NIQ Full View: Total Alcohol Pulse – October 2026

Latest 4 weeks w/e 10.24.26



Alcohol sales enter late October with limited momentum and continued pressure

During the four weeks ending October 24th, Total Alcohol remained on a subdued trajectory. Dollar sales reached $8.1B, down -2.2% vs YA, while case volume totaled 154.9M, declining -4.0% vs YA. Weekly dollar sales totaled $2.0B, up +0.3% versus the week ending October 17th.The marginal weekly lift puts the prior week's declines on pause, but leaves the industry searching for traction. With Halloween approaching, seasonal gatherings could provide a welcome boost to demand as October draws to a close.

Prepared Cocktails hold onto growth as traditional alcohol categories lose ground

- Prepared Cocktails Beer, Wine, and Spirits (BWS) provided a brighter spot in an otherwise subdued Alcohol market. Dollar growth accelerated to +2.3%, despite volume declining -1.7%. This gives the category's growth story firmer backing, although its gains remain confined to dollars.
- Beer slower pace of decline took some weight off the industry's performance. Dollar sales fell -2.6% and volume declined -4.3%. Both declines eased from the prior period, taking some pressure off the category. However, continued volume losses show that Beer has yet to regain its footing.
- Wine recorded deeper losses, with dollar sales slipping -3.8% and volume dropping -5.3%. Declines widened across both measures, leaving Wine with the weakest performance among the major categories.
- Spirits recorded dollar sales declines of -2.5% and volume losses of -2.4%. Both measures softened slightly from the prior period, leaving Spirits comparatively better positioned than traditional peers but with little momentum of its own.
- 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.
- The latest four-week results through October 24th reveal an uneven Alcohol landscape. Prepared Cocktails (BWS) stronger dollar growth and Beer's easing losses have yet to translate into a broader turnaround, with Wine losing further ground and volume remaining negative across all four major categories.

Ohio inches into dollar growth as major markets show uneven progress

- Regional trends continued to reflect nationwide industry softness, with most of the top ten state markets posting declines, with improving performance in select markets.
- Ohio led dollar performance with growth of +0.3% vs YA, moving beyond the prior period's -0.6% decline. New Jersey also crossed into slightly positive territory on volume, up +0.2% versus a -1.0% decline previously. These shifts bring both markets closer to stability, with stronger momentum still to be established.
- Massachusetts faced a deeper setback, with dollar sales falling -9.0% and volume declining -10.5%. Michigan and Illinois offered some relief, as dollar declines narrowed to -2.6% and -1.2%, respectively.
- The latest results reveal a widening contrast between markets approaching flat performance and those still absorbing substantial losses. Ohio and New Jersey's marginal gains, alongside smaller declines in Michigan and Illinois. However, continued weakness across most major markets keeps a broad return to growth out of reach.

Convenience narrows its declines as Club faces deeper dollar losses

- Channel dollar trends remained uneven. Club led declines at -4.3%, followed by Food -3.4%, Liquor -2.0%, Mass -1.7%, and Convenience -1.6%. Meanwhile, All Others +2.6% captured gains.
- Volume trends continued to differ from dollar trends. Food -4.7% led volumed losses, followed by Convenience -4.5%, Mass -4.5%, Liquor -3.2%, and Club -2.3%. Similar to dollar sales performance, All Others (+4.1%) was the sole volume grower.

Source: NielsenIQ Retail Measurement | Periods ending 10/24/26
Prepared Cocktails (BWS) includes Spirit based prepared cocktails, Wine based cocktails, Flavored Malt Beverages and Seltzers
All Other Channels includes: Drug, Military, and Dollar

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NIQ Full View: Spirits Pulse – October 2026

Latest 4 weeks w/e 10.24.26



Spirits

Weekly Spirits sales continue scaling up as we approach one of the seasonal peaks

During the four weeks ending October 24th, Spirits sustained losses, with dollars down -2.5% and volume -2.4%. Softer demand and broader economic headwinds remained the primary drag on performance, driving 88% of the decline. Spirits sales reached $521.6M in the latest week, up +1.7% from the prior week, a testament to Halloween and the holiday entertaining season. While Spirits remain more resilient than the broader industry, upcoming celebrations offer an opportunity to strengthening ongoing efforts.

