

NABCA Monthly Report

April 2023 Control States Results

Total Control States spirits sales declined by -3.5% in 9L volume with -1.5% in \$Vol showing a resultant +2.0% price mix. The rolling 12-month results declined by -0.6% in 9L volume with +2.2% in \$Vol.

This month there were 4 less selling days vs April 2022 with Alabama, Mississippi, Montana and North Carolina all 1 day less each.

Spirits - Markets	9L CMTY 2023-04	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,695,804	-3.5%	\$ 1,028,541,790	-1.5%	61,544,122	-0.6%	\$ 13,359,965,458	2.2%
Alabama	282,924	-6.1%	\$ 62,339,684	-3.9%	3,522,904	1.1%	\$ 773,038,202	4.4%
Iowa	210,949	-8.4%	\$ 32,804,449	-5.7%	2,801,239	-1.8%	\$ 440,693,219	2.4%
Idaho	106,284	-6.3%	\$ 22,351,895	-1.4%	1,421,612	-1.4%	\$ 300,276,450	4.3%
Mont Co	40,485	-1.5%	\$ 9,418,525	-2.2%	514,324	4.6%	\$ 120,743,265	4.3%
Maine	98,909	-2.1%	\$ 20,132,692	-0.1%	1,450,258	-0.3%	\$ 291,972,576	5.4%
Michigan	667,065	-1.9%	\$ 154,589,221	-4.3%	9,085,494	-2.8%	\$ 2,107,410,453	-3.0%
Mississippi	182,227	-2.7%	\$ 31,223,061	1.5%	2,218,171	-9.9%	\$ 375,679,164	-4.8%
Montana	76,265	-3.9%	\$ 13,989,315	-3.9%	1,074,096	-2.4%	\$ 204,976,585	1.3%
North Carolina	601,257	-5.0%	\$ 144,248,426	-1.7%	7,564,964	1.8%	\$ 1,787,023,417	6.8%
New Hampshire	188,972	-5.4%	\$ 35,030,628	-7.2%	2,321,301	-5.7%	\$ 441,750,197	-4.8%
Ohio	560,111	-5.7%	\$ 141,349,136	-2.5%	7,122,602	-1.4%	\$ 1,773,446,188	1.5%
Oregon	287,046	-5.8%	\$ 64,851,283	-4.6%	3,750,642	-1.4%	\$ 844,979,058	2.4%
Pennsylvania	660,223	2.4%	\$ 134,731,438	6.5%	9,077,173	3.3%	\$ 1,800,246,493	4.4%
Utah	128,881	3.2%	\$ 24,297,163	4.7%	1,741,025	5.1%	\$ 328,867,888	5.1%
Virginia	462,189	-3.8%	\$ 113,378,088	0.2%	5,837,533	-0.3%	\$ 1,421,265,322	4.4%
Vermont	32,076	-6.0%	\$ 7,055,339	0.0%	455,702	-2.9%	\$ 100,902,261	1.8%
West Virginia	61,880	-8.8%	\$ 9,505,019	-6.6%	873,005	-0.3%	\$ 133,947,565	3.4%
Wyoming	48,060	-6.7%	\$ 7,246,428	-6.3%	712,076	0.8%	\$ 112,747,153	4.3%

Cocktails, driven by Canned RTDs (+47.7% 9L volume), continue to dominate the category growth of +17.2% 9L volume. Tequila was the only other positive category at +2.7% 9L volume. Brandy/Cognac posted the largest decline of the major categories at -14.9% 9L and -18.6% in \$Vol driven by Cognac at -23.1% 9L and -22.0% \$Vol.

Spirits - Categories	9L CMTY 2023-04	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,695,804	-3.5%	\$ 1,028,541,790	-1.5%	61,544,122	-0.6%	\$ 13,359,965,458	2.2%
BRANDY / COGNAC	216,690	-14.9%	\$ 70,120,238	-18.6%	2,861,657	-12.3%	\$ 918,493,534	-13.3%
CACHACA	726	-2.3%	\$ 184,162	0.2%	9,309	0.0%	\$ 2,207,223	-3.4%
CANADIAN	452,659	-8.6%	\$ 92,102,621	-6.5%	6,129,078	-3.2%	\$ 1,231,731,533	-0.5%
COCKTAILS	243,746	17.2%	\$ 20,333,832	20.8%	3,093,997	28.3%	\$ 254,312,267	28.8%
CORDIALS	331,351	-4.2%	\$ 69,998,642	0.3%	4,503,270	-0.4%	\$ 962,072,439	3.2%
DOMESTIC WHISKEY	730,488	-4.6%	\$ 211,011,223	-0.1%	9,680,211	-0.6%	\$ 2,757,541,010	5.2%
GIN	162,531	-5.7%	\$ 33,724,591	0.9%	2,147,828	-5.0%	\$ 432,167,478	1.3%
IRISH	70,783	-8.8%	\$ 26,042,695	-3.3%	1,035,566	-1.3%	\$ 367,969,906	3.3%
NEUTRAL GRAIN SPIRIT	4,493	-16.8%	\$ 999,608	-12.3%	68,382	-13.9%	\$ 14,616,895	-10.7%
OTHER IMPORTED WHISKY	2,808	-8.0%	\$ 1,959,818	2.1%	39,842	4.8%	\$ 28,940,880	15.8%
RUM	393,167	-7.0%	\$ 61,825,379	-4.0%	5,480,734	-4.6%	\$ 842,401,653	-1.5%
SCOTCH	83,331	-8.3%	\$ 34,639,502	-8.1%	1,144,592	-7.3%	\$ 481,176,128	-5.1%
TEQUILA	513,677	2.7%	\$ 179,867,954	6.4%	6,098,096	7.9%	\$ 2,159,339,399	12.3%
VODKA	1,489,352	-2.4%	\$ 225,730,352	-0.6%	19,251,559	-1.6%	\$ 2,906,992,141	0.0%

