

# NABCA Monthly Report

## July 2023 Control States Results

Total Control States spirits sales 9L volume decreased by -0.4% over July last years and +1.0% in \$Vol showing a resultant +1.4% price mix. The rolling 12-month 9L volume results remain positive at +0.6% and +3.5% in \$Vol. During July, selling days were +1 day vs last year with Pennsylvania +3 days and New Hampshire and Utah both down -1 day each. Pennsylvania sales were impacted by the shift to sales being reported on a calendar month vs a fiscal month with the new ERP.

Spirits - Markets	9L CMTY 2023-07	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>5,213,669</b>	<b>-0.4%</b>	<b>\$ 1,123,290,215</b>	<b>1.0%</b>	<b>61,884,386</b>	<b>0.6%</b>	<b>\$ 13,531,555,029</b>	<b>3.5%</b>
Alabama	285,235	1.2%	\$ 61,373,688	3.0%	3,572,389	2.6%	\$ 789,532,873	6.4%
Iowa	219,291	1.2%	\$ 35,775,183	5.8%	2,829,442	0.4%	\$ 449,565,268	4.3%
Idaho	126,941	-3.3%	\$ 27,118,823	-1.0%	1,420,731	-0.9%	\$ 302,799,267	4.3%
Mont Co	44,439	-2.3%	\$ 10,558,598	5.3%	520,735	4.2%	\$ 123,697,499	6.1%
Maine	141,555	-1.9%	\$ 28,756,007	1.7%	1,451,974	0.0%	\$ 295,397,991	5.0%
Michigan	723,686	-3.7%	\$ 168,066,579	-5.5%	9,042,060	-2.3%	\$ 2,098,710,481	-2.5%
Mississippi	177,746	7.7%	\$ 29,864,112	2.0%	2,252,150	-6.4%	\$ 378,712,904	-3.7%
Montana	99,634	3.2%	\$ 19,128,882	2.0%	1,089,364	-0.1%	\$ 207,589,212	2.3%
North Carolina	665,714	1.2%	\$ 153,405,178	2.7%	7,657,608	3.4%	\$ 1,820,661,777	7.7%
New Hampshire	213,695	-13.1%	\$ 39,618,951	-10.1%	2,281,504	-4.8%	\$ 437,950,630	-2.4%
Ohio	600,844	-3.7%	\$ 150,555,766	-1.4%	7,114,558	-0.7%	\$ 1,785,502,363	2.6%
Oregon	324,334	-3.0%	\$ 71,828,161	-1.5%	3,751,093	-0.7%	\$ 848,800,169	2.3%
Pennsylvania	802,265	9.6%	\$ 152,920,281	13.4%	9,365,780	5.7%	\$ 1,873,845,340	8.3%
Utah	131,335	-2.6%	\$ 25,870,326	-2.3%	1,636,244	2.0%	\$ 331,753,762	4.8%
Virginia	489,477	-1.3%	\$ 120,038,178	1.8%	5,851,095	0.7%	\$ 1,436,015,373	5.2%
Vermont	38,133	-8.7%	\$ 8,438,441	-5.0%	449,177	-4.0%	\$ 100,968,012	1.7%
West Virginia	63,092	-6.6%	\$ 9,462,165	-6.9%	880,085	1.3%	\$ 135,157,986	4.1%
Wyoming	66,254	1.1%	\$ 10,510,895	4.3%	718,398	1.7%	\$ 114,894,122	5.8%

Cocktails, driven by Canned RTDs (+36.5% 9L volume and now 70% share of the category), continue to dominate the category growth of +20.0% 9L volume. Tequila 9L volume results remain positive at +7.7% and +8.1% in \$Vol and Cordials grew by 1.5% in 9L volume. All other major categories declined in 9L volume although Gin, Domestic Whiskey, Irish and Vodka posted positive \$Vol results.

Spirits - Categories	9L CMTY 2023-07	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>5,213,669</b>	<b>-0.4%</b>	<b>\$ 1,123,290,215</b>	<b>1.0%</b>	<b>61,884,386</b>	<b>0.6%</b>	<b>\$ 13,531,555,029</b>	<b>3.5%</b>
BRANDY / COGNAC	204,646	-12.9%	\$ 64,493,224	-17.9%	2,786,886	-10.7%	\$ 884,587,231	-12.1%
CACHACA	963	22.6%	\$ 245,236	39.5%	9,741	12.4%	\$ 2,382,935	14.3%
CANADIAN	460,339	-6.0%	\$ 93,298,897	-4.5%	6,104,134	-2.8%	\$ 1,237,145,961	0.3%
COCKTAILS	386,834	20.0%	\$ 31,977,412	22.7%	3,200,977	24.6%	\$ 275,298,739	28.1%
CORDIALS	353,329	1.5%	\$ 75,754,866	4.7%	4,550,657	1.7%	\$ 981,176,503	5.8%
DOMESTIC WHISKEY	735,461	-1.1%	\$ 212,576,658	3.4%	9,720,864	0.1%	\$ 2,797,193,791	5.5%
GIN	191,208	-5.9%	\$ 40,828,383	0.3%	2,136,741	-3.5%	\$ 437,561,440	3.2%
IRISH	73,845	-3.3%	\$ 26,352,815	0.2%	1,032,567	-0.9%	\$ 369,959,622	3.9%
NEUTRAL GRAIN SPIRIT	5,248	-6.1%	\$ 1,170,179	-2.0%	68,123	-11.0%	\$ 14,728,464	-8.0%
OTHER IMPORTED WHISKY	2,782	-10.2%	\$ 2,073,044	-10.8%	39,466	2.5%	\$ 29,884,368	16.6%
RUM	474,969	-6.7%	\$ 74,661,018	-3.3%	5,438,382	-3.5%	\$ 844,078,211	-0.3%
SCOTCH	84,474	-6.5%	\$ 35,683,714	-3.3%	1,132,056	-6.5%	\$ 479,799,847	-3.9%
TEQUILA	589,485	7.7%	\$ 209,601,299	8.1%	6,305,545	10.1%	\$ 2,241,869,889	13.6%
VODKA	1,650,066	-0.4%	\$ 254,546,269	0.5%	19,358,213	-0.2%	\$ 2,935,824,605	1.6%

