

NABCA Monthly Report

June 2022 Control State Results

Total Control States declined by -2.0% in 9L volume with negative -0.4% in \$Vol showing a resultant +1.6% price mix. This is a decline on the rolling 12-month results of +0.5% in 9L volume and +3.6% in \$Vol.

Selling days in June were flat vs last year with New Hampshire and Utah plus one day and Montana and Alabama minus one day.

Spirits - Markets	9L CMTY 2022-06	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,382,369	-2.0%	\$ 1,133,305,895	-0.4%	61,734,073	0.5%	\$ 13,051,964,060	3.6%
Alabama	301,516	1.2%	\$ 63,097,203	1.4%	3,494,836	2.5%	\$ 744,193,164	4.8%
Iowa	249,625	-5.5%	\$ 38,594,998	-0.8%	2,844,420	0.1%	\$ 432,281,896	3.6%
Idaho	121,309	-2.7%	\$ 25,218,292	3.4%	1,435,721	-1.4%	\$ 288,992,157	3.3%
Mont Co	45,486	7.9%	\$ 10,280,396	4.2%	498,615	12.6%	\$ 117,006,754	14.6%
Maine	134,477	-2.3%	\$ 26,733,945	3.2%	1,455,244	0.6%	\$ 280,193,254	5.6%
Michigan	944,495	-4.1%	\$ 216,648,462	-3.0%	9,277,008	-3.5%	\$ 2,156,802,117	-1.4%
Mississippi	177,681	-13.0%	\$ 29,057,730	-7.1%	2,425,275	-0.8%	\$ 393,346,743	4.3%
Montana	99,408	-9.3%	\$ 18,278,242	-8.0%	1,100,491	1.2%	\$ 202,580,912	4.8%
North Carolina	640,143	1.6%	\$ 144,961,678	5.9%	7,421,419	2.3%	\$ 1,685,460,783	8.3%
New Hampshire	224,469	-9.6%	\$ 40,025,068	-17.9%	2,420,811	-5.6%	\$ 453,048,410	-4.8%
Ohio	604,467	-1.8%	\$ 146,283,649	-1.2%	7,196,301	0.3%	\$ 1,743,994,255	3.2%
Oregon	321,821	-4.7%	\$ 70,941,663	1.2%	3,774,365	-0.9%	\$ 826,901,615	4.5%
Pennsylvania	697,608	2.6%	\$ 131,258,606	-0.6%	8,830,852	5.5%	\$ 1,707,809,723	6.0%
Utah	151,993	9.6%	\$ 27,578,045	8.3%	1,674,703	6.0%	\$ 315,930,663	7.9%
Virginia	483,240	-0.2%	\$ 114,053,260	3.3%	5,835,845	-0.7%	\$ 1,365,208,809	3.1%
Vermont	39,521	0.3%	\$ 8,266,701	3.1%	470,277	2.9%	\$ 99,583,376	7.0%
West Virgina	72,818	-6.4%	\$ 10,879,230	-1.7%	870,636	-0.8%	\$ 130,144,049	2.0%
Wyoming	72,292	0.4%	\$ 11,148,728	2.6%	707,254	-1.3%	\$ 108,485,381	1.3%

The Tequila and Cocktails (driven by canned cocktails) categories continue to be the only large volume growth drivers in June with all other categories either declining or close to flat. Both of these categories have grown share of total spirits over the last 12 months: Cocktails +1.1% and Tequila +1.1%. Cognac share has declined by -1.0% followed by Vodka share -0.6%.

Spirits - Categories	9L CMTY 2022-06	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,382,369	-2.0%	\$ 1,133,305,895	-0.4%	61,734,073	0.5%	\$ 13,051,964,060	3.6%
BRANDY / COGNAC	243,843	-16.5%	\$ 80,047,972	-19.0%	3,164,930	-15.6%	\$ 1,019,699,400	-16.4%
CACHACA	839	-23.0%	\$ 195,074	-26.4%	9,061	7.1%	\$ 2,198,597	5.8%
CANADIAN	504,239	-4.2%	\$ 96,321,121	-3.3%	6,299,056	-2.7%	\$ 1,234,341,628	0.1%
COCKTAILS	300,412	34.2%	\$ 23,018,306	31.4%	2,566,474	35.5%	\$ 208,063,643	30.3%
CORDIALS	362,587	-4.2%	\$ 73,821,393	-2.4%	4,495,718	2.8%	\$ 928,044,744	3.4%
DOMESTIC WHISKEY	795,002	-0.9%	\$ 219,225,329	4.6%	9,734,248	0.7%	\$ 2,642,219,132	7.4%
GIN	204,787	-6.9%	\$ 40,699,502	-2.4%	2,229,590	-3.7%	\$ 423,996,475	2.1%
IRISH	81,340	-1.0%	\$ 28,184,355	1.3%	1,048,368	5.9%	\$ 356,767,912	8.1%
NEUTRAL GRAIN SPIRIT	5,630	-15.0%	\$ 1,187,130	-9.3%	77,357	-13.6%	\$ 16,103,704	-9.5%
OTHER IMPORTED WHISKY	3,101	7.7%	\$ 2,037,011	9.3%	38,285	16.4%	\$ 25,131,187	19.6%
RUM	511,998	-6.6%	\$ 77,423,798	-3.9%	5,678,124	-3.0%	\$ 848,109,941	-0.7%
SCOTCH	98,226	-7.0%	\$ 39,395,111	-7.4%	1,219,757	-3.7%	\$ 500,984,191	1.1%
TEQUILA	548,205	5.8%	\$ 192,051,538	9.9%	5,707,816	14.1%	\$ 1,954,099,129	18.8%
VODKA	1,722,151	-3.4%	\$ 259,686,926	-2.2%	19,465,244	-1.3%	\$ 2,892,092,800	1.5%

