NABCA Monthly Report
April 2025 Control States Results

A huge improvement for Control States spirits sales in April with +3.3% growth in 9L volume compared to April of the previous year. The 9L volume growth was supported by a positive $Vol growth of 2.9%%, resulting in a negative price mix of -0.4%. Over the past 12 months, the decline in 9L volume was -0.8%, while dollar volume dropped -0.9%, yielding a close to flat price mix.

Selling days were a significant factor in April's growth. There were 3 additional selling days compared to the previous year, most notably Michigan (the largest Control spirits market) at +7 days. New Hampshire was -3 days and Pennsylvania -1 day. As detailed in the March results, Easter was in April this year vs March last year providing additional sales growth.

Spirits - Markets	9L CMTY 2025-04	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,873,623**	**3.3%**	**$ 1,074,541,845**	**2.9%**	**61,031,185**	**-0.8%**	**$ 13,521,957,889**	**-0.9%**
Alabama	307,189	2.8%	$ 67,074,752	0.6%	3,589,927	-0.5%	$ 805,463,133	-0.2%
Iowa	229,201	-1.4%	$ 35,382,015	-2.8%	2,749,884	-1.8%	$ 439,900,102	-2.5%
Idaho	102,927	-1.8%	$ 22,426,094	-0.3%	1,358,552	-2.7%	$ 300,400,510	-1.0%
Mont Co	40,489	7.3%	$ 9,100,155	4.8%	492,723	-2.0%	$ 117,219,662	-2.4%
Maine	98,717	-7.1%	$ 20,533,800	-7.1%	1,403,137	-2.3%	$ 293,555,124	-1.3%
Michigan	794,633	23.8%	$ 189,862,437	24.0%	8,933,571	-0.8%	$ 2,123,540,383	0.2%
Mississippi	184,573	1.0%	$ 32,044,810	1.8%	2,209,873	1.5%	$ 377,603,031	1.8%
Montana	82,739	-1.1%	$ 15,673,951	-0.3%	1,084,013	-0.6%	$ 210,737,741	-0.3%
North Carolina	620,346	2.9%	$ 148,999,465	1.7%	7,657,832	-0.2%	$ 1,849,725,181	0.1%
New Hampshire	155,823	-6.7%	$ 29,980,123	-6.3%	2,296,743	-1.1%	$ 450,498,695	-0.3%
Ohio	537,928	-2.8%	$ 136,208,163	-2.5%	6,795,202	-3.5%	$ 1,741,716,918	-2.9%
Oregon	276,467	-1.7%	$ 62,835,099	-1.3%	3,553,301	-3.2%	$ 810,732,692	-3.0%
Pennsylvania	720,700	3.3%	$ 142,878,008	-0.4%	9,568,064	2.5%	$ 1,868,525,212	-1.6%
Utah	118,544	0.1%	$ 23,861,514	0.2%	1,628,146	-0.6%	$ 331,319,359	-0.6%
Virginia	450,117	-0.6%	$ 112,038,764	0.9%	5,714,543	-1.6%	$ 1,455,366,866	0.3%
Vermont	29,873	-5.6%	$ 6,737,858	-5.8%	420,122	-3.6%	$ 98,473,785	-1.5%
West Virginia	68,233	-3.1%	$ 10,476,217	-4.8%	864,411	-2.0%	$ 132,680,562	-2.8%
Wyoming	55,123	0.1%	$ 8,428,620	-3.9%	711,143	-1.1%	$ 114,498,931	-2.1%

With positive volume came positive category growth for Cocktails +29.1% driven by Canned RTDs +39.8%, Cordials +3.3%, Domestic Whiskey +1.4% (+4.8% in $Vol), Imported Whisky +1.7%, Tequila +9/9% and Vodka +1.3%. All of these categories experienced positive $Vol growth.

Spirits - Categories	9L CMTY 2025-04	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,873,623**	**3.3%**	**$ 1,074,541,845**	**2.9%**	**61,031,185**	**-0.8%**	**$ 13,521,957,889**	**-0.9%**
BRANDY / COGNAC	197,551	-1.8%	$ 59,512,883	-3.2%	2,408,963	-8.0%	$ 717,645,485	-11.1%
CACHACA	701	-9.2%	$ 169,562	-13.7%	9,211	-6.2%	$ 2,269,718	-7.4%
CANADIAN	445,776	-2.2%	$ 91,089,323	-4.6%	5,688,717	-3.6%	$ 1,182,316,756	-2.8%
COCKTAILS	346,734	29.1%	$ 29,080,437	27.0%	4,496,781	26.1%	$ 375,174,945	23.2%
CORDIALS	353,048	3.3%	$ 75,572,222	3.7%	4,490,316	-1.8%	$ 995,574,784	-1.1%
DOMESTIC WHISKEY	738,658	1.4%	$ 224,142,333	4.8%	9,433,378	-2.0%	$ 2,866,161,830	0.3%
GIN	155,262	-1.3%	$ 33,295,205	0.1%	1,957,772	-4.6%	$ 418,960,470	-3.1%
IRISH	69,186	-2.0%	$ 24,550,752	-4.5%	960,072	-4.3%	$ 339,183,079	-6.4%
NEUTRAL GRAIN SPIRIT	3,992	-10.0%	$ 882,439	-10.2%	60,108	-8.7%	$ 13,211,526	-9.2%
OTHER IMPORTED WHISKY	2,862	1.7%	$ 1,933,807	5.7%	36,570	-1.0%	$ 26,139,857	-4.5%
RUM	375,750	-0.1%	$ 58,741,809	-2.4%	4,839,710	-6.8%	$ 763,873,406	-7.3%
SCOTCH	74,322	-2.4%	$ 31,404,299	-2.2%	1,010,263	-6.9%	$ 439,811,797	-6.3%
TEQUILA	617,651	9.9%	$ 218,052,538	9.3%	7,040,920	5.6%	$ 2,541,643,845	6.4%
VODKA	1,492,092	1.3%	$ 225,939,041	1.0%	18,598,118	-2.9%	$ 2,839,208,519	-3.1%

