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U.S. alcohol sales fell 2.2% in late October, NIQ reports

Case volume dropped 4.0%, prepared cocktails were the lone revenue gainer, and most major state markets remained in decline

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Alcohol sales in measured retail channels remained weak in the four weeks ending October 24, with revenue and volume both below year-earlier levels, according to new data from NIQ.

The market generated $8.1 billion in dollar sales during the period, down 2.2% from a year earlier. Case volume totaled 154.9 million, a 4.0% decline. NIQ said the figures showed the category was still moving through late October with little momentum, even though the latest weekly reading showed a small improvement.

For the week ending October 24, dollar sales were $2.0 billion, up 0.3% from the week ending October 17. That increase interrupted the prior week’s declines, but the broader trend remained soft. NIQ said seasonal gatherings tied to Halloween later in October could still provide some support for demand, though the four-week data did not yet show a wider recovery.

The biggest split in the market remained between prepared cocktails and the more established alcohol categories. Prepared cocktails, a group that NIQ said includes spirit-based prepared cocktails, wine-based cocktails, flavored malt beverages and seltzers, posted 2.3% growth in dollar sales. Volume for the segment still fell 1.7%, showing that even the strongest area of the market was not adding unit sales.

Beer continued to decline, though at a slower rate than in the prior period. Dollar sales for beer fell 2.6%, while volume dropped 4.3%. NIQ said the slower pace of decline took some pressure off the broader alcohol business, but the category still showed no return to growth.

Wine turned in the weakest performance among the major categories. Dollar sales fell 3.8% from a year earlier and volume declined 5.3%. Those losses were deeper than in the earlier period, adding to the strain on the overall market.

Spirits held up somewhat better than beer and wine, but still remained in negative territory. Dollar sales fell 2.5% and volume slipped 2.4%. NIQ described spirits as the most stable of the traditional alcohol categories, though it also said the segment showed little momentum of its own.

Taken together, the data pointed to a market where consumers were buying fewer cases across every major category. Even in prepared cocktails, where revenue increased, volume was still lower than a year earlier. That left the market relying on a narrow set of gains rather than a broad-based improvement.

Regional results showed a similar pattern, with most of the top 10 state markets still posting declines. Ohio was the strongest market on dollar sales, edging up 0.3% from a year earlier after a 0.6% decline in the previous period. New Jersey also moved closer to flat performance, with volume up 0.2% after a 1.0% decline in the earlier reading.

Those modest gains stood out because most large markets remained under pressure. Massachusetts posted some of the steepest losses, with dollar sales down 9.0% and volume down 10.5%. Michigan and Illinois showed some improvement, though both still remained negative. Dollar sales in Michigan fell 2.6%, while Illinois posted a 1.2% decline.

NIQ said the state-level data showed a widening divide between markets that were nearing stability and those still facing substantial pullbacks. Ohio and New Jersey were among the few places where the trend improved enough to cross into slight growth on at least one measure, while Massachusetts remained notably weak.

The channel picture was also uneven. Club stores recorded the sharpest drop in dollar sales, down 4.3% from a year earlier. Food stores followed with a 3.4% decline. Liquor stores were down 2.0%, mass retailers were down 1.7%, and convenience stores were down 1.6%.

Only the “All Others” channel group posted growth in dollars, rising 2.6%. NIQ said that grouping includes drug, military and dollar stores.

Volume trends by channel differed somewhat from dollar sales, but the overall direction was still negative in most outlets. Food stores had the largest volume decline at 4.7%. Convenience and mass retailers each fell 4.5%, liquor stores dropped 3.2%, and club stores were down 2.3%. Again, the “All Others” group was the only channel with positive volume growth, rising 4.1%.

The gap between dollar performance and volume performance across many channels underscored the broader problem facing the alcohol business in late October. Sales revenue in some areas was holding up better than unit demand, but actual case movement continued to weaken.

NIQ’s latest reading suggests that any recovery remained narrow and fragile through October 24. Prepared cocktails continued to separate from the rest of the market on revenue growth, beer’s decline moderated somewhat, and a few state markets moved closer to flat performance. But with wine weakening further, spirits still down, and volume negative across all four major alcohol categories, the industry entered the end of October without a clear turnaround in place.