

# NABCA Monthly Report

## December 2022 Control States Results

Total Control States spirits sales declined by -3.2% in 9L volume with +0.7% in \$Vol showing a resultant +3.9% price mix. The rolling 12-month results declined by -0.6% in 9L volume with +2.2% in \$Vol.

The selling days change vs last year was -6 days, 7 less days in Michigan (-19.1% 9L volume) and 1 more day in Utah (+7.2% 9L volume).

Spirits - Markets	9L CMTY 2022-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 % Chg	Shelf \$ R12TY	Shelf \$ % Chg
Totals	6,031,891	-3.2%	\$ 1,397,874,983	0.7%	61,665,761	-0.6%	\$ 13,238,886,393	2.2%
Alabama	355,299	-0.2%	\$ 84,837,984	3.7%	3,513,902	0.9%	\$ 761,695,498	3.5%
Iowa	257,968	-5.0%	\$ 43,093,223	1.8%	2,811,120	-1.8%	\$ 438,505,810	2.4%
Idaho	151,462	-0.7%	\$ 34,243,169	5.1%	1,431,977	-1.6%	\$ 297,621,583	3.9%
Mont Co	54,959	5.2%	\$ 14,091,937	7.9%	510,408	7.9%	\$ 119,104,076	7.2%
Maine	131,921	-7.7%	\$ 27,235,300	-1.4%	1,449,261	-1.0%	\$ 288,712,691	5.0%
Michigan	777,670	-19.1%	\$ 186,382,282	-18.4%	9,165,695	-2.4%	\$ 2,125,985,551	-1.8%
Mississippi	183,278	-19.8%	\$ 31,327,347	-15.4%	2,268,332	-8.9%	\$ 381,913,784	-2.3%
Montana	101,417	-4.3%	\$ 20,017,831	-1.5%	1,096,729	1.8%	\$ 207,116,038	5.5%
North Carolina	818,729	3.3%	\$ 209,151,962	10.0%	7,545,373	1.8%	\$ 1,758,346,555	7.1%
New Hampshire	207,646	-3.6%	\$ 42,767,363	-0.8%	2,338,613	-7.0%	\$ 440,451,170	-7.2%
Ohio	726,573	0.3%	\$ 191,538,158	4.7%	7,156,185	-1.7%	\$ 1,763,324,269	0.8%
Oregon	387,975	-2.8%	\$ 93,879,086	0.8%	3,762,933	-1.6%	\$ 841,003,409	2.9%
Pennsylvania	858,360	3.3%	\$ 181,006,400	5.2%	8,991,265	3.1%	\$ 1,741,820,542	2.7%
Utah	201,101	7.2%	\$ 40,593,346	9.7%	1,729,801	6.2%	\$ 324,929,041	6.0%
Virginia	628,953	2.8%	\$ 163,139,681	7.5%	5,839,089	-0.4%	\$ 1,402,114,577	3.8%
Vermont	48,559	-3.6%	\$ 11,658,754	2.3%	460,848	-1.0%	\$ 100,108,424	3.0%
West Virginia	78,354	-5.4%	\$ 12,507,369	-2.9%	880,152	-1.5%	\$ 133,949,191	2.0%
Wyoming	61,667	-5.6%	\$ 10,403,792	0.1%	714,076	0.1%	\$ 112,184,183	3.6%

Only Cocktails, Tequila, and Cachaca, reported growth for December. The decline in Brandy/Cognac continues mostly in the Cognac category -25.5% 9L volume. The declines in the scotch category are in both the blended -7.9% and single malt -15.2% minor categories.

Spirits - Categories	9L CMTY 2022-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 % Chg	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	6,031,889	-3.2%	\$ 1,397,873,127	0.7%	61,665,739	-0.6%	\$ 13,238,829,515	2.2%
BRANDY / COGNAC	279,864	-15.3%	\$ 88,302,797	-16.4%	2,944,132	-15.7%	\$ 941,750,836	-17.2%
CACHACA	901	15.9%	\$ 210,360	10.7%	8,889	-4.4%	\$ 2,093,353	-8.9%
CANADIAN	638,935	-3.3%	\$ 135,234,306	1.8%	6,263,302	-1.9%	\$ 1,248,627,884	0.9%
COCKTAILS	276,504	14.8%	\$ 24,991,643	17.6%	2,943,413	30.1%	\$ 239,548,150	28.6%
CORDIALS	541,141	-0.8%	\$ 125,199,013	3.9%	4,500,507	0.0%	\$ 947,830,306	2.3%
DOMESTIC WHISKEY	1,069,872	-1.9%	\$ 330,272,383	5.1%	9,733,756	0.0%	\$ 2,729,540,492	6.5%
GIN	190,387	-8.3%	\$ 40,061,307	-1.0%	2,170,572	-5.6%	\$ 426,856,527	0.2%
IRISH	107,706	-2.9%	\$ 39,634,637	3.2%	1,045,936	1.5%	\$ 364,179,300	5.0%
NEUTRAL GRAIN SPIRIT	7,734	-16.2%	\$ 1,659,901	-15.0%	71,085	-15.2%	\$ 15,050,919	-11.3%
OTHER IMPORTED WHISKY	5,313	-3.7%	\$ 4,006,389	-1.2%	39,354	7.1%	\$ 27,613,997	14.1%
RUM	523,892	-8.1%	\$ 82,816,020	-5.0%	5,543,119	-4.4%	\$ 841,650,835	-1.7%
SCOTCH	130,374	-10.3%	\$ 63,040,543	-6.9%	1,173,889	-6.3%	\$ 488,508,100	-3.7%
TEQUILA	534,574	6.1%	\$ 197,730,178	9.7%	5,938,198	8.9%	\$ 2,079,590,366	13.7%
VODKA	1,724,692	-4.7%	\$ 264,713,650	-3.1%	19,289,587	-1.9%	\$ 2,885,988,449	-0.5%

