.5%** in volume. **Tequila** built upon its recent momentum, achieving both dollar and volume growth (**+4.1%** and **+8.2%** respectively). **Non-Alcoholic Spirits** continued to see swift growth, with dollar sales up **+23.8%** and volume rising **+18.9%**. All other Spirits segments managed experience gains as well, with dollar sales up **+0.4%** and volume declining **-0.4%**.

Top 5 Manufacturers by Dollars

- No. 1 Diageo (-4.4% dollars, -50.2K cases)
- No. 2 Sazerac (+6.7% dollars, +75.1K cases)
- No. 3 Bacardi (+6.2% dollars, +27.8K cases)
- No. 4 Fifth Generation (+8.5% dollars, +30.6K cases)
- No. 5 Suntory Global Spirits (-3.7% dollars, -28.2K cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Sazerac (+6.7% dollars, +75.1K cases)
- No. 2 Fifth Generation (+8.5% dollars, +30.6K cases)
- No. 3 Bacardi (+6.2% dollars, +27.8K cases)
- No. 4 Heaven Hill (+2.9% dollars, -8.5K cases)
- No. 5 Campari America (+3.4% dollars, +6.0K cases)

Top 5 Brands by Dollars

- No. 1 Tito's Vodka (+6.5% dollars, +25.0K cases)
- No. 2 Crown Royal (-9.7% dollars, -21.6K cases)
- No. 3 Jack Daniel's (-6.5% dollars, -16.9K cases)
- No. 4 Don Julio (-2.7% dollars, -933 cases)
- No. 5 Fireball Whiskey (-7.5% dollars, -22.6K cases)

Top 5 Brands by Dollar Growth

- No. 1 Tito's Vodka (+6.5% dollars, +25.0K cases)
- No. 2 W.L. Weller (+105.6% dollars, +8.4K cases)
- No. 3 Cazadores (+54.8% dollars, +24.3K cases)
- No. 4 Lunazul Tequila (+23.3% dollars, +16.4K cases)
- No. 5 Svedka (+19.4% dollars, +40.4K cases)

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 09/26/26
 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:
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NIQ Full View: Wine Pulse – September 2026

Latest 4 weeks w/e 09.26.26

Wine

Wine looks to potential long-awaited rebound, as weekly trends improve in early Fall

In the four weeks ending September 26th, **Wine sat behind YA**, with dollar sales dropping **-1.4%** and volume down **-3.4%**. Latest declines were most attributed to buyer constraints (**80%**), followed by reduced distribution (**12%**) and ineffective promotions (**8%**). On a weekly basis, dollar sales totaled **\$364.6M**, up **+1.3%** versus the prior week. The upcoming weeks will be revealing in regard to Wine’s rebound potential, as the category enters a favorable seasonal period after a dull summer.

Wine underlying bright spots persist, but not yet able to overcome Still Wine struggles

During the four weeks ending September 26th, **Still Wine** held as the primary category lagger, with dollar sales down **-2.2%** and volume sliding **-4.0%**. **Sparkling Wine** made progress on its growth journey, posting dollar gains of **+3.4%** and volume growth of **+2.5%**. **Non-Alcoholic Wine** also offered a helpful boost, with dollar sales rising **+21.5%** and volume up **+18.6%**. Although Still Wine losses have yet to be outweighed by the smaller Wine segments, their upward results are evidence of dispersed growth pockets in a challenged category.

