

# NABCA

## NABCA Monthly Report - April 2026 Control States Results

Control States spirits sales declined in April compared to March, with 9L volume down -1.2% and \$Vol down -3.9%, resulting in a -2.7% price mix. Performance was influenced by four less selling days overall with one less selling day in Montgomery County, MD, five less selling days in Michigan, and two additional selling days in Utah. On a rolling 12-month basis, spirits remain negative down -1.3% in 9L volume and down -3.2% in \$Vol, yielding a -1.9% price mix.

Spirits - Markets	9L CMTY 2026-04	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>4,813,611</b>	<b>-1.2%</b>	<b>\$ 1,032,948,142</b>	<b>-4.0%</b>	<b>60,231,073</b>	<b>-1.3%</b>	<b>\$ 13,091,016,828</b>	<b>-3.2%</b>
Alabama	313,355	2.0%	\$ 67,354,535	-0.3%	3,632,115	1.2%	\$ 797,568,804	-1.0%
Iowa	211,200	-7.9%	\$ 33,607,391	-5.1%	2,633,743	-4.2%	\$ 419,376,634	-4.7%
Idaho	100,794	-2.1%	\$ 22,366,702	-0.4%	1,319,026	-2.9%	\$ 293,950,912	-2.2%
Mont Co	41,809	3.3%	\$ 8,921,160	-2.0%	520,564	5.7%	\$ 113,100,917	-3.5%
Maine	96,109	-2.6%	\$ 19,976,001	-2.7%	1,357,695	-3.2%	\$ 282,025,035	-3.9%
Michigan	672,729	-15.3%	\$ 157,500,487	-17.0%	8,459,436	-5.3%	\$ 1,976,632,338	-6.9%
Mississippi	214,274	16.1%	\$ 33,648,052	5.0%	2,261,585	2.3%	\$ 374,871,534	-0.7%
Montana	81,988	-0.9%	\$ 14,823,007	-5.7%	1,073,831	-0.9%	\$ 204,373,383	-3.0%
North Carolina	654,167	5.5%	\$ 147,836,949	-0.7%	7,784,075	1.7%	\$ 1,824,746,262	-1.3%
New Hampshire	137,693	-11.6%	\$ 26,331,744	-12.2%	2,235,294	-2.7%	\$ 434,695,820	-3.5%
Ohio	527,747	-1.9%	\$ 134,120,175	-1.5%	6,555,376	-3.5%	\$ 1,667,216,078	-4.3%
Oregon	270,863	-2.0%	\$ 60,595,076	-3.6%	3,456,922	-2.7%	\$ 780,069,553	-3.8%
Pennsylvania	748,958	3.9%	\$ 144,333,394	0.9%	9,673,294	1.1%	\$ 1,845,470,018	-1.3%
Utah	130,630	10.2%	\$ 24,589,156	3.0%	1,653,972	1.6%	\$ 326,794,518	-1.4%
Virginia	457,347	1.6%	\$ 111,870,269	-0.2%	5,645,241	-1.2%	\$ 1,414,992,075	-2.8%
Vermont	28,966	-3.0%	\$ 6,594,157	-2.2%	404,824	-3.6%	\$ 95,451,096	-3.1%
West Virginia	71,739	5.1%	\$ 10,324,266	-1.5%	860,422	-0.5%	\$ 128,653,655	-3.0%
Wyoming	53,243	-3.4%	\$ 8,155,619	-4.3%	703,658	-1.1%	\$ 111,028,196	-3.1%

From a category perspective, cocktails (driven by Canned RTDs) and Tequila continued to show improvement. Cachaca and Neutral Grain Spirit also showed improvement, albeit on a smaller base. All other major categories declined. Notably Scotch was down -9.8% in 9L volume due to less promotional activity by New Hampshire that contributed to a +20.7% 9L volume surge in March.

Spirits - Categorie	9L CMTY 2026-04	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>4,813,611</b>	<b>-1.2%</b>	<b>\$ 1,032,948,142</b>	<b>-4.0%</b>	<b>60,231,073</b>	<b>-1.3%</b>	<b>\$ 13,091,016,828</b>	<b>-3.2%</b>
BRANDY / COGNAC	180,670	-8.6%	\$ 52,768,324	-11.4%	2,228,169	-7.5%	\$ 651,680,330	-9.2%
CACHACA	809	15.3%	\$ 205,318	19.9%	9,172	-0.4%	\$ 2,288,534	0.8%
CANADIAN	301,485	-9.2%	\$ 65,983,688	-8.2%	3,901,097	-7.6%	\$ 861,754,018	-7.7%
COCKTAILS	467,089	34.7%	\$ 38,727,669	33.1%	5,541,708	23.2%	\$ 460,365,131	22.7%
CORDIALS	342,073	-3.0%	\$ 72,758,725	-3.8%	4,409,419	-1.7%	\$ 972,742,105	-2.3%
DOMESTIC WHISKY	825,453	-3.2%	\$ 237,906,657	-2.3%	10,547,381	-3.2%	\$ 3,025,048,699	-2.9%
GIN	147,675	-5.0%	\$ 32,370,365	-3.0%	1,860,649	-5.0%	\$ 402,674,687	-3.9%
IRISH	65,536	-5.3%	\$ 23,128,099	-5.8%	916,330	-4.6%	\$ 319,654,371	-5.8%
NEUTRAL GRAIN SPIRIT	4,116	3.1%	\$ 903,170	2.3%	56,970	-5.2%	\$ 12,488,116	-5.5%
OTHER IMPORTED	2,618	-8.6%	\$ 1,762,650	-8.9%	34,446	-5.8%	\$ 24,403,491	-6.7%
RUM	341,091	-9.2%	\$ 53,791,205	-8.5%	4,513,170	-6.8%	\$ 708,798,622	-7.2%
SCOTCH	67,042	-9.8%	\$ 28,568,915	-9.2%	946,620	-6.3%	\$ 408,784,903	-7.1%
TEQUILA	619,388	0.2%	\$ 208,131,932	-4.8%	7,121,040	1.1%	\$ 2,484,696,534	-2.3%
VODKA	1,448,525	-2.9%	\$ 215,891,416	-4.5%	18,144,574	-2.4%	\$ 2,754,800,543	-3.0%

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Wine sales declined in April, with 9L volume down -4.1% and \$Vol declining -3.8%, resulting in a +0.3% price mix. Utah's two additional selling days have impacted this. On a rolling 12-month basis, wine trends show a moderate decline, with 9L volume at -4.6%, \$Vol at -3.2%, and price mix remaining flat at +1.4%.

