

NABCA Monthly Report

December 2023 Control States Results

Total Control States spirits sales 9L volume saw an increase of +1.2% compared to December last year generating a +3.3% \$Vol gain driven by a +2.1% price mix. Over the past 12 months the 9L volume grew by +0.4% accompanied by a +2.9% in \$Vol. During December, selling days remained unchanged vs last year with New Hampshire +7 days and Pennsylvania +3 days covering Alabama, Mississippi, North Carolina, and Montana all -1 day and Utah -6 days. The large growth in New Hampshire was attributed to two state promotions, a multi-bottle discount, and a gift card bonus promotion which continued through the end of December.

Spirits - Markets	9L CMTY 2023-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	6,088,549	1.2%	\$ 1,445,267,486	3.3%	61,793,105	0.4%	\$ 13,643,569,972	2.9%
Alabama	341,689	-3.8%	\$ 82,777,677	-2.9%	3,589,773	2.2%	\$ 799,131,980	4.9%
Iowa	239,911	-7.0%	\$ 40,877,797	-5.3%	2,782,758	-1.0%	\$ 446,624,905	1.8%
Idaho	145,850	-3.7%	\$ 34,126,985	-0.5%	1,405,428	-1.9%	\$ 303,442,793	1.9%
Mont Co	48,025	-12.4%	\$ 12,777,049	-9.0%	504,406	-1.0%	\$ 123,544,693	3.9%
Maine	125,995	-4.5%	\$ 26,595,309	-2.3%	1,440,193	-0.6%	\$ 296,087,393	2.6%
Michigan	786,762	1.2%	\$ 191,053,944	2.5%	9,038,692	-1.4%	\$ 2,113,131,785	-0.6%
Mississippi	185,581	1.2%	\$ 32,458,136	3.5%	2,230,279	-1.7%	\$ 378,305,849	-1.0%
Montana	94,972	-6.4%	\$ 19,063,883	-4.9%	1,090,169	-0.6%	\$ 210,365,262	1.6%
North Carolina	779,467	-4.8%	\$ 201,119,794	-3.9%	7,644,774	1.3%	\$ 1,830,414,786	4.1%
New Hampshire	299,041	44.0%	\$ 64,735,352	51.4%	2,390,209	2.2%	\$ 465,490,983	5.7%
Ohio	711,905	-2.0%	\$ 192,493,874	0.5%	7,065,772	-1.3%	\$ 1,791,031,802	1.6%
Oregon	372,783	-3.9%	\$ 91,367,543	-2.6%	3,702,196	-1.6%	\$ 842,325,822	0.2%
Pennsylvania	1,000,620	16.9%	\$ 219,524,021	20.9%	9,416,246	4.8%	\$ 1,911,624,798	8.7%
Utah	157,683	-17.0%	\$ 33,773,444	-16.8%	1,639,537	1.0%	\$ 334,099,299	2.8%
Virginia	622,897	-1.0%	\$ 169,570,704	3.8%	5,824,951	-0.2%	\$ 1,447,989,391	3.3%
Vermont	46,580	-4.1%	\$ 11,403,567	-2.2%	441,491	-4.2%	\$ 100,571,658	0.5%
West Virginia	69,473	-11.3%	\$ 11,403,100	-8.9%	872,538	-0.9%	\$ 134,594,621	0.5%
Wyoming	59,314	-3.8%	\$ 10,145,307	-2.8%	713,696	-0.1%	\$ 114,792,150	2.3%

Brandy/Cognac continues to decline but for the 2nd month Cognac was only -1.5% 9L heavily impacted by the NH sales program providing a 289% 9L growth for the month vs last year. Tequila led the regular spirit categories growth at +10.6% with a price mix of only +1.5% below its 12-month price mix of +2.2%. Canned cocktails drove the growth of the cocktail category at +44.4% 9L cases improving on the sub-category 12-month result of 40.4%.

Spirits - Categories	9L CMTY 2023-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	6,088,549	1.2%	\$ 1,445,267,486	3.3%	61,793,105	0.4%	\$ 13,643,569,972	2.9%
BRANDY / COGNAC	267,147	-4.5%	\$ 83,096,889	-5.9%	2,687,409	-8.7%	\$ 840,129,215	-10.9%
CACHACA	903	0.1%	\$ 220,109	4.1%	9,849	10.8%	\$ 2,459,925	17.4%
CANADIAN	592,347	-6.9%	\$ 127,600,560	-5.0%	5,914,928	-5.3%	\$ 1,209,242,771	-2.7%
COCKTAILS	312,369	17.8%	\$ 29,385,544	17.3%	3,387,122	19.4%	\$ 293,859,167	22.4%
CORDIALS	553,642	2.4%	\$ 131,511,300	4.9%	4,556,685	1.3%	\$ 997,586,574	5.1%
DOMESTIC WHISKEY	1,058,617	-1.3%	\$ 340,343,193	2.7%	9,715,513	-0.4%	\$ 2,852,737,099	4.2%
GIN	183,932	-3.4%	\$ 40,258,251	0.7%	2,085,353	-3.9%	\$ 436,033,001	2.0%
IRISH	113,282	5.2%	\$ 41,617,115	5.0%	1,022,562	-2.2%	\$ 369,680,598	1.4%
NEUTRAL GRAIN SPIRIT	7,377	-4.6%	\$ 1,644,066	-1.0%	66,721	-6.1%	\$ 14,718,685	-2.2%
OTHER IMPORTED WHISKY	5,319	0.1%	\$ 4,178,511	4.1%	38,157	-3.0%	\$ 28,933,013	4.7%
RUM	507,260	-3.2%	\$ 82,758,105	-0.1%	5,318,706	-4.1%	\$ 837,629,347	-0.7%
SCOTCH	135,936	4.3%	\$ 66,978,645	6.1%	1,113,738	-5.1%	\$ 479,143,762	-2.1%
TEQUILA	591,317	10.6%	\$ 221,975,687	12.1%	6,523,688	9.8%	\$ 2,330,712,931	12.0%
VODKA	1,759,072	2.2%	\$ 273,569,462	3.3%	19,352,569	0.4%	\$ 2,950,306,187	2.0%