Top 5 Manufacturers by Dollars

- No. 1 Gallo (-0.4% dollars, -51.2K cases)
- No. 2 The Wine Group (-8.6% dollars, -230.0K cases)
- No. 3 Deutsch Family (+4.8% dollars, +16.7K cases)
- No. 4 Trinchero Family (-0.9% dollars, -7.6K cases)
- No. 5 Delicato Family Wines (-7.2% dollars, -53.3K cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Deutsch Family (+4.8% dollars, +16.7K cases)
- No. 2 Moet Hennessy USA (+4.5% dollars, +3.4K cases)
- No. 3 Duckhorn Wine Company (+5.2% dollars, +5.5K cases)
- No. 4 Constellation (+3.6% dollars, +8.6K cases)
- No. 5 Delegat USA (+10.2% dollars, +4.4K cases)

Top 5 Brands by Dollars

- No. 1 Josh (+9.1% dollars, +39.3K cases)
- No. 2 Barefoot (+1.6% dollars, +42.8K cases)
- No. 3 Sutter Home (-2.1% dollars, -10.6K cases)
- No. 4 Bota (-3.5% dollars, -24.8K cases)
- No. 5 LaMarca (+17.9% dollars, +28.2K cases)

Top 5 Brands by Dollar Growth

- No. 1 LaMarca (+17.9% dollars, +28.2K cases)
- No. 2 Josh (+9.1% dollars, +39.3K cases)
- No. 3 Whitehaven (+24.2% dollars, +9.3K cases)
- No. 4 Kim Crawford (+9.2% dollars, +8.2K cases)
- No. 5 Matua (+14.4% dollars, +7.0K cases)

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 09/26/26
Total Wine Excluding Wine Based Cocktails

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NIQ Full View: Beer Pulse – September 2026

Latest 4 weeks w/e 09.26.26

Beer

Beer’s uphill battle drags on as early Fall seasonal impact offers little relief

In the four weeks ending September 26th, Beer headwinds carried on, with dollar sales slipping **-2.0%** and volume declining **-3.1%**. Broad alcohol headwinds and waning consumer interest continue to drive category declines (**83%**), with weakened distribution also weighing on performance (**17%**). On a weekly basis, dollar sales totaled **\$866.6M**, down **-2.5%** from **\$889.2M** the prior week. Beer continues to exist in an environment of reduced demand, with few accelerators outside of football related consumption occasions to support the recovery push.

Growth builds among Beer smaller segments, while Beer’s core segment challenges persist

Beer’s top segments continue to limit category results. Domestic Premium losses continuously lead the pack, with dollar sales down **-6.1%** and volume down **-6.5%**, while Craft declined **-4.5%** in value and **-5.6%** in volume. Import declines were less pronounced (**-0.6%** in value, **-1.8%** in volume). Domestic Super Premium maintained growth, with dollar sales and volume both increasing **+3.7%**. Other positive contributors included both Cider and Non-Alcoholic Beer. Cider rose **+6.0%** in value and **+4.8%** in cases, while Non-Alcoholic Beer grew **+10.5%** in value and **+10.3%** in volume. The strength seen in Non-Alcoholic Beer remains tied to modern wellness and moderation trends, whereas other resilient segments show growth can be achieved where consumer appetite holds steady.

Top 5 Manufacturers by Dollars

- No. 1 Anheuser-Busch Inc. (-2.0% dollars, -1.5M cases)
- No. 2 Constellation (+0.8% dollars, -28.0K cases)
- No. 3 Molson Coors Beverage Co (-4.1% dollars, -1.3M cases)
- No. 4 Heineken USA (-7.5% dollars, -371.9K cases)
- No. 5 New Belgium Brewing (+7.3% dollars, +69.1K cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Constellation (+0.8% dollars, -28.0K cases)
- No. 2 New Belgium Brewing (+7.3% dollars, +69.1K cases)
- No. 3 Sapporo Breweries Ltd (+20.6% dollars, +24.3K cases)
- No. 4 Athletic Brewing Co (+6.1% dollars, +17.9K cases)
- No. 5 Diageo (+2.9% dollars, +4.6K cases)

Top 5 Brands by Dollars

- No. 1 Modelo (-0.0% dollars, -151.0K cases)
- No. 2 Budweiser (-8.4% dollars, -1.8M cases)
- No. 3 Michelob (+7.0% dollars, +828.9K cases)
- No. 4 Corona (-2.4% dollars, -241.9K cases)
- No. 5 Coors (-2.3% dollars, -337.6K cases)