Wines declined at -5.3% in 9L Volume with -3.3% in \$Vol returning to a positive price mix +2.0% . Rolling 12-month 9L volume was -4.1% with \$Vol at -0.3%. The six table wine states all posted negative 9L volume with only New Hampshire posting a \$Vol result at +0.6%.

Wine	9L CMTY 2023-04	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,305,634	-5.3%	\$ 137,148,827	-3.3%	17,127,345	-4.1%	\$ 1,860,024,518	-0.3%
Alabama	2,441	-16.2%	\$ 149,322	-6.0%	30,941	-4.6%	\$ 1,857,683	4.8%
Idaho	679	-11.5%	\$ 92,510	-7.7%	9,025	-8.9%	\$ 1,264,686	-4.0%
Mont Co	68,850	-5.9%	\$ 9,802,191	-0.8%	890,780	-2.5%	\$ 124,692,767	0.8%
Mississippi	119,799	-10.0%	\$ 10,783,661	-3.1%	1,500,290	-7.9%	\$ 133,103,189	0.5%
Montana	321	-8.7%	\$ 49,283	-1.4%	4,918	-12.0%	\$ 888,681	3.1%
New Hampshire	249,858	-4.3%	\$ 28,019,069	0.6%	2,908,631	-5.9%	\$ 331,761,005	-1.8%
Pennsylvania	722,821	-4.5%	\$ 72,220,641	-5.4%	9,776,334	-3.0%	\$ 1,028,599,279	-0.2%
Utah	108,213	-4.7%	\$ 12,949,421	-1.4%	1,513,512	-3.4%	\$ 188,796,287	1.1%
Virginia	2,431	-3.2%	\$ 406,290	1.2%	32,130	-19.2%	\$ 5,328,396	-2.8%
Vermont	642	-0.5%	\$ 86,356	10.4%	9,097	-5.7%	\$ 1,251,827	2.9%
West Virginia	411	-17.0%	\$ 24,024	-16.9%	5,725	19.2%	\$ 341,111	24.0%
Wyoming	29,170	-10.3%	\$ 2,566,035	-5.7%	445,959	-7.1%	\$ 42,138,650	-2.8%

The On-Premise spirits channel was -4.6% for April and also posted a negative \$Vol result at -0.2%. Only Vermont posted positive volume results. Michigan, New Hampshire, Pennsylvania, Utah and Vermont posted positive \$Vol results. Idaho posted the largest price mix growth with +8.5%.

The On-Premise wine channel was -5.4% 9L volume but remained positive in \$Vol at +1.3% resulting in a +6.6% price mix.

Spirits - Markets	9L CMTY 2023-04	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	759,599	-4.6%	\$ 185,883,068	-0.2%	9,343,099	4.0%	\$ 2,269,611,183	9.7%
Alabama	50,296	-4.1%	\$ 11,076,548	-1.3%	570,263	6.5%	\$ 126,510,759	10.7%
Idaho	18,069	-8.6%	\$ 4,315,554	-0.1%	245,495	0.6%	\$ 57,911,314	8.9%
Michigan	106,023	-2.0%	\$ 25,794,578	1.2%	1,354,526	4.1%	\$ 327,948,858	8.0%
Mississippi	15,923	-6.1%	\$ 2,284,691	-4.9%	166,421	-6.3%	\$ 24,648,512	2.7%
Mont Co	9,139	-4.9%	\$ 2,331,631	-4.7%	107,951	10.4%	\$ 28,215,024	11.5%
New Hampshire	30,172	-1.7%	\$ 6,246,259	2.3%	329,592	2.2%	\$ 67,369,915	6.5%
North Carolina	86,011	-5.4%	\$ 24,197,779	0.0%	1,023,698	8.6%	\$ 282,654,601	16.5%
Ohio	140,235	-9.1%	\$ 35,639,907	-5.2%	1,746,529	1.6%	\$ 444,499,408	6.6%
Oregon	58,158	-6.7%	\$ 13,921,683	-4.4%	744,830	9.0%	\$ 177,097,733	15.6%
Pennsylvania	131,144	-0.3%	\$ 32,580,669	6.6%	1,668,823	2.9%	\$ 399,385,785	8.7%
Utah	11,114	-0.7%	\$ 3,197,717	5.1%	149,232	5.8%	\$ 43,169,278	12.7%
Vermont	6,197	0.9%	\$ 1,590,375	5.5%	94,950	5.8%	\$ 24,828,113	10.8%
Virginia	90,204	-4.5%	\$ 21,496,287	-0.2%	1,032,505	3.6%	\$ 245,788,961	9.8%
Wyoming	6,916	-9.1%	\$ 1,209,390	-7.1%	108,285	-4.2%	\$ 19,582,921	-0.7%