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U.S. alcohol sales fell 1.4% in late October despite a Halloween lift

NielsenIQ said prepared cocktails rose 3.7%; total case volume dropped 3.0%; wine posted the deepest major-category decline

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U.S. alcohol sales fell in the four weeks ending Oct. 31, even as Halloween and Day of the Dead shopping lifted demand late in the period, according to a NielsenIQ report that pointed to continued pressure on consumer demand across much of the market.

NielsenIQ, or NIQ, said total alcohol sales reached $8.2 billion during the period, down 1.4% from a year earlier. Case volume totaled 155.7 million, a 3.0% decline from a year earlier. The report said the holiday selling window gave the industry a short-term boost, with weekly dollar sales rising to $2.1 billion in the week ending Oct. 24, up 5.8% from the prior week and close to year-earlier levels.

The improvement, however, did not change the broader pattern NIQ described as weaker underlying consumption. The report said seasonal demand helped moderate declines in some categories, but volume trends remained negative across every major segment.

Prepared cocktails were the strongest part of the market. NIQ said dollar sales in prepared cocktails rose 3.7% from a year earlier, while volume slipped 0.3%, a much narrower decline than the overall market. The firm said the category continued to benefit from demand for convenience and variety during social occasions tied to the fall holiday period. NIQ’s prepared cocktails grouping within beer, wine and spirits includes spirit-based prepared cocktails, wine-based cocktails, flavored malt beverages and seltzers.

Beer, the largest traditional category, remained under pressure but improved from earlier in the fall, NIQ said. Dollar sales for beer fell 1.6% and volume dropped 3.3%. The report said both measures were less negative than in the prior period, reflecting a normal seasonal lift even though sales still trailed year-earlier levels.

Wine remained the weakest major category in the report. Dollar sales fell 3.8% and volume declined 5.3%. NIQ said the category’s declines were steady on both measures and continued to weigh on overall industry performance.

Spirits posted smaller declines than wine and showed somewhat better volume stability than other traditional categories. NIQ said spirits dollar sales fell 2.0% and volume declined 1.7%. Both figures improved from the prior period, with the stronger change in volume.

Taken together, the results showed a market that is increasingly split between one pocket of growth and several mature categories that continue to contract. NIQ said prepared cocktails remain the industry's main source of growth, while spirits appear to be the most stable among the traditional alcohol categories. Beer and wine, by contrast, continued to face broader weakness despite the late-October holiday demand.

The report also showed a sharp divide across major state markets. Ohio led the largest markets in value growth, with sales up 2.6% from a year earlier. That marked a notable improvement from 0.4% growth in the previous reporting period. New Jersey and Illinois also moved back into positive territory, with value sales up 0.5% and 0.3%, respectively. Michigan improved to essentially flat performance.

At the other end of the market, Massachusetts continued to post the deepest declines among the states highlighted in the report. NIQ said dollar sales there fell 7.8% and volume dropped 9.6%. Florida also remained weak, with dollar sales down 5.5% and showing little improvement from the prior period.

NIQ said those state-level results point to a fragmented market in which gains in some large states are being offset by continued weakness in several important coastal markets. The pattern suggests that the industry is not moving in one direction nationwide, but instead depends increasingly on local demand conditions.

Sales performance also varied sharply by retail channel. Convenience stores showed the biggest improvement from the prior period, though they still posted a small decline in dollar sales. Club stores had the steepest dollar drop at 3.7%, followed by food stores at 2.8%, mass retailers at 1.7%, liquor stores at 1.4% and convenience at 0.4%. The only channel with dollar growth was the catchall category labeled all others, which rose 3.5%.

Volume trends were weaker than dollar trends across most channels, another sign that price and mix continue to cushion revenue even as shoppers buy fewer cases. Mass retailers recorded the largest volume decline at 4.4%, followed by food at 4.1%, convenience at 3.2%, liquor at 2.1% and club at 1.2%. The all others category was again the only segment to post growth, with volume up 5.4%.

The gap between dollar and volume results across categories and channels suggests that pricing remains firmer than demand. Even where dollar declines were modest, case sales often fell by a wider margin. That pattern has been common across consumer goods sectors as companies and retailers try to hold revenue in the face of more selective household spending.

NIQ’s report indicates that alcohol sales got some help from late-October celebrations, but not enough to reverse the broader downtrend. Consumers bought more during the seasonal period, especially in products tied to convenience and ready-to-drink occasions, yet overall spending and volume still came in below year-earlier levels.

For producers and retailers, the data point to a market in which growth is becoming harder to find outside prepared cocktails and a handful of state markets. Beer and spirits benefited from seasonal demand, but both remained in negative territory. Wine continued to lag, and channel performance stayed uneven. NIQ said the latest results show an alcohol market that is still demand-constrained, with short-term holiday gains offering only limited relief.