

NABCA Monthly Report

August 2023 Control States Results

Total Control States spirits sales 9L volume grew by +3.2% over August last year and +4.9% in \$Vol showing a resultant +1.7% price mix. The rolling 12-month 9L volume results improved at +0.8% and +3.7% in \$Vol. During August, selling days were +9 days vs last year with Michigan +7 days, Utah +6 days and Pennsylvania -4 days (PA moved to a calendar month on July 1st but will be vs a fiscal month until June 30th, 2024). West Virginia +24.7% in 9L volume had a vendor sales program for products that are not included in their September trade show.

Spirits - Markets	9L CMTY 2023-08	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,457,135	3.2%	\$ 1,173,359,747	4.9%	62,053,045	0.8%	\$ 13,587,179,423	3.7%
Alabama	304,306	5.7%	\$ 65,117,507	7.8%	3,588,911	2.7%	\$ 794,630,960	6.4%
Iowa	248,456	-4.3%	\$ 39,711,523	-4.1%	2,818,321	-0.6%	\$ 447,978,933	2.8%
Idaho	122,248	-1.0%	\$ 26,050,945	1.8%	1,419,537	-1.1%	\$ 303,298,115	3.8%
Mont Co	42,755	5.0%	\$ 10,212,012	12.6%	522,750	4.3%	\$ 124,840,381	6.9%
Maine	154,274	-0.6%	\$ 31,347,663	2.8%	1,451,088	-0.5%	\$ 296,239,759	4.2%
Michigan	902,069	24.6%	\$ 207,853,811	23.6%	9,219,886	-0.1%	\$ 2,138,434,037	0.1%
Mississippi	184,202	1.2%	\$ 31,208,136	0.4%	2,254,384	-5.3%	\$ 378,866,126	-3.5%
Montana	112,095	5.4%	\$ 21,822,298	10.2%	1,095,092	-0.4%	\$ 209,653,335	2.0%
North Carolina	652,120	3.5%	\$ 151,374,531	5.3%	7,679,475	3.0%	\$ 1,828,309,498	7.1%
New Hampshire	197,587	-6.3%	\$ 36,995,489	-6.3%	2,268,306	-5.1%	\$ 435,444,526	-3.0%
Ohio	595,716	-1.2%	\$ 149,304,498	0.9%	7,107,086	-0.9%	\$ 1,786,839,940	2.3%
Oregon	318,611	-1.7%	\$ 71,296,736	-0.5%	3,745,499	-1.0%	\$ 848,326,479	1.7%
Pennsylvania	785,056	-9.4%	\$ 151,214,299	-7.7%	9,284,309	4.5%	\$ 1,861,640,682	7.5%
Utah	158,158	30.0%	\$ 31,504,265	29.8%	1,672,709	4.1%	\$ 338,995,836	6.6%
Virginia	472,755	0.3%	\$ 113,670,911	2.1%	5,852,264	0.8%	\$ 1,438,353,308	5.1%
Vermont	37,637	-2.5%	\$ 8,506,354	1.5%	448,221	-3.9%	\$ 101,097,909	1.7%
West Virgina	88,349	24.7%	\$ 13,318,039	23.8%	897,559	2.8%	\$ 137,716,689	5.4%
Wyoming	80,741	12.9%	\$ 12,850,730	13.9%	727,646	1.6%	\$ 116,512,911	5.3%

Cocktails, driven by Canned RTDs +26.9% 9L volume continue to dominate the category growth of +15.9% 9L volume. Tequila 9L volume results remain positive at +13.1% and +13.8% in \$Vol and Cordials grew by 6.0% in 9L volume. The largest decline continues to be Brandy/Cognac at -12.7% 9L volume driven by Cognac at -24.1% which represents 39% of the category.

Spirits - Categories	9L CMTY 2023-08	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,457,135	3.2%	\$ 1,173,359,747	4.9%	62,053,045	0.8%	\$ 13,587,179,423	3.7%
BRANDY / COGNAC	209,949	-12.7%	\$ 63,110,320	-20.7%	2,756,320	-10.4%	\$ 868,159,545	-12.0%
CACHACA	1,042	38.9%	\$ 256,848	56.3%	10,033	17.0%	\$ 2,476,305	21.7%
CANADIAN	496,840	-1.6%	\$ 100,536,122	0.2%	6,096,158	-3.0%	\$ 1,237,388,966	0.1%
COCKTAILS	355,537	15.9%	\$ 29,740,698	22.4%	3,248,588	22.5%	\$ 280,628,095	26.8%
CORDIALS	374,449	6.0%	\$ 80,455,282	9.9%	4,571,801	2.1%	\$ 988,461,544	6.2%
DOMESTIC WHISKEY	802,949	4.3%	\$ 231,955,293	9.2%	9,751,335	0.2%	\$ 2,816,507,961	5.6%
GIN	195,884	-3.0%	\$ 41,709,567	2.7%	2,130,683	-3.6%	\$ 438,561,842	3.1%
IRISH	77,921	-0.9%	\$ 28,165,229	2.9%	1,031,866	-1.0%	\$ 370,767,799	3.8%
NEUTRAL GRAIN SPIRIT	5,656	-2.6%	\$ 1,236,093	1.9%	67,975	-10.5%	\$ 14,752,788	-7.5%
OTHER IMPORTED WH	2,847	-11.9%	\$ 2,100,974	-17.6%	39,084	0.7%	\$ 29,439,082	12.8%
RUM	478,133	-1.9%	\$ 74,774,025	0.5%	5,430,270	-3.5%	\$ 844,687,285	-0.4%
SCOTCH	88,091	-3.7%	\$ 36,977,208	-0.1%	1,128,699	-6.4%	\$ 479,801,799	-3.7%
TEQUILA	602,229	13.1%	\$ 212,181,186	13.8%	6,375,382	10.5%	\$ 2,268,025,820	13.7%
VODKA	1,765,587	3.1%	\$ 270,133,794	4.3%	19,414,803	0.1%	\$ 2,947,438,485	1.8%

