NABCA

# NABCA Monthly Report - August 2026 Control States Results

Control state results were generally weaker in August. While Michigan benefited from three additional selling days compared to the prior year, overall performance remained negative. Continued promotional activity in New Hampshire and increased consumer demand associated with the start of the college football season in West Virginia provided two notable bright spots. Spirits sales declined in August compared to the prior year, with 9L volume down -3.0% and $Vol down -5.5%, resulting in a -2.5% price mix. Rolling 12-month spirits results remained negative, with 9L volume down -0.8% and $Vol down -2.8%, producing a -2.0% price mix.

| Spirits - Markets | 9L CMTY 2026-08 | 9L % Chg | Shelf $ CMTY | Shelf $ % Chg | 9L R12TY | 9L R12 % | Shelf $ R12TY | Shelf $ % Chg |
|---|---|---|---|---|---|---|---|---|
| **Total Control** | **5,132,434** | **-3.0%** | **$ 1,057,421,771** | **-5.5%** | **60,238,303** | **-0.8%** | **$12,992,070,439** | **-2.8%** |
| Alabama | 300,704 | -1.2% | $ 60,342,004 | -7.4% | 3,660,282 | 1.8% | $ 792,959,374 | -1.3% |
| Iowa | 213,804 | -3.7% | $ 32,961,992 | -3.5% | 2,613,300 | -3.0% | $ 417,017,678 | -3.3% |
| Idaho | 112,153 | -5.4% | $ 25,119,836 | -4.0% | 1,306,949 | -3.0% | $ 292,864,781 | -2.1% |
| Mont Co | 42,074 | -7.8% | $ 8,102,413 | -14.3% | 517,204 | 1.4% | $ 110,814,456 | -4.8% |
| Maine | 131,512 | -4.3% | $ 26,734,475 | -4.2% | 1,345,089 | -2.9% | $ 278,756,718 | -3.7% |
| Michigan | 704,313 | -2.4% | $ 160,172,658 | -3.8% | 8,415,384 | -3.5% | $ 1,957,341,602 | -5.2% |
| Mississippi | 172,375 | -3.3% | $ 27,154,569 | -7.4% | 2,245,576 | 1.5% | $ 369,905,059 | -1.6% |
| Montana | 104,201 | 5.8% | $ 18,865,744 | 0.5% | 1,081,842 | -0.1% | $ 202,714,212 | -3.2% |
| North Carolina | 679,660 | -2.0% | $ 144,211,470 | -7.3% | 7,912,658 | 2.9% | $ 1,813,294,243 | -1.5% |
| New Hampshire | 242,078 | 10.3% | $ 45,774,819 | 13.7% | 2,299,966 | 3.5% | $ 447,903,458 | 3.2% |
| Ohio | 529,839 | -6.7% | $ 132,525,048 | -7.5% | 6,481,589 | -3.4% | $ 1,646,788,416 | -4.3% |
| Oregon | 296,767 | -4.4% | $ 64,870,805 | -6.1% | 3,440,805 | -2.4% | $ 771,030,511 | -3.9% |
| Pennsylvania | 828,274 | -6.2% | $ 146,144,996 | -7.7% | 9,643,086 | -0.6% | $ 1,829,113,725 | -2.2% |
| Utah | 140,449 | 0.3% | $ 26,130,672 | -4.1% | 1,649,833 | 1.4% | $ 321,338,154 | -2.4% |
| Virginia | 457,531 | -5.2% | $ 110,900,448 | -6.7% | 5,645,790 | -0.6% | $ 1,407,730,555 | -2.3% |
| Vermont | 33,631 | -5.7% | $ 7,806,113 | -6.9% | 399,457 | -3.8% | $ 94,093,195 | -3.8% |
| West Virginia | 77,667 | 11.1% | $ 9,853,419 | -4.6% | 875,341 | 1.8% | $ 127,883,431 | -2.9% |
| Wyoming | 65,402 | 4.1% | $ 9,750,291 | 0.0% | 704,152 | -0.8% | $ 110,520,872 | -2.6% |

Category performance was broadly negative. Cocktails, led by canned ready-to-drink (RTD) products, continued to be the primary growth driver, with 9L volume increasing +12.4% and $Vol rising +8.4%. Irish Whiskey and Cachaca also posted gains. All other major categories declined during the month.

