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U.S. alcohol sales fell 3.3% after late-summer demand failed to revive

Prepared cocktails rose 0.2%, the lone category with dollar growth, as beer, wine, spirits declined in every top state market.

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U.S. alcohol sales stayed under pressure in the four weeks ending August 1, as late-summer demand failed to pick up and every major category except prepared cocktails posted lower dollar sales than a year earlier, according to a new NielsenIQ market

report.

NielsenIQ said total alcohol dollar sales reached $8.5 billion in the latest four-week period, down 3.3% from the same stretch a year ago. Case volume totaled 169.7 million, a 5.0% drop. On a weekly basis, dollar sales slipped to $2.1 billion, down 1.1% from the week ending July 25, a sign that the category is still struggling to find momentum as retailers and suppliers head into the final weeks of summer.

The report points to a broad-based slowdown rather than a problem limited to one segment. Beer, wine and spirits all lost ground in both dollars and volume, while prepared cocktails were the only segment to post dollar growth. Even there, the gain was slight. Prepared cocktails rose 0.2% in sales, while volume fell 4.3%, suggesting that the category continues to benefit from consumer interest in convenience and flavored products but is not immune to weaker overall demand.

Wine again posted the deepest declines among the major categories. Dollar sales fell 4.1% and volume dropped 5.5%. That kept wine in line with the wider market’s weakness, but it also reinforced how difficult the category’s recovery has been in recent months.

Spirits showed somewhat better relative performance. Dollar sales were down 3.8% and volume fell 4.2%. NielsenIQ said spirits had narrowed the gap with beer after trailing it for much of the year, with tequila in particular helping the category move closer to the industry’s more resilient segments. Beer remained a large but pressured business, with dollar sales down 3.9% and volume off 5.2%.

The data suggests that shoppers are still buying alcohol, but at lower levels and with more caution. NielsenIQ described category performance as mixed within a cautious spending environment, with prepared cocktails standing out as the main source of growth and most other segments facing steady demand pressure.

The weakness was also visible across geography. In the top 10 state markets tracked by the report, every state posted declines in both dollar sales and volume. Michigan was the most resilient on a dollar basis, with sales down 0.9% and volume down 3.6%. Massachusetts saw the steepest drop in sales, falling 7.8%, while volume there

declined 6.1%.

California showed the most moderate volume decline, down 2.5%, while dollar sales slipped 2.1%. Washington posted the largest volume decline among the leading markets, with volume down 9.8% and dollar sales off 5.1%. The state data points to a national slowdown rather than a regional one, though the pace of decline varies sharply from market to market.

Retail channels told a similar story. Every major channel except the “all other” group posted lower dollar sales. NielsenIQ said convenience and club were down 3.9% in dollars, food stores fell 3.6%, and liquor stores declined 3.5%. Mass retail came closest to flat, with a 0.2% dollar decline. The “all other” group, which includes drug, military and dollar stores, was the only channel to post growth, up 1.6%.

Volume trends were weaker in several channels. Convenience stores led the declines, with volume down 6.7%. Liquor stores fell 5.0% and food stores were down 4.8%. Mass and club each posted smaller volume declines of 1.8%, while the all-other channel again stood apart with 3.6% growth.

Mass retail showed the clearest improvement from the previous four-week period ending July 18. In that earlier period, dollar sales in mass were down 1.6% and volume was down 3.1%. The latest reading suggests that while the channel is still losing ground, it has stabilized more than others as shoppers continue to shift where and how they buy alcohol.

The latest NielsenIQ snapshot leaves the industry entering late summer with few bright spots. Prepared cocktails continue to outperform the broader market, and spirits have shown recent improvement relative to beer. But with all major state markets in decline and most channels still negative, the broader retail alcohol business remains in a period of contraction as the season moves toward Labor Day.