Wines declined at -3.2% in 9L Volume with -1.7% in \$Vol returning a positive price mix +1.5%. Rolling 12-month 9L volume was -2.8% with \$Vol at +1.6% resulting in a +4.4% price mix.

Wine	9L CMTY 2023-07	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>1,251,913</b>	<b>-3.2%</b>	<b>\$ 133,899,911</b>	<b>-1.7%</b>	<b>17,135,752</b>	<b>-2.8%</b>	<b>\$ 1,884,621,465</b>	<b>1.6%</b>
Alabama	2,513	-10.0%	\$ 154,287	-1.5%	30,484	-4.3%	\$ 1,874,026	6.1%
Idaho	664	-9.6%	\$ 99,316	1.9%	8,668	-12.3%	\$ 1,248,957	-5.1%
Mont Co	64,324	-2.2%	\$ 9,079,213	0.3%	892,703	-1.3%	\$ 126,017,491	2.1%
Mississippi	107,867	1.1%	\$ 9,374,464	5.9%	1,493,562	-5.7%	\$ 134,023,572	2.3%
Montana	269	-25.6%	\$ 46,395	-31.8%	4,778	-8.1%	\$ 849,790	-1.1%
New Hampshire	234,489	-8.5%	\$ 27,337,174	-4.1%	2,882,798	-4.9%	\$ 332,885,226	-0.5%
Pennsylvania	696,350	-0.9%	\$ 70,405,780	-1.3%	9,835,639	-1.5%	\$ 1,049,975,061	2.4%
Utah	106,612	-8.2%	\$ 13,323,707	-5.5%	1,500,457	-3.5%	\$ 188,318,680	0.3%
Virginia	2,489	-0.7%	\$ 416,400	1.7%	32,322	-5.8%	\$ 5,403,144	4.2%
Vermont	646	-7.6%	\$ 89,739	0.4%	9,127	-5.8%	\$ 1,273,515	0.6%
West Virgina	359	-2.4%	\$ 23,744	7.4%	5,742	16.1%	\$ 344,662	19.5%
Wyoming	35,331	-7.6%	\$ 3,549,691	-1.2%	439,468	-5.8%	\$ 42,406,507	0.6%

The On-Premise spirits channel was +0.2% in July with +3.4% growth in \$vol resulting in a +3.2% price mix. Only Mississippi, Montgomery County, New Hampshire, North Carolina, Oregon, and Pennsylvania were positive in 9L volume. All states were up in \$Vol except for Idaho, Vermont, and Wyoming. The On-Premise wine channel was down -5.9% 9L volume with \$Vol also being negative at -0.7% and +5.2% price mix. Only Montgomery County and New Hampshire were up in both 9L volume and \$Vol.

Spirits - Markets	9L CMTY 2023-07	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>760,253</b>	<b>0.2%</b>	<b>\$ 185,841,928</b>	<b>3.4%</b>	<b>9,447,019</b>	<b>4.2%</b>	<b>\$ 2,316,755,841</b>	<b>9.5%</b>
Alabama	44,248	-3.0%	\$ 9,915,963	0.2%	576,883	6.4%	\$ 128,877,372	10.6%
Idaho	22,181	-2.9%	\$ 5,346,262	-1.5%	245,277	1.0%	\$ 58,312,918	7.6%
Michigan	110,919	-0.7%	\$ 27,395,419	2.9%	1,359,121	2.6%	\$ 332,860,521	6.7%
Mississippi	14,333	13.7%	\$ 2,173,741	16.1%	168,787	-1.0%	\$ 25,289,463	8.5%
Mont Co	8,767	6.5%	\$ 2,307,010	9.6%	111,109	10.0%	\$ 29,107,139	11.8%
New Hampshire	29,264	0.3%	\$ 5,976,876	4.7%	332,811	3.6%	\$ 68,703,652	7.9%
North Carolina	84,316	0.6%	\$ 23,183,818	3.3%	1,039,330	8.4%	\$ 289,312,580	14.7%
Ohio	140,244	-3.4%	\$ 36,507,726	0.2%	1,751,873	1.7%	\$ 449,947,227	6.4%
Oregon	64,960	6.0%	\$ 15,109,416	7.4%	748,805	6.2%	\$ 178,727,107	10.7%
Pennsylvania	126,105	3.9%	\$ 30,410,473	9.3%	1,720,046	5.2%	\$ 417,376,291	11.6%
Utah	10,982	-3.4%	\$ 3,193,070	1.7%	150,361	5.6%	\$ 43,841,164	11.8%
Vermont	7,687	-8.2%	\$ 1,991,569	-4.6%	94,939	4.2%	\$ 25,150,929	9.8%
Virginia	85,341	-1.2%	\$ 20,381,832	1.0%	1,038,436	3.8%	\$ 249,367,217	9.2%
Wyoming	10,905	-2.1%	\$ 1,948,753	-1.1%	109,240	-1.5%	\$ 19,882,261	1.9%