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U.S. wine and spirits sales declines eased in September

SipSource data showed spirits stabilizing faster, with wine volume down 6.7% and lower-priced bottles losing distribution

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The U.S. wine and spirits market showed signs of stabilizing in September, but the recovery remained uneven, with wine still under heavier pressure than spirits. Beverage Information Group reported on Tuesday that the latest SipSource data from Wine & Spirits Wholesalers of America pointed to a slower pace of decline across the combined market, even as demand and distribution continued to weaken in parts of the

wine business.

According to the report, combined wine and spirits volume fell 6.1% over the trailing 12 months through September, while revenue declined 4.9%. Over the most recent three-month period, volume was down 4.8% and revenue fell 3.7%. That narrower decline suggested the market was becoming more stable than it had been earlier in the year, though not all categories were improving at the same rate.

Spirits showed the firmer short-term trend. In the three months through September, spirits volume declined 3.1% and revenue slipped 3.5%. SipSource said several segments were performing better than the broader market, including bourbon, Tequila-Other and U.S. Whiskey-Other. The data also showed a clear split by price. Spirits priced from $20 to $29.99 were more resilient, while products in the $50 to $99.99 range remained under greater pressure.

That pricing pattern suggested consumers were still spending, but were making more selective choices about where to trade up. For producers, wholesalers and retailers, that matters because it can affect purchasing plans, inventory strategy and shelf allocation across the broader beverage alcohol business. A steadier mid-price spirits market may support some brands, while continued weakness in higher-priced bottles could weigh on premium portfolios.

Wine remained the weaker side of the market. SipSource reported that wine volume fell 6.7% in the latest three-month period, while revenue dropped 4.2%. Even within that decline, some segments held up better than others. Sauvignon blanc posted a 5.9% gain in revenue, and prosecco rose 4.8%, showing that consumer demand remained more durable in a limited number of varietals and occasions.

The report also found relative strength in Champagne and sparkling wine in the on-premise channel. That suggested restaurant and bar demand for celebratory and occasion-based products was holding up better than some other wine segments. The broader picture for wine, however, remained difficult as suppliers faced weaker demand and reduced product availability in some parts of the market.

Pricing data showed a widening divide inside the wine category. Wines priced below $13 continued to post substantial declines, while products priced at $16 and above were generally more resilient. That split is important for the beverage industry because it may shape which brands keep distribution and which lose visibility at retail and in restaurants. Lower-priced wines often depend on wide availability and steady volume, so distribution losses can deepen sales declines.

SipSource said points of distribution were falling, especially for lower-priced wines and in the on-premise channel. That means some products are being carried in fewer outlets, adding another layer of pressure beyond weaker consumer demand. For wineries and importers that depend on broad placement, the loss of distribution could make it harder to recover even if overall market conditions become less volatile.

The report was released on November 10 and was based on September results. Beverage Information Group said the data offered some support for the view that the market is stabilizing rather than improving in a broad-based way. In practice, the numbers point to a beverage alcohol market in which spirits are showing more near-term strength, while wine suppliers continue to face a tougher environment shaped by declining demand, sharper price sensitivity and reduced placement in lower-priced segments.