

# NABCA Monthly Report

## November 2022 Control States Results

Total Control States spirits sales grew by +3.7% in 9L volume with +7.3% in \$Vol showing a resultant +3.6% price mix. The rolling 12-month results remain steady with October at +0.2% in 9L volume and +3.0% in \$Vol.

The selling days change vs last year was +7 days, all in Michigan (+23.5% 9L volume).

Spirits - Markets	9L CMTY 2022-11	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>5,452,605</b>	<b>3.7%</b>	<b>\$ 1,197,330,612</b>	<b>7.3%</b>	<b>61,865,024</b>	<b>0.2%</b>	<b>\$ 13,227,766,235</b>	<b>3.0%</b>
Alabama	302,388	1.9%	\$ 67,372,467	5.5%	3,514,626	1.3%	\$ 758,256,430	4.0%
Iowa	234,873	-4.7%	\$ 37,461,087	-1.5%	2,824,438	-1.3%	\$ 437,659,023	2.6%
Idaho	119,465	0.7%	\$ 25,136,694	6.5%	1,432,983	-1.3%	\$ 295,950,608	4.1%
Mont Co	44,422	4.8%	\$ 10,585,073	4.5%	507,652	9.0%	\$ 118,072,376	8.4%
Maine	117,403	2.4%	\$ 23,868,732	8.0%	1,460,232	-0.4%	\$ 289,091,144	5.6%
Michigan	911,087	23.5%	\$ 215,615,117	25.3%	9,348,866	0.3%	\$ 2,168,073,124	1.2%
Mississippi	199,767	-13.4%	\$ 34,888,773	-6.5%	2,313,693	-6.0%	\$ 387,658,125	1.1%
Montana	98,228	7.9%	\$ 18,817,960	10.4%	1,101,283	1.0%	\$ 207,386,913	5.2%
North Carolina	638,108	2.9%	\$ 153,898,429	8.4%	7,519,099	2.1%	\$ 1,739,243,084	7.4%
New Hampshire	182,661	-3.8%	\$ 35,014,504	-0.2%	2,346,330	-7.0%	\$ 440,785,096	-7.1%
Ohio	589,921	-0.7%	\$ 147,950,557	2.0%	7,153,985	-1.4%	\$ 1,754,767,564	1.2%
Oregon	317,787	0.2%	\$ 72,651,773	3.7%	3,774,197	-1.0%	\$ 840,313,431	3.9%
Pennsylvania	908,199	2.8%	\$ 178,458,449	3.1%	8,964,200	3.7%	\$ 1,732,366,058	3.5%
Utah	133,846	4.8%	\$ 24,628,161	1.2%	1,716,267	6.3%	\$ 321,309,019	6.1%
Virginia	498,539	1.2%	\$ 123,685,731	6.6%	5,822,123	-1.2%	\$ 1,390,588,439	2.9%
Vermont	36,034	-2.2%	\$ 7,992,366	2.6%	462,652	-0.1%	\$ 99,840,822	3.9%
West Virginia	62,466	-4.1%	\$ 10,128,064	1.5%	884,641	-0.4%	\$ 134,328,575	3.3%
Wyoming	57,410	5.2%	\$ 9,176,674	11.7%	717,756	0.3%	\$ 112,076,405	3.4%

The Canadian, Domestic Whiskey and Vodka categories return to growth in November after a couple of negative performance months. The decline in Brandy/Cognac is mostly in the Cognac minor category -11.1% 9L volume. The declines in the Scotch category are in both the Blended -3.9% and Single Malt -6.6% minor categories.

Spirits - Categories	9L CMTY 2022-11	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>5,452,605</b>	<b>3.7%</b>	<b>\$ 1,197,330,612</b>	<b>7.3%</b>	<b>61,865,024</b>	<b>0.2%</b>	<b>\$ 13,227,766,235</b>	<b>3.0%</b>
BRANDY / COGNAC	261,416	-6.3%	\$ 80,864,081	-4.8%	2,994,599	-14.6%	\$ 959,050,925	-16.0%
CACHACA	819	21.2%	\$ 203,919	22.5%	8,765	-4.4%	\$ 2,072,218	-8.6%
CANADIAN	563,968	3.7%	\$ 114,980,916	6.8%	6,284,843	-1.8%	\$ 1,245,999,619	0.9%
COCKTAILS	255,768	24.4%	\$ 22,321,476	23.7%	2,907,832	31.9%	\$ 235,732,755	29.7%
CORDIALS	440,173	5.0%	\$ 97,287,495	9.0%	4,504,456	0.9%	\$ 943,004,329	2.6%
DOMESTIC WHISKEY	904,447	3.4%	\$ 262,363,798	9.9%	9,754,848	0.6%	\$ 2,713,356,860	7.3%
GIN	176,245	-4.0%	\$ 35,375,640	4.6%	2,188,055	-4.6%	\$ 427,417,337	1.3%
IRISH	92,494	2.3%	\$ 33,415,839	8.9%	1,049,203	1.8%	\$ 362,960,546	5.1%
NEUTRAL GRAIN SPIRIT	7,307	-12.3%	\$ 1,543,919	-11.2%	72,580	-14.4%	\$ 15,343,771	-10.0%
OTHER IMPORTED WHISKEY	3,975	4.0%	\$ 3,016,549	18.1%	39,557	12.0%	\$ 27,662,541	21.2%
RUM	479,965	-0.2%	\$ 73,568,394	2.3%	5,589,428	-3.6%	\$ 845,991,480	-0.9%
SCOTCH	109,262	-4.6%	\$ 46,685,753	-2.4%	1,188,940	-5.1%	\$ 493,128,101	-2.2%
TEQUILA	497,593	14.5%	\$ 178,952,574	19.4%	5,907,349	10.5%	\$ 2,061,717,584	15.5%
VODKA	1,659,170	2.4%	\$ 246,744,964	3.4%	19,374,545	-1.4%	\$ 2,894,264,285	0.3%

