

NABCA Monthly Report

March 2024 Control States Results

Total Control States spirits sales 9L volume declined -4.3% compared to March last year generating a -2.2% \$Vol decline but with a positive a +2.1% price mix. Over the past 12 months the 9L volume declined by -0.2% accompanied by a +1.9% in \$Vol. During March there were 8 fewer selling days with 3 additional days in Pennsylvania, 7 less days in Michigan and 1 day fewer in Alabama, Mississippi, Montana and North Carolina.

Spirits - Markets	9L CMTY 2024-03	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,843,767	-4.3%	\$ 1,091,992,667	-2.2%	61,504,515	-0.2%	\$ 13,632,554,008	1.9%
Alabama	293,244	-6.7%	\$ 66,016,484	-5.2%	3,592,386	1.5%	\$ 802,691,817	3.5%
Iowa	214,415	-9.2%	\$ 34,097,415	-6.4%	2,777,752	-1.5%	\$ 447,787,668	1.2%
Idaho	109,345	-4.2%	\$ 23,816,520	-1.9%	1,397,259	-2.2%	\$ 303,179,116	0.9%
Mont Co	38,054	-8.7%	\$ 9,394,667	-6.2%	505,252	-1.6%	\$ 123,030,951	2.0%
Maine	98,426	-10.9%	\$ 20,245,302	-9.1%	1,429,394	-1.6%	\$ 295,297,441	1.1%
Michigan	648,307	-20.0%	\$ 154,560,835	-17.2%	9,028,773	-0.8%	\$ 2,119,919,584	0.3%
Mississippi	185,865	-8.2%	\$ 31,712,047	-4.2%	2,177,490	-2.1%	\$ 370,761,165	-1.2%
Montana	76,198	-13.8%	\$ 14,541,013	-14.2%	1,083,395	0.6%	\$ 209,665,760	2.0%
North Carolina	633,733	-0.1%	\$ 155,994,351	2.3%	7,672,096	1.0%	\$ 1,845,707,825	3.1%
New Hampshire	167,700	11.5%	\$ 33,435,537	13.0%	2,343,561	0.5%	\$ 455,065,259	2.4%
Ohio	581,526	-1.2%	\$ 151,942,857	1.7%	7,046,469	-1.5%	\$ 1,795,051,729	1.0%
Oregon	293,372	-7.7%	\$ 66,950,156	-7.1%	3,675,837	-2.5%	\$ 837,071,310	-1.3%
Pennsylvania	721,574	11.9%	\$ 149,626,533	11.2%	9,300,158	2.6%	\$ 1,889,725,862	5.5%
Utah	155,556	0.4%	\$ 32,269,193	1.2%	1,638,967	1.0%	\$ 333,887,508	1.9%
Virginia	473,202	-2.3%	\$ 120,441,563	2.9%	5,814,057	-0.7%	\$ 1,453,449,359	2.3%
Vermont	34,264	-7.7%	\$ 7,976,599	-6.4%	436,432	-4.7%	\$ 99,877,983	-1.0%
West Virginia	68,750	-7.5%	\$ 10,819,010	-6.3%	873,254	-0.7%	\$ 134,948,315	0.3%
Wyoming	50,236	-14.3%	\$ 8,152,582	-14.5%	711,987	-0.5%	\$ 115,435,357	1.9%

Most spirit categories declined in March with the exceptions of Cocktails +14.3% in 9L volume led by Canned RTDs +30.9%. Tequila grew by 5.1% in 9L volume and +6.8% in \$Vol returning to a positive price mix of +1.7%.

Spirits - Categories	9L CMTY 2024-03	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,843,767	-4.3%	\$ 1,091,992,667	-2.2%	61,504,515	-0.2%	\$ 13,632,554,008	1.9%
BRANDY / COGNAC	214,016	-11.3%	\$ 66,155,416	-15.9%	2,635,175	-9.1%	\$ 815,512,006	-12.7%
CACHACA	733	-6.1%	\$ 179,103	-6.3%	9,769	4.7%	\$ 2,438,753	10.5%
CANADIAN	477,533	-5.2%	\$ 102,434,204	1.3%	5,871,108	-4.6%	\$ 1,209,993,916	-1.8%
COCKTAILS	232,315	14.3%	\$ 20,277,157	14.0%	3,440,267	16.9%	\$ 298,473,746	19.1%
CORDIALS	360,490	-4.1%	\$ 78,513,446	-2.0%	4,540,208	0.5%	\$ 998,875,259	3.9%
DOMESTIC WHISKEY	774,945	-4.3%	\$ 229,708,815	-0.1%	9,676,253	-0.6%	\$ 2,864,687,294	3.6%
GIN	155,165	-7.8%	\$ 32,336,631	-5.2%	2,057,212	-4.7%	\$ 432,737,696	0.2%
IRISH	106,124	-11.1%	\$ 37,999,658	-11.1%	1,002,437	-3.8%	\$ 362,551,334	-1.7%
NEUTRAL GRAIN SPIRIT	4,506	-7.2%	\$ 992,332	-6.6%	65,869	-4.9%	\$ 14,572,587	-1.3%
OTHER IMPORTED WHISKY	2,973	1.1%	\$ 1,939,237	-1.9%	38,061	-5.1%	\$ 28,697,045	-0.7%
RUM	388,188	-11.5%	\$ 61,890,833	-9.2%	5,211,309	-5.4%	\$ 825,561,996	-2.3%
SCOTCH	82,286	-6.4%	\$ 34,632,442	-5.0%	1,092,082	-5.2%	\$ 471,820,262	-2.6%
TEQUILA	546,103	5.1%	\$ 197,330,002	6.8%	6,613,802	8.7%	\$ 2,367,391,306	10.2%
VODKA	1,498,344	-5.6%	\$ 227,481,224	-4.9%	19,250,804	-0.2%	\$ 2,938,643,400	1.0%

