

NABCA Monthly Report

July 2022 Control State Results

Total Control States spirits sales declined by -2.8% in 9L volume with negative -0.3% in \$Vol showing a resultant +2.5% price mix. The rolling 12-month results remain positive with +0.5% in 9L volume and +3.5% in \$Vol.

Selling days in July were 5 days less vs last year with Alabama, Mississippi, Montana, North Carolina and Utah each with one day less.

Spirits - Markets	9L CMTY 2022-07	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,242,506	-2.8%	\$ 1,111,361,407	-0.3%	61,581,034	0.5%	\$ 13,050,273,880	3.5%
Alabama	281,868	-4.7%	\$ 59,307,333	-4.1%	3,480,822	1.9%	\$ 742,026,652	3.9%
Iowa	216,448	-10.6%	\$ 33,775,607	-4.0%	2,818,844	-0.7%	\$ 430,900,406	3.0%
Idaho	131,238	-1.9%	\$ 27,373,959	5.0%	1,433,215	-1.7%	\$ 290,325,756	3.2%
Mont Co	45,578	4.6%	\$ 10,045,841	-3.0%	500,599	11.8%	\$ 116,701,698	12.4%
Maine	144,362	-2.2%	\$ 28,267,085	4.0%	1,452,015	0.1%	\$ 281,280,336	5.3%
Michigan	751,464	-2.8%	\$ 177,831,839	-2.6%	9,255,569	-1.4%	\$ 2,152,043,094	0.4%
Mississippi	164,977	-10.7%	\$ 29,278,469	-0.2%	2,405,526	-0.8%	\$ 393,295,967	4.9%
Montana	96,531	-6.1%	\$ 18,748,934	1.9%	1,094,274	0.7%	\$ 203,085,976	5.1%
North Carolina	657,913	-2.2%	\$ 149,313,869	3.7%	7,406,832	1.5%	\$ 1,690,840,769	7.5%
New Hampshire	245,917	-8.9%	\$ 44,089,808	-8.9%	2,396,800	-5.7%	\$ 448,761,923	-4.5%
Ohio	623,583	-4.6%	\$ 152,643,061	-2.3%	7,166,586	-0.3%	\$ 1,740,440,411	2.4%
Oregon	334,402	0.8%	\$ 72,931,934	4.8%	3,776,997	-0.7%	\$ 830,182,099	4.5%
Pennsylvania	731,778	4.5%	\$ 134,479,374	1.7%	8,862,284	5.2%	\$ 1,711,057,728	5.4%
Utah	145,650	3.9%	\$ 26,460,704	2.2%	1,680,114	6.0%	\$ 316,499,582	7.4%
Virginia	495,999	-5.0%	\$ 117,791,875	0.0%	5,809,745	-1.3%	\$ 1,365,283,553	2.4%
Vermont	41,749	-5.5%	\$ 8,882,352	-3.4%	467,870	1.8%	\$ 99,272,052	5.4%
West Virginia	67,541	-5.9%	\$ 10,154,142	-3.4%	866,384	-1.1%	\$ 129,791,450	1.7%
Wyoming	65,507	-1.1%	\$ 9,985,222	-1.0%	706,559	-0.8%	\$ 108,484,428	1.8%

Tequila and Cocktails (driven by canned cocktails) continue to be the only growth drivers in July with all other categories either declining or close to flat.

Spirits - Categories	9L CMTY 2022-07	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,242,506	-2.8%	\$ 1,111,361,407	-0.3%	61,581,034	0.5%	\$ 13,050,273,880	3.5%
BRANDY / COGNAC	234,890	-15.6%	\$ 78,567,680	-15.2%	3,121,627	-15.3%	\$ 1,005,650,746	-16.1%
CACHACA	785	-33.2%	\$ 174,471	-40.1%	8,671	-1.2%	\$ 2,082,936	-3.7%
CANADIAN	489,889	-3.9%	\$ 97,703,060	-1.1%	6,279,415	-2.4%	\$ 1,233,299,806	0.3%
COCKTAILS	333,181	31.2%	\$ 25,945,537	28.3%	2,645,649	35.3%	\$ 214,390,173	31.0%
CORDIALS	348,309	-5.0%	\$ 72,221,520	-2.6%	4,477,459	2.2%	\$ 926,287,839	2.9%
DOMESTIC WHISKEY	743,157	-2.7%	\$ 205,345,209	3.2%	9,713,639	0.5%	\$ 2,649,000,582	7.1%
GIN	203,218	-6.7%	\$ 40,776,087	-1.0%	2,215,051	-3.9%	\$ 423,569,352	2.0%
IRISH	76,386	-8.1%	\$ 26,301,692	-4.7%	1,041,637	4.0%	\$ 355,472,137	6.5%
NEUTRAL GRAIN SPIRIT	5,590	-12.4%	\$ 1,193,630	-7.2%	76,569	-12.6%	\$ 16,011,660	-8.1%
OTHER IMPORTED WHISKY	3,096	7.0%	\$ 2,322,070	25.3%	38,488	16.1%	\$ 25,600,159	21.2%
RUM	509,260	-7.8%	\$ 77,175,243	-4.2%	5,634,933	-3.2%	\$ 844,724,923	-0.7%
SCOTCH	90,339	-9.5%	\$ 36,870,664	-6.3%	1,210,260	-4.3%	\$ 498,547,906	0.1%
TEQUILA	547,465	3.2%	\$ 193,628,696	9.4%	5,724,703	13.5%	\$ 1,971,057,993	18.5%
VODKA	1,656,932	-4.2%	\$ 253,122,732	-3.0%	19,392,887	-1.2%	\$ 2,884,461,479	1.4%

Wine declined by -7.4% in 9L volume and -8.2% in \$Vol for the month showing a negative price mix of -0.8% vs the rolling 12-month result of -5.8% in 9L volume and -2.5% 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. Pennsylvania, the largest wine market with 57% share of control state wine sales showed the smallest decline at -3.7%.

