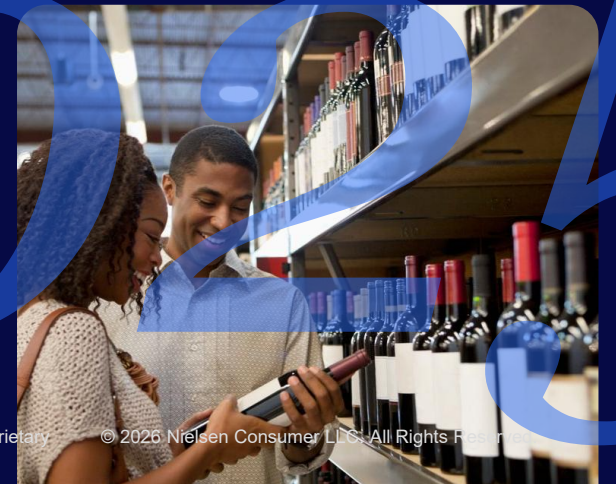
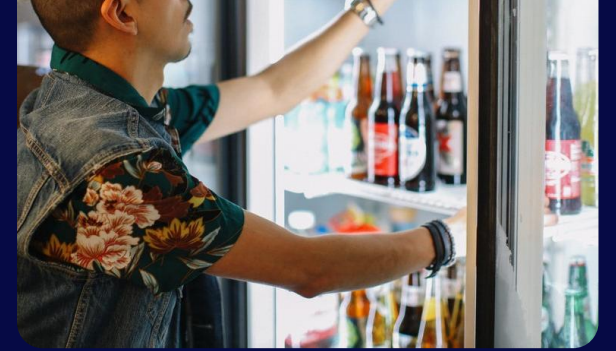


# NielsenIQ

## 2025 Year in Review

*Recapping 2025 Beverage Alcohol  
Off Premise Trends in the U.S.*

NIQ U.S. Beverage Alcohol Vertical  
52 weeks ending 01/03/2026



## Year End Timing:

### How does this impact 2025 data?

The 2025 Year in Review covers the 52 weeks ending 01/03/2026 vs 01/04/2025, ensuring we are capturing full-year 2025 timing vs the same weeks in the prior year.

- The **2024 Year in Review** period fell on the 28<sup>th</sup> of December, which excluded **three key days** for New Year's Eve purchasing.
- The **2025 Year in Review** period falls on the 3<sup>rd</sup> of January, ensuring **full coverage** of the New Year's Eve purchasing.

This timing misalignment between the 2024 and 2025 review adds in critical shopping days leading up to the New Year's Eve holiday, which is particularly important timing for gifting and entertaining, having the greatest impact on Wine and Spirits. As shoppers tend to purchase in close proximity to the occasion, and most product consumption occurs on the same day, these days are especially important for holiday season trends.

December 2024

| S  | M  | T  | W  | TH | F  | S  |
|----|----|----|----|----|----|----|
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1  | 2  | 3  | 4  |

December 2025

| S  | M  | T  | W  | TH | F  | S  |
|----|----|----|----|----|----|----|
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | 1  | 2  | 3  |



#### 2024 Year in Review

52 weeks ending 12/28/2024  
vs 52 weeks ending 12/30/2023



#### 2025 Year in Review

52 weeks ending 01/03/2026  
vs 52 weeks ending 01/04/2025



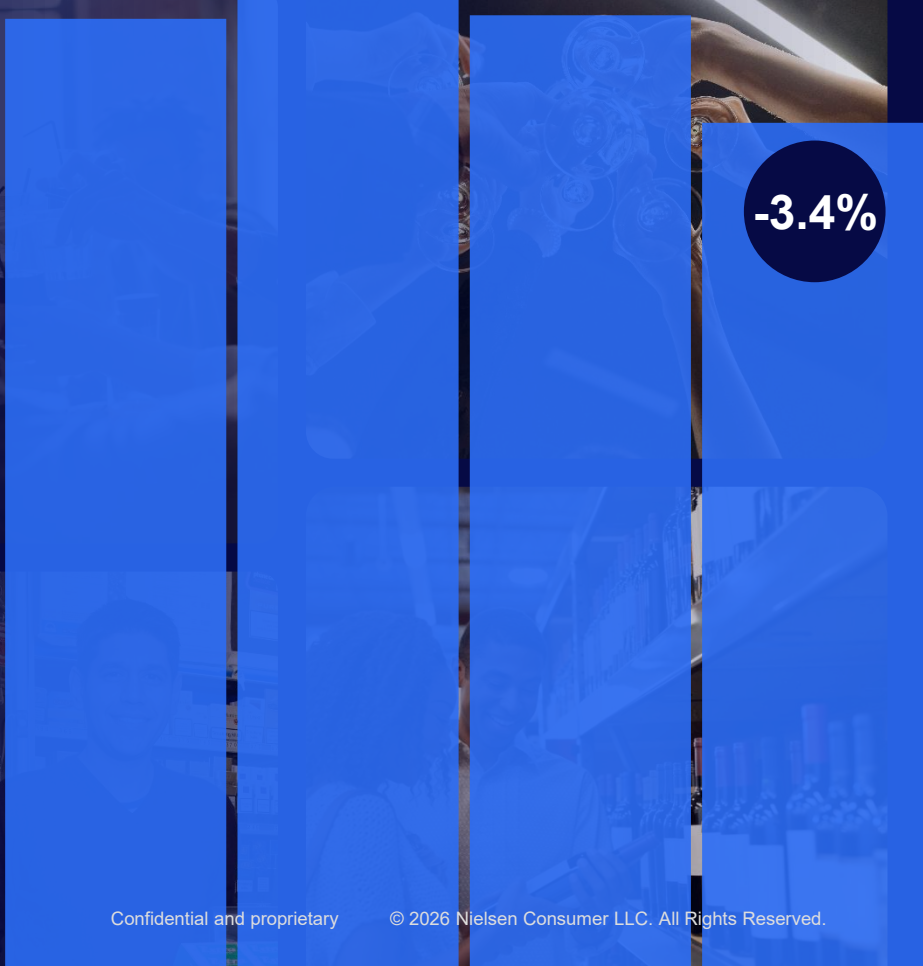
Executive Summary

## 2025 Beverage Alcohol Insights

2025 marked another challenging year for the **U.S. Beverage Alcohol industry**, with total off premise dollar sales declining **-3.4%** to **\$110 billion**, driven by broad-based volume softness across Beer, Wine, and Spirits. While inflationary pressures eased versus prior years, consumers remained highly value-conscious, moderating consumption, and prioritizing fewer but more intentional purchase occasions.

Growth pockets remained concentrated in **Ready to Drink (RTDs), Non Alcohol Beer, Wine, and Spirits, and premium-led segments**, reinforcing that consumer demand has not disappeared but has shifted. RTDs reached **12.4% of total alcohol dollars**, with Spirits-based RTDs continuing to offset declines in traditional spirits. At the same time, **Non Alcohol Beer, Wine, and Spirits surpassed \$1 Billion** in sales, signaling moderation as a complement, not a replacement, to alcohol consumption. Premiumization persisted as a mindset across categories, though increasingly enabled through small formats, trial sizes, and affordable premium cues rather than trading up alone.

Looking ahead, **2025 reinforced that shifts in consumer preferences are reshaping Beverage Alcohol**. Winning strategies hinge on aligning with moderation occasions, premium value perception, format flexibility, and RTD innovation, while navigating ongoing volume pressure and cautious consumer spend. Brands and retailers that balance accessibility with elevated experiences will be best positioned for recovery as the category recalibrates.



\$110B

-3.4%

# NielsenIQ

*By the Numbers*

# 2025

*U.S. Beverage Alcohol  
by the numbers*



**\$110 B**

2025 dollar sales of  
Total Beverage  
Alcohol in the Off  
Premise

**-3.7**

Beer/FMB/Cider/Seltzer  
dollar decline

**12.4%**

Ready to Drink dollar  
share of Total Alcohol

**\$1.01 B**

Non Alcohol Beer, Wine,  
and Spirits dollar sales in  
2025

**-3.4%**

Total Beverage Alcohol  
dollar decline vs 2025

**-1.8%**

Total Spirits  
dollar decline

**\$13.6 B**

Total Ready to Drink  
dollar sales in 2025

**+19.2%**

Dollar growth of Non Alc  
Beer, Wine, and Spirits  
vs 2024

**70%**

Premium+ Spirits share  
of total Spirits dollars

**-4.9%**

Total Wine  
dollar decline

**+25.7%**

Dollar growth of Spirits-  
based Ready to Drinks

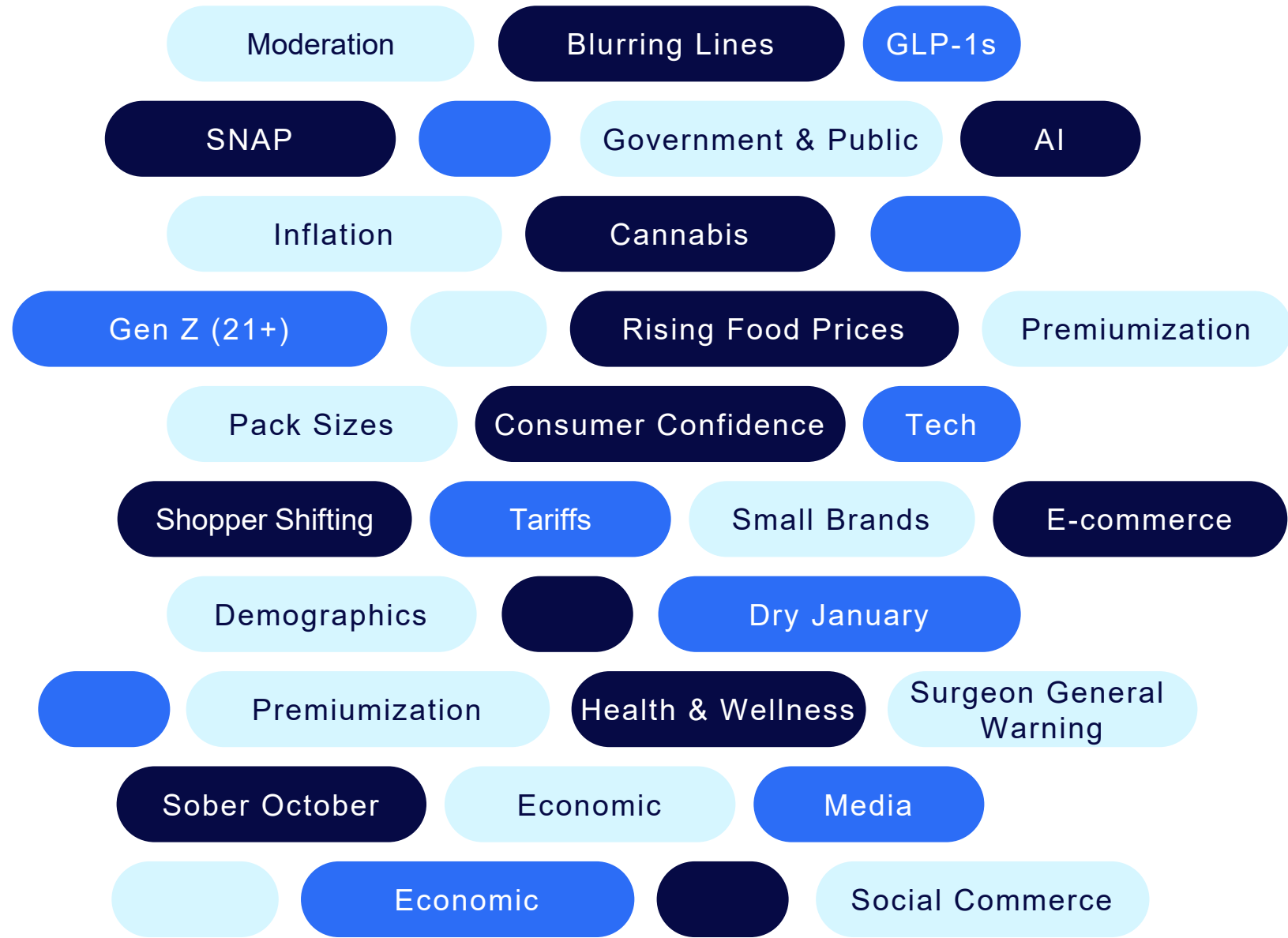
**95%**

Non Alcohol buyers who  
also purchase Alcohol-  
containing products



# Beverage Alcohol Drivers of Change

*Structural or Cyclical?*



# 2026 Headlines, Predictions, and Impacts

# 2026

This year will reward precision over scale. Brands that align to evolving occasions and shopper intent will outperform in a constrained growth environment.

Sales volume pressures continue



Price increases in 2024 and early 2025 helped protect dollar sales, but price elasticity is now largely exhausted. With fewer pricing levers available, 2026 growth must come from volume gains in a declining consumption environment, raising the bar on innovation, relevance, and execution.

Ready to Drink revolution switches to evolution



RTDs are now a permanent pillar of Beverage Alcohol, not a disruptive outlier. As the segment matures, consumer loyalty and differentiation will matter more than flavor proliferation, with diminishing returns from incremental line extensions.

“Drink-flation” persists, even without price increases



While frontline price increases may slow or stop, reduced promotional depth will replace pricing as the primary inflationary pressure. Shoppers should expect fewer and shallower deals, reshaping expectations around value and subsidization.

Consumption patterns collide with income and generational change



Growth will depend on re-engaging Gen X and Millennial spending power while adapting to Gen Z’s emerging 21+ behaviors, which may not align with historical models. What feels “aspirational” to the next generation is evolving.

An over-stuffed innovation pipeline demands correction



Many brands enter 2026 with more inventory than retail turns can support, accelerating SKU rationalization. Categories dependent on aging (e.g., Whiskey) face heightened inventory risk, making portfolio discipline and velocity critical.

Non Alcohol will become part of more portfolios



Non Alcohol Beer, Wine, and Spirits alternatives will become more mainstream moving through 2026 and beyond. Consumers will gravitate toward trusted brands that extend familiar flavors and quality cues into Non Alcohol.

