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U.S. Control-State Spirits Sales Fell 5.5% in August

Case volume dropped 3.0%, signaling a broader slowdown and a 2.5% decline in price and mix.

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Distilled spirits sales weakened further in August across the 18 U.S. control states tracked by the National Alcohol Beverage Control Association, with both case volume and dollar sales falling faster than they had a month earlier and faster than they did a year ago. NABCA said spirits sales in those publicly controlled distribution markets fell 3.0% in nine-liter case volume from August 2025, while dollar sales dropped 5.5%. The

gap between the two measures produced a negative price and mix effect of 2.5%, a sign that the market was not just selling fewer bottles but also generating less revenue per unit than a year earlier.

The August figures marked a clear deterioration from July. In that month, spirits volume had still edged up 0.3%, even as dollar sales declined 2.2%. August therefore represented a 3.3 percentage point worsening in both measures. The shift is notable because it points to a market under broader pressure, with weaker demand now coinciding with continued strain on pricing, promotions, or the product mix consumers are choosing.

The latest decline was also steeper than the one recorded in August of last year. In August 2025, spirits sales in the same control-state system had fallen 0.9% in volume and 3.0% in dollar terms. This year’s August drop was therefore 2.1 percentage points deeper on volume and 2.5 points deeper on value.

NABCA said overall control-state results were generally weaker in August even though Michigan had three more selling days than in the same month a year earlier, a calendar factor that might normally support sales. The group said two exceptions stood out. New Hampshire continued to benefit from promotional activity, and West Virginia saw stronger consumer demand linked to the start of the college football season. Even with those pockets of support, the broader spirits market in the control states remained negative.

The association’s rolling 12-month data, which smooth short-term swings, also showed that the slowdown is not limited to one month. For the 12 months ended in August, spirits volume was down 0.8%, dollar sales were down 2.8%, and the price and mix measure was down 2.0%. That longer-term pattern suggests persistent weakness in value growth and not just a temporary monthly setback.

Category results were broadly negative, according to the report. Cocktails were the main exception and remained the leading growth engine, helped by canned ready-to-drink products. In August, the cocktails category posted a 12.4% increase in nine-liter volume and an 8.4% rise in dollar sales. Irish whiskey and cachaça also recorded gains during the month. All other major spirits categories declined in August.

Over the rolling 12-month period, some traditional categories remained among the weakest performers. Canadian whisky, Scotch, and brandy and cognac were cited as notable laggards, while Irish whiskey was roughly flat over that longer span. That contrast between monthly gains for Irish whiskey and flat performance over 12 months shows how uneven the market has become by category.

The August spirits data are especially important for suppliers and distributors because the revenue drop again outpaced the decline in volume. When dollar sales fall more quickly than case sales, it usually points to pressure from lower-priced products, heavier discounting, more promotions, or a consumer shift away from higher-value brands. NABCA did not break out those drivers in detail in the monthly summary, but the negative 2.5% price and mix figure indicates that weakness extended beyond unit demand alone.

The report also showed that softness was not limited to spirits sold through retail channels. In the on-premise segment, which includes bars and restaurants, August spirits volume fell 1.6% and dollar sales fell 4.4%. Over the 12 months ended in August, on-premise spirits volume was still up 0.5%, but dollar sales were down 1.8%, leaving a negative 2.3% price and mix effect. That suggests a similar pattern of weaker revenue quality in places where consumers drink away from home.

Wine sales in the same control states also declined in August, though the pricing pattern was different. Wine volume fell 6.4% and dollar sales declined 5.0%, resulting in a positive 1.4% price and mix figure. Over the rolling 12-month period, wine volume was down 3.9% and dollar sales were down 2.2%, with a positive 1.7% price and mix effect. In on-premise wine, August volume fell 3.1% while dollar sales were essentially flat, producing a positive 3.1% mix result.

NABCA’s control-state figures cover wholesale sales in 18 states where alcoholic beverage distribution is controlled in whole or in part by public systems. Because of that structure, the data are closely watched as a timely indicator of parts of the U.S. beverage alcohol market, but they do not represent the entire country. Even so, the August results show a broad weakening in spirits demand in those states, with falling case sales now accompanied by an even sharper decline in revenue and continued dependence on a small number of categories, especially canned cocktails, to generate

growth.