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Alcohol retailers enter the holiday season with a darker outlook than bars and restaurants

Brewbound found that store operators cited economic uncertainty and supply chain strain, leaving bars more confident in seasonal traffic

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Stores that sell alcohol for off-site consumption are entering the holiday selling season with a darker outlook than bars and restaurants, according to a retailer survey reported by Brewbound on Wednesday, November 18.

The survey found a clear split between off-premise businesses, such as liquor stores and other beverage retailers, and on-premise operators, including bars and restaurants. Off-premise respondents were described as more pessimistic about their ability to post strong sales during the holiday period, while on-premise operators showed a somewhat more positive view of the weeks ahead.

According to Brewbound's report, economic uncertainty and supply chain pressures are weighing on store operators' confidence. Those concerns appear to be limiting expectations for a period that is usually one of the most important stretches of the year for alcohol sales. Holiday demand often drives higher volumes of wine, beer and spirits, along with gift-oriented purchases and larger-format sales for parties and gatherings.

By contrast, bars and restaurants are entering the season with somewhat stronger expectations. Brewbound reported that the more upbeat mood in on-premise channels is tied to customer traffic and continued demand for going out. That suggests some operators expect consumers to keep spending on social occasions and experiences away from home even as broader economic concerns remain in place.

The findings point to a meaningful divide inside the alcohol market at a time when retailers, distributors and suppliers are making late-season decisions on inventory, pricing and promotions. If store owners expect a weaker season, they may order more cautiously, focus on faster-moving products or limit exposure to slower premium items. If bars and restaurants see steadier traffic, they may be more willing to keep broader assortments on hand or lean into higher-margin offerings.

That difference matters across the beverage business because the holiday season is not only a sales opportunity but also a planning period that can shape production, replenishment and distribution into the first part of the new year. A more cautious stance from off-premise retailers could influence how much shelf space is given to certain categories and how aggressively brands pursue retail placements. A firmer outlook in on-premise channels could push suppliers to give more attention to draft

programs, cocktail ingredients and products aimed at by-the-glass service.

Brewbound’s report said the survey also highlighted consumption trends that may affect the market in the coming months, including consumer preferences for specific drink types and selling formats. The report did not detail those preferences in the information available, but the reference suggests that operators are looking beyond headline sales expectations and watching shifts in how consumers choose to buy and consume alcohol.

Those shifts are especially important in a market where stores and hospitality venues often respond to different customer behaviors. Off-premise retailers are more exposed to at-home consumption, gift purchases and bulk buying for gatherings. Bars and restaurants depend more on traffic, occasion-based spending and the willingness of consumers to pay for an experience in addition to the drink itself. When those two channels send different signals at the start of the holiday period, suppliers may need separate strategies instead of a single national approach.

The survey’s tone also reflects the pressure many retailers continue to face from factors outside their direct control. Economic uncertainty can affect how much shoppers are willing to spend on alcohol, whether they trade down to lower-priced products or whether they cut back on discretionary purchases altogether. Supply chain concerns can make it harder for stores to plan around seasonal demand, particularly if they are trying to avoid running out of popular products while also limiting excess inventory after the holidays.

For producers of beer, wine and spirits, that combination can create a difficult operating environment. A store that is uncertain about demand may not want to overcommit to seasonal displays or large orders. A restaurant or bar that expects solid traffic may still be selective, favoring products with stronger turnover or items that fit holiday menus and promotions. As a result, the same holiday season can produce different opportunities depending on where the product is sold.

The divergence reported by Brewbound also suggests that headline measures of consumer spending may not tell the whole story for beverage companies. Consumers may still be willing to spend in one setting while becoming more cautious in another.

That can lead to a market where value, convenience and experience each matter in different ways across retail and hospitality.

Brewbound said the survey underscored the need for different responses by each part of the market. For alcohol retailers, that could mean tighter inventory management and more focused promotions. For bars and restaurants, it could mean leaning into seasonal traffic and social occasions. For distributors and suppliers, the message is that holiday execution may depend on recognizing that store shelves and on-premise menus are not facing the same level of confidence heading into the end of the year.