Tequila holds modest growth and Non-Alcoholic Spirits upkeeps leading pace

Performance across the leading Spirits categories (Vodka, Whiskey, and Tequila) remained uneven as the holiday season approaches. Whiskey's losses slightly deepened, with dollar sales down -4.8% and volume down -5.3%. Vodka held steady with minor improvement, now declining -1.2% in dollars and -1.9% in volume. Similarly, Tequila dollars grew +0.6%, and volume rose slightly, now +5.1%. Non-Alcoholic Spirits strengthened in volume with steady value trend, +20.4%, and volume increasing +22.0%. All other Spirits segments collectively fell -2.5% in dollars and -3.5% in volume, leaving growth concentrated in select areas.

Top 5 Manufacturers by Dollars

- *No. 1 Diageo (-6.5% dollars, -74.8K cases)*
- *No. 2 Sazerac (+5.8% dollars, +54.1K cases)*
- *No. 3 Bacardi (+2.7% dollars, +5.4K cases)*
- *No. 4 Fifth Generation (+6.6% dollars, +18.9K cases)*
- *No. 5 Suntory Global Spirits (-6.4% dollars, -43.8K cases)*

Top 5 Manufacturers by Dollar Growth

- *No. 1 Sazerac (+5.8% dollars, +54.1K cases)*
- *No. 2 Fifth Generation (+6.6% dollars, +18.9K cases)*
- *No. 3 Bacardi (+2.7% dollars, +5.4K cases)*
- *No. 4 Constellation (+21.5% dollars, +6.4K cases)*
- *No. 5 Frederick Wildman (+33.4% dollars, +194 cases)*

Top 5 Brands by Dollars

- *No. 1 Tito's Vodka (+4.8% dollars, +13.9K cases)*
- *No. 2 Crown Royal (-9.7% dollars, -21.0K cases)*
- *No. 3 Jack Daniel's (-8.2% dollars, -20.9K cases)*
- *No. 4 Don Julio (-5.4% dollars, -4.1K cases)*
- *No. 5 Fireball Whiskey (-7.1% dollars, -25.9K cases)*

Top 5 Brands by Dollar Growth

- *No. 1 W.L. Weller (+105.1% dollars, +8.6K cases)*
- *No. 2 Cazadores (+56.0% dollars, +24.3K cases)*
- *No. 3 Tito's Vodka (+4.8% dollars, +13.9K cases)*
- *No. 4 Lunazul Tequila (+17.0% dollars, +11.8K cases)*
- *No. 5 Svedka (+16.0% dollars, +32.1K cases)*

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 10/24/26
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 – October 2026

Latest 4 weeks w/e 10.24.26



Wine

Seasonal demand contributes to some relief as four-week declines persist

In the four weeks ending October 24th, Wine contracted further, with dollar sales declining -3.8% versus last year, and volume -5.3%. Weaker consumer engagement was the largest contributor to losses and accounted for a larger share of declines this week (73%, up from 47%), followed by reduced product availability (16%), and underperforming promotions (11%). Weekly dollar sales reached $372.5M, up +1.0% versus the prior week, an expected uptick as seasonal demand consolidates later in the month (Last year it was +1.2% vs prev). While this weekly increase is encouraging, the widening gap between value and volume trends is a reminder of the need for premium and for accessible options.