# Topline Trends

2025 Year in Review



# Total Beverage Alcohol Performance *Off Premise*

**\$110  
Billion**

*Dollar sales of total Alcohol in 2025*

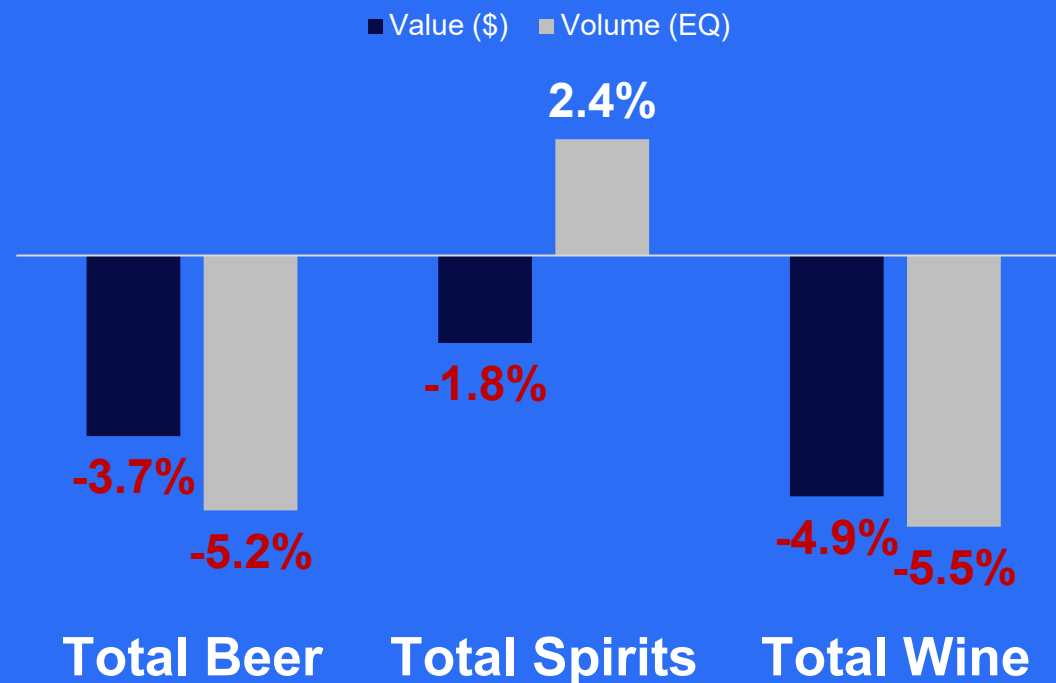
**-3.4%**

Dollar sales change  
of total Alcohol in  
2025 vs 2024

Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

# 2025 struggled to achieve *value* and *volume* sales growth

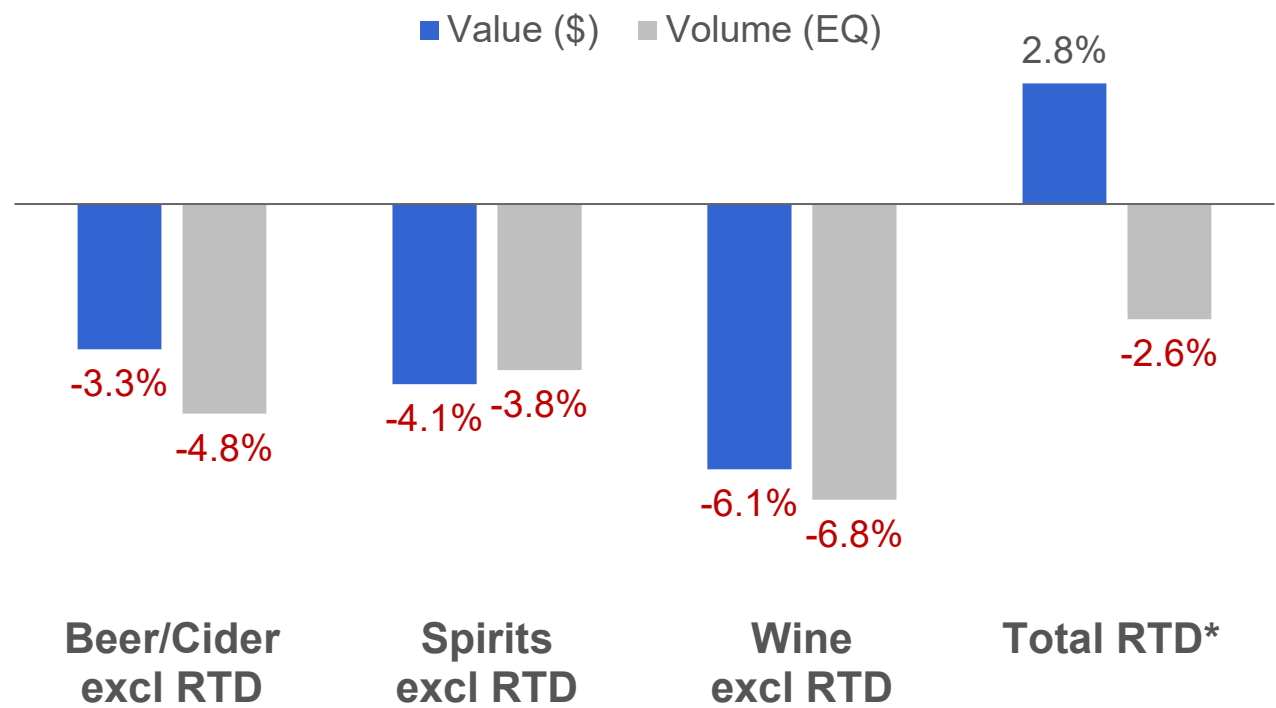
Beverage Alcohol by Category – Value and Volume Change  
NIQ Off Premise Channels



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

# Excluding RTDs, annual growth was not achieved

Beverage Alcohol by Category (excl RTDs) – Value and Volume Change  
*NIQ Off Premise Channels*



\* Total RTD = Seltzers / FMBs / Spirits RTDs / Wine RTDs

**12.4%**  
RTDs \$ share  
of Off Premise  
Alcohol



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

# All channels faced dollar declines across Total Alcohol in 2025

Channel trends: Dollar change vs year ago



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

*\*Represents "All Other Channels" including Mass Merch, Dollar, Club, Drug, Military, and Other*

# Alcohol performance varies across key states with most states facing declines in total dollars

Total Beverage Alcohol – Top States\*  
\$ | % Change vs. Year Ago

## California

\$14.3 B | -3.9% change vs year ago

## Texas

\$12.3 B | -1.8% change vs year ago

## Florida

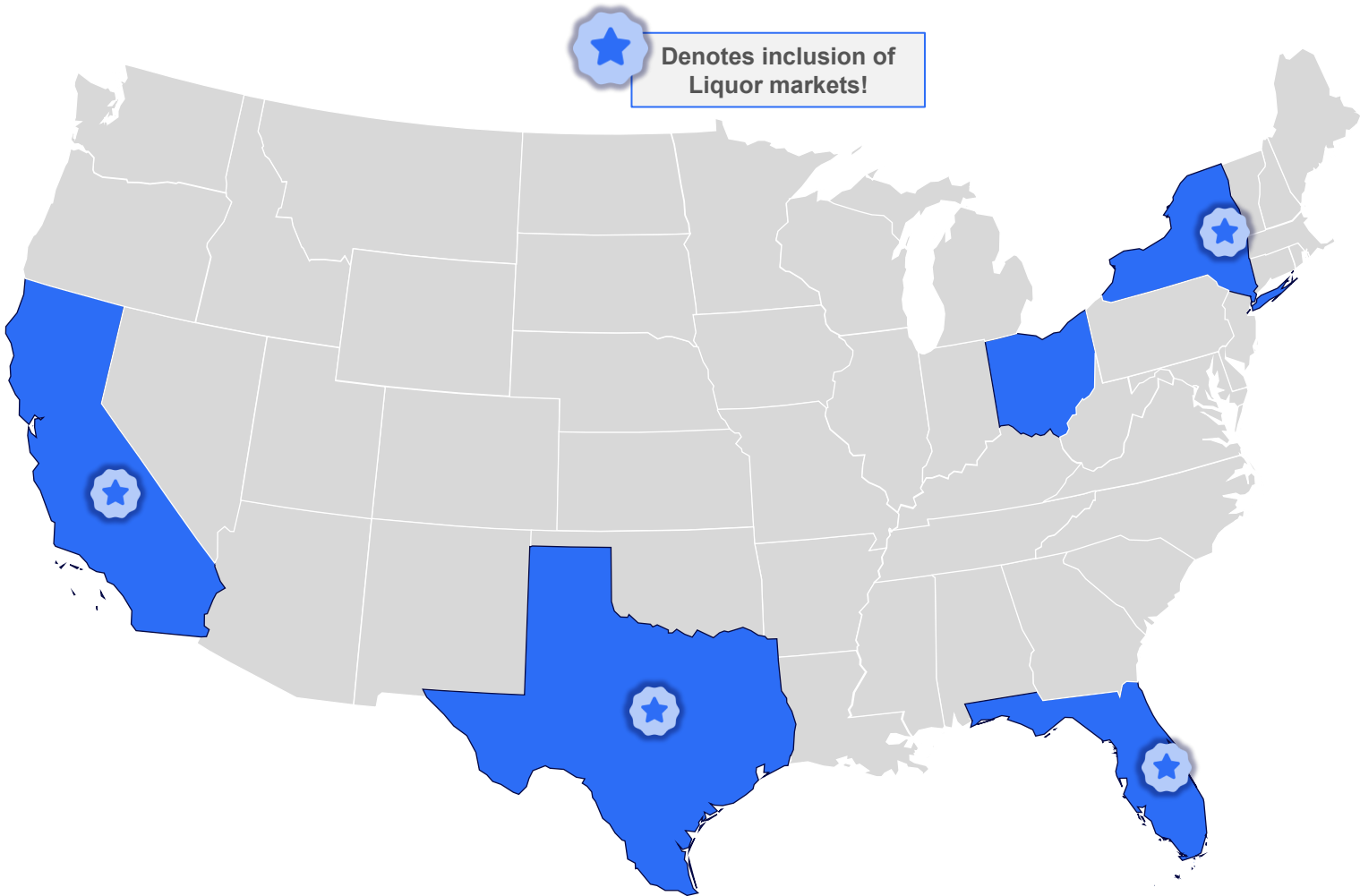
\$8.6 B | -4.7% change vs year ago

## New York

\$5.8 B | -7.0% change vs year ago

## Ohio

\$3.3 B | -2.8% change vs year ago



\*California (CA xAOC+CA Conv+CA Liquor); Florida (FL xAOC Census+Liquor Open State+FL Conv; does not include Publix Liquor), Texas (TX xAOC+TX Conv+TX Liquor); New York (NY xAOC Census+NY Conv+NY Liquor); Ohio (Ohio xAOC + Ohio Conv) Source: NIQ Discover Integrated Database; L52 weeks ending 01/03/2026 vs. year ago

# Category Trends

2025 Year in Review

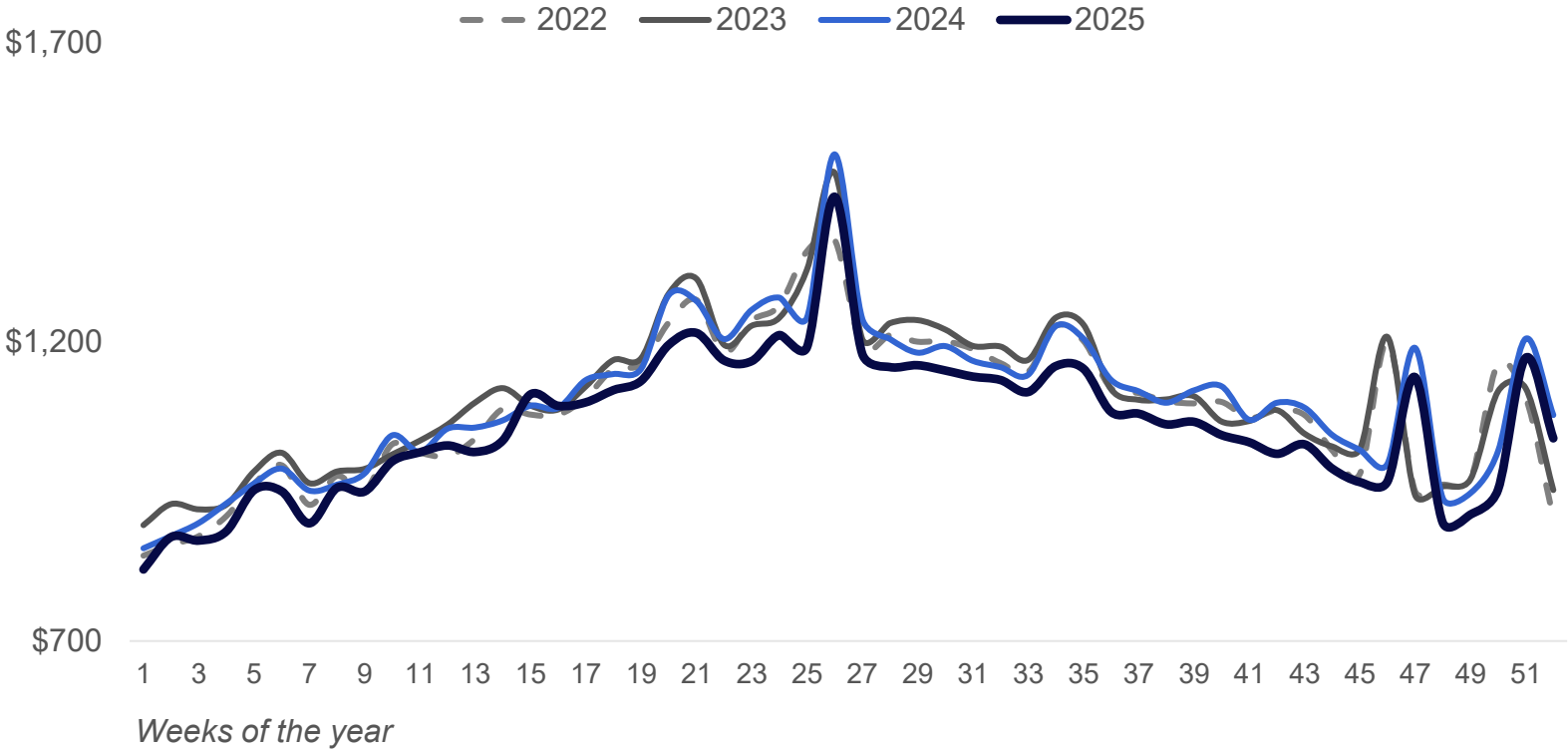
# Beer/FMB/Cider dollar trend

Weekly dollars peaked during 4th of July holiday but fell below 2024 levels most weeks out of the year



