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U.S. spirits sales fell 1.9% in early November

Tequila and non-alcoholic spirits led the category, with whiskey down 5.0% and consumer caution accounting for 65% of weakness

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Retail sales of spirits in the United States showed a modest improvement at the start of November, even as the category remained below year-earlier levels and weekly sales slowed after Halloween, according to NielsenIQ’s November 2026 U.S. Spirits Pulse report.

The report, which tracks total spirits sales excluding prepared cocktails, said dollar sales in the four weeks ending November 7 fell 1.9% from a year earlier, while volume declined 1.4%. NielsenIQ said both measures improved from the prior reporting period, suggesting the category entered the holiday selling season on firmer ground even though consumers were still pulling back.

NielsenIQ said consumer caution and broader economic pressure remained the main factors weighing on the spirits business, accounting for 65% of the category's softness. The firm said that drag eased from the prior period, helping overall trends improve despite uneven performance across major segments.

In the first week of the four-week period, the spirits category generated $515.4 million in sales. Even so, that week's sales were 10.3% lower than the previous week, a sign of post-Halloween normalization after stronger seasonal demand.

The report pointed to a widening gap between the strongest and weakest parts of the market. Tequila continued to gain ground, with dollar sales up 2.3% and volume up 6.8% in the four weeks ending November 7. Non-alcoholic spirits posted the fastest growth in the report, with value up 26.0% and volume up 30.6%, both stronger than in the prior week.

Vodka, the largest spirits segment by many retail measures, came close to returning to growth. NielsenIQ said vodka dollar sales were nearly flat, slipping 0.1%, while volume was down 0.3%. That made vodka one of the more stable large categories in the period.

Whiskey moved in the opposite direction. The category's dollar sales and volume each fell 5.0%, showing continued pressure even though NielsenIQ said volume trends improved slightly from the previous period. The report said growth outside tequila and non-alcoholic spirits remained limited, with the "all other" group down 1.9% in dollars and 2.8% in volume. That group includes brandy, cognac, cordials, gin, grain alcohol and rum.

Among manufacturers, Diageo remained the largest by dollar sales in the measured period, but its dollar sales fell 5.4% and case sales declined by 59,900. Sazerac ranked second and posted one of the strongest performances among the biggest suppliers, with dollar sales up 5.5% and case sales up 85,400. Bacardi ranked third, with dollar sales up 3.8% and case sales up 12,800.

Fifth Generation, the maker of Tito’s Handmade Vodka, ranked fourth among manufacturers by dollar sales and reported a 7.8% increase in dollars along with a gain of 29,400 cases. Suntory Global Spirits rounded out the top five manufacturers by dollar sales, though its dollar sales fell 5.9% and case volume dropped by 42,700.

When ranked by dollar growth rather than size, Sazerac led the top manufacturers group, followed by Fifth Generation and Bacardi. Constellation also posted strong momentum, with dollar sales up 15.6% and case sales up 6,900. Heaven Hill made the list with a 0.4% gain in dollar sales despite a decline of 13,900 cases, indicating price mix or premiumization may have offset lower volume.

At the brand level, Tito’s Vodka was the top brand by dollar sales and also one of the strongest gainers. NielsenIQ said Tito’s dollar sales rose 6.3% and case sales increased by 24,700. Crown Royal ranked second by dollars, but its dollar sales fell 8.8% and case sales declined by 16,200. Jack Daniel’s ranked third and posted a 6.6% drop in dollar sales with case sales down 17,400.

Don Julio ranked fourth by dollar sales, though its dollar sales slipped 2.3% and case sales were nearly flat, down by 682 cases. Fireball Whiskey ranked fifth, with dollar sales down 5.9% and case sales off by 21,500.

The fastest-growing brands by dollar sales showed a different picture from the biggest brands overall. After Tito’s, Cazadores posted a 60.7% increase in dollar sales and added 26,500 cases. W.L. Weller’s dollar sales jumped 82.6%, with case sales up 7,400. Lunazul Tequila reported a 17.7% rise in dollar sales and gained 13,100 cases. Svedka also increased dollar sales by 17.7% and added 51,700 cases, one of the largest volume gains among the brands listed.

The data suggests that shoppers are still spending selectively in spirits, favoring a narrower group of brands and categories while cutting back elsewhere. Tequila and non-alcoholic spirits continued to stand out as growth areas, while vodka stabilized and whiskey remained under pressure. For large suppliers and retailers, the report points to a market that improved from late October into early November but has not yet returned to broad-based growth.

NielsenIQ based the report on retail measurement data for the four-week period ending November 7, covering total spirits sales in the U.S. excluding prepared cocktails.