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U.S. spirits sales fell 2.4% in early October, extending a preholiday slowdown

NielsenIQ reported a 2.3% volume drop, with weekly revenue rising 1.1% to $512.8 million before Halloween buying

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Spirits sales remained under pressure in the four weeks ended October 17, even as weekly revenue moved slightly higher ahead of Halloween and the year-end holiday season, according to NielsenIQ’s October 2026 Spirits Pulse report.

NielsenIQ said dollar sales for total spirits, excluding prepared cocktails, fell 2.4% from a year earlier in the four-week period, while volume declined 2.3%. The report said softer demand and broader economic headwinds were the main factors behind the slowdown and accounted for 89% of the overall decline.

Even with those losses, the category showed a modest week-to-week improvement at the end of the period. Sales reached $512.8 million in the week ended October 17, up 1.1% from the week ended October 10. NielsenIQ said that increase offered a better setup for seasonal buying tied to Halloween gatherings and holiday entertaining.

The report described spirits as more resilient than the broader beverage alcohol industry, although the category has not returned to growth overall. That relative stability is likely to be tested over the next several weeks, when consumer spending patterns around celebrations and hosting often shape late-year results.

Performance across major categories remained uneven. Whiskey posted some of the weakest numbers among leading segments, with dollar sales down 4.7% and volume down 5.2% in the four weeks ended October 17. Vodka also weakened, with dollar sales slipping 1.3% and volume down 2.1%.

Tequila continued to show growth, though at a slower pace on the revenue side. Dollar sales for tequila rose 0.7%, while volume increased 5.0%. That gap suggests consumers kept buying more product even as dollar growth moderated. Tequila was one of the few major traditional spirits segments to stay in positive territory during the period.

Non-alcoholic spirits posted the strongest growth in the report. Dollar sales in that segment rose 20.5%, and volume climbed 20.9%. The category remains much smaller than vodka, whiskey or tequila, but the gains show demand is expanding at a much faster rate than in most conventional spirits segments.

Other spirits categories, grouped together by NielsenIQ, also remained weak. That group, which includes brandy, cognac, cordials, gin, grain alcohol and rum, fell 2.3% in dollar sales and 3.0% in volume. With those declines, growth in the broader spirits market was concentrated in a limited number of areas rather than spread across the

category.

Among manufacturers, Diageo remained the largest by dollar sales, despite a 6.6% drop and a loss of 75,000 cases in the period. Sazerac ranked second and delivered the strongest growth among the top five by dollars, with sales up 5.7% and volume up by 54,300 cases. Bacardi held the No. 3 position, with dollar sales up 2.8% and cases up 9,000. Fifth Generation, the producer of Tito’s Handmade Vodka, ranked fourth and posted a 6.5% increase in dollar sales, with case gains of 18,000. Suntory Global Spirits rounded out the top five, with dollar sales down 6.0% and case sales lower by 41,100.

Looking only at dollar growth, Sazerac led the major manufacturers tracked in the report, followed by Fifth Generation and Bacardi. Constellation also posted a sharp increase, with dollar sales up 27.6% and case sales up 6,200. Heaven Hill appeared in the top five for dollar growth with a 0.4% increase, even though its case volume fell by 17,700, showing that pricing and product mix still lifted revenue.

At the brand level, Tito’s Vodka remained the top-selling spirits brand by dollars and was also one of the few top brands to grow. Its dollar sales rose 4.7%, and case volume increased by 13,100. Crown Royal ranked second by dollars but fell 10.5%, with case sales down 23,400. Jack Daniel’s was third and declined 8.3%, with a drop of 20,900 cases. Don Julio ranked fourth, with dollar sales down 5.2% and case volume down 4,100. Fireball Whiskey was fifth and posted a 7.0% decline in dollar sales, with case losses of 24,000.

Among the fastest-growing brands by dollar sales, Cazadores ranked first, up 55.9% with an increase of 24,000 cases. W.L. Weller followed with a 90.2% jump in dollar sales and a gain of 7,400 cases. Tito’s Vodka also appeared on the dollar-growth list, underscoring its ability to expand while holding the top revenue position. Lunazul Tequila posted an 18.5% increase in dollar sales and added 12,800 cases, while Svedka rose 16.5% and gained 32,500 cases.

The NielsenIQ data were drawn from its retail measurement business drivers report for the four weeks ended October 17 and cover total spirits sales excluding prepared cocktails.