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US Wine and Spirits Industry Shows Early Signs of Stabilization After 2025 Downturn

Analysts see cautious optimism for 2026 as spirits steady and wine sales remain broadly weak across all segments

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The Wine & Spirits Wholesalers of America (WSWA) has reported that the wine and spirits industry is showing early signs of stabilization in 2026, following a challenging year in 2025. According to the association, spirits began to stabilize in December, with demand holding steady and volumes performing better than revenues. This comes after both categories experienced significant declines in the first quarter of 2025, with spirits revenue dropping 3.6% and wine revenue falling 8.3%.

Industry analysts note that the current year’s first quarter will benefit from easier comparisons due to last year’s downturn. The WSWA stated that while it does not anticipate a rapid recovery, it also does not expect broader economic conditions to deteriorate further. The group emphasized that spirits trends have largely stabilized, but cautioned that the dip in December revenues should be closely watched.

Wine remains a concern for the industry, as weakness continues across all price points. The WSWA highlighted that softness in wine sales is not limited to any single segment, suggesting a broader challenge for producers and distributors.

Within the spirits category, Bourbon has maintained steady performance, according to the WSWA. In contrast, Irish whiskey has experienced notable short-term volatility. Tequila has shown resilience despite overall tougher conditions for spirits, but growth in the Reposado segment may have reached its peak.

The association is also monitoring the Prosecco category to determine if it can sustain growth amid generally sluggish wine sales. Prosecco has been one of the few bright spots in recent years, but its future trajectory remains uncertain as consumer preferences continue to shift.

The WSWA’s outlook reflects cautious optimism for 2026, with expectations for stabilization rather than a strong rebound. Industry participants are advised to keep a close eye on category trends and macroeconomic factors as they plan for the remainder of the year.