Wines grew +3.7% in 9L Volume with +3.8% in \$Vol returning a positive price mix +0.1% attributable entirely to Pennsylvania at +37,800 9L cases (additional selling days) and New Hampshire +36,400 9L cases coming from a Euro Spirits and Wine sale with 20% discount. Rolling 12-month 9L volume was -4.5% with \$Vol at +0.2% resulting in a +4.7% price mix.

Wine	9L CMTY 2024-03	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,315,867	3.7%	\$ 144,377,705	3.8%	16,425,944	-4.5%	\$ 1,868,665,760	0.2%
Alabama	2,342	-13.5%	\$ 147,811	-10.6%	29,113	-7.3%	\$ 1,829,601	-2.0%
Idaho	581	-21.4%	\$ 86,385	-19.5%	7,833	-14.1%	\$ 1,183,721	-7.0%
Mont Co	67,978	-11.4%	\$ 9,993,329	-7.1%	859,928	-4.1%	\$ 125,086,296	0.0%
Mississippi	114,397	-8.0%	\$ 10,019,796	-8.1%	1,388,037	-8.6%	\$ 126,753,221	-5.0%
Montana	437	2.7%	\$ 71,466	-7.9%	4,721	-4.6%	\$ 860,193	-3.3%
New Hampshire	228,512	19.0%	\$ 25,829,800	22.1%	2,861,219	-2.0%	\$ 340,375,865	2.6%
Pennsylvania	722,608	5.5%	\$ 75,426,073	4.2%	9,348,510	-4.7%	\$ 1,036,248,469	0.3%
Utah	145,112	-1.7%	\$ 19,351,820	-1.3%	1,461,746	-3.8%	\$ 188,063,382	-0.5%
Virginia	2,510	-1.1%	\$ 442,762	5.5%	31,784	-1.3%	\$ 5,451,526	2.4%
Vermont	720	-15.4%	\$ 104,616	-2.2%	8,807	-6.7%	\$ 1,243,343	-2.5%
West Virgina	402	-16.8%	\$ 26,677	-1.7%	5,182	-10.8%	\$ 342,941	-0.9%
Wyoming	30,267	-15.4%	\$ 2,876,995	-15.0%	419,062	-6.7%	\$ 41,226,111	-2.5%

The on-premise spirits channel declined by -6.1% in 9L volume and -5.6% in \$Vol resulting in a positive +0.5% price mix. The on-premise wine channel was +3.4% 9L volume with \$vol at +4.0% with a +0.6% price mix. The wine on-premise data excludes the Pennsylvania WEP accounts.

Spirits - Markets	9L CMTY 2024-03	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	797,175	-6.1%	\$ 199,735,676	-5.6%	9,396,193	0.2%	\$ 2,334,620,123	2.9%
Alabama	50,799	-9.9%	\$ 11,571,453	-8.5%	579,211	1.2%	\$ 130,276,801	2.9%
Idaho	19,175	-10.8%	\$ 4,637,356	-10.3%	237,695	-3.8%	\$ 57,085,459	-1.4%
Michigan	107,090	-18.5%	\$ 26,572,545	-17.9%	1,360,748	0.3%	\$ 337,651,288	3.1%
Mississippi	14,367	-11.0%	\$ 2,223,520	-10.1%	163,068	-2.6%	\$ 25,126,906	1.5%
Mont Co	8,981	-8.6%	\$ 2,410,237	-7.9%	109,837	1.3%	\$ 29,269,573	3.3%
New Hampshire	30,148	25.4%	\$ 6,347,131	27.6%	341,450	3.4%	\$ 71,366,047	6.2%
North Carolina	92,423	-6.2%	\$ 26,107,894	-5.8%	1,044,161	1.5%	\$ 293,713,956	3.9%
Ohio	146,120	-9.2%	\$ 38,609,929	-8.0%	1,727,133	-1.9%	\$ 448,927,015	0.6%
Oregon	61,426	-8.6%	\$ 14,733,185	-8.9%	734,400	-2.0%	\$ 175,854,016	-1.1%
Pennsylvania	145,948	9.0%	\$ 36,130,003	7.2%	1,714,945	2.7%	\$ 424,338,146	6.8%
Utah	15,739	-2.6%	\$ 4,781,080	1.4%	147,298	-1.2%	\$ 43,655,885	1.5%
Vermont	7,470	-14.0%	\$ 2,050,179	-14.4%	95,002	0.1%	\$ 25,480,434	3.0%
Virginia	89,648	-5.9%	\$ 22,074,110	-4.0%	1,033,692	-0.3%	\$ 251,915,547	2.5%
Wyoming	7,841	-12.3%	\$ 1,487,054	-11.2%	107,554	-1.3%	\$ 19,959,050	1.4%