| Spirits - Categorie | 9L CMTY 2026-08 | 9L % Chg | Shelf $ CMTY | Shelf $ % Chg | 9L R12TY | 9L R12 % | Shelf $ R12TY | Shelf $ % Chg |
|---|---|---|---|---|---|---|---|---|
| **Total Control** | **5,132,434** | **-3.0%** | **$ 1,057,421,771** | **-5.5%** | **60,238,303** | **-0.8%** | **$12,992,070,439** | **-2.8%** |
| BRANDY / COGNA | 160,643 | -11.4% | $ 47,182,453 | -9.6% | 2,177,224 | -6.9% | $ 638,351,565 | -7.6% |
| CACHACA | 959 | 15.3% | $ 240,436 | 12.6% | 9,662 | 6.4% | $ 2,455,558 | 11.1% |
| CANADIAN | 284,277 | -12.7% | $ 61,767,932 | -14.6% | 3,798,367 | -8.4% | $ 836,156,369 | -9.2% |
| COCKTAILS | 669,419 | 12.4% | $ 50,734,884 | 8.4% | 6,017,286 | 21.3% | $ 495,921,868 | 21.2% |
| CORDIALS | 350,873 | -1.3% | $ 76,567,986 | -1.4% | 4,406,740 | -0.7% | $ 975,150,938 | -1.0% |
| DOMESTIC WHISK | 803,723 | -7.3% | $ 225,751,527 | -6.8% | 10,428,095 | -3.0% | $ 3,005,849,717 | -2.4% |
| GIN | 162,119 | -5.7% | $ 35,774,349 | -5.1% | 1,828,466 | -4.3% | $ 397,191,127 | -3.3% |
| IRISH | 69,372 | 0.2% | $ 23,763,576 | -1.7% | 914,396 | -3.4% | $ 318,116,586 | -4.1% |
| NEUTRAL GRAIN S | 4,697 | -0.6% | $ 1,011,296 | -2.8% | 56,899 | -2.2% | $ 12,441,747 | -2.6% |
| OTHER IMPORTED | 2,516 | -10.5% | $ 1,729,689 | -21.4% | 34,000 | -6.9% | $ 23,694,545 | -8.6% |
| RUM | 367,399 | -8.7% | $ 57,293,023 | -8.4% | 4,427,501 | -5.8% | $ 695,394,169 | -5.8% |
| SCOTCH | 74,593 | -9.9% | $ 30,966,154 | -9.7% | 932,378 | -5.2% | $ 402,346,158 | -6.3% |
| TEQUILA | 630,343 | -0.3% | $ 210,979,062 | -4.2% | 7,177,742 | 1.5% | $ 2,466,967,343 | -2.7% |
| VODKA | 1,551,426 | -3.0% | $ 233,583,550 | -4.6% | 18,028,939 | -1.7% | $ 2,721,129,445 | -2.8% |

# NABCA

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Wine sales continued to soften in August, with 9L volume decreasing -6.4% and $Vol declining -5.0%, yielding a positive +1.4% price mix. Rolling 12-month wine trends remained negative, with 9L volume down -3.9% and $Vol decreasing -2.2%, resulting in a positive +1.7% price mix.

| Wine | 9L CMTY 2026-08 | 9L % Chg | Shelf $ CMTY | Shelf $ % Chg | 9L R12TY | 9L R12 % | Shelf $ R12TY | Shelf $ % Chg |
|---|---|---|---|---|---|---|---|---|
| **Total Control** | **1,089,884** | **-6.4%** | **$ 130,835,525** | **-5.0%** | **14,343,336** | **-3.9%** | **$ 1,723,179,858** | **-2.2%** |
| Alabama | 1,750 | -12.8% | $ 135,103 | -2.2% | 23,109 | -4.8% | $ 1,786,446 | -0.1% |
| Idaho | 575 | -4.6% | $ 99,470 | -1.9% | 7,030 | -2.9% | $ 1,205,612 | 1.8% |
| Mont Co | 55,425 | -6.2% | $ 8,040,590 | -8.2% | 758,223 | -5.1% | $ 115,973,402 | -4.9% |
| Mississippi | 97,605 | -4.4% | $ 9,093,240 | -3.0% | 1,262,177 | -4.7% | $ 117,482,862 | -3.2% |
| Montana | 375 | -9.2% | $ 67,153 | -3.1% | 5,289 | 0.2% | $ 976,538 | 5.6% |
| New Hampshire | 213,409 | -3.0% | $ 27,338,734 | 0.4% | 2,481,075 | -4.2% | $ 310,400,298 | -2.0% |
| Pennsylvania | 577,652 | -8.0% | $ 66,957,868 | -8.7% | 8,024,819 | -3.8% | $ 945,919,304 | -2.1% |
| Utah | 106,718 | -7.1% | $ 15,064,950 | 2.1% | 1,366,672 | -1.9% | $ 184,749,691 | -0.2% |
| Virginia | 2,328 | -5.5% | $ 463,321 | -2.2% | 29,407 | -4.4% | $ 5,801,226 | -2.7% |
| Vermont | 579 | -2.6% | $ 99,820 | 7.9% | 7,693 | -4.4% | $ 1,270,779 | 1.2% |
| West Virginia | 327 | -4.5% | $ 24,534 | -4.2% | 4,403 | -5.1% | $ 329,293 | -1.8% |
| Wyoming | 33,139 | -0.5% | $ 3,450,524 | 0.4% | 373,434 | -4.1% | $ 37,282,851 | -3.3% |