Wines have slightly slowed their decline with -0.9% in 9L volume and -1.9% in \$Vol for the month showing a negative price mix of -1.0%. The rolling 12-month result is -4.8% in 9L volume and -1.9% in \$Vol. The six markets where the state is the sole wholesaler for wines (highlighted in the table below) account for 99.3% of the \$Vol.

Wine - Markets	9L CMTY 2022-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 % Chg	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,817,058	-0.9%	202,473,968	-1.8%	17,378,725	-4.8%	1,840,849,006	-1.9%
Alabama	3,133	-3.9%	203,369	8.7%	31,455	-4.3%	1,827,014	2.5%
Idaho	1,049	-13.1%	155,229	-5.9%	9,372	-8.4%	1,292,111	-3.0%
Mont Co	96,910	1.3%	14,454,824	3.9%	902,442	-1.7%	124,418,956	1.0%
Mississippi	133,916	-0.6%	12,199,629	6.5%	1,531,488	-7.1%	132,421,288	0.2%
Montana	498	-30.8%	84,267	-23.7%	4,994	-10.0%	884,687	5.3%
New Hampshire	270,995	-5.5%	32,813,295	-0.8%	2,960,122	-6.6%	333,037,252	-3.4%
Pennsylvania	1,073,912	0.6%	113,187,387	-4.5%	9,905,739	-4.2%	1,010,028,180	-2.9%
Utah	187,807	-0.6%	24,197,206	3.3%	1,535,461	-2.7%	188,359,576	4.0%
Virginia	4,145	6.0%	734,875	12.3%	31,938	-30.3%	5,217,275	-11.8%
Vermont	1,118	-6.8%	172,176	2.1%	9,148	-7.2%	1,223,849	-0.3%
West Virginia	730	44.7%	40,093	49.0%	5,420	10.6%	314,851	7.4%
Wyoming	42,845	-14.5%	4,231,618	-9.1%	451,146	-9.1%	41,823,968	-5.2%

For spirits, the On-Premise channel declined -0.3% in 9L volume, as a result of less selling days in Michigan, with \$Vol growth of +5.8% showing a positive price mix of +6.1%. Rolling 12-month 9L volume is at +11.2% with \$Vol at +17.1%. The channel represents 16.6% of the total Control States spirits value for December remaining steady with November for Rolling 12-months. Wines in the channel were up from November with +4.4% in 9L volume and +8.5% in \$Vol.

Spirits - Markets	9L CMTY 2022-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 % Chg	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	\$ 729,961	-0.3%	\$ 182,947,117	5.8%	\$ 9,218,652	11.2%	\$ 2,197,634,831	17.1%
Alabama	\$ 43,871	2.1%	\$ 10,490,396	6.4%	\$ 558,685	7.8%	\$ 122,146,746	11.7%
Idaho	\$ 20,421	0.6%	\$ 4,861,975	9.4%	\$ 245,504	2.7%	\$ 56,595,106	10.7%
Michigan	\$ 95,443	-15.3%	\$ 23,765,206	-11.8%	\$ 1,344,055	18.0%	\$ 321,359,993	22.1%
Mississippi	\$ 9,803	-18.2%	\$ 1,494,302	-4.4%	\$ 165,091	-6.4%	\$ 23,739,633	0.6%
Mont Co	\$ 8,749	12.5%	\$ 2,428,245	16.0%	\$ 105,434	26.7%	\$ 27,308,011	27.7%
New Hampshire	\$ 23,444	10.2%	\$ 4,736,013	14.8%	\$ 325,494	5.9%	\$ 65,679,149	10.0%
North Carolina	\$ 84,000	7.1%	\$ 24,243,745	16.1%	\$ 999,088	15.9%	\$ 270,831,679	24.8%
Ohio	\$ 137,483	-2.6%	\$ 35,827,058	2.1%	\$ 1,731,838	4.3%	\$ 434,361,574	9.3%
Oregon	\$ 61,416	4.4%	\$ 14,885,435	10.0%	\$ 733,282	22.7%	\$ 172,414,454	32.4%
Pennsylvania	\$ 128,857	2.3%	\$ 30,987,491	8.3%	\$ 1,643,523	11.3%	\$ 380,436,587	15.8%
Utah	\$ 14,218	7.3%	\$ 4,234,304	18.1%	\$ 146,259	13.5%	\$ 41,304,205	20.4%
Vermont	\$ 8,578	7.2%	\$ 2,288,322	13.0%	\$ 92,716	21.6%	\$ 23,843,689	27.2%
Virginia	\$ 84,898	6.5%	\$ 21,052,857	13.7%	\$ 1,017,848	11.1%	\$ 237,879,713	17.5%
Wyoming	\$ 8,780	-10.6%	\$ 1,651,768	-6.1%	\$ 109,836	-2.6%	\$ 19,734,292	2.4%