Spirits - Categories	9L CMTY 2022-07	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,293,133	-7.4%	\$ 130,818,169	-8.2%	17,628,465	-5.8%	\$ 1,838,163,237	-2.5%
Alabama	2,794	-11.2%	\$ 156,487	-6.1%	31,850	-6.6%	\$ 1,766,254	-4.1%
Idaho	734	-7.9%	\$ 97,469	-9.4%	9,887	-9.4%	\$ 1,316,663	-5.3%
Mont Co	65,677	-10.2%	\$ 9,029,263	-7.0%	903,648	-3.3%	\$ 123,280,063	0.8%
Mississippi	106,680	-15.8%	\$ 8,830,293	-10.5%	1,583,345	-5.0%	\$ 131,017,033	1.2%
Montana	361	-43.7%	\$ 66,485	-23.8%	5,201	-7.6%	\$ 857,613	8.3%
New Hampshire	256,379	-10.4%	\$ 28,523,376	-6.4%	3,032,317	-6.1%	\$ 334,736,253	-2.8%
Pennsylvania	702,586	-3.7%	\$ 65,973,282	-8.9%	9,984,284	-6.4%	\$ 1,008,220,584	-4.7%
Utah	116,164	-7.7%	\$ 14,034,580	-5.1%	1,562,515	-1.6%	\$ 188,124,330	7.7%
Virginia	2,507	-42.4%	\$ 409,457	-17.7%	34,315	-26.6%	\$ 5,183,489	-15.5%
Vermont	667	-15.4%	\$ 89,354	-8.1%	9,393	-6.9%	\$ 1,206,811	1.1%
West Virgina	368	6.9%	\$ 22,106	8.3%	4,946	-3.8%	\$ 288,411	-7.4%
Wyoming	38,216	-16.2%	\$ 3,585,968	-14.8%	466,654	-9.1%	\$ 42,161,663	-5.3%

For spirits the On-Premise channel declined by -3.8% in 9L volume but remained positive in \$Vol with +1.3% showing a positive price mix of +5.1%. Rolling 12-month 9L volume remains high at +32.3% with \$Vol at +39.2%. The channel represents 16.2% of the total Control States spirits value for July and also for Rolling 12-months. Wines in the channel were -5.6% in 9L volume and -1.7% in \$Vol.

Spirits - Markets	9L CMTY 2022-07	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	759,124	-3.8%	\$ 179,824,820	1.3%	9,069,083	32.3%	\$ 2,112,445,042	39.2%
Alabama	45,636	-2.1%	\$ 9,899,110	0.3%	542,447	16.8%	\$ 116,510,643	19.4%
Idaho	22,841	-4.6%	\$ 5,428,403	5.0%	242,928	11.0%	\$ 54,192,682	18.0%
Michigan	111,728	0.2%	\$ 26,626,219	3.5%	1,324,234	47.4%	\$ 311,872,610	53.4%
Mississippi	12,605	-18.3%	\$ 1,873,013	-12.6%	170,511	3.2%	\$ 23,305,742	5.4%
Mont Co	8,232	-8.4%	\$ 2,104,611	-9.8%	101,043	56.9%	\$ 26,026,169	63.2%
New Hampshire	29,181	-8.0%	\$ 5,707,127	-4.4%	321,406	16.9%	\$ 63,649,860	20.4%
North Carolina	83,796	1.6%	\$ 22,454,355	13.0%	958,479	38.8%	\$ 252,194,824	48.3%
Ohio	145,191	-6.0%	\$ 36,454,467	-1.4%	1,722,947	20.3%	\$ 422,730,855	25.8%
Oregon	61,305	-4.4%	\$ 14,068,157	2.1%	705,202	54.5%	\$ 161,451,306	68.0%
Pennsylvania	121,330	-1.4%	\$ 27,824,663	0.6%	1,635,415	43.8%	\$ 370,548,552	48.9%
Utah	11,370	-6.7%	\$ 3,138,970	-3.3%	142,332	32.4%	\$ 39,226,510	38.6%
Vermont	8,375	-10.2%	\$ 2,086,414	-8.1%	91,112	56.1%	\$ 22,906,194	62.7%
Virginia	86,394	-7.3%	\$ 20,188,898	-1.2%	1,000,095	28.2%	\$ 228,322,285	35.8%
Wyoming	11,141	-9.9%	\$ 1,970,411	-7.4%	110,933	3.9%	\$ 19,506,811	8.5%