



NIQ Full View: Total Alcohol Pulse – April 2026

Latest 4 weeks w/e 04.18.26

Total Alcohol budding momentum stalls in Mid April as YoY declines persist

During the four weeks ending April 18th, **Total Alcohol** trailed year ago levels. **Dollar sales** held at \$8.1B, (-2.9% vs YA), while case volume declined -3.3% vs YA to 157.2M. On a weekly basis, dollar sales were flat at \$2.0B in both the latest period and the prior period (w/e April 11th), reflecting a -0.8% WoW (week-over-week) drop.

Traditional categories facing increased pressure as Prepared Cocktails hold steady

- **Prepared Cocktails** remained the only growing category, as dollar sales were up +4.4% and case volume fell -0.2%.
- **Spirits** held the steepest declines, with dollar sales down -6.0% and volume down -5.2%.
- **Wine** followed with slightly slower losses, with dollar sales down -4.9% and volume down -6.1%, as trends fell short of the solid momentum in recent periods.
- **Beer** continued to outperform other traditional categories, with dollar sales down -2.0% and volume down -3.4%.
- Latest performance highlights a familiar sense of instability across categories, as **Spirits** losses remain a heavy weight, **Wine** progress shown in early Spring slows, and even **Beer** resilience is tested. **Prepared Cocktails** hold as the ultimate source of growth, as increasing consumer engagement with pre-mixed cocktails partially offsets declining interest in other categories.

Broad underperformance led by Massachusetts, while Ohio anchors stability efforts

- Regional results mirrored Mid April instability shown in Total U.S. **Ohio** was the only key state to deliver growth, with dollar sales up +1.8%, while the most stable losses were seen in **Michigan** (-1.1%). **Massachusetts** usurped **Florida** (-4.8%) as the leading decliner, with sales down -7.9%.
- Volume trends were generally soft across the top ten states. **Ohio** (+0.2%) slightly held onto growth, while **New Jersey** (-0.3%) saw the slowest decline. **Massachusetts** experienced the largest volume dips at -7.1%.
- Overall, results emphasize ongoing strength in Ohio, outperforming other key state markets despite broad underperformance, while weakness is led by Massachusetts and Florida.

Stagnancy stretches across channels, with Liquor and Convenience driving Total US instability

- Retail channel results reflected Total U.S. weakness. **Mass** was the sole growth channel, up +0.7%. In contrast, sales declines were seen in all remaining channels: **Liquor** -5.1%, **Club** -3.5%, **Convenience** -2.5%, **Food** -1.0%, and **All Others** -2.7%.
- Volume trends closely followed these results, as many channels struggled. **Club** was most stable -0.3%, followed by **Mass** -0.9%, **Food** -1.5%, **Liquor** -4.5%, **Convenience** -4.8%, while **All Others** outperformed, up +0.9%.
- Compared with the prior L4W period (w/e April 11th), **Liquor** and **Convenience** drove industry results with accelerated losses versus their previous dollar (Liquor, -2.9%, Convenience, -1.1%) and volume (Liquor -2.8% Convenience, -3.5%) declines.



NIQ Full View: Spirits Pulse – April 2026

Latest 4 weeks w/e 04.18.26

Spirits

Spirits performance points to ongoing headwinds throughout Mid April

In the four weeks ending April 18th, Spirits losses continued, with dollar sales down **-6.0%** and volume declining **-5.2%**. This L4W period delivered sales of **\$511.1M** in the latest week, down from **\$513.4M** the prior week, resulting in a WoW drop of **-0.5%**.

Downward trends of core segments persist, weighing on broader industry results

In the four weeks ending April 18th, top categories (**Vodka**, **Whiskey**, and **Tequila**) saw declines. Whiskey led losses, with dollar sales down **-6.8%** and volume falling **-7.0%**. Vodka followed (**-5.1%** in value, **-4.6%** in volume). Tequila saw slightly smaller declines, as dollar sales fell **-4.9%**, while volume dipped **-1.5%**. **Non-Alc Spirits** sustained strength, up **+33.9%** in dollar sales and **+55.6%** in volume. The **All Other** segment dragged results, down **-7.1%** in dollar sales and **-6.4%** in volume, continuously driven by softness in **Brandy** and **Cognac**.