Sparkling Wine shows improvement, while growth slows in Non-Alc

During the four weeks ending October 24th, Still Wine had deeper declines in both metrics, value -4.6%, cases -5.8%. Conversely, Sparkling Wine accelerated in both, now dollars pacing at +1.5%, and volume +0.1% after recurring declines. Non-Alcoholic Wine also maintained growth, though it moderated slightly, with value growing +18.4% and volume up +14.6%. 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, -68.3K cases)*
- *No. 2 The Wine Group (-9.4% dollars, -260.0K cases)*
- *No. 3 Deutsch Family (+3.4% dollars, +9.8K cases)*
- *No. 4 Trinchero Family (-4.5% dollars, -36.5K cases)*
- *No. 5 Delicato Family Wines (-6.8% dollars, -54.5K cases)*

Top 5 Manufacturers by Dollar Growth

- *No. 1 Deutsch Family (+3.4% dollars, +9.8K cases)*
- *No. 2 Vineyard Brands (+8.7% dollars, +6.1K cases)*
- *No. 3 Wagner Family Wines (+3.8% dollars, +2.6K cases)*
- *No. 4 Delegat USA (+7.6% dollars, +2.8K cases)*
- *No. 5 Constellation (+2.2% dollars, +3.9K cases)*

Top 5 Brands by Dollars

- *No. 1 Josh (+7.9% dollars, +38.2K cases)*
- *No. 2 Barefoot (+1.0% dollars, +37.3K cases)*
- *No. 3 Bota (-3.8% dollars, -31.9K cases)*
- *No. 4 Sutter Home (-4.0% dollars, -22.3K cases)*
- *No. 5 La Marca (+15.2% dollars, +22.6K cases)*

Top 5 Brands by Dollar Growth

- *No. 1 Josh (+7.9% dollars, +38.2K cases)*
- *No. 2 La Marca (+15.2% dollars, +22.6K cases)*
- *No. 3 Whitehaven (+23.7% dollars, +8.5K cases)*
- *No. 4 Made by James (+1,078.5% dollars, +9.2K cases)*
- *No. 5 Matua (+13.4% dollars, +6.0K cases)*

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 10/24/26
Total Wine Excluding Wine Based Cocktails

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NIQ Full View: Beer Pulse – October 2026

Latest 4 weeks w/e 10.24.26



Beer

Beer benefits from some seasonal momentum, narrowing ongoing declines

In the four weeks ending October 24th, Beer improved its declining trends, with dollars now down -2.6% and volume pacing at -4.3%. Softer consumer interest accounted for 84% of declines, with distribution losses contributing 16%. On a weekly basis, dollar sales totaled $849.6M, down -0.8% from the prior week. The latest improvement is encouraging, as some seasonal momentum builds up late in October.

Import and Domestic Super Premium have the best improvements

Beer's largest segments remained in decline, though several showed modest improvement. Domestic Premium had the steepest losses, with dollars down -6.6% and volume down -7.7%, while Craft declined -4.6% in value and -6.1% in volume. Import losses narrowed the most (-0.7% in value, -2.3% in volume). Domestic Super Prem also strengthened, with dollar sales up +0.8%, and volume easing up to growth +0.2%. Other positive contributors included Cider and Non-Alcoholic Beer. Cider was mostly steady, with +5.3% in value, and +3.7% in cases, while Non-Alcoholic Beer accelerated +7.6% in value and +6.4% in volume.

Top 5 Manufacturers by Dollars

- *No. 1 Anheuser-Busch Inc. (-3.1% dollars, -2.2M cases)*
- *No. 2 Constellation (+0.8% dollars, -133.3K cases)*
- *No. 3 Molson Coors Beverage Co. (-4.7% dollars, -1.6M cases)*
- *No. 4 Heineken USA (-7.5% dollars, -373.3K cases)*
- *No. 5 New Belgium Brewing (+7.1% dollars, +62.0K cases)*

Top 5 Manufacturers by Dollar Growth

- *No. 1 Constellation (+0.8% dollars, -133.3K cases)*
- *No. 2 New Belgium Brewing (+7.1% dollars, +62.0K cases)*
- *No. 3 Sapporo Breweries Ltd. (+15.3% dollars, +18.6K cases)*
- *No. 4 Schilling Cider (N/A dollars, +7.1K cases)*
- *No. 5 Boston Beer (+0.5% dollars, -9.8K cases)*

