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Wine Sales Fell 6.4% in Control States in August, NABCA Says

Wine trailed beer and spirits, with revenue down 5% in a regulated channel watched closely for demand shifts.

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Wine sales declined in the publicly controlled alcohol markets tracked by the National Alcohol Beverage Control Association in August, extending signs of softer demand in one of the industry’s key regulated channels in the United States.

NABCA said its August 2026 results showed wine sales in control states fell 6.4% from the same month a year earlier. By value, wine sales were down 5%. The association also reported weaker activity in hospitality, where wine volume fell 3.1% while sales value was roughly unchanged, a sign that pricing and product mix may have partly offset lower consumption.

The August report also showed that wine underperformed other major beverage categories in the same markets. Spirits sales rose 4.1% from August 2025, and beer sales increased 0.5%, according to NABCA. The group said the figures reflect ongoing trends in controlled alcohol markets as states adjust to changing consumer preferences and broader market conditions.

Control states play a distinct role in the U.S. alcohol business because they regulate, and in many cases directly manage, parts of the wholesale or retail sale of beverage alcohol. NABCA represents those states, which use control systems to oversee alcohol distribution and sales while also generating public revenue. That makes the monthly data closely watched by producers, distributors, retailers, and analysts looking for early signals about shifts in demand.

The August numbers add to evidence that wine is facing more pressure than some competing categories in regulated markets. A 6.4% drop in volume alongside a 5% decline in value suggests that fewer bottles were sold and that revenue also moved lower, though not as sharply as volume. In hospitality, the gap was more noticeable. Volume fell, but value was nearly flat, which can indicate consumers traded into higher-priced products, bought through different formats, or that operators relied on price increases to steady sales.

For the beverage industry, that pattern matters because control-state results offer a way to compare movement in volume and value across wine, beer, and spirits in a meaningful part of the U.S. market. The data can help suppliers and sellers gauge whether current weakness is concentrated in consumption, pricing, or channel mix, especially at a time when companies across alcoholic beverages are watching for changes in spending habits and drinking occasions.

NABCA did not provide a detailed breakdown in the release of which states or product segments drove the wine decline most sharply. It described the August results as part of broader shifts in controlled markets, where consumer preferences and market conditions continue to change. Even so, the headline figures point to a clear divergence in August: spirits posted solid growth, beer was nearly flat with a small gain, and wine recorded the largest drop among the major categories.

Because control states cover a significant regulated portion of the U.S. alcohol landscape, the results are likely to be examined closely by wine companies assessing inventory, pricing, and on-premise strategy going into the fall selling season. The hospitality figures may draw particular attention, since a modest decline in volume paired with stable value can point to a market where traffic or servings are under pressure even as menu pricing holds. NABCA said the August results represent sales trends across the control-state system it tracks in the United States.