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NIQ Full View: Total Alcohol Pulse – October 2026

Latest 4 weeks w/e 10.31.26



Alcohol sales benefit from seasonal lift, but broader pressure persists

During the four weeks ending October 31st, Total Alcohol generated $8.2B in sales, down -1.4% vs YA, while case volume totaled 155.7M, declining -3.0% vs YA. The Halloween and Day of the Dead selling period provided a welcome boost, with weekly dollar sales reaching $2.1B, up +5.8% versus the week ending October 24th and nearly matching year-ago levels. While seasonal demand improved short-term performance, the category continues to contend with softer underlying consumption trends.

Prepared Cocktails remain growth engine as traditional alc categories are pressured

- Prepared Cocktails Beer, Wine, and Spirits (BWS) remained the lone major growth driver, with dollar sales increasing +3.7%, while volume declines narrowed to -0.3%, reinforcing the category's resilience relative to the broader market during a seasonal period that can benefit from convenience and variety in hosting occasions.
- Beer also benefitted from a seasonal boost. Dollar sales declined -1.6% and volume -3.3%. Both metrics eased from the prior period. While still negative when compared to last year's sales, Beer performance is more favorable than earlier in the fall, a normal seasonal pattern.
- Wine remained the weakest major category, with dollar sales down -3.8% and volume -5.3%. Declines held steady across both measures, continuing to weigh on overall industry performance.
- Spirits posted dollar declines of -2.0% and volume losses of -1.7%. Both measures improved from the prior period, especially volume. Spirits continues to prove its volume resilience among traditional categories.
- 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 31st reveal a bifurcated Alcohol market. Prepared Cocktails (BWS) continued to drive growth, while Beer and Spirits benefited from seasonal demand that helped moderate declines. Wine reporting steady declines, and volume trends stayed negative across all major categories, highlighting a demand-constrained environment.

Ohio leads improving trend as Michigan, Illinois, and New Jersey return to growth, while Florida and Massachusetts weigh on performance

- Performance across major markets remained uneven, though several of the largest states posted meaningful improvement versus the prior period.
- Ohio led major markets, with value growth reaching +2.6% vs YA, strengthening from +0.4% in the prior period. New Jersey (+0.5%) and Illinois (+0.3%) both reversed value declines thanks to recent lift in sales, making them two of the largest markets to cross back into positive territory this period. Michigan eased into a flat performance.
- Massachusetts improved but continued to face the steepest declines, with value down -7.8% and volume -9.6%. Florida remained under pressure, with dollar sales down -5.5% showing little improvement from the prior period.
- The latest results highlight an increasingly fragmented market landscape, with improving trends across select large states offset by continued weakness in several key coastal markets.

Convenience improves as channel performance remains uneven

- Channel dollar trends remained mixed, with Convenience showing the greatest improvements versus the prior period. Club led declines at -3.7%, followed by Food -2.8%, Mass -1.7%, Liquor -1.4%, and Convenience -0.4%. Meanwhile, All Others +3.5% captured gains.
- Volume trends continued to trail dollar trends. Mass -4.4% led volume declines, followed by Food -4.1%, Convenience -3.2%, Liquor -2.1%, and Club -1.2%. Similar to dollar sales performance, All Others (+5.4%) was the sole volume grower.

Source: NielsenIQ Retail Measurement | Periods ending 10/31/26
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 10.31.26



Spirits

Weekly Spirits sales rally around Halloween demand while trends continue to improve

During the four weeks ending October 31st, Spirits sustained losses, with dollars down -2.0% and volume -1.7%. While consumer caution and broader economic pressures continued to weigh on results, accounting for 90% of category softness, performance improved relative to the prior period. The Halloween week delivered a notable boost, generating $574.4M in sales and advancing +10.1% versus the previous week. As consumers transition into the holiday entertaining season, the category enters November with stronger near-term momentum and moderating losses.