2025 Off-premise **Beer** down **-3.7%** vs 2024  
**-5.2%** 288oz EQ volume change vs. year ago

Total Beer/FMB/Cider weekly dollars (millions)  
NIQ off-premise channels



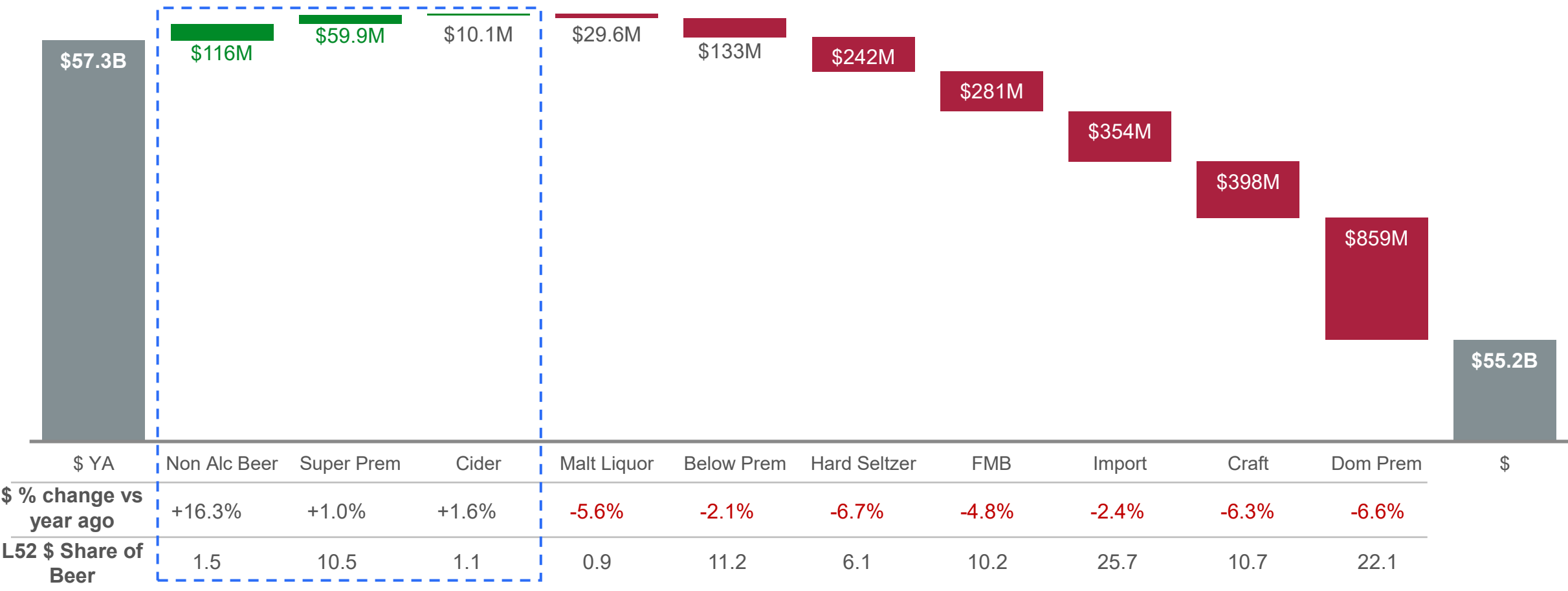
Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Weekly Trend

# Super Premium and Non Alc Beer found growth in 2025, as well as a small bump in Cider sales

2025 Off-premise Beer down -3.7% vs 2024

## Beer Subsegments – Contribution to dollar sales (in millions)

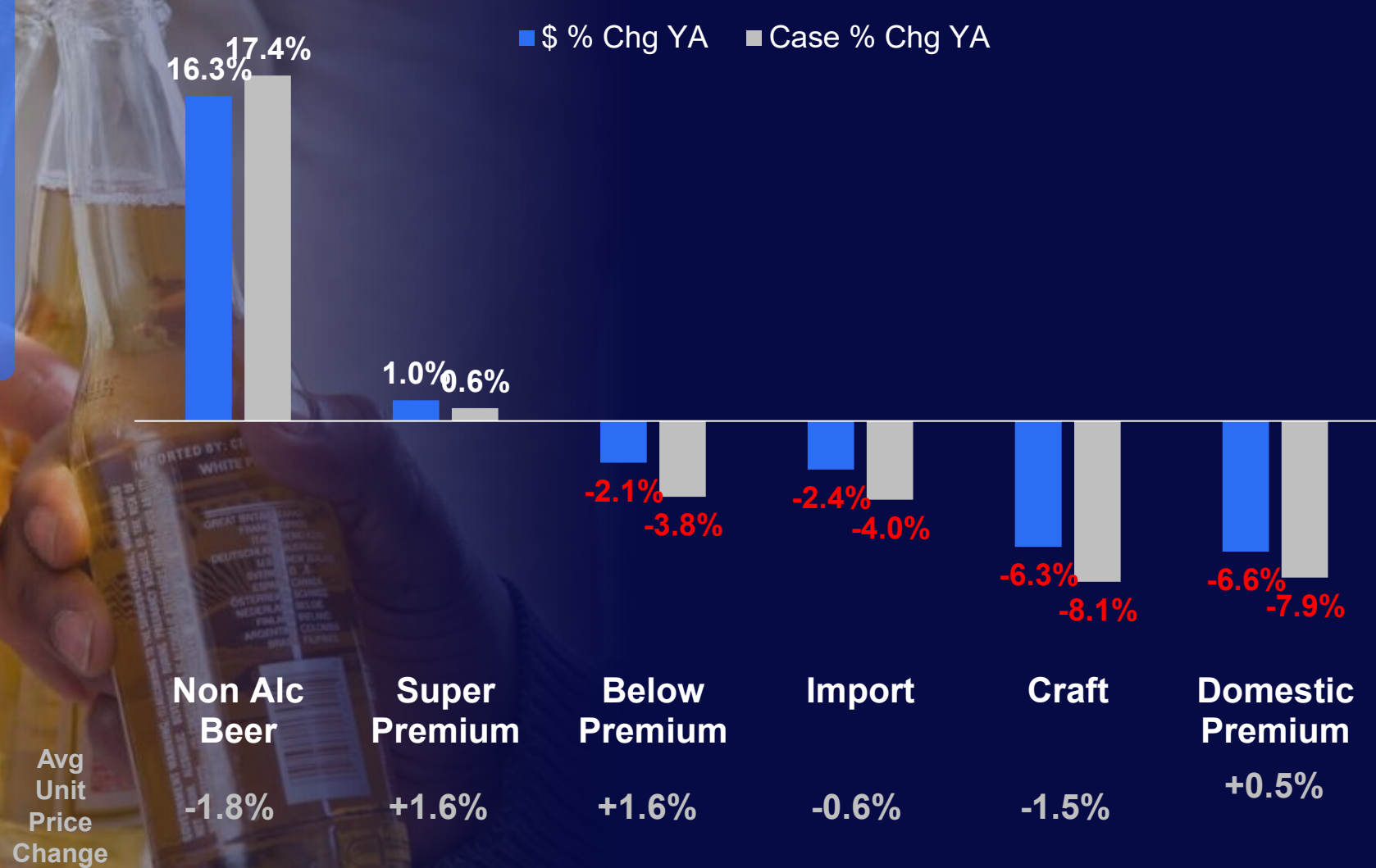
NIQ off-premise channels



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago **\*Non Alc Beer is excluded from subsegments on this slide**

# Beer Premiumization is driven by Non Alc and Super Premium

Dollar and Volume Change vs. year ago for Beer Subsegments

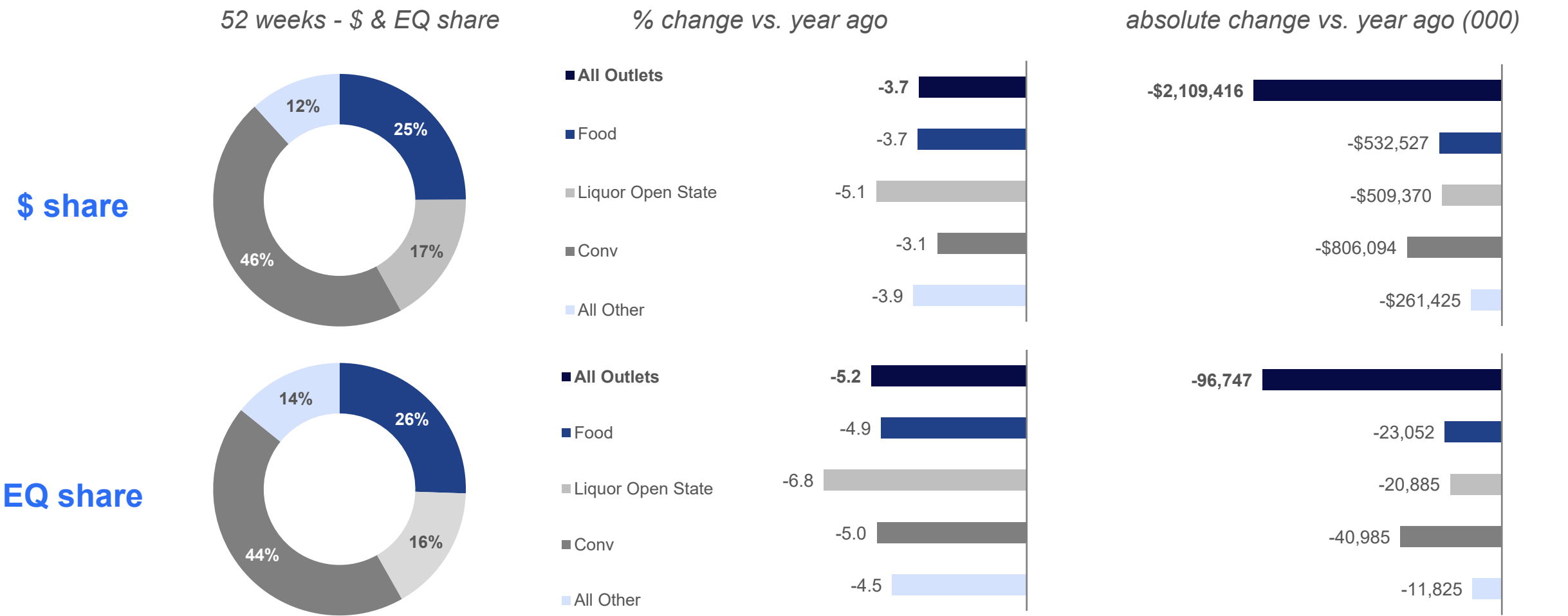


\*Non Alc Beer is excluded from subsegments on this slide

Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

# Beer/FMB/Cider dollar sales are down -3.7%, with all major channels facing declines

## Total Beer/FMB/Cider – Channel share



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

\*All other includes Mass Merch, Club, Military, Drug and Dollar channels

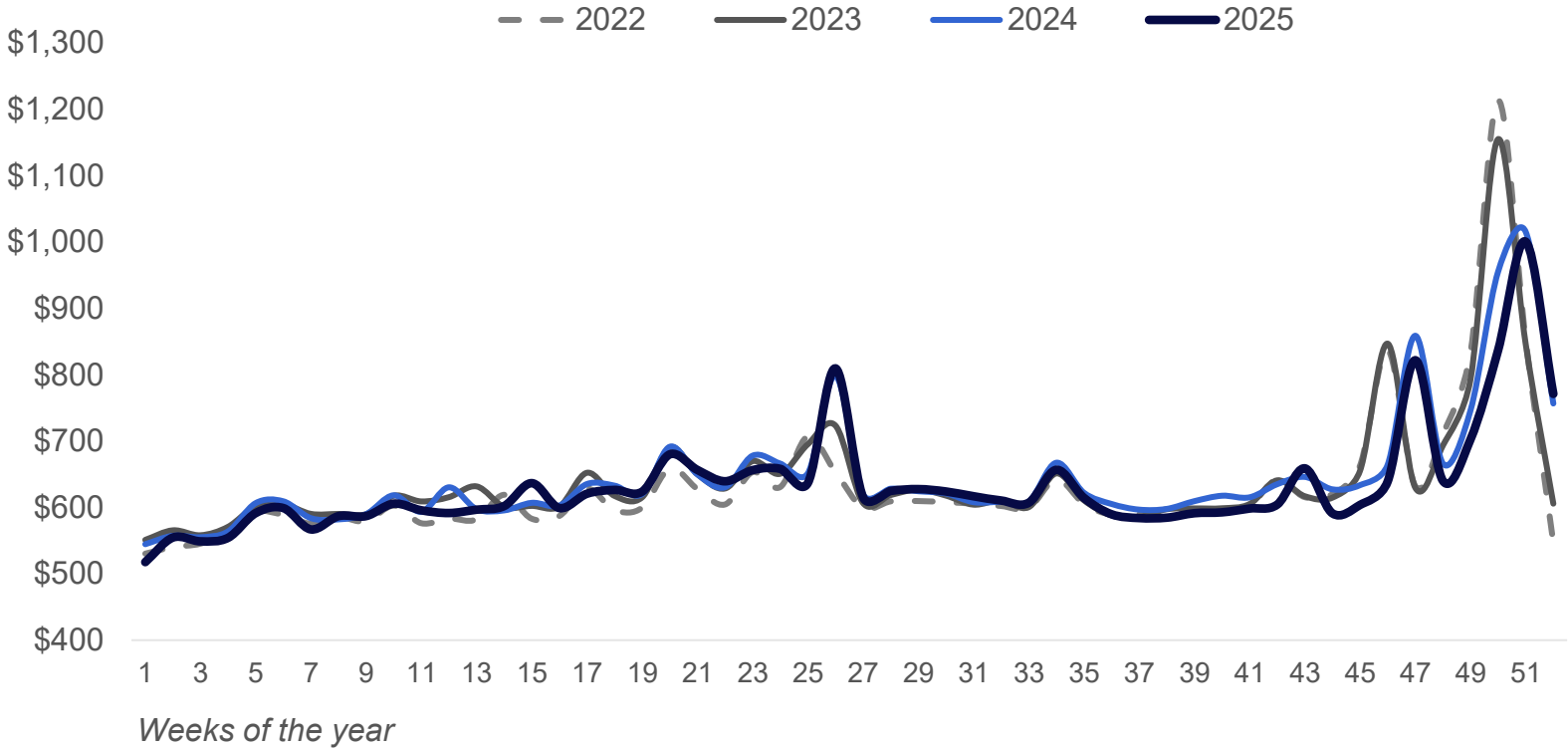
# Total Spirits dollar trend

Spirits including RTDs trending above 2024 comps, but year end holiday weeks are falling short



2025 Off-premise **Spirits** down **-1.8%** vs 2024  
**+2.4%** 9L EQ volume change vs. year ago

Total Spirits weekly dollars (millions)  
NIQ off-premise channels



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Weekly Trend

# Spirits *excl.* RTDs dollar trend

Excluding RTDs, Spirits are declining in 2025 vs year ago, with most weeks falling short of year ago comps

