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Weaker consumer engagement drove a 3.8% drop in U.S. retail wine sales through Oct. 24

Volume fell 5.3%, still wine remained the main drag, sparkling returned to growth, non-alcoholic gains offered only partial relief

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U.S. retail wine sales continued to weaken in the four weeks ended October 24, even as seasonal demand lifted results from the prior week, according to NielsenIQ data.

NielsenIQ said dollar sales for total wine, excluding wine-based cocktails, fell 3.8% from a year earlier in the latest four-week period, while volume dropped 5.3%. The report said weaker consumer engagement was the main reason for the decline and accounted for 73% of the losses, up from 47% in the prior reading. Reduced product availability accounted for 16% of the decline, and underperforming promotions made up the remaining 11%.

The report showed a modest week-to-week improvement late in the period. Weekly dollar sales reached $372.5 million, up 1.0% from the previous week. NielsenIQ described that increase as an expected seasonal lift as demand consolidated later in October. A year earlier, the same comparison had shown a 1.2% increase from the previous week.

Even with that weekly gain, the report pointed to a widening difference between value and volume trends. Dollar sales fell less than volume, suggesting consumers were still spending more selectively even as fewer units moved through stores. NielsenIQ said that gap underscored the need for both premium products and more accessible price options in the category.

Still wine remained the main source of weakness. In the four weeks ended October 24, still wine posted a 4.6% decline in dollar sales and a 5.8% drop in cases. Because still wine makes up the largest part of the category, its continued contraction limited the benefit from smaller segments that were growing.

Sparkling wine showed a better performance. NielsenIQ said sparkling wine returned to growth after recurring declines, with dollar sales up 1.5% and volume up 0.1% in the latest four-week period. That improvement made sparkling one of the few areas of the wine business to move back into positive territory.

Non-alcoholic wine also remained in growth, though at a slower pace than earlier. Dollar sales in that segment rose 18.4%, while volume increased 14.6%. The gains were strong compared with the rest of the category, but NielsenIQ said the moderation meant the segment was providing only partial support against the broader decline in wine sales.

Among manufacturers, E. & J. Gallo Winery remained the largest by dollar sales, though its sales were down 1.2% and its case volume fell by 68,300 cases. The Wine Group held the second spot, but it posted a steeper 9.4% decline in dollar sales and a loss of 260,000 cases. Deutsch Family ranked third and was one of the few major suppliers to grow, with dollar sales up 3.4% and case volume increasing by 9,800 cases. Trinchero Family came fourth, with dollar sales down 4.5% and case volume off by 36,500 cases. Delicato Family Wines ranked fifth, with dollar sales down 6.8% and case volume lower by 54,500 cases.

When ranked by dollar growth rather than size, Deutsch Family led the group of major gainers. Vineyard Brands followed with dollar sales up 8.7% and case volume up 6,100 cases. Wagner Family Wines posted a 3.8% increase in dollar sales and added 2,600 cases. Delegat USA rose 7.6% in dollar sales with case gains of 2,800. Constellation rounded out the top five growers, with dollar sales up 2.2% and case volume ahead by 3,900.

At the brand level, Josh was the top wine brand by dollar sales and also one of the strongest performers in growth. NielsenIQ said Josh increased dollar sales by 7.9% and added 38,200 cases. Barefoot ranked second by dollar sales and posted a 1.0% increase, with case volume up 37,300. Bota held third place, though dollar sales fell 3.8% and volume dropped by 31,900 cases. Sutter Home ranked fourth, with dollar sales down 4.0% and case volume off by 22,300. La Marca came in fifth by dollar sales and recorded one of the strongest gains among leading brands, with sales up 15.2% and volume ahead by 22,600 cases.

Among the fastest-growing brands by dollars, Josh ranked first, followed by La Marca. Whitehaven posted a 23.7% increase in dollar sales and a gain of 8,500 cases. Made by James showed the largest percentage jump, with dollar sales rising 1,078.5% and case volume up 9,200, though from a smaller base than the category’s biggest brands. Matua also made the top five growth list, with dollar sales up 13.4% and volume ahead by 6,000 cases.

The NielsenIQ figures, based on its retail measurement and business drivers data for the four weeks ended October 24, suggest that wine suppliers entered the late fall selling season with selective pockets of strength but continued broad pressure in the

core business. The main pattern in the period was a category still losing sales and volume overall, with sparkling and non-alcoholic products offsetting only part of the decline in still wine.