Growth remains concentrated in Tequila and Non-Alc Spirits as Vodka narrows the gap

Performance across the leading Spirits categories (Vodka, Whiskey, and Tequila) continued to diverge. Tequila continued to gain ground, with dollars increasing +1.7% and volume rising +6.1%, while Non-Alcoholic Spirits maintained the strongest momentum, up +22.7% in dollars and +25.6% in volume. Vodka delivered another step forward, with declines narrowing to -0.4% in dollars and -0.7% in volume. In contrast, Whiskey remained under pressure, with dollar sales down -4.9% and volume down -5.2%. Outside these categories, All Others declined -2.0% in dollars and -2.9% in volume, leaving growth concentrated in a select group of consumer-favored segments.

Top 5 Manufacturers by Dollars

- *No. 1 Diageo (-6.0% dollars, -68.6K cases)*
- *No. 2 Sazerac (+5.9% dollars, +79.1K cases)*
- *No. 3 Bacardi (+3.5% dollars, +9.8K cases)*
- *No. 4 Fifth Generation (+7.3% dollars, +25.1K cases)*
- *No. 5 Suntory Global Spirits (-6.2% dollars, -44.7K cases)*

Top 5 Manufacturers by Dollar Growth

- *No. 1 Sazerac (+5.9% dollars, +79.1K cases)*
- *No. 2 Fifth Generation (+7.3% dollars, +25.1K cases)*
- *No. 3 Bacardi (+3.5% dollars, +9.8K cases)*
- *No. 4 Constellation (+17.8% dollars, +7.2K cases)*
- *No. 5 Heaven Hill (+0.9% dollars, -12.9K cases)*

Top 5 Brands by Dollars

- *No. 1 Tito's Vodka (+5.7% dollars, +20.1K cases)*
- *No. 2 Crown Royal (-9.5% dollars, -19.4K cases)*
- *No. 3 Jack Daniel's (-7.5% dollars, -19.2K cases)*
- *No. 4 Don Julio (-3.0% dollars, -1.5K cases)*
- *No. 5 Fireball Whiskey (-6.6% dollars, -24.5K cases)*

Top 5 Brands by Dollar Growth

- *No. 1 Tito's Vodka (+5.7% dollars, +20.1K cases)*
- *No. 2 Cazadores (+60.0% dollars, +26.4K cases)*
- *No. 3 W.L. Weller (+103.7% dollars, +8.5K cases)*
- *No. 4 Lunazul Tequila (+18.9% dollars, +13.9K cases)*
- *No. 5 Svedka (+17.5% dollars, +51.4K cases)*

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 10/31/26
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 10.31.26



Wine

Seasonal demand provides a stronger weekly lift as Wine declines remain unchanged

In the four weeks ending October 31st, Wine continued to face pressure, with dollar sales declining -3.8% versus last year and volume down -5.3%. Weaker consumer engagement remained the primary source of category losses, accounting for 69% of the decline, followed by reduced product availability (18%) and underperforming promotions (13%). Weekly dollar sales reached $381.3M, increasing +2.3% versus the prior week. While the Halloween-related lift supported near-term results, the gap between dollar and volume performance continues to highlight the importance of balancing premium offerings with value-oriented options.

Sparkling Wine builds momentum while Non-Alcoholic Wine maintains double-digit growth

Performance across Wine segments remained uneven during the four weeks ending October 31st. Still Wine continued to weigh on category results, with dollar sales declining -4.7% and cases down -5.9%. In contrast, Sparkling Wine strengthened further, with dollars increasing +2.2% and volume up +0.9%, marking a continued improvement from recent trends. Non-Alcoholic Wine also remained a growth contributor, with value rising +19.3% and volume advancing +15.3%. Despite ongoing support from these smaller segments, Still Wine's continued weakness remains the primary constraint on overall category performance.