Wine declined by -5.1% in 9L volume and -5.3% in \$Vol for the month vs -5.4% in 9L volume and -2.0% in \$Vol for R12. 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 2022-06	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,337,438	-5.1%	\$ 136,855,050	-5.3%	17,732,164	-5.4%	\$ 1,844,733,858	-2.0%
Alabama	2,750	-1.4%	\$ 153,136	3.6%	32,204	-5.5%	\$ 1,776,307	-3.5%
Idaho	798	3.6%	\$ 106,825	6.2%	9,950	-9.8%	\$ 1,326,772	-4.8%
Mont Co	77,258	-0.4%	\$ 10,515,908	1.7%	911,118	-3.0%	\$ 123,960,453	1.3%
Mississippi	114,172	-16.8%	\$ 9,760,948	-9.6%	1,603,317	-4.2%	\$ 132,030,258	2.3%
Montana	381	-18.3%	\$ 68,480	-20.4%	5,482	0.8%	\$ 877,888	13.5%
New Hampshire	275,046	-4.7%	\$ 30,951,558	-1.4%	3,062,181	-5.5%	\$ 336,682,674	-2.4%
Pennsylvania	691,424	-4.5%	\$ 65,764,810	-9.8%	10,011,000	-6.2%	\$ 1,009,678,181	-4.4%
Utah	127,359	2.6%	\$ 15,037,323	8.0%	1,572,196	-1.1%	\$ 188,855,520	9.1%
Virginia	2,363	-41.1%	\$ 376,080	-20.2%	36,158	-20.1%	\$ 5,271,517	-12.9%
Vermont	686	-5.1%	\$ 86,843	4.4%	9,515	-4.7%	\$ 1,214,655	3.8%
West Virginia	489	37.0%	\$ 32,034	54.4%	4,922	-5.0%	\$ 286,709	-8.7%
Wyoming	44,711	-7.1%	\$ 4,001,059	-7.9%	474,013	-8.0%	\$ 42,768,756	-3.8%

The On-Premise channel grew by +3.3% in 9L volume and +8.4% in \$Vol during June and follows on from a huge increase in June of 2021 of +85.7% 9L volume (restocking post Covid closures). Rolling 12-month 9L volume remains high at +38.9% with \$Vol at +45.9%. The channel represents 17% of the total Control States spirits value for June vs 16% for R12. Wines in the channel were flat at -0.2% in 9L volume but remained positive with +2.9% in \$Vol.

Spirits - Markets	9L CMTY 2022-06	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	836,138	3.3%	\$ 197,770,742	8.4%	9,099,323	38.5%	\$ 2,110,232,964	45.9%
Alabama	47,984	1.9%	\$ 10,413,128	5.6%	543,410	20.6%	\$ 116,483,381	23.3%
Idaho	22,369	-3.4%	\$ 5,215,824	5.1%	244,021	16.0%	\$ 53,936,117	22.7%
Michigan	138,729	1.8%	\$ 32,764,826	4.3%	1,324,035	51.6%	\$ 310,980,897	58.3%
Mississippi	13,674	-18.4%	\$ 1,933,268	-14.9%	173,340	6.7%	\$ 23,575,233	9.8%
Mont Co	11,320	21.2%	\$ 2,834,349	16.7%	101,794	67.4%	\$ 26,254,933	76.8%
New Hampshire	33,236	2.0%	\$ 6,614,862	5.1%	323,930	21.5%	\$ 63,909,503	24.9%
North Carolina	91,877	7.1%	\$ 24,408,373	14.9%	957,126	48.3%	\$ 249,620,351	56.9%
Ohio	155,938	1.0%	\$ 39,088,947	5.6%	1,732,285	24.7%	\$ 423,249,191	30.3%
Oregon	66,970	17.4%	\$ 15,530,325	29.1%	708,034	66.0%	\$ 161,165,966	80.7%
Pennsylvania	127,768	1.0%	\$ 29,579,595	4.5%	1,637,107	51.9%	\$ 370,395,612	58.1%
Utah	13,518	10.7%	\$ 3,787,686	19.2%	143,144	41.1%	\$ 39,334,530	47.7%
Vermont	8,362	5.3%	\$ 2,087,175	10.7%	92,060	71.5%	\$ 23,090,152	80.0%
Virginia	92,951	4.6%	\$ 21,476,789	10.2%	1,006,874	35.1%	\$ 228,573,347	43.4%
Wyoming	11,443	-3.3%	\$ 2,035,595	-1.4%	112,162	7.4%	\$ 19,663,751	12.4%