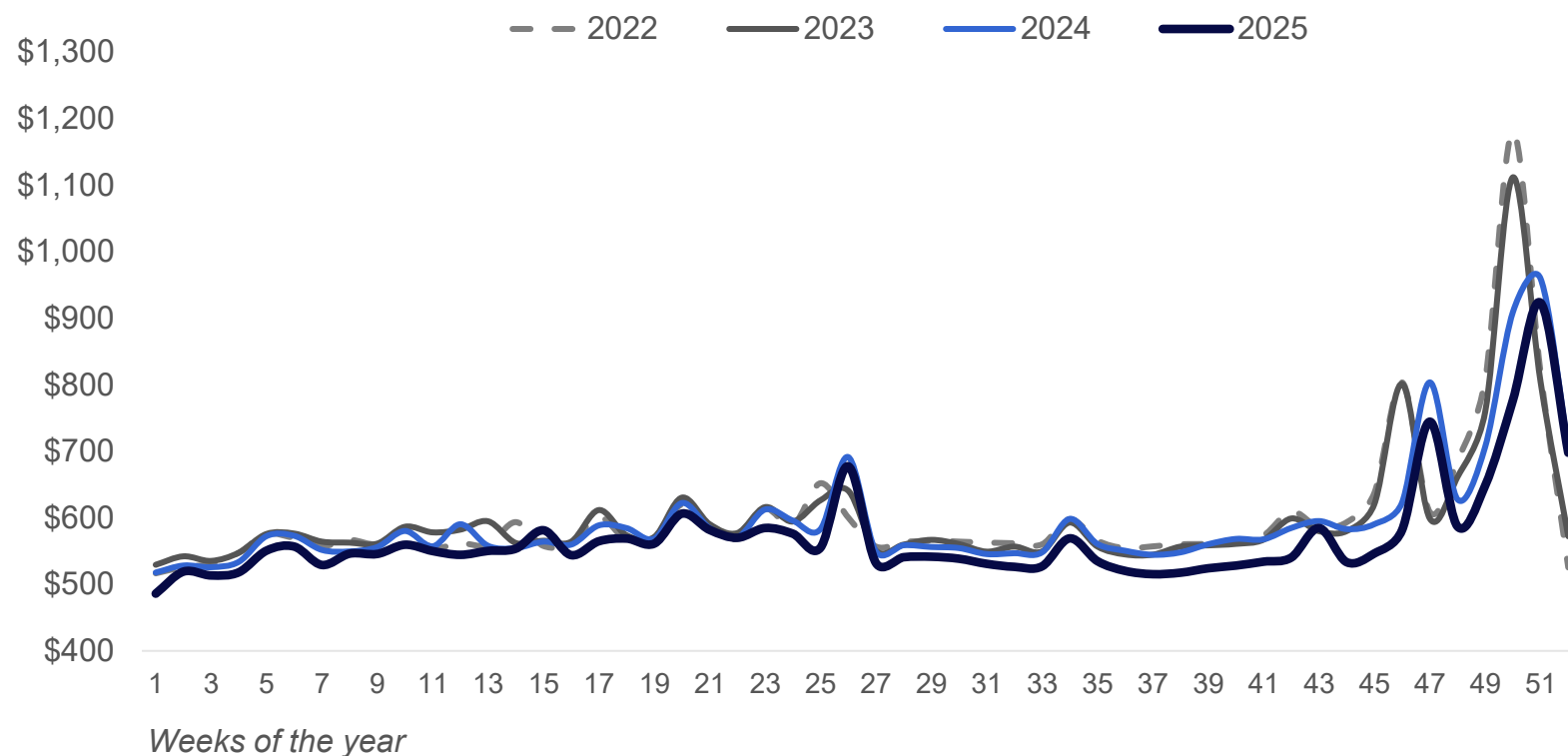


2025 Off-premise **Spirits excl. RTDs** down  
**-4.1%** vs 2024

**-3.8%** 9L EQ volume change vs. year ago

**Total Spirits excl. RTDs weekly dollars (millions)**

*NIQ off-premise channels*

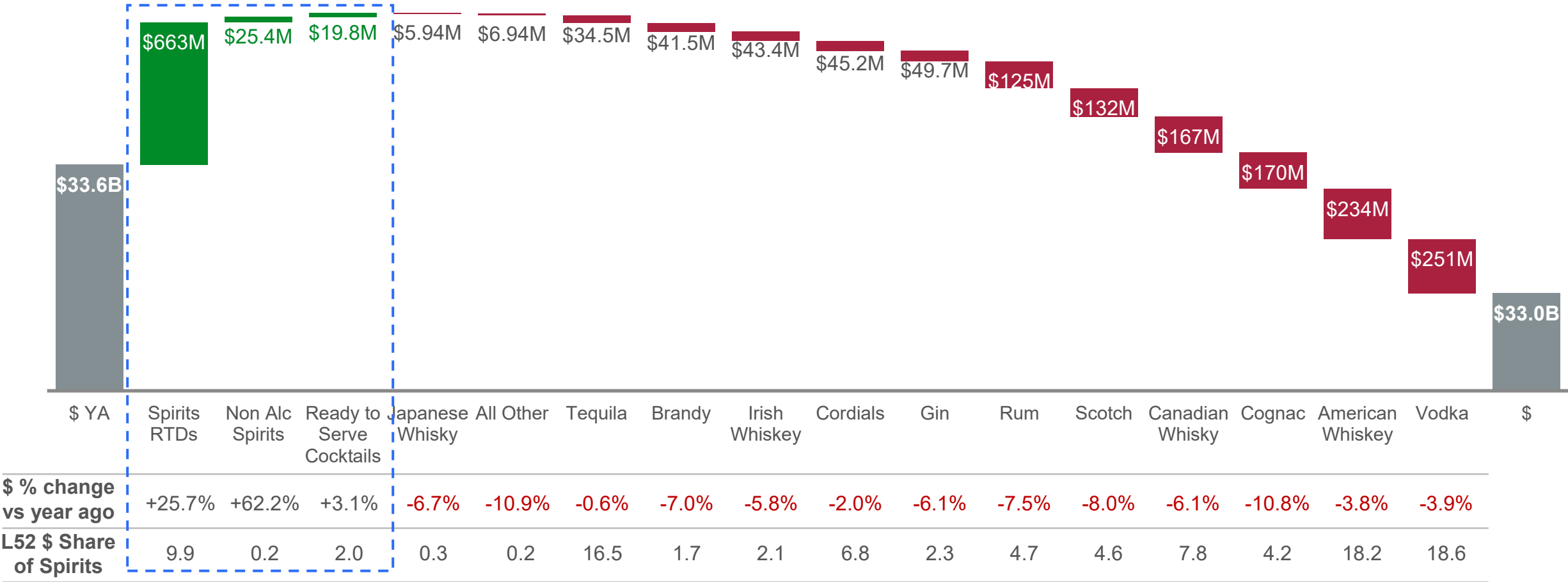


Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Weekly Trend

# Growth in Spirits-based RTDs is offsetting over \$0.65 billion in Spirits declines in 2025

2025 Off-premise Spirits down **-0.8%** vs 2024

Spirits segments – Contribution to dollar sales (in millions)  
NIQ off-premise channels

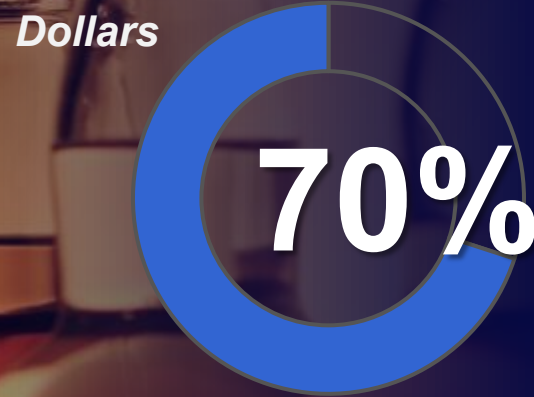


Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

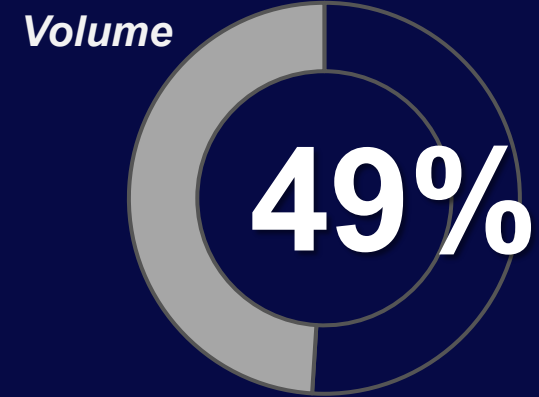
# Spirits Premiumization is influenced by RTDS

Premium+ shopper  
repertoire includes  
RTD driving  
premiumization  
within Spirits

## Premium+ Share of Spirits

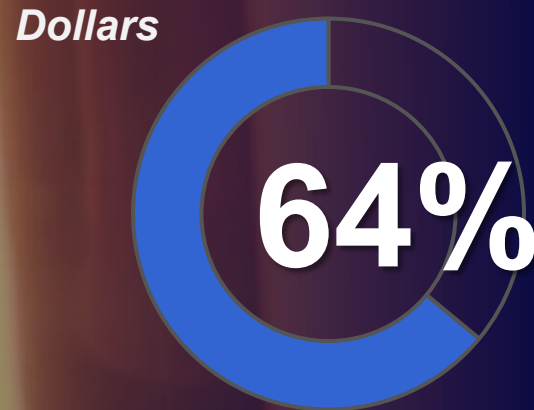


Flat vs year ago

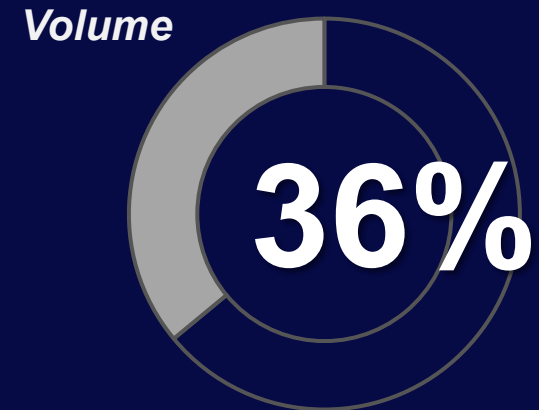


+2 pts vs year ago

## Premium+ Share of Spirits – Without RTD



-2 pts vs year ago



-2 pts vs year ago

Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

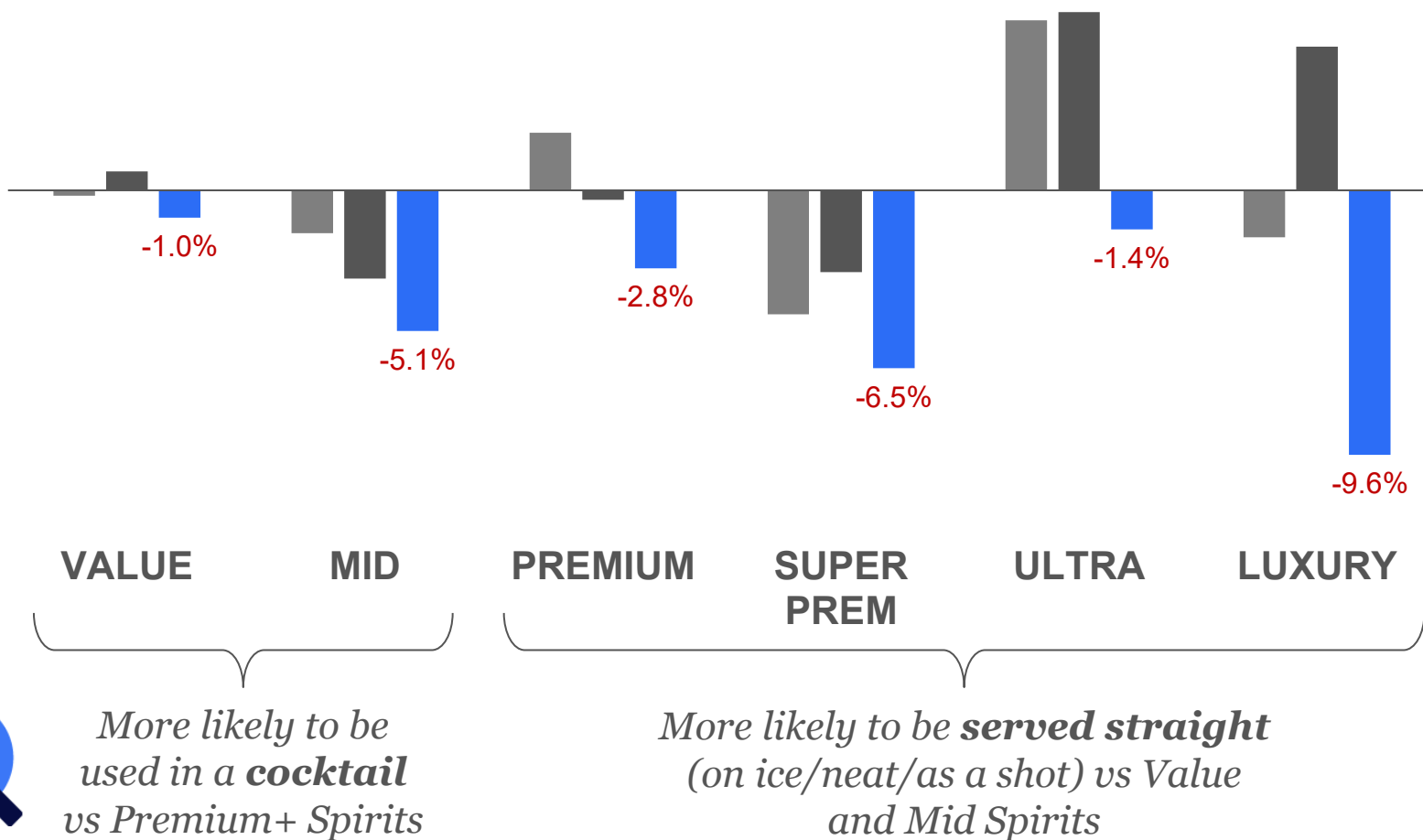
# Premium+ positioning in Spirits

Consumers purchase Premium+ Spirits for specific consumption occasions, aspirations, and gifting



Spirits (Excluding RTD) - \$ Sales % Change vs. year ago  
NIQ off-premise channels

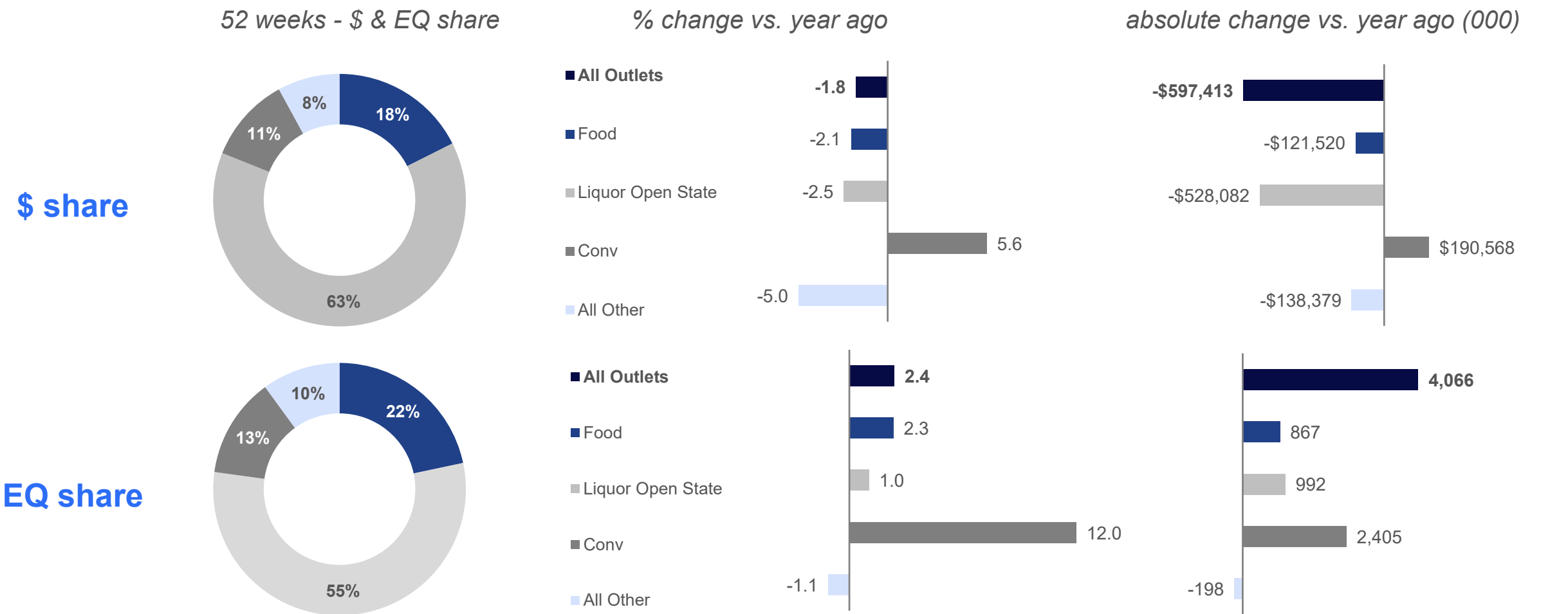
■ Cal Yr 2023 ■ Cal Yr 2024 ■ Cal Yr 2025



