NABCA Monthly Report
February 2025 Control States Results

Total Control States spirits sales experienced a -4.4% decline in 9L volume compared to February of the previous year. However, despite this volume decline, $Vol saw an even steeper drop of -5.5%, resulting in a negative price mix of -1.1%. This suggests that consumers either shifted towards lower-priced options or that discounting and promotions were more prevalent during the month. Over the past 12 months, the decline in 9L volume was -1.1%, while dollar volume dropped -0.8%, yielding a slightly positive +0.3% price mix.

A significant factor impacting February's performance was the number of selling days. There were nine fewer selling days compared to the previous year, with most states having one fewer day. The exceptions were Michigan and New Hampshire, which had the same number of days, and Utah, which had six additional days.

Spirits - Markets	9L CMTY 2025-02	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,273,540**	**-4.4%**	**$ 945,244,165**	**-5.5%**	**61,068,810**	**-1.1%**	**$ 13,548,561,205**	**-0.8%**
Alabama	267,045	-5.5%	$ 59,955,805	-6.2%	3,587,765	-0.7%	$ 806,793,754	0.1%
Iowa	196,320	-9.5%	$ 31,256,643	-11.0%	2,753,960	-1.6%	$ 441,580,405	-1.9%
Idaho	95,542	-5.9%	$ 20,947,708	-5.4%	1,364,665	-2.7%	$ 301,222,986	-0.8%
Mont Co	36,691	3.2%	$ 8,664,388	-2.3%	490,009	-3.7%	$ 117,416,012	-3.3%
Maine	98,952	-9.0%	$ 20,305,089	-8.6%	1,415,357	-1.8%	$ 295,845,177	-0.5%
Michigan	581,883	-6.3%	$ 134,568,114	-7.1%	8,800,834	-4.3%	$ 2,091,796,697	-2.8%
Mississippi	165,551	3.0%	$ 27,808,629	2.2%	2,203,387	0.4%	$ 376,790,387	1.3%
Montana	73,132	-11.3%	$ 14,384,146	-12.6%	1,077,380	-1.7%	$ 209,573,325	-1.2%
North Carolina	534,017	-5.5%	$ 130,222,952	-6.2%	7,674,091	0.0%	$ 1,857,213,836	0.8%
New Hampshire	139,736	-3.7%	$ 27,320,154	-3.2%	2,319,843	-0.3%	$ 455,860,991	1.0%
Ohio	475,265	-8.5%	$ 122,028,234	-8.1%	6,852,966	-2.9%	$ 1,756,873,498	-2.0%
Oregon	246,986	-8.5%	$ 56,536,591	-8.8%	3,574,279	-3.4%	$ 815,279,893	-3.2%
Pennsylvania	662,180	2.3%	$ 131,833,862	-1.8%	9,554,318	3.6%	$ 1,876,531,065	0.1%
Utah	151,382	23.2%	$ 31,574,766	21.8%	1,661,622	1.4%	$ 338,128,075	1.4%
Virginia	407,274	-6.6%	$ 103,073,012	-6.8%	5,739,919	-1.5%	$ 1,460,456,367	0.7%
Vermont	32,120	-6.8%	$ 7,710,449	-5.6%	423,710	-3.6%	$ 99,159,540	-1.3%
West Virginia	58,270	-11.4%	$ 8,855,188	-12.2%	866,643	-1.4%	$ 133,708,695	-1.5%
Wyoming	51,195	-7.2%	$ 8,198,437	-10.3%	708,062	-1.7%	$ 114,330,503	-2.1%

Most spirit categories declined in February, reflecting the broader market downturn. However, cocktails emerged as a standout performer, growing by +31.2%. This surge was largely driven by canned cocktails, which added 59,000 9L cases, with an overwhelming 70% of this growth coming from Pennsylvania, aided by the new grocery and convenience store distribution. This underscores the ongoing momentum of the RTD segment, which continues to gain traction as consumer preferences shift toward convenience and pre-mixed options. Only Domestic Whiskey, Gin, Other Imported Whiskey, and Tequila maintained a positive price mix in February.

Spirits - Categories	9L CMTY 2025-02	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,273,540**	**-4.4%**	**$ 945,244,165**	**-5.5%**	**61,068,810**	**-1.1%**	**$ 13,548,561,205**	**-0.8%**
BRANDY / COGNAC	181,304	-9.9%	$ 52,781,609	-13.6%	2,435,084	-8.5%	$ 728,558,610	-12.0%
CACHACA	589	-17.0%	$ 140,828	-18.5%	9,354	-4.7%	$ 2,318,952	-5.4%
CANADIAN	314,457	-6.1%	$ 68,030,394	-7.5%	4,277,979	-1.4%	$ 951,928,648	0.9%
COCKTAILS	260,506	31.2%	$ 22,469,178	29.9%	4,359,560	24.5%	$ 364,086,081	21.5%
CORDIALS	315,126	-6.0%	$ 69,353,622	-6.3%	4,498,720	-1.7%	$ 997,486,726	-0.9%
DOMESTIC WHISKE	795,631	-6.5%	$ 226,242,345	-4.9%	10,940,918	-2.7%	$ 3,116,924,239	-0.2%
GIN	129,896	-9.2%	$ 27,177,117	-9.1%	1,971,280	-4.8%	$ 421,123,544	-3.1%
IRISH	74,973	-7.0%	$ 26,073,965	-10.8%	965,835	-5.0%	$ 343,533,712	-6.5%
NEUTRAL GRAIN SP	3,695	-11.3%	$ 809,557	-11.9%	61,060	-7.8%	$ 13,427,968	-8.3%
OTHER IMPORTED V	2,679	-10.9%	$ 1,840,873	-3.5%	36,536	-0.7%	$ 26,105,755	-4.8%
RUM	317,880	-8.8%	$ 49,845,728	-10.7%	4,873,723	-7.4%	$ 771,662,409	-7.2%
SCOTCH	67,553	-10.4%	$ 28,570,232	-11.0%	1,022,464	-6.9%	$ 444,497,265	-6.2%
TEQUILA	486,878	-0.1%	$ 173,089,235	0.0%	6,966,830	5.7%	$ 2,516,595,304	6.8%
VODKA	1,322,339	-6.0%	$ 198,758,399	-7.0%	18,649,203	-3.1%	$ 2,849,637,055	-3.2%