Top 5 Brands by Dollar Growth

- No. 1 Michelob (+7.0% dollars, +828.9K cases)
- No. 2 Pacifico (+18.6% dollars, +284.2K cases)
- No. 3 Busch (+2.4% dollars, +129.0K cases)
- No. 4 New Belgium (+8.5% dollars, +64.7K cases)
- No. 5 Victoria (+14.7% dollars, +68.5K cases)

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 09/26/26
Total Beer Excluding FMBs and Hard Seltzer

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NIQ Full View: Prepared Cocktails Pulse – September 2026

Latest 4 weeks w/e 09.26.26

Prepared Cocktails (BWS)

Prepared Cocktails stay in positive stride despite weekly dip in early Fall

In the four weeks ending September 26th, Prepared Cocktails BWS growth endured, with dollar sales increasing **+4.8%** while case volume grew **+0.7%**. On a weekly basis, dollar sales totaled **\$272.7M**, down **-2.7%** from the prior week. Despite the weekly slip, L4W trends show the category remains in a great position, with near perfect alignment to current consumer preferences for convenience, portability, flavor and more through Spirits- and Wine-based products.

Spirit- and Wine-based RTD write growth playbook while FMB/Seltzer seeks recovery

Performance across Prepared Cocktails continue to chart varied paths by alcohol base. **Spirits-based RTDs** are acting as the primary growth source, with dollar sales improving **+25.9%** and volume increasing **+29.2%**. Wine-based cocktails also contributed with notable gains, up **+8.6%** in value and **+6.0%** volume. Contrastingly, FMB/Seltzer lingers in a slump, with dollar sales sliding **-4.4%** and volume down **-6.3%**. The overarching category theme is increasingly becoming Spirits- and Wine-based RTD focused, as they lead positive trends while Malt-based offerings strive to re-join the growth conversation.

Top 5 Manufacturers by Dollars

- No. 1 Mark Anthony Brands (+0.5% dollars, -81.6K cases)
- No. 2 Boston Beer (-1.7% dollars, -252.0K cases)
- No. 3 Anheuser-Busch Inc. (+10.3% dollars, +103.1K cases)
- No. 4 Gallo (-0.7% dollars, -15.2K cases)
- No. 5 Sazerac (+10.3% dollars, +55.4K cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Stateside Brands (+117.7% dollars, +511.9K cases)
- No. 2 Anheuser-Busch Inc. (+10.3% dollars, +103.1K cases)
- No. 3 Sazerac (+10.3% dollars, +55.4K cases)
- No. 4 Moet Hennessy USA (N/A dollars, +6.2K cases)
- No. 5 Diageo (+2.6% dollars, +18.3K cases)

Top 5 Brands by Dollars

- No. 1 White Claw (+1.6% dollars, +7.5K cases)
- No. 2 Twisted Tea (-7.7% dollars, -255.0K cases)
- No. 3 BuzzBallz (+13.2% dollars, +58.6K cases)
- No. 4 Cutwater Cocktail (+21.5% dollars, +130.5K cases)
- No. 5 Smirnoff (+5.9% dollars, +63.7K cases)

Top 5 Brands by Dollar Growth

- No. 1 Surfside Cocktail (+70.0% dollars, +302.2K cases)
- No. 2 Super Lyte Cocktail (N/A dollars, +208.2K cases)
- No. 3 Cutwater Cocktail (+21.5% dollars, +130.5K cases)
- No. 4 Sun Cruiser Cocktail (+69.6% dollars, +194.5K cases)
- No. 5 BuzzBallz (+13.2% dollars, +58.6K cases)

Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 09/26/26
 Prepared Cocktails (BWS) includes: Spirit based Ready to Drink and Ready to Serve, Wine based cocktails, FMBs and Seltzers

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