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026  
Omnichannel Shopping Fundamentals Study by NIQ BASES (OSF)

# Total Spirits dollar sales are down -1.8%; Convenience is up driven by Spirits RTDs

## Total Spirits – Channel share



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

\*All other includes Mass Merch, Club, Military, Drug and Dollar channels

# Total Wine dollar trend

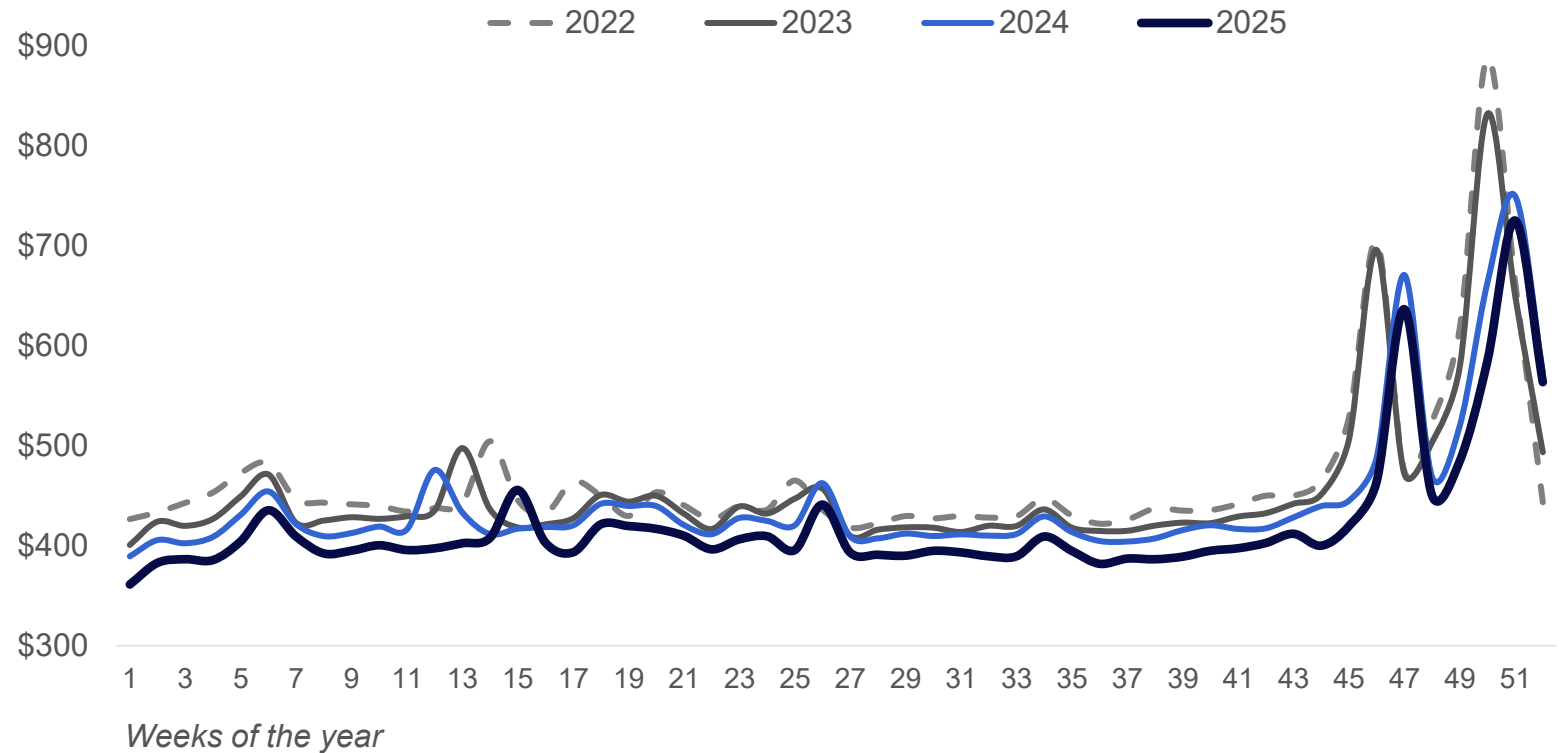
Wine sales falling short throughout 2025, as well as year end holiday weeks



2025 Off-premise **Wine** down **-4.9%** vs 2024

**-5.5%** 9L EQ volume change vs. year ago

Total Wine weekly dollars (millions)  
NIQ off-premise channels

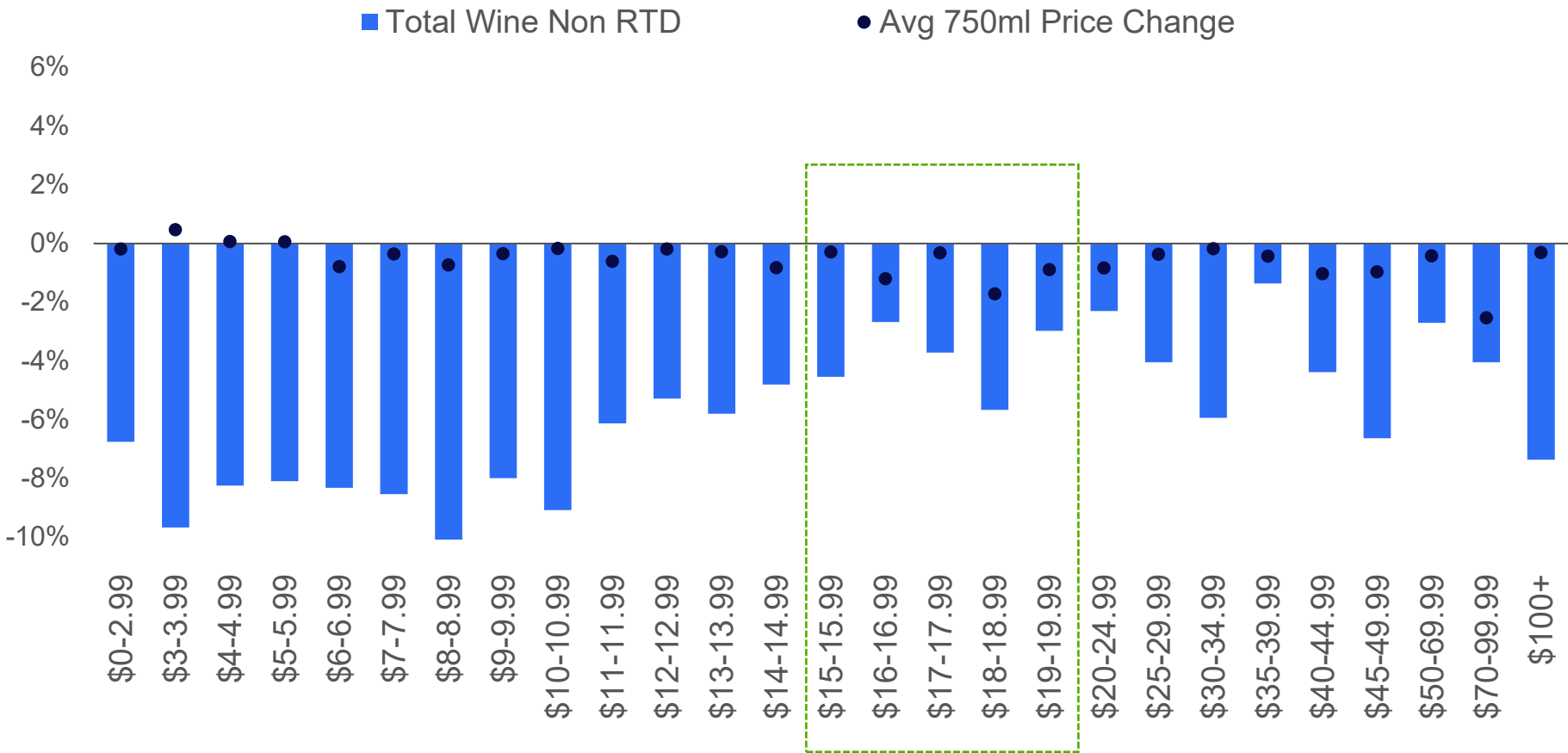


Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Weekly Trend

# Wine pricing – Premiumization as a mind set, while value priced Wines face steeper declines

Many retailers use \$19.99 threshold as a psychological price point for promotions

Total Wine (non RTD) by UPC Price Dollar Change vs Price Change  
NIQ off-premise channels



16.6%

Of Wine is sold is in the \$15 - \$20 range

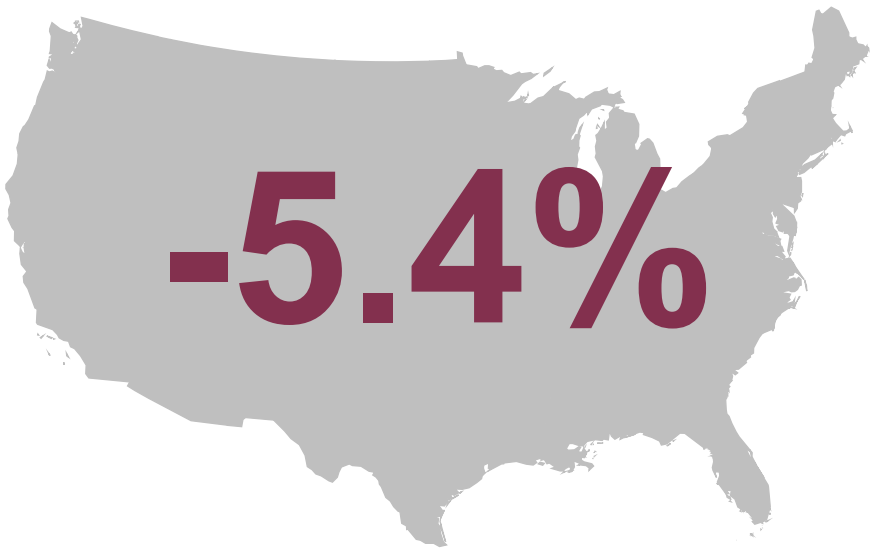
\$19.99

Continues to be a key retail threshold that consumers recognize as a quality point

Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

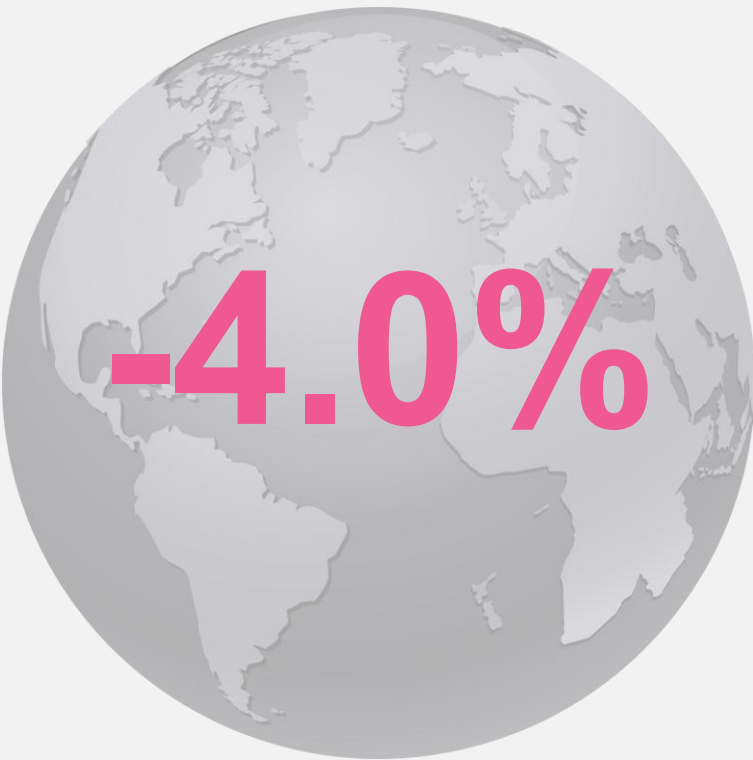
# Domestic Wine vs Import Total Wine Dollar Trend

NIQ off-premise channels



Decrease in **Domestic Wine** (Non RTD)  
dollars vs YA

**Domestic** is 65% of Wine dollars



Decrease in **Import Wine** (Non RTD)  
dollars vs YA

**Import** is 35% of Wine dollars

Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

# *Wine Performance by Type in 2025*

*NIQ off-premise channels*

**-9.1%**

*Red  
Table*

**-4.6%**

*White  
Table*

**-9.6%**

*Rose*

**-4.7%**

*Sparkling*



**-0.7%**  
Prosecco



**-1.6%**  
French  
Champagne

Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

# Wine-based RTDs and Non Alc Wine are two bright spots across the Wine industry

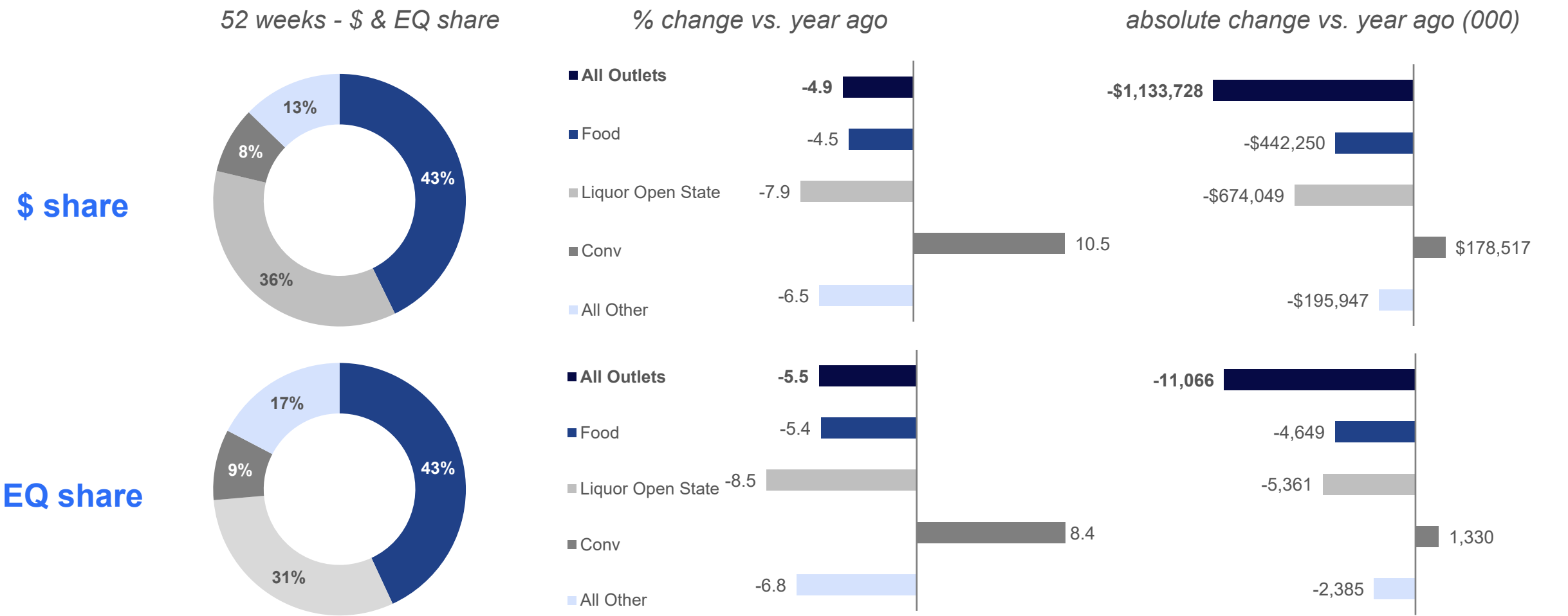
Wine by Segment (\$B & Change vs YA)  
*NIQ off-premise channels*



