# NIQ Full View: Total Alcohol Pulse – November 2026

*Latest 4 weeks w/e 11.14.26*



## Alcohol continues through mid-November on steadier footing as category declines narrow

During the four weeks ending November 14th, Total Alcohol generated $8.1B in sales, down -1.2% vs YA, and case volume totaled 152.8M, declining -2.6% vs YA. The second week of November generated $2.0B in sales, declining -0.7% versus the prior week as Veterans Day and pre-Thanksgiving shopping translated into some momentum, with dollar and volume trends improving slightly, continuing the November steadiness. While underlying demand remains pressured, seasonal selling periods provide a key opportunity to mitigate broader category softness.

## Prepared Cocktails remain a growth engine as traditional alcohol categories are pressured

- Prepared Cocktails Beer, Wine, and Spirits (BWS) accelerated in both metrics, with dollars growing +4.5% and volume reversing slight declines to a flat positive of +0.6%. As consumers prepare for the year-end gathering season, the format is well-positioned to capture various drinking occasions, reinforcing its role as the industry's bright spot. However, anticipate deaccelerating growth, as the category laps strong prior-year gains.
- Beer continued to stabilize as declines narrow, with value down -1.4% and cases -3.0%, a greater improvement for volume (from -3.2% in prior period). Early November seasonality brings some relief to Beer performance, which could translate to the rest of the season.
- Wine continued to have the softest performance across major categories, with dollar sales down -3.6% and volume -5.1%. Wine reversed its temporary ease, to now posting deeper declines across both metrics.
- Spirits posted dollar declines of -1.9% and volume losses of -1.1%. Value trend was unchanged compared to the previous week, however, volume eased further, pointing to consumers shopping for the best value, whether that is a different size, brand, or deeper promotions.
- Besides the established gap between Prepared Cocktails (BWS) and traditional categories, the latest four-week results highlight the continuous narrower declines in Beer and Spirits, as the categories benefit from the busier selling periods upon the industry. Unfortunately, Wine did not see such improvement compared to year ago sales as it faces a wider consumer pressure.

## Alcohol's growth map is splitting: Ohio and Michigan strengthen while volume pressure deepens in Massachusetts, Washington, and Texas signaling risk

- Performance across major markets remained fragmented, with gains strengthening in select states while several large markets lost ground versus the prior period.
- Ohio led major markets, with value growth reaching +3.3% vs YA, up from +3.0% in the prior period. Michigan also strengthened to +1.1% (from +0.8%). Illinois moderated growth at +1.0% (from +1.4%), while New Jersey also moderated, now flat (from +0.3%).
- Massachusetts continued to face the steepest declines, with value down -7.1% (vs -6.9% in the prior period) and volume -9.5% (vs -8.9%). Washington also came under greater pressure, with volume falling -7.1% (vs -6.6% ).
- The latest results show select large states gaining ground, while weakness persists across several of the largest markets. Dollar sales are down in Texas (-3.3%), New York (-3.2%), and California (-2.6%), with volume falling faster as cases decline -5.6% in Texas, -4.5% in California, and -2.7% in New York.

## Convenience increases momentum as channel performance remains uneven

- Channel dollar trends remained mixed. Food led declines at -2.6%, followed by Club -1.4% (best improvement versus prior week), Liquor -1.3%, Mass -0.3%, and Convenience -0.3%. Meanwhile, All Others +3.1% saw stronger gains.
- Volume trends continued to trail dollar trends. Food -3.5% led volume declines, followed by Mass -2.9% (eased most), Convenience -3.0%, Liquor -2.0%, while Club +1.4% continued strengthening its recent growth. Similar to dollar sales performance, All Others (+5.3%) was the strongest volume grower.

*Source: NielsenIQ Retail Measurement | Periods ending 11/17/26*
*Prepared Cocktails (BWS) includes Spirit based prepared cocktails, Wine based cocktails, Flavored Malt Beverages and Seltzers*
*All Other Channels includes: Drug, Military, and Dollar*

© 2026 Nielsen Consumer LLC. All Rights Reserved.

# NIQ Full View: Spirits Pulse – November 2026

*Latest 4 weeks w/e 11.14.26*



***Spirits***

## Spirits face continued pressure in November as holiday demand has yet to offset softness

During the four weeks ending November 14th, Spirits posted dollar sales declines of -1.9% and volume declines of -1.1%, both weaker than the prior period. Softer consumer demand remained the primary driver of category declines, accounting for 85% of losses, while price pressures contributed the remaining 15%. The latest week generated $525.4M in sales, improving +1.8% versus the prior week, following the post-Halloween slowdown. Category trends remain challenged as consumers continue to prioritize value and limit discretionary spending heading into the holiday season.