Wines sales declined at -7.5% in 9L Volume with -6.4% in \$Vol returning a positive price mix +1.1% (impacted mostly by selling days in PA). Rolling 12-month 9L volume was -3.0% with \$Vol at +1.4% resulting in a +4.4% price mix.

Wine	9L CMTY 2023-08	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,336,889	-7.5%	\$ 144,137,252	-6.4%	17,027,045	-3.0%	\$ 1,879,926,363	1.4%
Alabama	2,350	-3.4%	\$ 145,844	4.6%	30,402	-4.7%	\$ 1,880,760	5.8%
Idaho	647	-10.1%	\$ 94,418	-5.1%	8,595	-12.6%	\$ 1,247,071	-5.2%
Mont Co	70,069	3.1%	\$ 9,874,763	7.2%	894,824	-1.0%	\$ 126,679,898	2.5%
Mississippi	119,598	-2.4%	\$ 11,075,353	-0.9%	1,490,572	-5.1%	\$ 133,934,383	2.0%
Montana	552	47.5%	\$ 106,063	116.2%	4,956	-5.2%	\$ 907,027	4.4%
New Hampshire	230,671	-4.1%	\$ 26,999,207	0.0%	2,873,021	-4.8%	\$ 332,886,691	-0.6%
Pennsylvania	728,402	-14.8%	\$ 73,877,445	-16.1%	9,708,982	-2.4%	\$ 1,040,861,456	1.6%
Utah	134,386	22.5%	\$ 16,672,287	23.0%	1,525,140	-1.8%	\$ 191,547,071	1.8%
Virginia	2,480	0.6%	\$ 415,608	4.4%	32,336	-1.5%	\$ 5,420,741	6.0%
Vermont	702	8.9%	\$ 98,871	4.8%	9,125	-4.9%	\$ 1,278,004	1.7%
West Virginia	439	15.7%	\$ 29,514	45.1%	5,802	16.4%	\$ 353,897	22.0%
Wyoming	46,591	8.9%	\$ 4,747,603	11.6%	443,288	-4.9%	\$ 42,928,431	1.7%

The On-Premise spirits channel was +4.1% in August with +7.1% growth in \$vol resulting in a +3.0% price mix. All states were up in \$Vol except for Idaho, and Pennsylvania. The On-Premise wine channel was down -6.8% 9L volume with \$Vol flat vs last year resulting in a +6.8% price mix.

Spirits - Markets	9L CMTY 2023-08	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	861,011	4.1%	\$ 211,309,472	7.1%	9,481,038	4.1%	\$ 2,330,776,957	9.1%
Alabama	53,073	8.4%	\$ 11,680,601	10.3%	581,003	5.8%	\$ 129,970,254	9.8%
Idaho	23,011	-3.4%	\$ 5,535,018	-1.6%	244,459	0.1%	\$ 58,224,855	6.0%
Michigan	142,015	27.8%	\$ 35,167,722	31.0%	1,390,002	5.1%	\$ 341,186,648	9.2%
Mississippi	16,178	5.9%	\$ 2,454,511	7.0%	169,689	-0.2%	\$ 25,448,888	8.2%
Mont Co	9,540	7.8%	\$ 2,528,764	14.1%	111,796	9.8%	\$ 29,418,615	12.1%
New Hampshire	29,162	3.0%	\$ 5,964,696	4.8%	333,672	3.8%	\$ 68,975,731	7.8%
North Carolina	94,155	6.0%	\$ 26,058,655	9.1%	1,044,628	7.6%	\$ 291,482,516	13.4%
Ohio	157,757	-0.7%	\$ 40,814,336	1.7%	1,750,815	1.2%	\$ 450,621,985	5.6%
Oregon	69,057	0.2%	\$ 16,529,509	1.5%	748,933	4.5%	\$ 178,969,906	8.4%
Pennsylvania	141,381	-9.1%	\$ 34,464,975	-4.7%	1,705,915	4.4%	\$ 415,685,452	11.0%
Utah	13,872	27.4%	\$ 4,025,922	29.0%	153,277	7.8%	\$ 44,747,235	13.0%
Vermont	8,918	5.7%	\$ 2,351,703	9.3%	95,417	4.5%	\$ 25,350,004	9.7%
Virginia	90,468	2.9%	\$ 21,418,149	5.9%	1,040,983	3.6%	\$ 250,555,489	8.9%
Wyoming	12,424	10.8%	\$ 2,314,911	12.5%	110,449	-1.2%	\$ 20,139,377	1.8%