Top 5 Manufacturers by Dollars

- *No. 1 Gallo (-1.0% dollars, -63.4K cases)*
- *No. 2 The Wine Group (-9.7% dollars, -268.0K cases)*
- *No. 3 Deutsch Family (+3.3% dollars, +13.2K cases)*
- *No. 4 Trinchero Family (-4.2% dollars, -34.2K cases)*
- *No. 5 Delicato Family Wines (-7.2% dollars, -57.3K cases)*

Top 5 Manufacturers by Dollar Growth

- *No. 1 Deutsch Family (+3.3% dollars, +13.2K cases)*
- *No. 2 Moet Hennessy USA (+2.5% dollars, +2.4K cases)*
- *No. 3 Wagner Family Wines (+4.6% dollars, +3.1K cases)*
- *No. 4 Delegat USA (+8.1% dollars, +3.2K cases)*
- *No. 5 Constellation (+2.5% dollars, +4.9K cases)*

Top 5 Brands by Dollars

- *No. 1 Josh (+7.3% dollars, +38.7K cases)*
- *No. 2 Barefoot (+1.3% dollars, +40.2K cases)*
- *No. 3 Bota (-3.8% dollars, -32.9K cases)*
- *No. 4 Sutter Home (-3.6% dollars, -20.6K cases)*
- *No. 5 LaMarca (+15.7% dollars, +23.5K cases)*

Top 5 Brands by Dollar Growth

- *No. 1 LaMarca (+15.7% dollars, +23.5K cases)*
- *No. 2 Josh (+7.3% dollars, +38.7K cases)*
- *No. 3 Whitehaven (+23.7% dollars, +8.6K cases)*
- *No. 4 Made By James (N/A dollars, +12.2K cases)*
- *No. 5 Kim Crawford (+7.5% dollars, +5.3K cases)*

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 10/31/26
Total Wine Excluding Wine Based Cocktails

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NIQ Full View: Beer Pulse – October 2026

Latest 4 weeks w/e 10.31.26



Beer

Beer declines narrow further as Halloween demand boosts weekly sales

In the four weeks ending October 31st, Beer continued to improve, with dollar sales down -1.6% and volume pacing at -3.3%, both showing meaningful gains versus the prior period. Softer consumer interest remained the primary driver of category weakness, accounting for 86% of declines, while distribution losses contributed 13%. On a weekly basis, dollar sales reached $870.8M, increasing +2.5% versus the prior week as Halloween-related demand provided an additional lift. Seasonal occasions helped foster momentum, contributing to improved dollar and volume trends heading into November.

Import and Domestic Super Premium continue to lead category improvements

Performance remained mixed across Beer segments, though several categories continued to gain ground. Import returned to dollar growth, increasing +0.3% in value while volume improved to -1.5%. Domestic Super Premium also strengthened, with dollar sales up +2.3% and volume rising +1.6%. Other positive contributors included Cider (+6.5% value, +4.9% cases) and Non-Alcoholic Beer (+8.9% value, +7.5% volume). Meanwhile, Domestic Premium remained the weakest major segment, down -5.5% in dollars and -6.8% in volume, while Craft declined -4.1% in value and -5.6% in volume.

Top 5 Manufacturers by Dollars

- *No. 1 Anheuser-Busch Inc. (-1.9% dollars, -1.7M cases)*
- *No. 2 Constellation (+1.8% dollars, +58.7K cases)*
- *No. 3 Molson Coors Beverage Co (-3.6% dollars, -1.3M cases)*
- *No. 4 Heineken USA (-6.5% dollars, -338.4K cases)*
- *No. 5 New Belgium Brewing (+6.7% dollars, +48.9K cases)*

Top 5 Manufacturers by Dollar Growth

- *No. 1 Constellation (+1.8% dollars, +58.7K cases)*
- *No. 2 New Belgium Brewing (+6.7% dollars, +48.9K cases)*
- *No. 3 Boston Beer (+1.8% dollars, +17.3K cases)*
- *No. 4 Sapporo Breweries Ltd (+15.6% dollars, +18.9K cases)*
- *No. 5 Athletic Brewing Co (+3.6% dollars, +4.9K cases)*

Top 5 Brands by Dollars

- *No. 1 Modelo (+0.8% dollars, -130.5K cases)*
- *No. 2 Budweiser (-7.4% dollars, -1.6M cases)*
- *No. 3 Michelob (+5.3% dollars, +462.2K cases)*
- *No. 4 Corona (-1.5% dollars, -185.4K cases)*
- *No. 5 Coors (-1.9% dollars, -429.0K cases)*