## Tequila and Non-Alc Spirits continue to outperform while Whiskey remains challenged

Performance across the leading Spirits categories (Vodka, Whiskey, and Tequila) remained highly uneven. Tequila maintained momentum, growing +2.3% in dollars and +6.0% in volume, while Non-Alcoholic Spirits maintained the strongest momentum (+25.9% in value, +32.5% in volume). Meanwhile, Vodka continued to improve (+0.0% in value, +0.1% in volume). In contrast, Whiskey remained under pressure, with dollars declining -5.3% and volume down -4.6%. All Other Spirits also trended below category performance, reinforcing a market where growth remains concentrated in a select group of consumer-favored segments while traditional categories continue to face ongoing demand pressures.

## Top 5 Manufacturers by Dollars

- *No. 1 Diageo (-5.2% dollars, -53.0K cases)*
- *No. 2 Sazerac (+4.6% dollars, +95.5K cases)*
- *No. 3 Bacardi (+3.8% dollars, +15.5K cases)*
- *No. 4 Suntory Global Spirits (-5.6% dollars, -38.4K cases)*
- *No. 5 Fifth Generation (+7.8% dollars, +31.6K cases)*

## Top 5 Manufacturers by Dollar Growth

- *No. 1 Sazerac (+4.6% dollars, +95.5K cases)*
- *No. 2 Fifth Generation (+7.8% dollars, +31.6K cases)*
- *No. 3 Bacardi (+3.8% dollars, +15.5K cases)*
- *No. 4 Constellation (+12.9% dollars, +6.9K cases)*
- *No. 5 Campari America (+0.5% dollars, -2.0K cases)*

## Top 5 Brands by Dollars

- *No. 1 Tito's Vodka (+6.1% dollars, +26.8K cases)*
- *No. 2 Crown Royal (-8.4% dollars, -13.2K cases)*
- *No. 3 Jack Daniel's (-6.2% dollars, -17.0K cases)*
- *No. 4 Don Julio (-1.5% dollars, +13 cases)*
- *No. 5 Fireball Whiskey (-5.4% dollars, -18.8K cases)*

## Top 5 Brands by Dollar Growth

- *No. 1 Tito's Vodka (+6.1% dollars, +26.8K cases)*
- *No. 2 Cazadores (+60.5% dollars, +26.6K cases)*
- *No. 3 W.L. Weller (+66.4% dollars, +6.8K cases)*
- *No. 4 Lunazul Tequila (+17.6% dollars, +13.0K cases)*
- *No. 5 Svedka (+17.1% dollars, +51.2K cases)*
- *No. 5 Svedka (+17.7% dollars, +51.7K cases)*

*Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 11/14/26*
*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 isrequired 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.

© 2026 Nielsen Consumer LLC. All Rights Reserved.

# NIQ Full View: Wine Pulse – November 2026

*Latest 4 weeks w/e 11.14.26*



***Wine***

## Wine trends improve in mid-November, though category declines remain persistent

In the four weeks ending November 14th, Wine dollar sales declined -3.6% while case volume fell -5.1%. The latest week generated $389.6M in sales, improving +2.6% versus the prior week. Consumer demand softness remained the primary driver of category declines, accounting for 71% of losses, while distribution headwinds contributed 18% and reduced promotional support drove an additional 11%. While the category remains challenged, weekly improvement and continued growth across select premium and emerging segments suggest Wine is entering the holiday season on somewhat firmer footing than earlier this fall.

## Sparkling Wine sustains growth while Still Wine remains the primary drag

Performance across Wine segments continued to diverge. Non-Alcoholic Wine remained the category's strongest growth engine, with latest four-week dollar sales increasing +18.4% and case volume up +13.7%. Sparkling Wine also maintained momentum, with dollars growing +2.4% and volume increasing +1.4%. In contrast, Still Wine remained the largest source of weakness, with dollar sales down -4.5% and cases declining -5.7%. Despite continued pressure on core segments, growth pockets within the category continue to demonstrate consumers' willingness to engage with innovation and occasion-driven offerings.