Wine continues to decline with -3.3% in 9L volume and -4.5% in \$Vol for the month showing a negative price mix of -1.2%. The rolling 12-month result is -5.2% in 9L volume and -2.0% in \$Vol. The six markets where the state is the sole wholesaler for wines (highlighted in the table below) account for 99.5% of the \$Vol.

Spirits - Categories	9L CMTY 2022-11	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>1,722,883</b>	<b>-3.3%</b>	<b>\$ 179,586,764</b>	<b>-4.5%</b>	<b>17,400,800</b>	<b>-5.2%</b>	<b>\$ 1,836,536,372</b>	<b>-2.0%</b>
Alabama	2,374	-3.9%	\$ 149,890	9.0%	31,583	-4.3%	\$ 1,810,486	1.1%
Idaho	796	-9.7%	\$ 112,650	-1.3%	9,530	-7.7%	\$ 1,300,419	-2.7%
Mont Co	84,328	-2.0%	\$ 12,072,874	-1.1%	901,159	-2.1%	\$ 123,865,641	1.0%
Mississippi	149,122	-6.7%	\$ 13,607,787	2.3%	1,532,308	-8.7%	\$ 131,651,902	-1.4%
Montana	492	13.1%	\$ 88,676	32.3%	5,215	-5.6%	\$ 905,487	8.9%
New Hampshire	252,417	-5.9%	\$ 31,159,682	-0.5%	2,975,839	-6.1%	\$ 333,445,294	-3.0%
Pennsylvania	1,064,483	-2.3%	\$ 103,639,998	-6.9%	9,899,081	-4.8%	\$ 1,006,884,735	-3.1%
Utah	125,476	-4.1%	\$ 14,471,019	-5.9%	1,541,482	-2.7%	\$ 187,807,182	4.8%
Virginia	3,059	3.6%	\$ 513,338	7.5%	31,702	-33.0%	\$ 5,136,854	-15.1%
Vermont	826	-4.9%	\$ 122,629	6.7%	9,230	-6.9%	\$ 1,220,232	-0.4%
West Virginia	631	39.3%	\$ 36,428	47.1%	5,195	5.4%	\$ 301,673	1.5%
Wyoming	38,878	-0.7%	\$ 3,611,596	1.0%	458,401	-8.7%	\$ 42,203,494	-5.6%

For spirits, the On-Premise channel grew +8.7% in 9L volume, driven by the additional selling days in Michigan with \$Vol growth of +14.3% showing a positive price mix of +5.6%. Rolling 12-month 9L volume is at +17.0% with \$Vol at +23.3%. The channel represents 15.7% of the total Control States spirits value for November down from 16.5% for Rolling 12-months. Wines in the channel were -0.5% in 9L volume and +3.8% in \$Vol.

Spirits - Markets	9L CMTY 2022-11	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>768,342</b>	<b>8.7%</b>	<b>\$ 187,694,576</b>	<b>14.3%</b>	<b>9,220,827</b>	<b>17.0%</b>	<b>\$ 2,187,687,148</b>	<b>23.3%</b>
Alabama	41,884	6.1%	\$ 9,415,687	10.3%	557,781	9.9%	\$ 121,519,358	14.0%
Idaho	18,471	2.8%	\$ 4,325,415	10.5%	245,378	4.9%	\$ 56,177,412	12.6%
Michigan	122,332	37.9%	\$ 29,929,472	42.0%	1,361,318	31.0%	\$ 324,526,558	35.7%
Mississippi	13,094	0.6%	\$ 1,981,814	22.1%	167,275	-4.6%	\$ 23,808,941	1.1%
Mont Co	9,105	18.3%	\$ 2,395,242	17.0%	104,461	33.9%	\$ 26,972,931	35.4%
New Hampshire	23,615	3.3%	\$ 4,753,640	6.2%	323,317	8.3%	\$ 65,068,969	12.3%
North Carolina	80,612	10.9%	\$ 22,747,961	19.0%	993,515	21.0%	\$ 267,465,630	30.1%
Ohio	139,194	2.9%	\$ 35,622,365	7.4%	1,735,453	7.8%	\$ 433,608,101	13.1%
Oregon	56,871	3.9%	\$ 13,683,099	8.7%	730,667	32.8%	\$ 171,062,841	43.5%
Pennsylvania	160,355	2.1%	\$ 37,777,005	7.0%	1,640,660	18.6%	\$ 378,048,632	23.2%
Utah	9,867	3.6%	\$ 2,724,212	6.7%	145,293	18.1%	\$ 40,656,004	24.6%
Vermont	6,445	7.0%	\$ 1,709,869	11.8%	92,141	29.8%	\$ 23,580,681	35.6%
Virginia	79,008	7.0%	\$ 19,311,523	13.6%	1,012,689	14.9%	\$ 235,349,233	21.6%
Wyoming	7,489	-2.8%	\$ 1,317,271	2.9%	110,880	-0.1%	\$ 19,841,857	5.1%