

NABCA Monthly Report

November 2023 Control States Results

Total Control States spirits sales 9L volume declined by -1.1% compared to November last year but remained positive in \$Vol at +1.3% with a resultant +2.4% price mix. The rolling 12-month 9L volume results -0.1% and +2.7% in \$Vol. During November, selling days were +1 day vs last year with Utah +6 days and Pennsylvania -5 days. Pennsylvania has been on a calendar month since July 1st, but the previous year's data is on their fiscal month. The large growth in New Hampshire was due to 2 state promotions, a multi-bottle discount and a gift card bonus promotion.

Spirits - Markets	9L CMTY 2023-11	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,381,094	-1.1%	\$ 1,217,114,791	1.3%	61,722,632	-0.1%	\$ 13,595,713,990	2.7%
Alabama	313,117	3.6%	\$ 70,598,136	4.3%	3,603,383	2.5%	\$ 801,101,990	5.7%
Iowa	241,268	2.7%	\$ 39,222,993	4.5%	2,800,879	-0.9%	\$ 448,822,284	2.5%
Idaho	116,196	-2.7%	\$ 25,041,937	-0.5%	1,411,040	-1.5%	\$ 303,572,697	2.6%
Mont Co	40,364	-8.7%	\$ 10,774,028	2.2%	511,211	0.9%	\$ 124,810,768	5.9%
Maine	116,313	-0.9%	\$ 24,327,850	1.9%	1,446,119	-1.0%	\$ 296,725,220	2.6%
Michigan	911,470	0.0%	\$ 219,848,994	1.9%	9,029,599	-3.4%	\$ 2,108,191,267	-2.8%
Mississippi	194,785	-2.5%	\$ 35,479,276	1.8%	2,228,055	-3.7%	\$ 377,178,249	-2.7%
Montana	92,663	-5.7%	\$ 18,320,732	-2.8%	1,096,614	-0.4%	\$ 211,294,627	1.9%
North Carolina	650,695	2.0%	\$ 160,244,140	4.1%	7,684,059	2.2%	\$ 1,838,457,797	5.7%
New Hampshire	229,027	25.4%	\$ 45,929,240	31.2%	2,298,779	-2.0%	\$ 443,513,931	0.6%
Ohio	590,394	0.1%	\$ 151,080,611	2.1%	7,080,440	-1.0%	\$ 1,790,074,998	2.0%
Oregon	307,574	-3.2%	\$ 70,539,166	-2.8%	3,717,387	-1.5%	\$ 844,806,402	0.5%
Pennsylvania	771,364	-14.9%	\$ 160,978,928	-11.5%	9,271,381	3.5%	\$ 1,873,128,426	7.1%
Utah	156,251	24.9%	\$ 32,170,540	30.5%	1,671,741	3.5%	\$ 340,890,339	6.1%
Virginia	495,198	-0.7%	\$ 125,317,653	1.2%	5,831,007	0.2%	\$ 1,441,601,555	3.7%
Vermont	35,032	-2.8%	\$ 8,069,838	0.9%	443,470	-4.2%	\$ 100,829,445	1.0%
West Virginia	64,216	2.8%	\$ 10,110,231	-0.2%	881,418	-0.4%	\$ 135,689,955	1.0%
Wyoming	55,167	-3.9%	\$ 9,060,499	-2.3%	716,048	-0.2%	\$ 115,024,039	2.5%

Brandy/Cognac continues to decline but the 9L and \$Vol decrease is shifting from Cognac to Domestic Brandy with Cognac posting a positive 9L result +1.5% (for the first time YTD and due to the NH promotion +7,000 9L cases) but with negative \$Vol -5.2%. Tequila led the spirit categories growth at +7.2% but with a diminishing price mix of only +0.6% coming from large growth in the premium price tier (vs super and ultra-premium). Canned cocktails drove the growth of the cocktail category but at +14% it was the slowest growth month for this subcategory YTD.

Spirits - Categories	9L CMTY 2023-11	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,381,094	-1.1%	\$ 1,217,114,791	1.3%	61,722,632	-0.1%	\$ 13,595,713,990	2.7%
BRANDY / COGNAC	250,201	-4.3%	\$ 76,307,167	-5.9%	2,700,125	-9.8%	\$ 845,310,972	-12.0%
CACHACA	733	-10.5%	\$ 179,182	-12.5%	9,848	12.4%	\$ 2,450,828	18.2%
CANADIAN	535,184	-4.8%	\$ 112,867,954	-1.7%	5,959,128	-5.0%	\$ 1,215,839,735	-2.0%
COCKTAILS	263,268	6.6%	\$ 24,656,416	9.5%	3,340,040	19.0%	\$ 289,462,591	22.5%
CORDIALS	428,623	-2.6%	\$ 98,490,780	1.0%	4,543,974	0.9%	\$ 991,421,798	5.0%
DOMESTIC WHISKEY	907,278	0.1%	\$ 273,396,762	3.7%	9,729,242	-0.4%	\$ 2,843,279,006	4.5%
GIN	166,732	-5.4%	\$ 34,718,852	-2.0%	2,091,806	-4.4%	\$ 435,808,494	1.9%
IRISH	88,909	-3.9%	\$ 32,356,708	-3.3%	1,016,985	-3.1%	\$ 367,651,778	1.2%
NEUTRAL GRAIN SPIRIT	7,179	-1.8%	\$ 1,570,024	1.7%	67,079	-7.6%	\$ 14,733,050	-4.0%
OTHER IMPORT WHISKY	3,564	-10.3%	\$ 2,689,574	-10.9%	38,151	-3.6%	\$ 28,768,023	3.9%
RUM	453,251	-5.6%	\$ 72,321,447	-2.1%	5,335,335	-4.6%	\$ 837,659,439	-1.2%
SCOTCH	105,695	-3.3%	\$ 46,094,667	-1.7%	1,108,175	-6.8%	\$ 475,230,577	-3.8%
TEQUILA	533,549	7.2%	\$ 193,579,392	7.8%	6,467,024	9.5%	\$ 2,306,422,929	11.8%
VODKA	1,636,900	-1.2%	\$ 247,745,387	0.0%	19,315,628	-0.3%	\$ 2,941,386,549	1.4%