## Top 5 Manufacturers by Dollars

- *No. 1 Gallo (-0.9% dollars, -71.0K cases)*
- *No. 2 The Wine Group (-10.5% dollars, -278.1K cases)*
- *No. 3 Deutsch Family (+3.4% dollars, +17.3K cases)*
- *No. 4 Trinchero Family (-3.6% dollars, -32.0K cases)*
- *No. 5 Delicato Family Wines (-7.7% dollars, -54.7K cases)*

## Top 5 Manufacturers by Dollar Growth

- *No. 1 Deutsch Family (+3.4% dollars, +17.3K cases)*
- *No. 2 Constellation (+4.3% dollars, +9.1K cases)*
- *No. 3 Moet Hennessy USA (+2.2% dollars, +3.1K cases)*
- *No. 4 Delegat USA (+9.2% dollars, +4.2K cases)*
- *No. 5 Vineyard Brands (+7.3% dollars, +5.7K cases)*

## Top 5 Brands by Dollars

- *No. 1 Josh Cellars (+7.6% dollars, +44.4K cases)*
- *No. 2 Barefoot (+1.6% dollars, +39.3K cases)*
- *No. 3 Bota (-2.9% dollars, -21.5K cases)*
- *No. 4 Sutter Home (-3.5% dollars, -21.3K cases)*
- *No. 5 LaMarca (+14.3% dollars, +22.5K cases)*

## Top 5 Brands by Dollar Growth

- *No. 1 Josh Cellars (+7.6% dollars, +44.4K cases)*
- *No. 2 LaMarca (+14.3% dollars, +22.5K cases)*
- *No. 3 Whitehaven (+23.2% dollars, +8.7K cases)*
- *No. 4 Jacks Peak (N/A dollars, +13.7K cases)*
- *No. 5 Kim Crawford (+8.0% dollars, +7.3K cases)*

*Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 11/14/26*
*Total Wine Excluding Wine Based Cocktails*

**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 isrequired 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.

© 2026 Nielsen Consumer LLC. All Rights Reserved.

# NIQ Full View: Beer Pulse – November 2026

*Latest 4 weeks w/e 11.14.26*



***Beer***

## Beer approaches mid-November with continued improvement

In the four weeks ending November 14th, Beer dollar sales declined -1.4% while volume fell -3.0%, representing a modest improvement from the prior period. The latest week generated $804.9M in sales, declining -3.1% versus the prior week as Halloween-related selling activity moved further into the rearview mirror. Softer consumer demand was the primary driver of category declines, accounting for 81% of total losses, while distribution headwinds contributed 18%. Despite softer weekly results, the broader four-week trend indicates Beer continues to maintain a more moderate position than other traditional alcohol categories entering the holiday season.

## Domestic Super Premium builds on momentum while Non-Alcoholic Beer continues to outpace Beer category growth

Performance remained mixed across Beer segments. Domestic Super Premium strengthened further, with dollar sales increasing +3.0% and volume rising +2.1%, continuing to lead growth among major segments. Import also showed modest improvement (+0.3% in value, -1.0% in volume). Non-Alcoholic Beer continued to deliver the strongest growth rates across Beer, advancing +8.8% in dollars and +7.3% in cases, while Cider also remained a positive contributor (+6.4% in value, +4.9% in cases). Domestic Premium remained the weakest major segment, declining -5.0% in dollars and -6.4% in volume, while Craft softened slightly (-4.1% in value, -5.4% in volume).

## Top 5 Manufacturers by Dollars

- *No. 1 Anheuser-Busch Inc. (-1.6% dollars, -1.5M cases)*
- *No. 2 Constellation (+1.6% dollars, +35.5K cases)*
- *No. 3 Molson Coors Beverage Co. (-3.2% dollars, -1.2M cases)*
- *No. 4 Heineken USA (-5.5% dollars, -169.1K cases)*
- *No. 5 New Belgium Brewing (+7.8% dollars, +72.1K cases)*

## Top 5 Manufacturers by Dollar Growth

- *No. 1 Constellation (+1.6% dollars, +35.5K cases)*
- *No. 2 New Belgium Brewing (+7.8% dollars, +72.1K cases)*
- *No. 3 Sapporo Breweries Ltd. (+15.4% dollars, +18.3K cases)*
- *No. 4 Schilling Cider (+23.7% dollars, +14.9K cases)*
- *No. 5 Boston Beer (+1.1% dollars, +10.8K cases)*