Wines also experienced a big improvement over previous months (not impacted by Michigan) with -1.4% in 9L volume and -2.4% in $Vol resulting in a negative -1.0% price mix. The 12-month results were -6.4% in 9L volume and -4.1% in $Vol with a positive price mix of +2.3%.

Wine	9L CMTY 2025-04	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,197,865**	**-1.4%**	**$ 132,213,240**	**-2.4%**	**15,294,144**	**-6.4%**	**$ 1,790,759,039**	**-4.1%**
Alabama	2,004	-10.4%	$ 145,593	4.5%	25,420	-12.1%	$ 1,779,781	-2.2%
Idaho	530	-0.1%	$ 82,339	2.4%	7,294	-5.1%	$ 1,164,547	-0.6%
Mont Co	65,315	-4.7%	$ 9,927,662	6.8%	808,118	-6.0%	$ 123,160,238	-1.1%
Mississippi	113,783	-2.1%	$ 10,324,012	-3.9%	1,355,878	-2.0%	$ 124,294,866	-2.0%
Montana	364	35.0%	$ 60,611	55.0%	5,030	7.7%	$ 897,849	5.5%
New Hampshire	196,822	1.2%	$ 22,578,169	-2.9%	2,658,195	-5.3%	$ 325,166,840	-3.1%
Pennsylvania	684,984	-1.9%	$ 73,333,232	-3.9%	8,594,173	-7.8%	$ 982,015,054	-5.6%
Utah	100,746	-0.2%	$ 12,538,295	1.8%	1,399,781	-3.8%	$ 185,542,859	-1.1%
Virginia	2,294	-4.1%	$ 434,496	4.3%	31,025	-2.3%	$ 5,923,003	8.4%
Vermont	592	-6.9%	$ 87,585	-1.5%	8,254	-6.2%	$ 1,274,042	2.3%
West Virginia	368	-1.0%	$ 26,891	7.1%	4,726	-8.1%	$ 328,915	-4.4%
Wyoming	30,064	1.6%	$ 2,673,856	-2.2%	396,242	-5.5%	$ 39,208,619	-5.3%

The On-Premise spirits channel performance improved in April in both 9L volume at +4.7% and $Vol +2.7%, leading to a negative price mix of -2.0%. Over 12 months, the declines were -2.0% in 9L volume and -2.7% in $Vol. On-premise wine improved greatly, in line with the overall category performance (not impacted by the additional Michigan days) in 9L volume at -1.1%, and $Vol -1.4%, resulting in a negative price mix of -0.3%. Over the 12-month period, wine 9L volume was down -6.9%, but $Vol fell only -4.1%.

Spirits - Markets	9L CMTY 2025-04	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**820,013**	**4.7%**	**$ 198,426,496**	**2.7%**	**9,234,494**	**-2.0%**	**$ 2,277,696,486**	**-2.7%**
Alabama	56,485	4.9%	$ 12,186,953	3.5%	581,371	-0.2%	$ 129,143,917	-1.4%
Idaho	18,034	-2.0%	$ 4,329,395	-1.5%	230,594	-3.1%	$ 56,328,070	-1.5%
Michigan	130,006	23.7%	$ 32,203,573	23.4%	1,350,270	-0.7%	$ 335,887,288	-0.6%
Mississippi	17,167	1.2%	$ 2,586,555	3.2%	180,563	10.0%	$ 27,634,411	9.0%
Mont Co	9,755	7.2%	$ 2,524,719	15.7%	107,141	-2.4%	$ 27,920,362	-3.0%
New Hampshire	26,632	0.3%	$ 5,698,633	1.3%	328,892	-2.7%	$ 70,203,201	-0.8%
North Carolina	100,440	9.4%	$ 26,476,282	2.5%	1,065,371	1.5%	$ 290,168,839	-1.8%
Ohio	145,157	-1.1%	$ 36,702,062	-2.5%	1,670,799	-3.6%	$ 432,971,951	-4.0%
Oregon	59,637	3.8%	$ 14,296,619	4.1%	717,098	-2.3%	$ 170,959,084	-2.7%
Pennsylvania	140,304	-1.1%	$ 33,764,044	-4.4%	1,643,525	-4.7%	$ 399,755,499	-6.3%
Utah	10,825	2.9%	$ 3,125,302	2.5%	146,459	-0.2%	$ 43,592,176	0.2%
Vermont	6,328	-3.7%	$ 1,636,329	-4.7%	93,456	-2.0%	$ 25,515,864	-0.4%
Virginia	91,699	1.4%	$ 21,544,753	-1.3%	1,015,164	-1.8%	$ 248,310,967	-1.6%
Wyoming	7,545	-5.6%	$ 1,351,275	-5.8%	103,789	-4.5%	$ 19,304,858	-4.4%