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

# Total Wine dollar sales are down -4.9%; Convenience is up driven by Wine RTDs

## Total Wine – Channel share



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

\*All other includes Mass Merch, Club, Military, Drug and Dollar channels

# Top Trends

2025 Year in Review

# What's winning in Beverage Alcohol?

Recognizing the consumer influences these “winners” have is crucial to sustaining future consumer engagement



## Ready to Drinks

- Spirits-based RTDs remain a dollar growth driver. Staying aligned with cocktail and flavor trends is key to success



## Small Sizes in Spirits

- Unlock growth opportunities with small formats to drive trial and premiumization, not just value for shoppers



## Premiumization

- Consumers to gravitate toward high-quality, trusted alcohol brands. It's no longer about price alone but about perceived value—consumers are willing to pay more for quality, authenticity, and experience



## Non Alcohol & Moderation

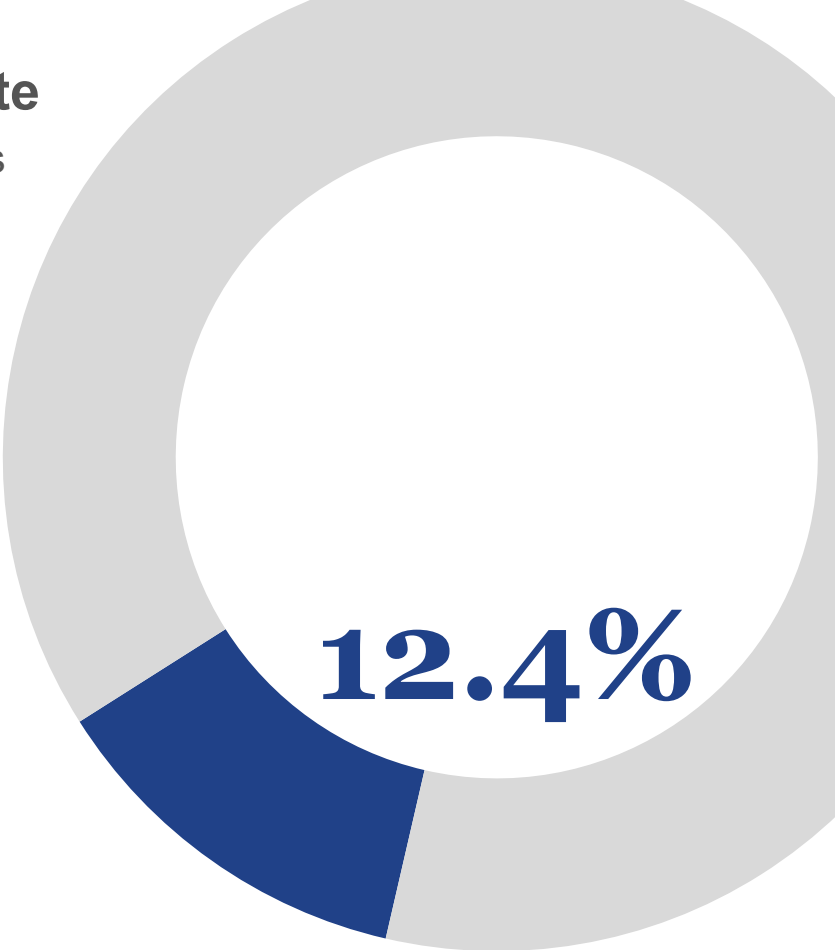
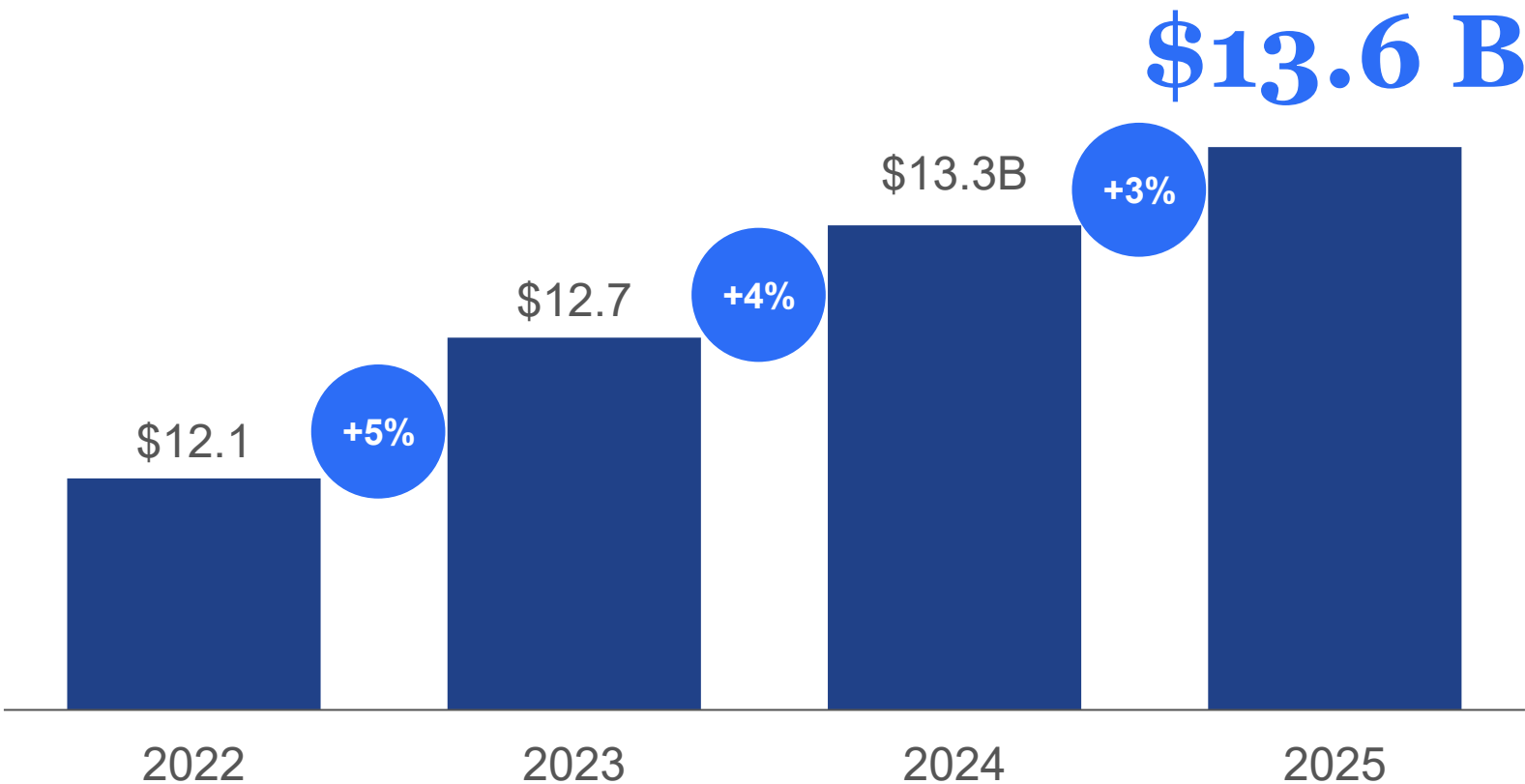
- Non Alc products are a part of the BevAl consumer repertoire used as a moderating play for many consumers on an occasion basis

*Ready to Drink* products continue to grow dollars at a slower rate

Ready to Drinks continue to be a bright spot in BevAI, representing 12.4% of dollar sales

Ready to Drink Dollar Sales (in Billions) and % Change vs YA

NIQ Off Premise Channels



*\$ share of Total Alcohol*

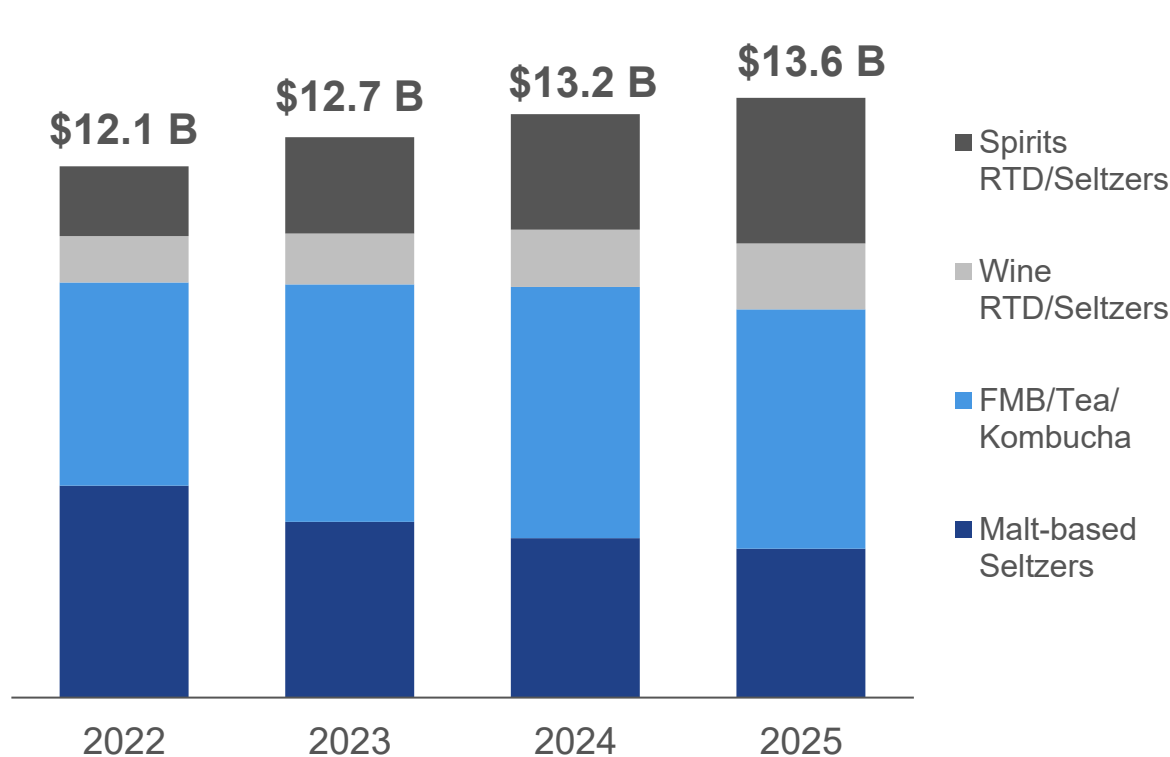
Source: NIQ Discover Integrated Database; Scan Off Premise Channels (xAOC+Conv+Liquor Open State); L52 weeks ending 01/03/2026