## Top 5 Brands by Dollars

- *No. 1 Modelo (+0.4% dollars, -153.0K cases)*
- *No. 2 Budweiser (-7.3% dollars, -1.5M cases)*
- *No. 3 Michelob (+6.0% dollars, +525.3K cases)*
- *No. 4 Corona (-1.1% dollars, -149.4K cases)*
- *No. 5 Coors (-1.6% dollars, -402.2K cases)*

## Top 5 Brands by Dollar Growth

- *No. 1 Michelob (+6.0% dollars, +525.3K cases)*
- *No. 2 Pacifico (+19.6% dollars, +258.9K cases)*
- *No. 3 Busch (+3.5% dollars, +173.8K cases)*
- *No. 4 New Belgium (+8.2% dollars, +59.2K cases)*
- *No. 5 Victoria (+16.5% dollars, +69.9K cases)*

*Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 11/14/26*
*Total Beer Excluding FMBs and Hard Seltzer*

**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 isrequired 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.

© 2026 Nielsen Consumer LLC. All Rights Reserved.

# NIQ Full View: Prepared Cocktails Pulse – November 2026

*Latest 4 weeks w/e 11.14.26*



***Prepared Cocktails (BWS)***

## Prepared Cocktails extend growth momentum as positive volume trends continue into November

In the four weeks ending November 14th, Prepared Cocktails BWS strengthened versus the prior period, with dollar sales increasing +4.5% and volume growth improving to +0.6%. The latest week generated $251.8M in sales, down -3.3% from the prior week, a substantially smaller decline than the previous reporting period. As the holiday selling season approaches, Prepared Cocktails remains one of the strongest-performing segments across Beverage Alcohol.

## Spirit-based RTDs accelerate further while FMB/Seltzer narrows declines

Performance across Prepared Cocktails remained highly differentiated by base type. Spirits-based RTDs continued to lead category growth, with dollar sales accelerating to +22.8% and volume up +26.3%. Similarly, Wine-based cocktails also remained a growth contributor, delivering +6.6% in value and +4.7% in volume. Meanwhile, FMB/Seltzer posted another week of improving trends, with dollar sales declining -2.8% and volume down -5.3%. Growth remains concentrated in Spirit-based RTDs, with consumers continuing to favor ready-to-drink cocktail formats across key consumption occasions.

## Top 5 Manufacturers by Dollars

- *No. 1 Mark Anthony Brands (+1.9% dollars, -32.4K cases)*
- *No. 2 Boston Beer (-1.7% dollars, -252.7K cases)*
- *No. 3 Anheuser-Busch Inc. (+6.3% dollars, +57.6K cases)*
- *No. 4 Sazerac (+6.0% dollars, +44.3K cases)*
- *No. 5 Gallo (+0.4% dollars, -8.5K cases)*

## Top 5 Manufacturers by Dollar Growth

- *No. 1 Stateside Brands (+119.0% dollars, +431.7K cases)*
- *No. 2 Anheuser-Busch Inc. (+6.3% dollars, +57.6K cases)*
- *No. 3 Mark Anthony Brands (+1.9% dollars, -32.4K cases)*
- *No. 4 Sazerac (+6.0% dollars, +44.3K cases)*
- *No. 5 Diageo (+3.8% dollars, +21.6K cases)*

## Top 5 Brands by Dollars

- *No. 1 White Claw (+3.2% dollars, +32.6K cases)*
- *No. 2 Twisted Tea (-7.1% dollars, -228.1K cases)*
- *No. 3 BuzzBallz (+6.2% dollars, +30.2K cases)*
- *No. 4 Cutwater Cocktail (+12.6% dollars, +80.9K cases)*
- *No. 5 Smirnoff (+6.5% dollars, +59.8K cases)*

## Top 5 Brands by Dollar Growth

- *No. 1 Surfside Cocktail (+64.7% dollars, +232.0K cases)*
- *No. 2 Super Lyte Cocktail (N/A dollars, +199.7K cases)*
- *No. 3 Sun Cruiser Cocktail (+68.0% dollars, +140.9K cases)*
- *No. 4 Cutwater Cocktail (+12.6% dollars, +80.9K cases)*
- *No. 5 White Claw (+3.2% dollars, +32.6K cases)*

*Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 11/14/26*
*Prepared Cocktails (BWS) includes: Spirit based Ready to Drink and Ready to Serve, Wine based cocktails, FMBs and Seltzers*

**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 isrequired 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.

© 2026 Nielsen Consumer LLC. All Rights Reserved.