Top 5 Manufacturers by Dollars

- No. 1 Diageo (-10.8% in dollars, -133.5K in cases)
- No. 2 Sazerac (+2.7% in dollars, +15.3K in cases)
- No. 3 Bacardi (-5.0% in dollars, -28.4K in cases)
- No. 4 Suntory Global Spirits (-8.7% in dollars, -58.6K in cases)
- No. 5 Fifth Generation (+2.3% in dollars, +317 in cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Sazerac (+2.7% in dollars, +15.3K in cases)
- No. 2 Fifth Generation (+2.3% in dollars, +317 in cases)
- No. 3 Constellation (+10.2% in dollars, +3.6K in cases)
- No. 4 Trincher Family (+21.7% in dollars, 792 in cases)
- No. 5 Deutsch Family (+3.6% in dollars, -337 in cases)

Top 5 Brands by Dollars

- No. 1 Tito's Vodka (+0.2% in dollars, -4.6K in cases)
- No. 2 Crown Royal (-10.7% in dollars, -25.7K in cases)
- No. 3 Don Julio (-14.6% in dollars, -16.8K in cases)
- No. 4 Jack Daniel's (-6.3% in dollars, -12.3K in cases)
- No. 5 Fireball (-6.8% in dollars, -19.8K in cases)

Top 5 Brands by Dollar Growth

- No. 1 Lunazul Tequila (+31.3% in dollars, +18.0K in cases)
- No. 2 Colonel E.H. Taylor (+99.5% in dollars, +5.0K in cases)
- No. 3 W.L. Weller (+52.1% in dollars, +4.9K in cases)
- No. 4 Lalo Tequila (+54.3% in dollars, +4.9K in cases)
- No. 5 Svedka (+13.4% in dollars, +43.2K in cases)

Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 04/18/26

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 – April 2026

Latest 4 weeks w/e 04.18.26

Wine

Wine slowdown intensifies through Mid April as previous signs of stability fade

In the four weeks ending April 18th, **Wine** fell below year-ago levels, with dollar sales dropping **-4.9%** and case volume down **-6.1%**. Weekly sales totaled **\$354.8M**, down from **\$373.9M** the prior week, for a **-5.1%** WoW decrease as early Spring momentum has slowed significantly through Mid April.

Still and Sparkling Wine slip into weaker performance, driving category losses

During the four weeks ending April 18th, **Still Wine** led declines, with dollar sales down **-5.7%** and volume falling **-6.7%**. In contrast, **Sparkling Wine** fell flat, down **-0.1%** in value and **+0.3%** in volume. **Non-Alcoholic Wine** continued to outperform core wine segments, with double-digit increases in both dollar sales (**+15.8%**) and volume (**+11.0%**), supported by sustained consumer interest in moderation and wellness-oriented alternatives.

Top 5 Manufacturers by Dollars

- No. 1 Gallo (-4.0% in dollars, -209.1K in cases)
- No. 2 The Wine Group (-10.7% in dollars, -243.9K in cases)
- No. 3 Deutsch Family (+1.1% in dollars, +9.1K in cases)
- No. 4 Trincherio Family (-4.6% in dollars, -33.3K in cases)
- No. 5 Delicato Family Wines (-6.4% in dollars, -50.2K in cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Duckhorn Wine Company (+6.3% in dollars, +8.9K in cases)
- No. 2 Deutsch Family (+1.1% in dollars, +9.1K in cases)
- No. 3 Vineyard Brands (+10.9% in dollars, +9.0K in cases)
- No. 4 Kobrand (+5.9% in dollars, +2.9K in cases)
- No. 5 Constellation (+2.0% in dollars, +9.4K in cases)

Top 5 Brands by Dollars

- No. 1 Josh (+4.7% in dollars, +27.9K in cases)
- No. 2 Barefoot (-6.1% in dollars, -48.9K in cases)
- No. 3 Sutter Home (-4.6% in dollars, -21.9K in cases)
- No. 4 Bota (-5.9% in dollars, -37.2K in cases)
- No. 5 LaMarca (+12.8% in dollars, +22.1K in cases)

Top 5 Brands by Dollar Growth

- No. 1 LaMarca (+12.8% in dollars, +22.1K in cases)
- No. 2 Josh (+4.7% in dollars, +27.9K in cases)
- No. 3 Art of the Cooper (+76.5% in dollars, +14.0K in cases)
- No. 4 Whitehaven (+18.9% in dollars, +6.8K in cases)
- No. 5 La Vieille Ferme (+22.3% in dollars, +10.1K in cases)

Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 04/18/26
Total Wine Excluding Wine Based Cocktails

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NIQ Full View: Beer Pulse – April 2026

Latest 4 weeks w/e 04.18.26

Beer

Beer navigates Mid April softness YoY despite slight growth in weekly sales

In the four weeks ending April 18th, Beer saw declines, with dollar sales down **-2.0%** and case volume declining **-3.4%**. On a weekly basis, sales equaled **\$873.6M** vs **\$867.7M** the previous week, resulting in a **+0.7%** WoW bump.

Import Beer joins Domestic and Craft in contributing to category instability

In the four weeks ending April 18th, pressure faced by core segments outweighed growth areas. Domestic Premium led losses (**-5.6%** in value, **-6.8%** in volume), followed by Craft (**-4.2%** in value, **-5.3%** in volume), and Import (**-0.6%** in value, **-1.5%** in volume) while resilience remained concentrated in smaller segments. Domestic Super Premium (**+3.0%** in value, **+3.0%** in volume), Cider (**+5.1%** in value, **+3.7%** in volume), and Non-Alc Beer (**+9.3%** in value, **+8.2%** in volume) each made positive contribution.