# Spirits and Wine RTD products are driving growth of RTDs, as well as niche FMB segments

Hard Juice, a newer segment, is driving growth within FMBs

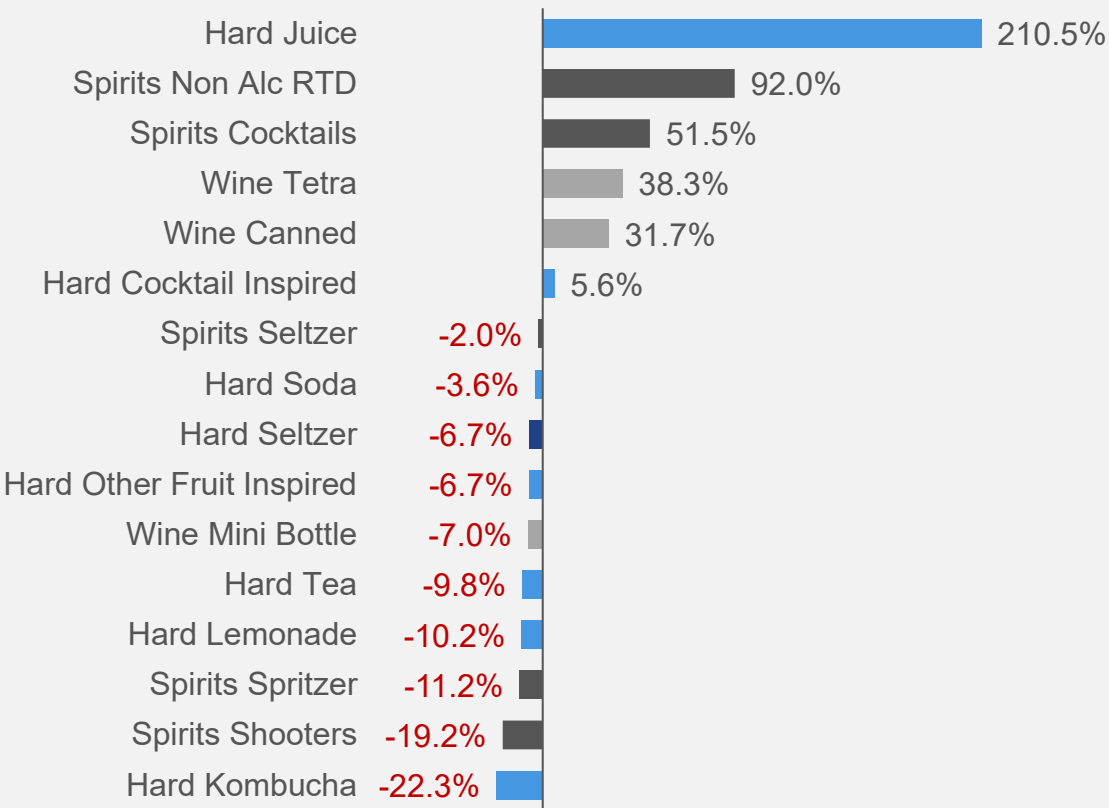
Total RTD – \$ by Alcohol Base

NIQ Off Premise Channels



Total RTD - \$ growth by Segment

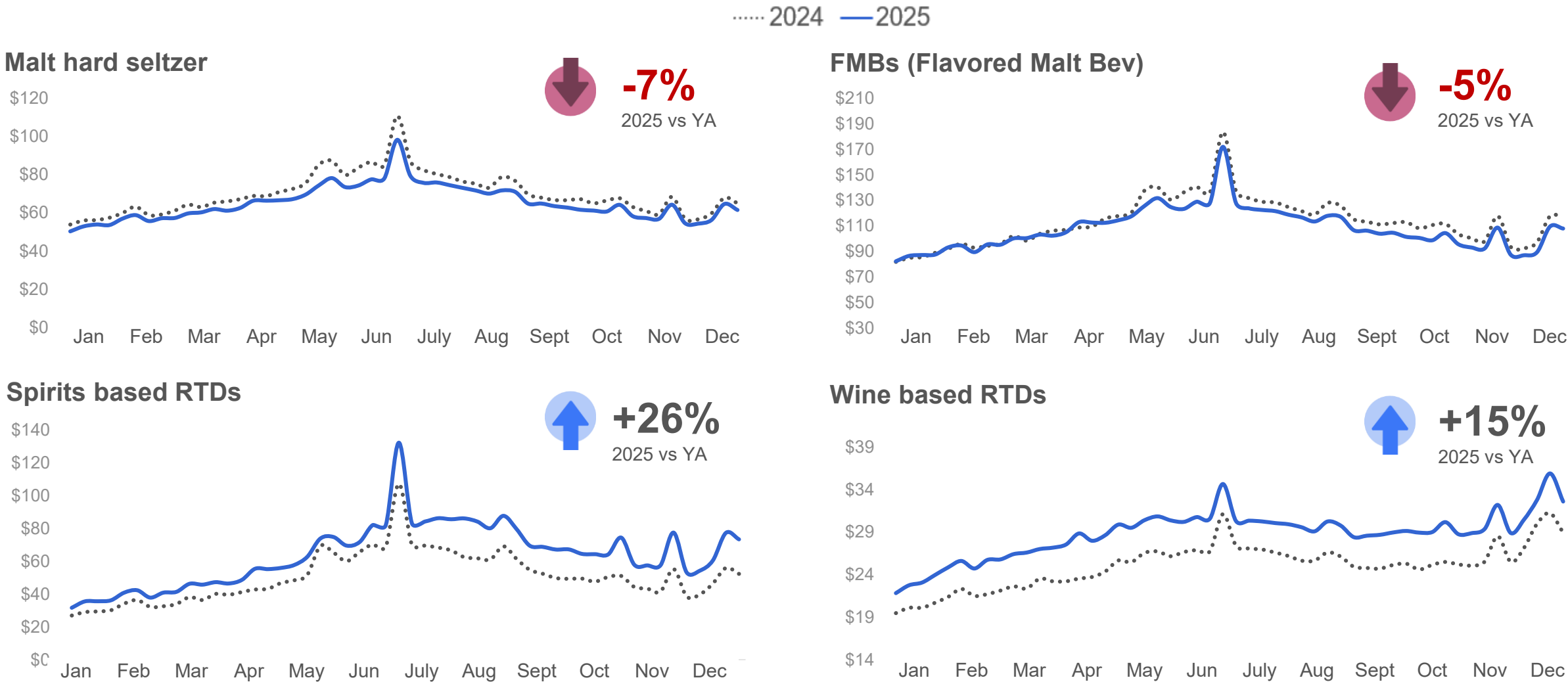
NIQ Off Premise Channels



Source: NIQ Discover Integrated Database; Scan Off Premise Channels (xAOC+Conv+Liquor Open State); L52 weeks ending 01/03/2026

# RTD segments typically peak during summer months; performance varies by segment

Weekly dollar sales (millions) | NIQ off-premise channels



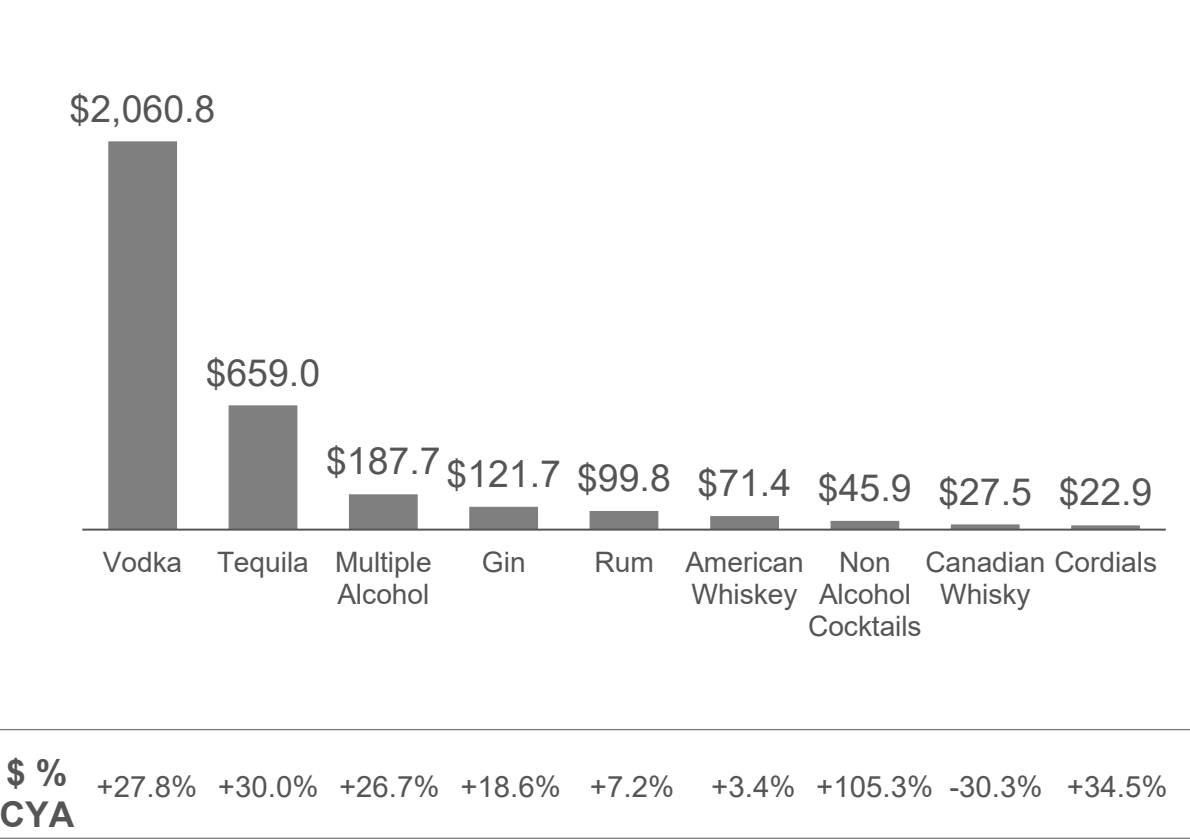
Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Weekly data thru week ending 01/03/2026 vs. year ago

# Ready to Drink led by Soda/Seltzer Cocktails likely with a Vodka or Tequila base

Simple mixed drinks are a key staple of the On Premise and the translation to RTD cocktails is very clear

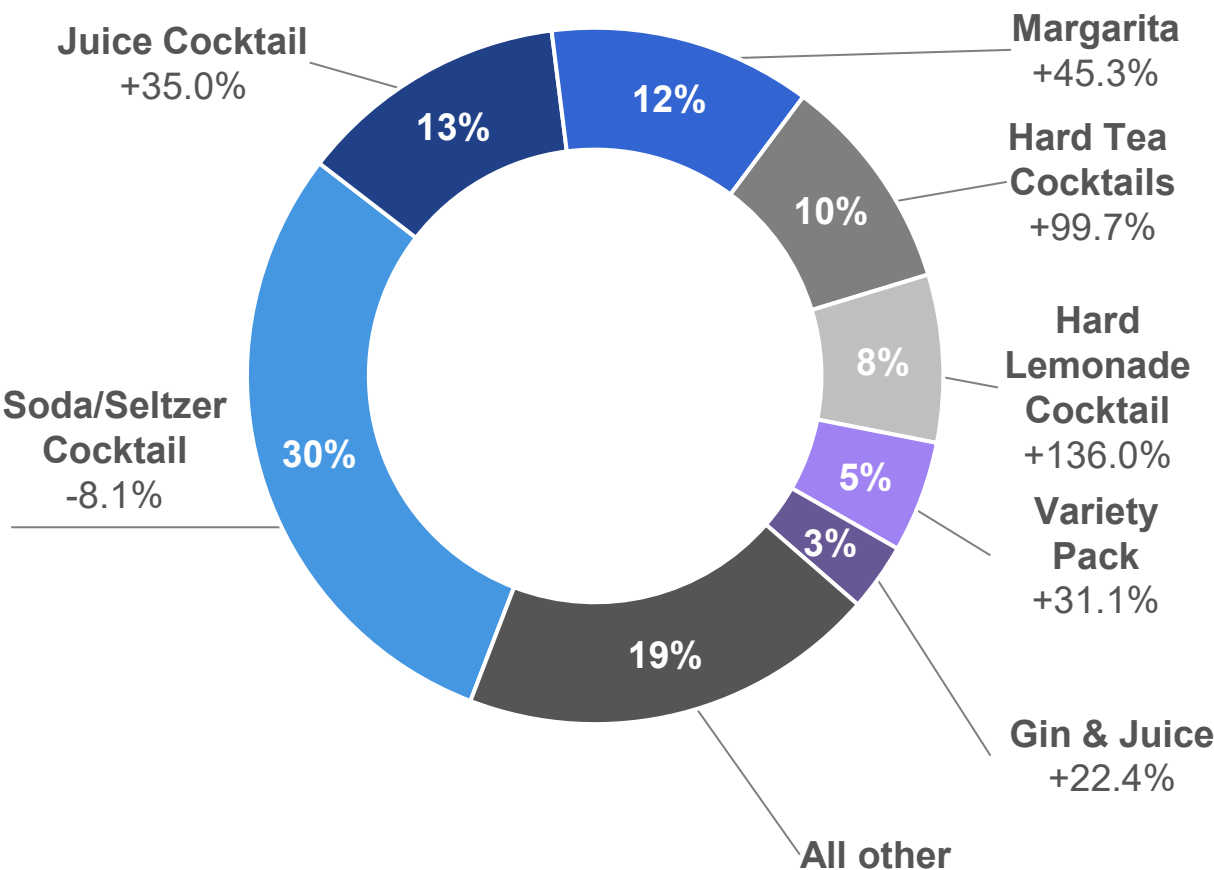
## Spirits RTDs Total Dollars by Alcohol Base

L52 weeks absolute \$ (in millions) & % change vs. year ago



## Spirits RTDs Total Dollars by Cocktail Type

L52 weeks dollar share & % change vs. year ago



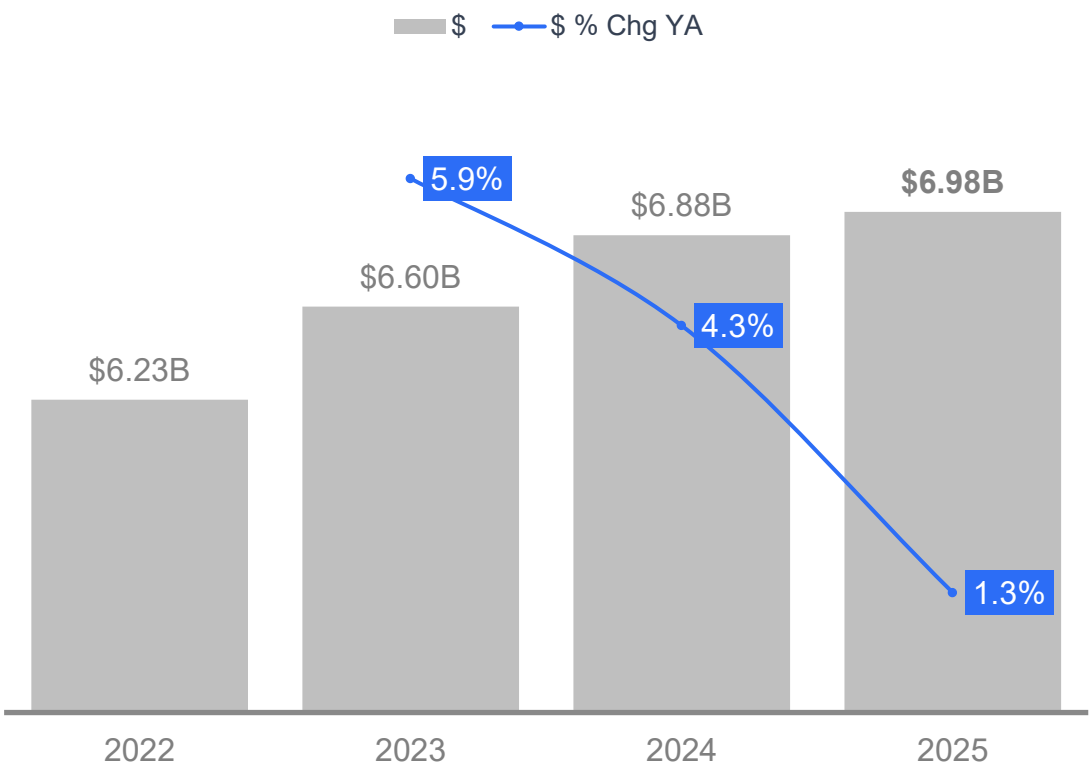
Source: NIQ Discover Integrated Database; Scan Off Premise Channels (xAOC+Conv+Liquor Open State); L52 weeks ending 01/03/2026

# In 2025, Small Sizes in Spirits unlocked trial and accelerated premiumization

Small sizes gain momentum due to consumers seeking affordability, right sized product offerings, and trial occasions

## Spirits (non RTD) Small Sizes\* Total Dollars Trended

L52 weeks absolute \$ & % change vs. year ago



## Spirits (non RTD) Small Sizes\* Growth by Price Tier

L52 weeks dollar share & % change vs. year ago

|         | \$ % CYA – Small | \$ Share | Cont to Growth |
|---------|------------------|----------|----------------|
| Luxury  | 77%              | 0.7%     | 1.9%           |
| Ultra   | 40%              | 6.5%     | 26.9%          |
| SP      | -6%              | 21.5%    | NA             |
| Premium | 7%               | 36.7%    | 57.3%          |
| Mid     | 3%               | 29.5%    | 10.3%          |
| Value   | 6%               | 5.2%     | 3.5%           |

Source: Source: NIQ Discover Integrated Database; Scan Off Premise Channels (xAOC+Conv+Liquor Open State); L52 weeks ending 01/03/2026 [3] Source: NielsenIQ Retail Measurement | US ALC – Integrated | Total US xAOC + Liquor Open State + Conv during Rolling 52W w/e 01/03/2026 . Small size = sum of 375ml and under

Non Alcohol Beer, Wine, and Spirits exceeds the \$1 Billion mark in 2025

Non Alcohol products are solidifying their place in the consumer repertoire

\$1.01 B

Off premise Total Non Alc Beer, Wine, and Spirits sales in the latest 52 weeks

Up \$162.3 million vs year ago | +19.2% vs year ago

Non alc is 0.9% sales of total alcohol

95%

of the buyers of Non Alcohol Beer, Wine, and Spirits are also purchasing alcohol containing products

