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U.S. wine sales fell 3.4% in early November, marking a slower decline

Growth in sparkling and non-alcoholic wine offset part of the slump driven mainly by weaker consumer engagement

Wednesday, November 18, 2026



U.S. wine sales remained under pressure in early November, but the pace of decline eased as sparkling and non-alcoholic products continued to grow, according to a NielsenIQ report covering the four weeks ending November 7.

The report, NIQ Full View: US Wine Pulse for November 2026, said total wine sales excluding wine-based cocktails fell 3.4% in dollar terms from a year earlier, while volume dropped 5.0%. NIQ said both measures improved from the prior reporting period, suggesting that category losses were moderating after a weaker stretch in the fall.

Weekly dollar sales reached $379.7 million, down 0.6% from the previous week, the report said. NIQ described the latest readings as a steadier start to November for a category that has faced broad pressure from softer demand.

The research firm said weaker consumer engagement remained the main source of losses. It attributed 79% of the decline to lower engagement, followed by reduced availability at 20% and underperforming promotions at 15%. NIQ did not suggest that the figures were mutually exclusive, but it identified consumer demand as the dominant issue.

The performance gap between wine segments remained wide. Still wine, which makes up the largest share of the market, continued to weigh on overall results. Dollar sales for still wine fell 4.3% from a year earlier, and case sales declined 5.5%. Even so, NIQ said both results were better than the prior week, indicating that the segment’s contraction had become less severe.

Sparkling wine posted growth in both value and volume. Dollar sales rose 2.3%, and volume increased 1.4%, extending a run of gains that has made sparkling one of the strongest areas in the category. Non-alcoholic wine also continued to expand at a much faster pace than the broader market. NIQ said dollar sales for non-alcoholic wine climbed 18.9%, while volume rose 14.4%. That was a slight moderation from earlier periods, but it still represented double-digit growth in both measures.

The manufacturer rankings showed that the largest suppliers were not moving in the same direction. Gallo remained the top manufacturer by dollar sales, despite a 0.7% decline and a drop of 56,500 cases. The Wine Group held the second position, but its dollar sales fell 9.6% and case sales declined by 266,500. Deutsch Family ranked third and stood out among the largest suppliers because its dollar sales rose 3.6% and case volume increased by 16,300. Trinchero Family was fourth, with dollar sales down 3.8% and case sales down 32,200. Delicato Family Wines ranked fifth, with dollar sales off 7.0% and case volume down 52,000.

Among manufacturers with the strongest dollar growth, Deutsch Family shared the top line of 3.6% growth with Constellation, which also posted a 3.6% gain in dollars and added 7,400 cases. Delegat USA recorded the fastest percentage increase among the companies listed, with dollar sales up 9.8% and case volume up 4,200. Moet Hennessy USA posted 2.0% dollar growth and gained 2,500 cases. Vineyard Brands rounded out the group with a 7.4% rise in dollar sales and an increase of 5,600 cases.

Brand performance also showed that consumers were still spending in selected parts of the market even as the category as a whole declined. Josh ranked first by dollar sales and posted one of the strongest gains among major brands. NIQ said Josh dollar sales rose 7.6% from a year earlier, with case sales up 41,100. Barefoot ranked second by dollars and grew 1.6%, also adding 41,100 cases. Bota was third, but its dollar sales fell 3.3% and case sales dropped 26,200. Sutter Home ranked fourth, with dollar sales down 3.7% and case volume down 21,000. LaMarca ranked fifth and showed one of the strongest performances among leading brands, with dollar sales up 15.1% and cases up 22,700.

The list of brands with the strongest dollar growth pointed to continued consumer interest in a narrower set of labels. Josh again appeared near the top with 7.6% dollar growth. LaMarca followed with 15.1%. Whitehaven posted the largest percentage gain among the brands listed, with dollar sales rising 25.2% and case sales increasing by 9,100. Made by James was also included after adding 12,300 cases, though NIQ did not provide a comparable dollar growth figure. Kim Crawford rounded out the list with dollar sales up 8.0% and case sales up 6,200.

The report suggests that the wine market is still dealing with a broad pullback in consumer demand, but the losses have become less steep than they were earlier in the season. That pattern was visible across several measures in the November 7 period, especially in the narrower declines for still wine and the continued gains in sparkling and non-alcoholic products.

NIQ’s figures add to evidence that shoppers are becoming more selective rather than leaving the category evenly across all segments. The strongest results came from areas tied to specific consumption occasions and newer consumer preferences, including sparkling wine and alcohol-free alternatives. At the same time, large parts of the traditional still wine business continued to post lower sales and fewer cases, keeping the broader category in decline.