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Prepared cocktails were the only major U.S. alcohol category to post dollar growth

Sales rose 3.7% in the four weeks ended October 31, with beer, wine and spirits all below year-earlier levels

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Prepared cocktails continued to outpace the rest of the U.S. alcohol market at the end of October, standing as the only major category to post dollar growth while beer, wine and spirits all declined from a year earlier, according to NielsenIQ data reported Wednesday by Kane's Beverage News Daily.

In the four weeks ended October 31, prepared cocktails rose 3.7% in dollar sales. Their volume was still slightly lower, down 0.3%, but that was a smaller decline than in the prior period. The result left prepared cocktails as the clearest growth engine in a market where the biggest alcohol categories were still losing volume, a split that could shape how suppliers, distributors and retailers manage assortments, pricing and inventory in the months ahead.

Beer showed some seasonal improvement but remained below year-earlier levels. Dollar sales fell 1.6% and volume dropped 3.3%. Kane's said the category benefited from seasonal demand that helped moderate the declines, a pattern often seen during fall gathering and hosting occasions, but the broader trend remained weak.

Inside beer, performance varied widely by segment. Imports returned to dollar growth, with value up 0.3% and volume up 1.5%. Domestic super premium beer also improved, rising 2.3% in dollars and 1.6% in volume. Cider gained 6.5% in value and 4.9% in

volume, while non-alcoholic beer rose 8.9% in dollars and 7.5% in volume. Domestic premium remained the weakest major beer segment, down 5.5% in dollar sales and 6.8% in volume. Craft beer also stayed under pressure, falling 4.1% in value and 5.6% in volume.

Wine remained the weakest major alcohol category in the latest reading. Dollar sales declined 3.8% and volume fell 5.3%, continuing a steady slide that weighed on the overall market. Still wine remained the main problem area, with dollar sales down 4.7% and volume off 5.9%.

Smaller wine segments were stronger, but not enough to offset the continued decline in still wine. Sparkling wine increased 2.2% in dollar sales and 0.9% in volume. Non-alcoholic wine posted much stronger gains, with value up 19.3% and volume up 15.3%. Those gains showed some consumer interest shifting toward alternative wine occasions, but the size of those segments was not enough to change the broader category trend.

Spirits also posted declines, though the category remained more resilient than wine and showed firmer volume performance than many other traditional alcohol segments. Dollar sales fell 2%, and volume dropped 1.7%. The category improved from the prior period, especially on volume, according to the report.

The leading spirits segments continued to move in different directions. Tequila kept gaining ground, with dollar sales up 1.7% and volume up 6.1%. Non-alcoholic spirits showed the fastest momentum in the category, rising 22.7% in value and 25.6% in volume. Vodka came close to stabilizing, with value down 0.4% and volume down 0.7%. Whiskey remained weaker, dropping 4.9% in dollar sales and 5.2% in volume. Other spirits outside the major named segments were down 2% in value and 2.9% in volume, leaving growth concentrated in a relatively small group of products.

The state-level picture was also uneven. Ohio led the large markets with 2.6% value growth from a year earlier, improving from 0.4% in the prior period. New Jersey rose 0.5% and Illinois gained 0.3%, with both moving back into positive territory after earlier declines. Michigan was roughly flat.

Other large states remained under heavier pressure. Massachusetts posted the steepest decline among the major markets, with dollar sales down 7.8% and volume down 9.6%. Florida also continued to struggle, with value sales down 5.5% and little improvement from the prior period. The differences among large states point to a more fragmented market, with better conditions in some Midwest and Northeast markets offset by weaker coastal performance.

Retail channels told a similar story of uneven demand. Club stores had the biggest decline in dollar sales at 3.7%, followed by food at 2.8%, mass at 1.7%, liquor at 1.4% and convenience at 0.4%. Kane's said convenience showed the greatest improvement from the prior period even though it was still down from a year earlier.

Volume trends were weaker than dollar trends across most channels. Mass fell 4.4% in volume, food dropped 4.1%, convenience declined 3.2%, liquor was down 2.1% and club fell 1.2%. The all others channel was the only one to grow in both measures, with dollar sales up 3.5% and volume up 5.4%.