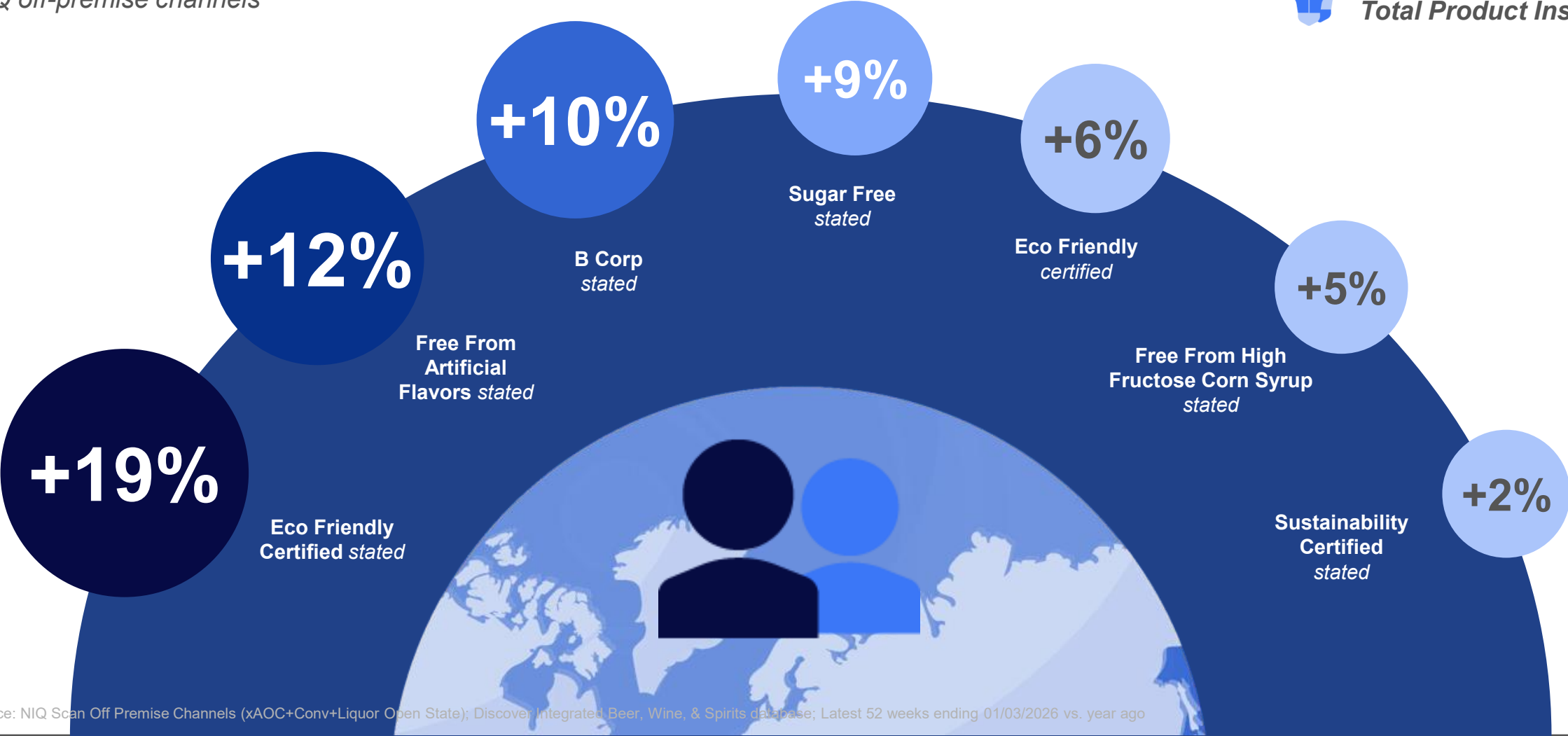


Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago; right panel of slide is Source: NielsenIQ Expanded Omnishopper Panel on Demand, US ALC – Integrated (21+ Only) Database; L52 WE 11/29/2025, Total Outlets, Total US

# Top Beverage Alcohol wellness attributes span from environmental claims to social responsibility to “better for you”

Trending health & wellness attributes for Total Alcohol – Dollar % change vs year ago  
NIQ off-premise channels

 Insights powered by **NIQ**  
**Total Product Insight** data



Source: NIQ Scan Off Premise Channels (xAOC+Conv+Liquor Open State); Discover Integrated Beer, Wine, & Spirits database; Latest 52 weeks ending 01/03/2026 vs. year ago

# Innovation item launches vary by segment, but half of innovation dollars are driven by Ready to Drink launches

## Total Beverage Alcohol Innovation Insights for 2025

Total Sales

**\$110.2 B**

-3.0% vs year ago

Innovation Sales

**\$2.75 B**

-11.7% vs year ago

Innovation Contribution

**2.5%**

-0.2pts vs year ago

# of Innovation Items

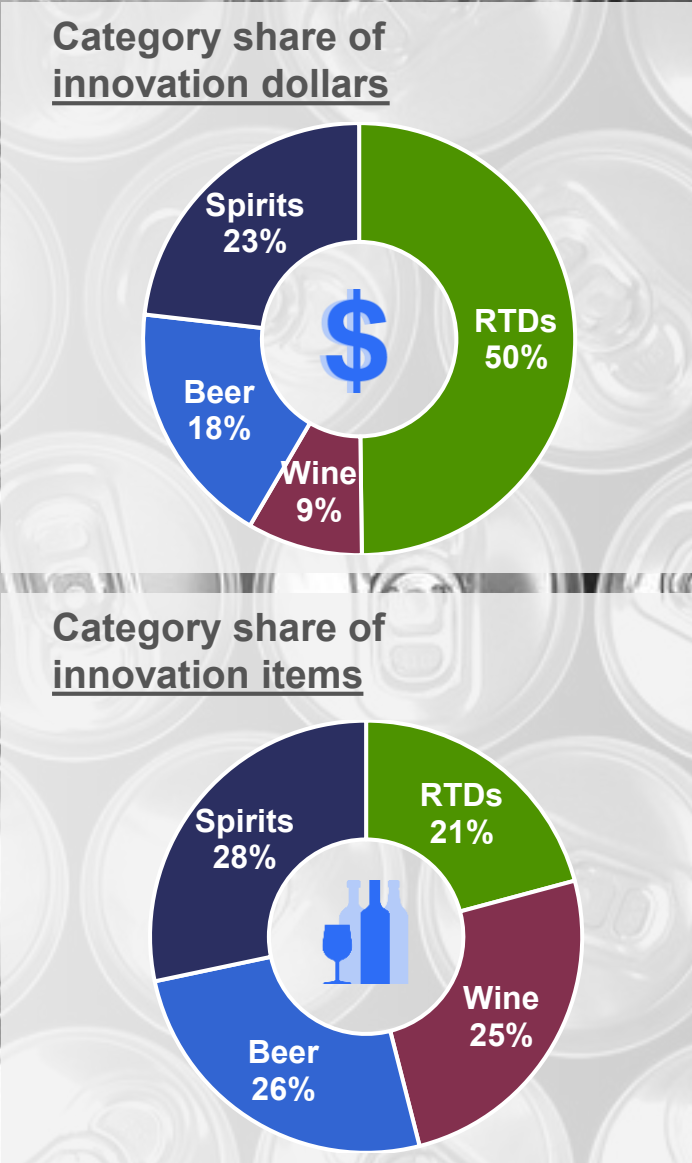
**4,205**

-17.0% vs year ago

Innovation Type

**72%**

are Line Extensions



Source: NIQ Innovation Measurement (IM) – Innovation Profiler Scorecard; Latest 52 weeks ending 11/29/2025 vs 11/30/2024

# BevAI Buyers by Generation in the *Off Prem*

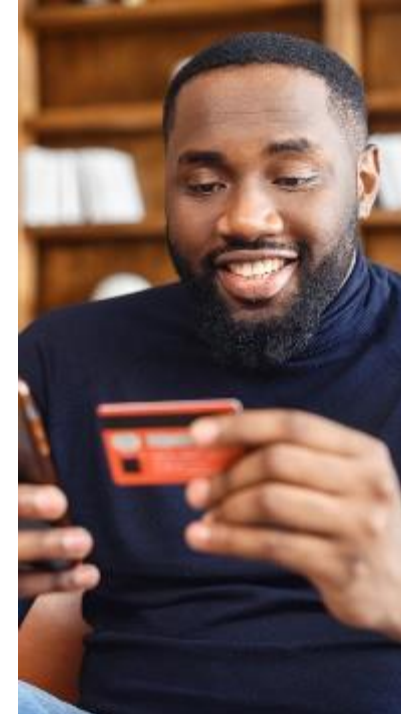
% of BevAI Buying Households  
*% of BevAI Dollars*



**11%**

Generation Z  
(21+ LDA)

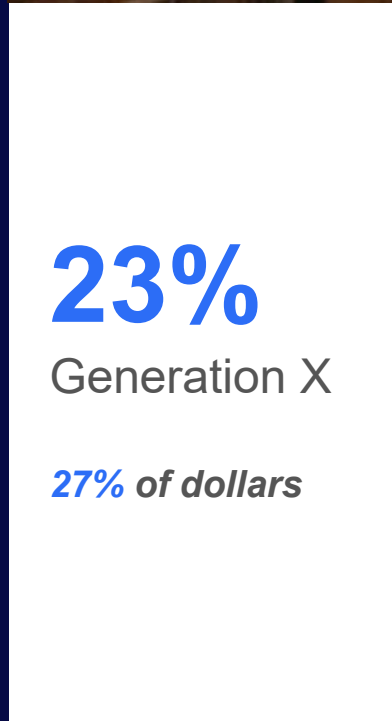
*7% of dollars*



**32%**

Millennials

*30% of dollars*



**23%**

Generation X

*27% of dollars*



**35%**

Boomers/  
Traditionalists

*36% of dollars*



Source: NielsenIQ Expanded Omnishopper Panel on Demand, US ALC – Integrated (21+ Only) Database; L52 WE 11/29/2025, Total Outlets, Total US

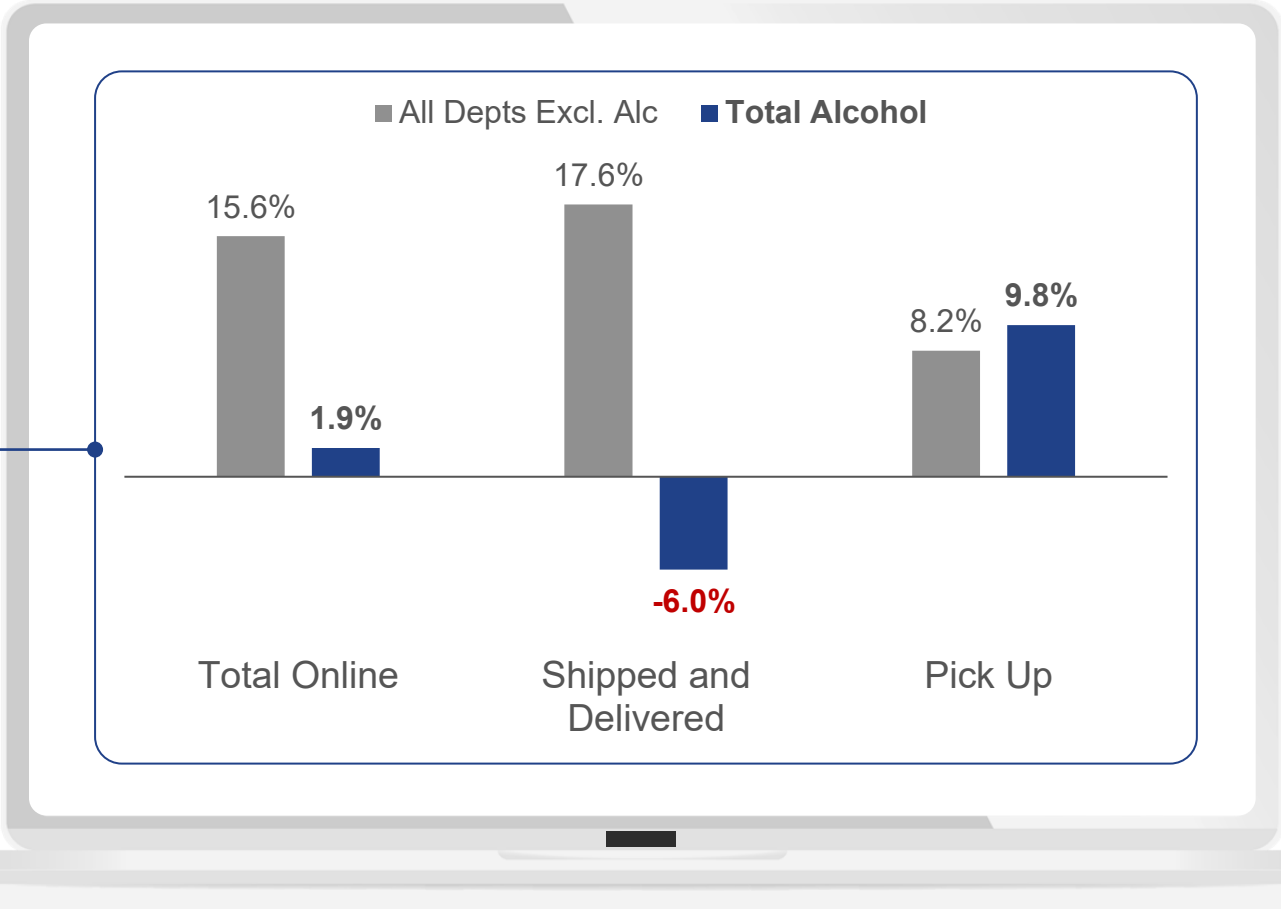
**NIQ**

© 2025 Nielsen Consumer LLC. All Rights Reserved.

# Pick Up (Click & Collect) method driving online growth for Beverage Alcohol

% sales growth – U.S. Omnisaless  
*Omnisaless* = In Store + Online

**-2.1%** | *Alcohol Omnisaless  
(In Store + Online)  
dollar change vs. year ago*



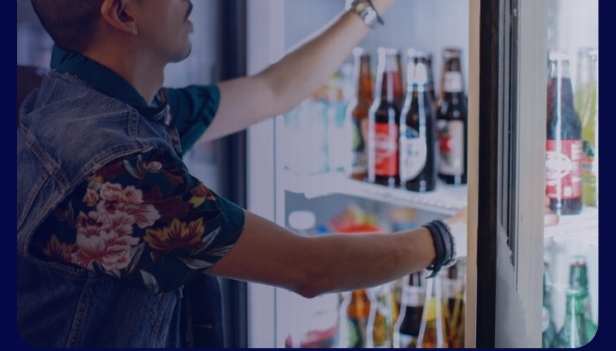
Source: NIQ Omnisaless, Total U.S. BevAI Markets, Latest 52 weeks ended 11/22/2025 vs. Year Ago

# NielsenIQ

2025 Beverage Alcohol Highlights

## Top 5 Highlights from 2025

- 1** Beverage Alcohol remained under pressure in 2025, with dollar declines across Beer, Wine, and Spirits driven primarily by sustained volume softness
- 2** Ready to Drinks continued to be the most reliable growth engine, now accounting for over **12% of total alcohol dollars** despite slowing growth rates
- 3** Premiumization persisted, but increasingly through **small sizes, trusted brands, and occasion-based purchases**, rather than broad price trading up
- 4** Non Alcohol Beer, Wine, and Spirits solidified their role in moderation behaviors, surpassing **\$1 Billion in sales** while remaining complementary to alcohol consumption
- 5** Consumer demand favored **quality, flexibility, and intentionality**, reinforcing that future growth will come from alignment with evolving occasions



# Thank you!

## 2025 Year in Review

NIQ U.S. Beverage Alcohol Vertical  
52 weeks ending 01/03/2026

# NielsenIQ



**Kaleigh Theriault**

[Kaleigh.Theriault@nielseniq.com](mailto:Kaleigh.Theriault@nielseniq.com)