Wines declined at -10.4% in 9L Volume with -9.2% in \$Vol returning a positive price mix +1.2% heavily influenced by the negative selling days in Pennsylvania. Rolling 12-month 9L volume was -3.9% with \$Vol at +0.7% resulting in a +4.6% price mix.

Wine	9L CMTY 2023-11	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,543,676	-10.4%	\$ 172,707,375	-9.2%	16,724,403	-3.9%	\$ 1,869,174,307	0.7%
Alabama	2,361	-0.5%	\$ 151,999	1.2%	30,173	-4.5%	\$ 1,880,145	3.8%
Idaho	678	-14.9%	\$ 99,635	-12.7%	8,327	-12.6%	\$ 1,232,841	-5.3%
Mont Co	82,286	-2.7%	\$ 12,357,294	1.9%	882,261	-2.2%	\$ 126,372,940	1.8%
Mississippi	131,557	-11.9%	\$ 12,385,474	-9.1%	1,442,970	-6.1%	\$ 130,367,694	-1.0%
Montana	466	-5.4%	\$ 76,966	-18.2%	4,869	-6.6%	\$ 876,128	-3.8%
New Hampshire	238,754	-5.4%	\$ 29,397,602	-5.6%	2,835,731	-4.7%	\$ 331,643,397	-0.5%
Pennsylvania	898,470	-15.6%	\$ 95,798,466	-16.0%	9,531,102	-3.7%	\$ 1,035,800,227	0.9%
Utah	148,882	18.7%	\$ 18,241,106	25.0%	1,510,682	-1.7%	\$ 192,071,069	2.4%
Virginia	2,972	-2.9%	\$ 518,712	1.1%	31,971	0.9%	\$ 5,401,947	5.2%
Vermont	800	-7.5%	\$ 112,749	-8.1%	8,967	-5.8%	\$ 1,254,080	-0.8%
West Virginia	474	-25.0%	\$ 30,793	-15.5%	5,702	9.8%	\$ 359,069	19.0%
Wyoming	35,976	-7.5%	\$ 3,536,447	-3.2%	431,645	-5.8%	\$ 41,913,807	-0.8%

The on-premise spirits channel declined in November (mainly due to the selling days in PA) with -1.3% in 9L volume and +1.8% in \$vol resulting in a +3.1% price mix. The largest decrease was in Pennsylvania at -12.2% in 9L volume. The on-premise wine channel was -3.8% 9L volume with \$vol at +1.4% with a +5.2% price mix. The wine on-premise data now excludes the Pennsylvania WEP accounts.

Spirits - Markets	9L CMTY 2023-11	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	758,504	-1.3%	\$ 191,532,855	1.8%	9,448,809	2.5%	\$ 2,338,810,056	6.8%
Alabama	42,865	2.3%	\$ 9,805,822	4.1%	583,455	4.6%	\$ 130,832,481	7.7%
Idaho	18,065	-2.2%	\$ 4,260,053	-1.5%	243,066	-0.9%	\$ 58,109,128	3.4%
Michigan	122,674	0.3%	\$ 31,017,318	3.6%	1,362,650	0.1%	\$ 336,776,975	3.8%
Mississippi	12,755	-2.6%	\$ 2,049,162	3.4%	166,756	-0.3%	\$ 25,342,167	6.4%
Mont Co	9,169	0.7%	\$ 2,523,723	5.4%	111,365	6.6%	\$ 29,587,626	9.7%
New Hampshire	23,923	1.3%	\$ 4,988,869	5.0%	334,711	3.5%	\$ 69,589,660	7.0%
North Carolina	83,653	3.8%	\$ 23,995,621	5.5%	1,049,925	5.7%	\$ 294,642,734	10.2%
Ohio	139,356	0.1%	\$ 36,347,730	2.0%	1,746,724	0.7%	\$ 451,668,056	4.2%
Oregon	58,074	2.1%	\$ 13,947,879	1.9%	745,480	2.0%	\$ 178,630,840	4.4%
Pennsylvania	140,752	-12.2%	\$ 35,326,903	-7.7%	1,707,503	4.1%	\$ 420,815,439	10.5%
Utah	12,210	23.8%	\$ 3,596,801	32.0%	152,304	5.2%	\$ 44,982,240	10.6%
Vermont	6,662	3.4%	\$ 1,817,605	6.3%	95,398	3.5%	\$ 25,504,743	8.2%
Virginia	80,945	2.5%	\$ 20,497,510	6.1%	1,040,694	2.8%	\$ 252,354,447	7.2%
Wyoming	7,400	-1.2%	\$ 1,357,860	3.1%	108,779	-1.9%	\$ 19,973,518	0.7%