Top 5 Brands by Dollars

- *No. 1 Modelo (+0.0% dollars, -212.8K cases)*
- *No. 2 Budweiser (-8.4% dollars, -1.8M cases)*
- *No. 3 Michelob (+3.7% dollars, +307.3K cases)*
- *No. 4 Corona (-3.3% dollars, -324.7K cases)*
- *No. 5 Coors (-2.8% dollars, -494.5K cases)*

Top 5 Brands by Dollar Growth

- *No. 1 Pacifico (+22.7% dollars, +317.3K cases)*
- *No. 2 Michelob (+3.7% dollars, +307.3K cases)*
- *No. 3 New Belgium (+8.1% dollars, +57.0K cases)*
- *No. 4 Victoria (+17.4% dollars, +78.3K cases)*
- *No. 5 Busch (+1.5% dollars, +10.0K cases)*

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 10/24/26
Total Beer Excluding FMBs and Hard Seltzer

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NIQ Full View: Prepared Cocktails Pulse – October 2026

Latest 4 weeks w/e 10.24.26



Prepared Cocktails (BWS)

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

In the four weeks ending October 24th, Prepared Cocktails BWS dollar sales increased +2.3% while case volume losses narrowed -1.7%. On a weekly basis, dollar sales totaled $267.2M, down -0.3% 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 maintain momentum while easing FMB/Seltzer declines offer some relief

Performance across Prepared Cocktails BWS continued to vary widely by base. Spirits-based RTDs led growth, with dollar sales rising +19.1% and volume increasing +21.3%. Growth of Wine-based cocktails continued moderating, now +5.8% in value and +4.5% volume. Similar to last week, FMB/Seltzer's declines eased to -4.7% in dollars and -7.1% in volume. Stronger RTD growth and narrowing FMB/Seltzer losses reflect positive seasonal demand.

Top 5 Manufacturers by Dollars

- *No. 1 Mark Anthony Brands (+0.2% dollars, -126.0K cases)*
- *No. 2 Boston Beer (-3.7% dollars, -332.9K cases)*
- *No. 3 Anheuser-Busch Inc. (+6.1% dollars, +29.1K cases)*
- *No. 4 Sazerac (+4.8% dollars, +33.8K cases)*
- *No. 5 Gallo (-2.3% dollars, -43.2K cases)*

Top 5 Manufacturers by Dollar Growth

- *No. 1 Stateside Brands (+102.5% dollars, +386.1K cases)*
- *No. 2 Anheuser-Busch Inc. (+6.1% dollars, +29.1K cases)*
- *No. 3 Sazerac (+4.8% dollars, +33.8K cases)*
- *No. 4 Moët Hennessy USA (N/A dollars, +5.9K cases)*
- *No. 5 Constellation (+60.4% dollars, +23.9K cases)*

Top 5 Brands by Dollars

- *No. 1 White Claw (+1.8% dollars, -15.2K cases)*
- *No. 2 Twisted Tea (-8.5% dollars, -269.0K cases)*
- *No. 3 BuzzBallz (+5.9% dollars, +30.4K cases)*
- *No. 4 Cutwater Cocktail (+14.2% dollars, +73.6K cases)*
- *No. 5 Smirnoff (+3.9% dollars, +26.0K cases)*

Top 5 Brands by Dollar Growth

- *No. 1 Surfside Cocktail (+55.2% dollars, +205.9K cases)*
- *No. 2 Super Lyte Cocktail (N/A dollars, +180.4K cases)*
- *No. 3 Sun Cruiser Cocktail (+58.5% dollars, +134.3K cases)*
- *No. 4 Cutwater Cocktail (+14.2% dollars, +73.6K cases)*
- *No. 5 Monaco (+27.3% dollars, +53.6K cases)*

Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 10/24/26
Prepared Cocktails (BWS) includes: Spirit based Ready to Drink and Ready to Serve, Wine based cocktails, FMBs and Seltzers

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