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The decline in U.S. wine and spirits sales slowed in September

SipSource data showed spirits improved most over three months, with wine still hurt by lower-priced distribution losses

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The U.S. wine and spirits market showed signs of stabilizing in September, but the improvement was uneven and did not amount to a return to growth, according to SipSource data released by the Wine & Spirits Wholesalers of America on Tuesday, November 10.

The industry data showed combined wine and spirits volume fell 6.1% over the 12 months through September, while revenue declined 4.9%. Shorter-term figures were somewhat better. Over the three months through September, volume was down 4.8% and revenue fell 3.7%, suggesting that the pace of contraction had eased, especially in spirits.

Spirits posted the clearest signs of improvement. Over the latest three-month period, spirits volume declined 3.1% and revenue slipped 3.5%. WSWA said categories including bourbon, Tequila-Other and U.S. Whiskey-Other were among the segments with improving trends. Mid-priced spirits also held up better than other parts of the market. Products priced between $20 and $29.99 showed greater resilience, while bottles in the $50 to $99.99 range remained under heavier pressure.

Those pricing patterns suggest consumers are still spending, but more selectively. Demand appeared to be stronger where shoppers saw clearer value, while higher-priced segments continued to feel the strain. That matters for suppliers and distributors that had relied on premiumization to lift sales in recent years.

Wine continued to lag behind spirits and faced broader problems than demand alone. Over the three months through September, wine volume fell 6.7% and revenue dropped 4.2%. The weakness was most pronounced in lower-priced wines, especially products priced below $13. Wines priced at $16 and above generally performed better, according to the data.

Some wine segments still showed pockets of strength. Sauvignon Blanc posted a 5.9% revenue gain, and Prosecco rose 4.8%. Champagne and sparkling wines also performed relatively better in bars and restaurants, indicating that occasion-based purchases and consumer preferences continued to support parts of the category even as the broader market weakened.

WSWA said wine’s difficulties also reflected shrinking points of distribution, particularly for lower-priced products and in the on-premise channel. In practical terms, that means some wines are losing shelf space, menu placement or availability, making it harder for the category to recover even if consumer demand steadies. The distribution issue adds a structural challenge that spirits, at least for now, appear to be navigating more

effectively.

Channel performance also offered a mixed picture. The on-premise market, which includes restaurants and bars, continued to outperform off-premise sales such as liquor stores and other retail outlets, though both channels remained in negative territory. September brought some improvement in off-premise depletion trends, an encouraging sign because that channel still accounts for a large share of overall industry sales.

The timing is important for wholesalers, producers and retailers as they prepare for the holiday selling season, when inventory decisions, pricing plans and distribution strategy can have an outsized effect on year-end results. A slower pace of decline could help companies fine-tune forecasts and stock levels for November and December, but the latest figures also suggest that easing losses should not be mistaken for a broader rebound.

WSWA said comparisons could become somewhat easier in the fourth quarter because the industry is measuring against a particularly weak period in late 2025. Even so, the group said the market still faces uneven demand, pressure across price tiers and continuing distribution losses, particularly in wine. The next several months are likely to show whether the recent improvement in spirits and selected wine segments can hold as consumers make holiday purchases.