Wine sales mirrored trends observed over the past couple of months, with 9L volume declining by -5.6% and dollar volume dropping by -6.4% in February, leading to a negative price mix of -0.8%. The rolling 12-month trend for wine sales showed a -5.5% decline in volume and a -3.1% decline in dollar sales, but with a positive price mix of +2.4%.

Wine	9L CMTY 2025-02	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,129,905**	**-5.6%**	**$ 127,783,416**	**-6.4%**	**15,475,458**	**-5.5%**	**$ 1,806,386,460**	**-3.1%**
Alabama	1,817	-17.8%	$ 136,117	-3.2%	25,952	-12.0%	$ 1,770,881	-4.1%
Idaho	560	-4.8%	$ 90,505	-1.8%	7,292	-8.8%	$ 1,151,735	-4.4%
Mont Co	57,759	-13.3%	$ 8,849,946	-9.3%	816,475	-6.0%	$ 123,025,696	-2.3%
Mississippi	99,024	-10.9%	$ 9,162,050	-9.5%	1,362,140	-2.6%	$ 124,902,735	-2.1%
Montana	340	-4.3%	$ 54,106	-16.7%	4,944	5.0%	$ 865,350	-0.1%
New Hampshire	172,928	-0.3%	$ 20,352,663	-2.0%	2,701,700	-4.4%	$ 330,176,650	-1.6%
Pennsylvania	628,950	-9.3%	$ 66,085,158	-12.7%	8,678,829	-6.8%	$ 988,295,864	-4.3%
Utah	136,851	18.4%	$ 19,736,647	20.1%	1,435,003	-2.0%	$ 189,208,669	0.5%
Virginia	2,230	-7.0%	$ 421,216	0.0%	31,275	-1.7%	$ 5,905,642	8.8%
Vermont	661	-9.9%	$ 105,060	5.5%	8,410	-5.2%	$ 1,284,397	3.1%
West Virginia	390	-7.1%	$ 30,335	8.2%	4,719	-10.3%	$ 325,610	-5.2%
Wyoming	28,395	-3.9%	$ 2,759,425	-5.5%	398,710	-6.1%	$ 39,471,216	-5.4%

On-premise spirits channel faced significant declines in both 9L volume at -9.0% and $Vol -10.2%, leading to a negative price mix of -1.2%. Over 12 months, the declines were less steep at -2.3% in volume and -2.7% in value. On-premise wine also saw a drop in 9L volume at -7.6%, but a slight increase in $Vol +1.3%, resulting in a strong positive price mix of +8.9%. Over the 12-month period, wine 9L volume was down -6.3%, but $Vol fell only -3.5%

Spirits - Markets	9L CMTY 2025-02	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**668,659**	**-9.0%**	**$ 164,990,713**	**-10.2%**	**9,227,742**	**-2.3%**	**$ 2,283,320,533**	**-2.7%**
Alabama	46,966	-5.1%	$ 10,344,912	-6.9%	581,781	-0.5%	$ 129,689,519	-1.3%
Idaho	16,850	-8.7%	$ 4,107,526	-8.4%	231,252	-3.7%	$ 56,395,525	-2.1%
Michigan	90,264	-8.5%	$ 22,333,964	-8.4%	1,330,274	-4.0%	$ 331,070,942	-3.6%
Mississippi	13,986	1.1%	$ 2,107,450	-1.1%	177,033	7.4%	$ 27,137,769	6.9%
Mont Co	6,934	-16.0%	$ 1,864,724	-18.3%	106,981	-3.3%	$ 27,791,996	-4.6%
New Hampshire	23,159	-3.6%	$ 5,011,887	-1.3%	332,392	-0.9%	$ 70,845,288	1.2%
North Carolina	77,559	-5.1%	$ 20,894,614	-10.1%	1,056,793	0.6%	$ 290,899,303	-1.5%
Ohio	118,357	-12.6%	$ 30,430,946	-13.5%	1,678,607	-3.6%	$ 435,833,014	-3.6%
Oregon	50,776	-12.1%	$ 12,407,964	-12.1%	717,050	-3.1%	$ 170,889,062	-3.6%
Pennsylvania	120,328	-11.1%	$ 29,333,825	-13.2%	1,651,576	-2.9%	$ 403,813,057	-4.2%
Utah	15,800	27.2%	$ 5,004,887	30.7%	148,592	0.6%	$ 44,218,696	1.4%
Vermont	8,200	-10.0%	$ 2,313,215	-9.0%	93,977	-2.3%	$ 25,635,713	-0.7%
Virginia	72,058	-11.6%	$ 17,399,291	-12.6%	1,017,543	-2.1%	$ 249,780,305	-1.2%
Wyoming	7,422	-14.7%	$ 1,435,508	-15.7%	103,891	-4.4%	$ 19,320,344	-4.1%