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# U.S. alcohol sales fell 1.3% in early November on lower case purchases

Prepared cocktails rose 4.1%, offering the market its clearest growth pocket despite continued declines in beer, wine and spirits

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U.S. alcohol sales showed smaller declines at the start of November, but the market remained under pressure as shoppers continued to pull back on volume purchases, according to an NIQ report covering the four weeks ending Nov. 7.

NIQ said total alcohol sales reached $8.1 billion in the four-week period, down 1.3% from a year earlier. Case volume totaled 154.4 million, down 2.8%. The report said the gap between dollar sales and volume shows consumers are still buying fewer cases even as pricing and mix help support revenue.

In the week ending Nov. 7, alcohol sales totaled $2.0 billion, down 5.0% from the previous week as the market moved past Halloween demand. Even with that weekly drop, NIQ said both dollar and volume trends improved from the prior reporting period, pointing to a steadier start to November after a softer year for the category.

The report described seasonal demand as an important support for the market. Holiday gatherings and other late-year occasions are helping offset weaker underlying consumption, though NIQ said they have not been enough to lift the category back to growth overall.

Prepared cocktails remained the strongest part of the business. NIQ said prepared cocktails across beer, wine and spirits rose 4.1% in dollar sales from a year earlier, while volume was roughly flat, up 0.1%. That was an improvement from slight volume declines in the earlier period.

The report said the category continues to benefit from consumers looking for convenient products for social occasions. NIQ identified prepared cocktails as the industry’s main growth engine, though it said growth is likely to moderate because the segment is now being compared with strong gains a year ago.

Traditional alcohol categories were still down, but several showed smaller declines than before. Beer sales fell 1.5% in dollars and 3.2% in volume. NIQ said the category appeared to be stabilizing as seasonal demand improved results.

Wine remained the weakest major segment. Dollar sales fell 3.4% and volume dropped 5.0%. NIQ said wine still underperformed the broader alcohol market, but both measures improved somewhat as the fourth quarter progressed.

Spirits sales declined 1.9% in dollars and 1.4% in volume. NIQ said both figures improved from the prior period, with volume showing the clearest progress. Among the traditional categories, the report said, spirits continued to show relative resilience.

The state-by-state picture was uneven, with a few large markets posting gains and others remaining weak. NIQ said Ohio led major markets, with dollar sales up 3.0% from a year earlier, improving from 2.6% in the previous period. Illinois also strengthened, rising 1.4% after a 0.3% gain in the prior reading. Michigan returned to growth, with dollar sales up 0.8% after a 0.1% decline earlier.

New Jersey stayed in positive territory, though growth slowed. Dollar sales there rose 0.3%, down from 0.5% in the prior period.

Other large states continued to struggle, especially on volume. Massachusetts posted the sharpest declines among the major markets in the report, with dollar sales down 7.0% and volume down 9.1%. Both measures improved slightly from the prior period, but the state remained one of the weakest performers.

Florida also showed a wider drop in volume than in value. Dollar sales there fell 5.1%, while case volume dropped 6.1%. NIQ said that pattern suggests consumers are still cutting back on how much they buy even when revenues hold up somewhat better.

Texas, New York and California also recorded dollar declines. NIQ said dollar sales were down 3.1% in Texas, 3.1% in New York and 2.7% in California. In each state, volume fell faster than revenue, with case sales down 5.6% in Texas, 4.4% in California and 3.4% in New York.

The report said those results point to a more fragmented national market. Gains in a handful of states are being offset by persistent weakness elsewhere, especially where volume erosion is outpacing dollar declines.

Performance also varied by retail channel. Food stores posted the weakest dollar trend, with sales down 2.4% from a year earlier. Club stores were down 2.3%, though NIQ said that channel showed the best improvement from the prior week. Liquor stores posted a 1.4% decline, mass retailers were down 0.6%, and convenience stores fell 0.4%.

The convenience channel stood out as one of the steadier parts of the market even though it remained slightly negative on dollar sales. NIQ said that continuing stability helped the channel maintain momentum relative to several larger store formats.

A group NIQ labels All Others, which includes drug, military and dollar stores, posted the strongest gains. Dollar sales in that group rose 2.8%.

Volume trends across channels remained weaker than dollar trends. Food stores again posted the largest decline, with volume down 3.5%. Mass retailers were also down 3.5%, convenience stores fell 3.3%, and liquor stores were down 2.2%.

Club stores were the only named major channel to return to volume growth, rising 0.5%. The All Others group posted the strongest volume gain, up 4.8%.

The report’s findings reinforce a pattern that has persisted across much of the year: consumers are still spending in alcohol, but they are buying fewer cases, and growth is concentrated in a narrower set of products and markets. NIQ’s prepared cocktails category includes spirit-based prepared cocktails, wine-based cocktails, flavored malt beverages and seltzers.