Wines grew at +0.6% in 9L Volume with +3.6% in \$Vol returning a positive price mix +3.0% heavily influenced by the additional 3 selling days in Pennsylvania. Rolling 12-month 9L volume was -3.7% with \$Vol at +1.1% resulting in a +4.8% price mix.

Wine	9L CMTY 2023-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,828,711	0.6%	\$ 220,420,641	3.6%	16,735,460	-3.7%	\$ 1,884,202,485	1.1%
Alabama	2,693	-14.0%	\$ 180,331	-11.3%	29,733	-5.5%	\$ 1,857,369	1.7%
Idaho	897	-14.5%	\$ 137,689	-12.7%	8,174	-12.8%	\$ 1,215,527	-6.1%
Mont Co	85,418	-12.0%	\$ 13,335,045	-8.0%	870,640	-3.6%	\$ 125,223,862	0.5%
Mississippi	117,640	-12.4%	\$ 11,678,705	-4.4%	1,426,313	-7.1%	\$ 129,850,818	-2.0%
Montana	444	-10.7%	\$ 78,892	-7.2%	4,815	-3.6%	\$ 872,582	-1.5%
New Hampshire	321,849	18.8%	\$ 41,639,638	26.9%	2,886,540	-2.5%	\$ 340,457,903	2.2%
Pennsylvania	1,104,092	2.8%	\$ 127,553,765	3.6%	9,561,239	-3.5%	\$ 1,047,465,565	1.5%
Utah	151,346	-19.4%	\$ 20,864,237	-14.7%	1,474,223	-4.0%	\$ 188,582,975	0.0%
Virginia	4,014	-3.2%	\$ 734,013	-0.1%	31,840	-0.3%	\$ 5,401,082	3.5%
Vermont	1,078	-9.5%	\$ 166,228	-3.5%	8,928	-5.2%	\$ 1,248,043	-0.5%
West Virgina	469	-35.7%	\$ 36,604	-8.7%	5,441	0.4%	\$ 355,580	12.9%
Wyoming	38,770	-9.5%	\$ 4,015,470	-6.0%	427,571	-5.2%	\$ 41,670,403	-0.5%

The on-premise spirits channel returned to growth after a November decline with +4.1% in 9L volume and +5.9% in \$Vol resulting in a +1.8% price mix. The on-premise wine channel was +5.7% 9L volume (Pennsylvania and New Hampshire driven) with \$vol at +6.8% with a +1.1% price mix. The wine on-premise data now excludes the Pennsylvania WEP accounts.

Spirits - Markets	9L CMTY 2023-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	759,528	4.1%	\$ 193,693,991	5.9%	9,478,380	2.8%	\$ 2,349,546,892	6.8%
Alabama	43,184	-1.6%	\$ 10,462,336	-0.3%	582,768	4.3%	\$ 130,804,421	7.1%
Idaho	19,722	-3.4%	\$ 4,822,659	-0.8%	242,368	-1.3%	\$ 58,069,812	2.6%
Michigan	101,972	6.8%	\$ 25,881,851	8.9%	1,369,179	1.9%	\$ 338,893,621	5.5%
Mississippi	10,711	9.3%	\$ 1,716,978	14.9%	167,663	1.6%	\$ 25,564,843	7.7%
Mont Co	8,367	-4.4%	\$ 2,396,817	-1.3%	110,983	5.3%	\$ 29,556,199	8.2%
New Hampshire	30,943	32.0%	\$ 6,489,977	37.1%	342,213	5.1%	\$ 71,343,998	8.6%
North Carolina	82,469	-1.8%	\$ 23,918,138	-1.3%	1,048,394	4.9%	\$ 294,317,127	8.7%
Ohio	138,661	0.9%	\$ 36,656,672	2.3%	1,747,902	0.9%	\$ 452,497,670	4.2%
Oregon	61,306	-0.2%	\$ 14,853,830	-0.2%	745,369	1.7%	\$ 178,599,235	3.6%
Pennsylvania	149,161	15.8%	\$ 37,536,178	21.1%	1,727,811	5.1%	\$ 427,354,297	11.5%
Utah	11,538	-18.9%	\$ 3,476,518	-17.9%	149,622	2.6%	\$ 44,223,871	7.1%
Vermont	8,870	3.4%	\$ 2,409,700	5.3%	95,690	3.2%	\$ 25,626,122	7.5%
Virginia	84,891	0.0%	\$ 21,570,238	2.5%	1,040,687	2.2%	\$ 252,871,828	6.3%
Wyoming	7,732	-11.9%	\$ 1,502,099	-9.1%	107,732	-1.9%	\$ 19,823,850	0.5%