Import Beer drove recent Beer results with a **notable shift in sales performance**, as formerly positive trends turned negative (**+2.1%** in the prior period).

Top 5 Manufacturers by Dollars

- No. 1 Anheuser-Busch Inc. (-1.9% in dollars, -1.6M in cases)
- No. 2 Constellation (+0.9% in dollars, +23.2K in cases)
- No. 3 Molson Coors Beverage Co. (-4.3% in dollars, -1.6M in cases)
- No. 4 Heineken USA (-8.2% in dollars, -388.3K in cases)
- No. 5 New Belgium Brewing (+6.5% in dollars, +59.2K in cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Constellation (+0.9% in dollars, +23.2K in cases)
- No. 2 New Belgium Brewing (+6.5% in dollars, +59.2K in cases)
- No. 3 Diageo (+3.7% in dollars, +10.9K in cases)
- No. 4 Sierra Nevada (+2.2% in dollars, +10.8K in cases)
- No. 5 Athletic Brewing Co. (+5.8% in dollars, +16.9K in cases)

Top 5 Brands by Dollars

- No. 1 Modelo (-0.4% in dollars, -181.2K in cases)
- No. 2 Budweiser (-7.6% in dollars, -1.7M in cases)
- No. 3 Michelob (+6.3% in dollars, +659.3K in cases)
- No. 4 Corona (-1.6% in dollars, -149.6K in cases)
- No. 5 Coors (-2.4% in dollars, -427.4K in cases)

Top 5 Brands by Dollar Growth

- No. 1 Michelob (+6.3% in dollars, +659.3K in cases)
- No. 2 Pacifico (+20.9% in dollars, +276.3K in cases)
- No. 3 Busch (+2.5% in dollars, +73.1K in cases)
- No. 4 New Belgium (+7.7% in dollars, +58.6K in cases)
- No. 5 Victoria (+14.0% in dollars, +61.3K in cases)

Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 04/18/26
Total Beer Excluding FMBs and Hard Seltzer

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Prepared Cocktails

Prepared Cocktails navigate stable trajectory in mid April results

In the four weeks ending April 18th, Prepared Cocktails dollars sales grew **+4.4%**, while case volume dropped by **-0.2%**. Weekly performance was generally flat, with sales totaling **\$265.3M** versus **\$266.2M** in the prior week, for a modest **-0.4%** WoW decline. Beyond this week-over-week lull, Prepared Cocktails continue to hold strong position for sales gains, as both seasonal momentum and consumer engagement trends fuel the category.

Spirits-based RTDs remain at forefront of Prepared Cocktail success through mid April

In the four weeks ending April 18th, Spirits-based cocktails continued to lead performance, with an increase of **+36.2%** in dollar sales and **+37.0%** in volume. Wine-based cocktails shared double digit growth, up **+12.9%** in dollar sales and **+10.1%** in volume. In contrast, FMB/Seltzer maintained losses, with sales down **-4.8%** in value and **-6.5%** in volume, as the category loses some relevance at the benefit of other RTD bases.

Top 5 Manufacturers by Dollars

- No. 1 Mark Anthony Brands (-0.5% in dollars, -140.7K in cases)
- No. 2 Boston Beer (-3.7% in dollars, -331.1K in cases)
- No. 3 Anheuser-Busch Inc. (+45.6% in dollars, +454.8K in cases)
- No. 4 Sazerac (+5.2% in dollars, +13.7K in cases)
- No. 5 Gallo (+3.8% in dollars, +40.8K in cases)

Top 5 Manufacturers by Dollar Growth

- No. 1 Anheuser-Busch Inc. (+45.6% in dollars, +454.8K in cases)
- No. 2 Stateside Brands (+99.1% in dollars, +214.5K in cases)
- No. 3 Sazerac (+5.2% in dollars, +13.7K in cases)
- No. 4 Gallo (+3.8% in dollars, +40.8K in cases)
- No. 5 Diageo (+2.9% in dollars, -1.0K in cases)

Top 5 Brands by Dollars

- No. 1 White Claw (+1.4% in dollars, -800 in cases)
- No. 2 Twisted Tea (-7.9% in dollars, -272.1K in cases)
- No. 3 BuzzBallz (+8.8% in dollars, +35.1K in cases)
- No. 4 Cutwater Cocktail (+152.6% in dollars, +393.6K in cases)
- No. 5 Smirnoff (+2.7% in dollars, +20.7K in cases)

Top 5 Brands by Dollar Growth

- No. 1 Cutwater Cocktail (+152.6% in dollars, +393.6K in cases)
- No. 2 Surfside Cocktail (+99.1% in dollars, +205.3K in cases)
- No. 3 Sun Cruiser Cocktail (+189.3% in dollars, +158.4K in cases)
- No. 4 BuzzBallz (+8.8% in dollars, +35.1K in cases)
- No. 5 BeatBox (+14.4% in dollars, +50.5K in cases)

Source: NielsenIQ Retail Measurement | Periods ending 4 W.E. 04/18/26

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

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