Top 5 Brands by Dollar Growth

- *No. 1 Michelob (+5.3% dollars, +462.2K cases)*
- *No. 2 Pacifico (+20.5% dollars, +282.6K cases)*
- *No. 3 Busch (+3.0% dollars, +130.1K cases)*
- *No. 4 Victoria (+18.7% dollars, +83.0K cases)*
- *No. 5 Modelo (+0.8% dollars, -130.5K cases)*

Source: NielsenIQ Retail Measurement | Business Drivers | Periods ending 4 W.E. 10/31/26
Total Beer Excluding FMBs and Hard Seltzer

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NIQ Full View: Prepared Cocktails Pulse – October 2026

Latest 4 weeks w/e 10.31.26



Prepared Cocktails (BWS)

Prepared Cocktails build on recent gains as Halloween demand drives a strong weekly sales increase

In the four weeks ending October 31st, Prepared Cocktails BWS continued to improve, with dollar sales increasing +3.7% while case volume declines narrowed to -0.3%. Weekly dollar sales totaled $301.2M, up +6.0% from the prior week as seasonal demand provided a meaningful lift heading into Halloween. The stronger four-week performance reflects continued support from Spirits- and Wine-based offerings, though volume trends have yet to fully transition into sustained growth.

Prepared Cocktails continue to gain ground as volume trends approach growth

Performance across Prepared Cocktails BWS remained highly dependent on base type. Spirits-based RTDs continued to pace category growth, with dollar sales increasing +21.5% and volume up +24.3%. Wine-based cocktails also remained in positive territory, growing +6.5% in value and +4.9% in volume. Meanwhile, FMB/Seltzer trends improved further, with declines narrowing to -3.7% in dollars and -6.1% in volume. Growth continues to be driven by RTDs, while easing FMB/Seltzer declines helped reduce pressure on overall category performance.

Top 5 Manufacturers by Dollars

- *No. 1 Mark Anthony Brands (+1.1% dollars, -74.8K cases)*
- *No. 2 Boston Beer (-2.4% dollars, -291.1K cases)*
- *No. 3 Anheuser-Busch Inc. (+6.3% dollars, +48.2K cases)*
- *No. 4 Sazerac (+5.6% dollars, +42.0K cases)*
- *No. 5 Gallo (-1.3% dollars, -30.7K cases)*

Top 5 Manufacturers by Dollar Growth

- *No. 1 Stateside Brands (+110.1% dollars, +435.1K cases)*
- *No. 2 Anheuser-Busch Inc. (+6.3% dollars, +48.2K cases)*
- *No. 3 Sazerac (+5.6% dollars, +42.0K cases)*
- *No. 4 Mark Anthony Brands (+1.1% dollars, -74.8K cases)*
- *No. 5 Moet Hennessy USA (N/A dollars, +2.4M cases)*

Top 5 Brands by Dollars

- *No. 1 White Claw (+2.4% dollars, +6.0K cases)*
- *No. 2 Twisted Tea (-7.7% dollars, -247.9K cases)*
- *No. 3 BuzzBallz (+6.2% dollars, +32.7K cases)*
- *No. 4 Cutwater Cocktail (+13.4% dollars, +80.5K cases)*
- *No. 5 Smirnoff (+5.8% dollars, +51.5K cases)*

Top 5 Brands by Dollar Growth

- *No. 1 Surfside Cocktail (+60.2% dollars, +235.9K cases)*
- *No. 2 Super Lyte Cocktail (+198841.1% dollars, +12.2M cases)*
- *No. 3 Sun Cruiser Cocktail (+64.3% dollars, +146.7K cases)*
- *No. 4 Cutwater Cocktail (+13.4% dollars, +80.5K cases)*
- *No. 5 Monaco (+30.0% dollars, +59.9K cases)*

Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 10/31/26
Prepared Cocktails (BWS) includes: Spirit based Ready to Drink and Ready to Serve, Wine based cocktails, FMBs and Seltzers

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