The on-premise channel was also down for spirits in August, with 9L volume declining -1.6% and $Vol decreasing -4.4%. Rolling 12-month on-premise spirits performance remained mixed, with 9L volume up +0.5% and $Vol down -1.8%, resulting in a -2.3% price mix.

On-premise wine results were mixed in August. 9L volume declined -3.1% while $Vol was essentially flat, generating a positive +3.1% price mix. Longer-term trends remained challenging, with rolling 12-month 9L volume down -3.9% and $Vol decreasing -2.0%, resulting in a positive +1.9% price mix.

| Spirits - On Premise | 9L CMTY 2026-08 | 9L % Chg | Shelf $ CMTY | Shelf $ % Chg | 9L R12TY | 9L R12 % | Shelf $ R12TY | Shelf $ % Chg |
|---|---|---|---|---|---|---|---|---|
| **Total Control** | **786,557** | **-1.6%** | **$ 183,150,322** | **-4.4%** | **9,263,812** | **0.5%** | **$ 2,219,904,745** | **-1.8%** |
| Alabama | 52,021 | -2.5% | $ 10,240,004 | -9.7% | 615,869 | 4.5% | $ 131,601,214 | 1.1% |
| Idaho | 21,730 | 1.0% | $ 5,444,506 | 2.0% | 233,619 | 1.6% | $ 57,780,982 | 2.7% |
| Michigan | 117,005 | 1.9% | $ 28,460,497 | 0.5% | 1,307,265 | -1.5% | $ 322,303,760 | -2.6% |
| Mississippi | 13,850 | -8.9% | $ 2,047,071 | -10.7% | 164,129 | -10.2% | $ 24,853,199 | -10.8% |
| Mont Co | 8,511 | -5.1% | $ 1,871,457 | -12.6% | 107,825 | 0.7% | $ 26,669,624 | -3.3% |
| New Hampshire | 29,328 | 0.0% | $ 5,897,844 | -3.0% | 326,089 | -1.0% | $ 67,884,631 | -3.1% |
| North Carolina | 99,123 | 2.7% | $ 23,385,266 | -5.2% | 1,158,021 | 6.6% | $ 291,844,383 | 0.6% |
| Ohio | 135,189 | -4.2% | $ 34,170,033 | -6.1% | 1,629,375 | -1.2% | $ 414,588,052 | -2.8% |
| Oregon | 63,151 | -0.4% | $ 14,398,416 | -2.5% | 711,051 | -0.1% | $ 165,126,004 | -2.2% |
| Pennsylvania | 132,434 | -2.9% | $ 30,263,570 | -4.6% | 1,658,217 | 0.7% | $ 387,783,352 | -2.1% |
| Utah | 12,204 | -0.5% | $ 3,454,376 | -0.3% | 148,320 | 0.3% | $ 42,900,623 | -1.8% |
| Vermont | 8,095 | -3.3% | $ 2,163,596 | -3.7% | 91,009 | -2.3% | $ 24,946,466 | -2.0% |
| Virginia | 84,128 | -5.2% | $ 19,630,587 | -7.0% | 1,011,771 | -0.5% | $ 243,181,734 | -1.6% |
| Wyoming | 9,789 | 5.4% | $ 1,723,100 | 1.6% | 101,252 | -2.4% | $ 18,440,723 | -3.8% |