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U.S. retail wine sales fell 3.8% in the four weeks ending Oct. 24

Volume dropped 5.3%, with gains in sparkling and non-alcoholic wine failing to offset losses in still wine

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Retail wine sales in the United States kept falling in the four weeks ending October 24, even as a late-month seasonal lift helped weekly sales improve, according to NielsenIQ data released on Monday, November 2.

NielsenIQ said dollar sales for wine fell 3.8% from the same period a year earlier, while volume dropped 5.3%. The figures point to a market where consumers are buying less wine overall, even as some higher-priced and fast-growing segments offer limited support.

The research firm said weaker consumer engagement was the main driver of the category's losses and accounted for 73% of the decline during the period, up from 47% in the prior reading. Reduced product availability contributed 16% of the decline, while weaker promotions made up 11%.

At the weekly level, dollar sales reached $372.5 million, up 1.0% from the prior week. NielsenIQ said the increase was in line with a seasonal pickup that tends to arrive later in October. Even so, the broader trend remained negative over the full four-week period.

The gap between dollar and volume performance also widened, suggesting shoppers continued to pull back on the number of bottles purchased more than on total spending. NielsenIQ said that dynamic underscores the need for both premium products and more accessible price points, as producers try to retain value while addressing pressure on consumer demand.

Still wine remained the weakest part of the market. NielsenIQ reported that still wine sales fell 4.6% in dollar terms and 5.8% in cases in the four weeks ending October 24. Because still wine makes up the largest share of the category, its continued decline weighed heavily on overall results.

Sparkling wine, by contrast, improved. Dollar sales for sparkling wine rose 1.5% from a year earlier, while volume edged up 0.1% after repeated declines. The non-alcoholic wine segment also continued to grow, though at a slower pace than before. NielsenIQ said non-alcoholic wine sales rose 18.4% in dollars and 14.6% in volume.

Those gains, however, were not enough to offset the weakness in still wine. The data suggests that growth in smaller segments is helping cushion the category, but not yet changing the broader direction of the U.S. retail wine market.

Among the largest wine companies by dollar sales, Gallo remained in the top spot despite a 1.2% decline in dollars and a drop of 68,300 cases. The Wine Group ranked second and posted a steeper 9.4% decline in dollar sales, with volume down by 260,000 cases. Deutsch Family ranked third and stood out as the strongest performer among the top five, with dollar sales up 3.4% and case sales up by 9,800. Trinchero Family's dollar sales fell 4.5%, while Delicato Family Wines declined 6.8%.

In NielsenIQ's ranking of the top five manufacturers by dollar growth, Deutsch Family led the group, followed by Vineyard Brands, up 8.7%, Wagner Family Wines, up 3.8%, Delegat USA, up 7.6%, and Constellation, up 2.2%.

At the brand level, Josh was the top wine brand by dollar sales and also one of the strongest gainers, with sales up 7.9% and case volume up by 38,200. Barefoot followed with dollar sales up 1.0% and volume up by 37,300 cases. Bota's dollar sales fell 3.8%, and Sutter Home declined 4.0%. La Marca posted one of the clearest gains among major brands, with dollar sales up 15.2% and volume up by 22,600 cases.

Among the fastest-growing brands by dollar sales, NielsenIQ listed Josh, La Marca, Whitehaven, Matua and Made by James. Made by James recorded the sharpest percentage increase, with dollar sales up 1,078.5%, though from a much smaller base than the larger national brands.

The NielsenIQ figures cover total wine excluding wine-based cocktails. For wine producers, importers, wholesalers and retailers, the data offers a recent read on U.S. demand in one of the world's most important beverage markets. The continued decline in volume, together with isolated pockets of growth in sparkling and non-alcoholic wine, could affect inventory planning, distribution decisions and category strategy across the broader drinks business as companies head deeper into the holiday selling season.