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U.S. retail wine sales fell 3.8% in the four weeks ending Oct. 31

Weaker consumer engagement caused most of the decline, despite growth in sparkling and non-alcoholic segments

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U.S. retail wine sales remained under pressure in the four weeks ending Oct. 31, even as sparkling wine and non-alcoholic wine posted gains that helped limit the broader downturn.

NielsenIQ said on Tuesday, Nov. 10, that dollar sales for total wine fell 3.8% from a year earlier, while volume dropped 5.3% in the same period. The data covers total wine sales excluding wine-based cocktails.

According to NielsenIQ, weaker consumer engagement was the main driver of the decline, accounting for 69% of category losses. Reduced product availability made up 18% of the drop, while weaker promotional performance accounted for 13%.

The report also showed a short-term improvement in weekly sales. Weekly wine dollar sales reached $381.3 million, up 2.3% from the prior week. NielsenIQ said demand tied to Halloween supported that gain, but the wider gap between dollar and volume trends suggests many shoppers are still pulling back on purchases even when sales values hold up better. That pattern points to continued pressure on the category as retailers and producers try to balance higher-priced bottles with more affordable offerings.

Performance differed sharply across segments. Still wine remained the biggest drag on the market, with dollar sales down 4.7% and case sales down 5.9% in the four weeks ending Oct. 31. Sparkling wine, by contrast, continued to improve, with dollar sales rising 2.2% and volume up 0.9%. Non-alcoholic wine, though still a smaller part of the market, posted the strongest growth, with value up 19.3% and volume up 15.3%.

NielsenIQ said the gains in sparkling and non-alcoholic wine were not enough to offset the weakness in still wine, which continues to weigh on the overall category. The divergence underscores how uneven demand has become across wine styles and price points in the U.S. retail market.

Among manufacturers, Gallo remained the top supplier by dollar sales, though its sales slipped 1.0% and its case volume fell by 63,400 cases. The Wine Group ranked second, with dollar sales down 9.7% and volume lower by 268,000 cases. Deutsch Family posted one of the stronger performances among large suppliers, with dollar sales up 3.3% and case volume up 13,200 cases. Trinchero Family recorded a 4.2% dollar decline, and Delicato Family Wines fell 7.2%.

In NielsenIQ’s ranking of manufacturers by dollar growth, Deutsch Family led the group, followed by Moet Hennessy USA, Wagner Family Wines, Delegat USA and Constellation. Delegat USA posted the largest percentage increase among those companies, with dollar sales up 8.1%.

At the brand level, Josh ranked first by dollar sales and rose 7.3%, adding 38,700 cases. Barefoot followed with a 1.3% increase and a gain of 40,200 cases. Bota and Sutter Home both declined, with dollar sales down 3.8% and 3.6%, respectively. LaMarca stood out among leading brands, with dollar sales climbing 15.7% and volume up 23,500 cases.

LaMarca also led NielsenIQ’s list of brands by dollar growth, followed by Josh, Whitehaven, Made By James and Kim Crawford. Whitehaven posted a 23.7% dollar increase, while Kim Crawford rose 7.5%.

The figures add to signs that wine sellers are entering the holiday selling period with mixed conditions. Sparkling wine and non-alcoholic offerings may provide some support for retailers and distributors building year-end assortments, while the continued weakness in still wine could keep pressure on pricing, promotions and inventory decisions across the broader beverage business.