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U.S. Alcohol Sales Fall 2.4% in March as Consumers Shift Toward Ready-to-Drink and Non-Alcoholic Options

Prepared cocktails and non-alcoholic beverages post strong gains while traditional spirits and wine categories continue to decline

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U.S. alcohol sales continued to lag behind last year’s levels in March 2026, according to NielsenIQ’s latest Full View report. For the four weeks ending March 28, total alcohol sales reached $7.8 billion, down 2.4% from the same period a year ago. Case volume also declined by 2.7%, totaling 151.2 million cases. The slowdown follows the end of St. Patrick’s Day celebrations and comes as the industry transitions into spring, a period that typically brings changes in consumer drinking habits.

The report highlights a growing divide between traditional beverage categories and newer segments. Prepared cocktails were the only major category to post growth, with dollar sales up 4.7% compared to last year, even as volume slipped slightly by 0.1%. Spirits saw the sharpest decline among core categories, with dollar sales down 5.7% and volume off by 4.6%. Wine followed closely, with a 5% drop in dollar sales and a 5.6% decrease in volume. Beer remained the most stable of the traditional segments, with dollar sales down just 1% and volume down 2.6%.

Within spirits, vodka, whiskey, and tequila continued to drive declines. Whiskey posted a 6.7% drop in value and a 6.8% fall in volume, while tequila and vodka each fell by 4.6% in value. Non-alcoholic spirits stood out as an exception, with dollar sales up 39.8% and volume surging by 67.9%. In wine, both still and sparkling segments remained under pressure, but non-alcoholic wine grew by 13.8% in dollars and 11.3% in volume.

Beer’s performance was held back by domestic premium brands and craft beers, which saw declines of 5% and 3.4% in value respectively. However, imports grew by 1.6%, domestic super premium beers rose by 3%, cider increased by 5.3%, and non-alcoholic beer climbed by nearly 12%.

Prepared cocktails benefited from strong gains in spirits-based ready-to-drink (RTD) products, which jumped by 35.8% in value and 36.8% in volume over the four-week period. Wine-based RTDs also performed well, up 15.7% in value and 14.2% in volume. In contrast, flavored malt beverages and seltzers continued to lose ground.

Retail channel performance showed mass merchandise retailers such as supermarkets and hypermarkets outperforming other channels with a modest increase of 1% in dollar sales over last year. Club stores also gained momentum after a weaker prior period,

returning to positive volume growth of 1.2%. Liquor stores experienced the steepest declines at -4.5%, followed by food stores (-1.7%), convenience stores (-1.1%), and other channels including drugstores and military outlets (-3.7%).

Regional results revealed significant differences across states. California proved most resilient among large markets, with dollar sales down just 0.3% but volume up by 3.1%. Massachusetts registered the largest drop in dollar sales at -7.4%, while New York saw the sharpest decline in case volume at -7%.

Brand performance varied widely within each category during this period. In spirits, Sazerac led manufacturers for dollar growth (+$9.2 million), while Tito’s Vodka was the top brand for total dollars (+$1 million). Lunazul Tequila posted the highest brand growth (+$5.7 million). For wine, Duckhorn Wine Company led manufacturers for growth (+$2.1 million), while Josh was both the top brand for total dollars (+$3.4 million) and for growth.

In beer, Constellation Brands saw significant gains (+$27.7 million), driven by brands like Modelo (+$9.5 million) and Michelob (+$21.9 million). Prepared cocktails saw Anheuser-Busch Inc., Cutwater Cocktail (+$33.1 million), Surfside Cocktail (+$10.4 million), Sun Cruiser Cocktail (+$8.8 million), BeatBox (+$5.7 million), and BuzzBallz (+$4 million) among the fastest-growing brands.

The data points to ongoing pressure on traditional alcohol categories as consumers show more interest in convenience-oriented products like RTDs and non-alcoholic alternatives that support moderation or wellness trends.

NielsenIQ’s analysis suggests that retailers focusing on mass merchandise or club formats are better positioned than those relying on liquor or convenience stores as consumer preferences shift toward these channels.

As spring progresses, industry observers will be watching whether beer’s resilience continues and if prepared cocktails can maintain their momentum through warmer months when outdoor gatherings typically boost demand for convenient beverage options.

The report underscores that while overall alcohol sales remain below last year’s levels, there are pockets of growth—especially among non-alcoholic products and ready-to-drink cocktails—that reflect changing consumer tastes across the U.S market.