Wine	9L CMTY 2026-04	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>1,148,241</b>	<b>-4.1%</b>	<b>\$ 130,756,028</b>	<b>-3.8%</b>	<b>14,583,119</b>	<b>-4.7%</b>	<b>\$ 1,736,330,759</b>	<b>-3.2%</b>
Alabama	1,988	-0.8%	\$ 148,960	1.9%	23,644	-7.0%	\$ 1,786,997	0.4%
Idaho	526	-0.7%	\$ 86,301	1.9%	7,020	-3.8%	\$ 1,188,377	1.8%
Mont Co	64,519	-1.2%	\$ 9,895,018	-0.3%	775,703	-4.0%	\$ 118,742,582	-3.6%
Mississippi	104,910	-7.8%	\$ 10,074,879	-2.5%	1,297,465	-4.3%	\$ 119,781,892	-3.6%
Montana	419	15.3%	\$ 73,191	13.0%	5,546	10.3%	\$ 991,973	10.0%
New Hampshire	178,960	-9.1%	\$ 21,378,111	-5.3%	2,504,188	-5.8%	\$ 309,886,254	-4.7%
Pennsylvania	659,810	-3.7%	\$ 72,740,801	-5.3%	8,157,240	-5.1%	\$ 953,834,977	-3.2%
Utah	106,694	5.9%	\$ 13,343,036	5.3%	1,393,189	-0.5%	\$ 185,353,587	-0.2%
Virginia	2,232	-2.7%	\$ 436,234	0.4%	29,651	-4.4%	\$ 5,783,556	-2.4%
Vermont	534	-9.7%	\$ 84,873	-3.1%	7,810	-5.4%	\$ 1,251,543	-1.8%
West Virginia	365	-0.8%	\$ 26,633	-1.2%	4,459	-5.6%	\$ 329,989	0.3%
Wyoming	27,284	-9.3%	\$ 2,467,927	-8.5%	377,198	-4.8%	\$ 37,397,301	-4.7%

On-Premise channel spirits sales are mixed, with 9L volume increasing +0.6% and \$Vol declining -1.7% resulting in a -2.3% price mix. Only 6 of the 14 reporting states recorded declines. Rolling 12-month on-premise results also continue to be mixed, with 9L volume up modestly +0.2% and \$Vol down -1.8%, resulting in a -2.0% price mix.

On-Premise channel wine sales remain negative; however, 9L volume improved to -3.8% and \$Vol modestly increased +0.1%, generating a +3.9% price mix. On a rolling 12-month basis, on-premise wine finished down -3.8% in 9L volume and -2.8% in \$Vol yielding a +1.0% price mix.

Spirits - On Premise	9L CMTY 2026-04	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>825,171</b>	<b>0.6%</b>	<b>\$ 195,094,734</b>	<b>-1.7%</b>	<b>9,253,784</b>	<b>0.2%</b>	<b>\$ 2,236,567,810</b>	<b>-1.8%</b>
Alabama	63,587	12.7%	\$ 13,212,040	8.4%	619,194	6.5%	\$ 134,017,406	3.8%
Idaho	18,482	2.5%	\$ 4,552,314	5.2%	231,486	0.4%	\$ 56,937,803	1.1%
Michigan	113,768	-12.5%	\$ 27,512,974	-14.6%	1,300,292	-3.7%	\$ 322,329,582	-4.0%
Mississippi	14,349	-16.4%	\$ 2,038,912	-21.2%	176,591	-2.2%	\$ 26,672,543	-3.5%
Mont Co	10,506	7.7%	\$ 2,536,123	0.5%	107,653	0.5%	\$ 27,176,427	-2.7%
New Hampshire	25,601	-3.9%	\$ 5,307,250	-6.9%	327,223	-0.5%	\$ 68,908,076	-1.8%
North Carolina	108,736	8.3%	\$ 27,224,851	2.8%	1,126,614	5.8%	\$ 292,344,436	0.8%
Ohio	145,713	0.4%	\$ 36,116,371	-1.6%	1,639,169	-1.9%	\$ 419,079,792	-3.2%
Oregon	58,636	-1.7%	\$ 13,709,130	-4.1%	711,087	-0.8%	\$ 166,711,674	-2.5%
Pennsylvania	146,476	4.4%	\$ 34,518,184	2.2%	1,658,679	0.9%	\$ 390,773,388	-2.2%
Utah	11,562	6.8%	\$ 3,188,815	2.0%	148,460	1.4%	\$ 43,102,849	-1.1%
Vermont	6,188	-2.2%	\$ 1,622,584	-0.8%	91,761	-1.8%	\$ 25,191,454	-1.3%
Virginia	94,307	2.8%	\$ 22,279,607	3.4%	1,014,441	-0.1%	\$ 244,745,788	-1.4%
Wyoming	7,260	-3.8%	\$ 1,275,577	-5.6%	101,134	-2.6%	\$ 18,576,593	-3.8%