NABCA

NABCA Monthly Report - February 2026 Control States Results

February Control States spirits sales improved versus January, with 9L volume declining -1.4% and $Vol decreasing -3.4%, resulting in a -2.0% price mix. Performance was impacted by six fewer selling days in Utah, with no other states experiencing calendar shifts. On a rolling 12-month basis, spirits finished down -1.4% in 9L volume and -3.0% in $Vol, yielding a -1.6% price mix.

Spirits - Markets	9L CMTY 2026-02	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,214,903**	**-1.4%**	**$ 913,452,239**	**-3.4%**	**60,231,775**	**-1.4%**	**$ 13,148,171,891**	**-3.0%**
Alabama	265,867	-0.4%	$ 58,689,718	-2.8%	3,615,654	0.8%	$ 797,706,205	-1.2%
Iowa	190,081	-3.2%	$ 30,051,723	-4.0%	2,655,711	-3.6%	$ 420,752,044	-4.7%
Idaho	92,122	-3.6%	$ 20,395,838	-2.8%	1,326,631	-2.8%	$ 295,106,633	-2.0%
Mont Co	34,171	-6.9%	$ 7,743,316	-10.6%	519,660	6.1%	$ 113,860,245	-3.0%
Maine	99,704	0.8%	$ 20,202,507	-0.5%	1,357,434	-4.1%	$ 282,301,917	-4.6%
Michigan	567,459	-2.5%	$ 129,221,252	-4.0%	8,554,445	-2.8%	$ 2,005,430,755	-4.1%
Mississippi	156,167	-5.7%	$ 25,409,776	-8.7%	2,209,980	0.3%	$ 369,799,413	-1.9%
Montana	78,427	7.2%	$ 15,267,940	6.0%	1,071,840	-0.5%	$ 205,155,639	-2.1%
North Carolina	528,275	-1.1%	$ 125,268,792	-3.8%	7,747,160	1.0%	$ 1,831,517,014	-1.4%
New Hampshire	177,103	26.7%	$ 33,784,050	23.7%	2,221,156	-4.3%	$ 431,847,123	-5.3%
Ohio	464,555	-2.3%	$ 117,206,550	-4.0%	6,590,189	-3.8%	$ 1,678,686,303	-4.5%
Oregon	240,894	-2.5%	$ 54,615,186	-3.4%	3,474,013	-2.8%	$ 785,533,255	-3.7%
Pennsylvania	655,270	-1.0%	$ 126,625,210	-4.1%	9,642,667	0.9%	$ 1,848,435,144	-1.5%
Utah	123,589	-18.4%	$ 24,660,327	-21.7%	1,631,730	-1.8%	$ 325,533,235	-3.7%
Virginia	402,077	-1.3%	$ 100,393,297	-2.7%	5,649,458	-1.6%	$ 1,420,881,067	-2.7%
Vermont	30,949	-3.6%	$ 7,435,512	-3.6%	407,255	-3.9%	$ 96,025,484	-3.2%
West Virginia	58,357	0.2%	$ 8,745,373	-1.2%	856,916	-1.1%	$ 128,678,075	-3.8%
Wyoming	49,834	-2.7%	$ 7,735,872	-6.4%	699,878	-1.2%	$ 110,922,340	-3.0%

Category performance remains consistent with prior months, as Cocktails (driven by Canned RTDs) and Tequila continued to deliver positive 9L volume growth. The key exception in February was Scotch, which grew +4.5% in 9L volume, driven primarily by New Hampshire (+152%) supported by strong promotional activity.

Spirits - Categories	9L CMTY 2026-02	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,214,903**	**-1.4%**	**$ 913,452,239**	**-3.4%**	**60,231,775**	**-1.4%**	**$ 13,148,171,891**	**-3.0%**
BRANDY / COGNAC	168,879	-6.9%	$ 48,203,966	-8.7%	2,254,577	-7.4%	$ 662,664,944	-9.0%
CACHACA	616	4.6%	$ 156,707	10.4%	8,984	-4.0%	$ 2,224,792	-4.1%
CANADIAN	278,680	-11.1%	$ 60,039,664	-11.7%	3,959,604	-7.3%	$ 873,801,853	-8.1%
COCKTAILS	311,550	19.5%	$ 26,135,568	16.1%	5,332,009	22.3%	$ 443,682,866	21.7%
CORDIALS	310,451	-1.4%	$ 68,650,276	-1.1%	4,419,545	-1.7%	$ 976,234,045	-2.1%
DOMESTIC WHISKEY	772,106	-3.1%	$ 217,328,626	-4.0%	10,582,444	-3.3%	$ 3,031,514,186	-2.8%
GIN	123,115	-5.3%	$ 26,344,863	-3.2%	1,866,010	-5.4%	$ 403,378,471	-4.3%
IRISH	71,828	-4.2%	$ 24,975,908	-4.2%	925,674	-4.2%	$ 323,232,761	-5.9%
NEUTRAL GRAIN SPIRIT	3,655	-1.1%	$ 788,215	-2.7%	56,855	-6.9%	$ 12,485,782	-7.0%
OTHER IMP WHISKY	2,436	-9.1%	$ 1,671,917	-9.3%	34,984	-4.3%	$ 24,671,714	-5.5%
RUM	298,431	-6.1%	$ 47,143,176	-5.4%	4,550,383	-6.6%	$ 714,561,042	-7.4%
SCOTCH	70,578	4.5%	$ 29,091,151	1.9%	945,641	-7.5%	$ 410,910,022	-7.6%
TEQUILA	491,856	1.0%	$ 167,728,080	-3.4%	7,108,541	2.0%	$ 2,501,475,908	-0.6%
VODKA	1,310,685	-0.9%	$ 195,141,711	-1.9%	18,186,207	-2.5%	$ 2,766,464,672	-2.9%

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Wine sales slowed in February, with 9L volume down -4.7% and $Vol declining -6.0%, resulting in a -1.3% price mix, partially due to the six fewer selling days in Utah. On a rolling 12-month basis, wine trends continue to stabilize, with 9L volume at -5.3%, $Vol at -3.9%, and price mix improving to +1.4%.

Wine	9L CMTY 2026-02	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,076,533**	**-4.7%**	**$ 123,907,570**	**-6.0%**	**14,653,082**	**-5.3%**	**$ 1,739,063,087**	**-3.9%**
Alabama	1,758	-3.3%	$ 133,676	-2.2%	23,899	-7.9%	$ 1,797,427	1.5%
Idaho	527	-6.0%	$ 88,677	-4.5%	7,070	-3.1%	$ 1,189,454	3.1%
Mont Co	56,224	-2.7%	$ 8,593,034	-2.9%	778,670	-4.6%	$ 119,333,304	-3.0%
Mississippi	96,876	-2.2%	$ 8,897,323	-2.9%	1,304,941	-4.2%	$ 119,703,263	-4.2%
Montana	541	58.9%	$ 89,161	64.8%	5,460	10.4%	$ 975,596	12.7%
New Hampshire	164,713	-4.8%	$ 19,849,239	-2.5%	2,520,819	-6.7%	$ 310,765,243	-5.9%
Pennsylvania	614,702	-2.3%	$ 67,014,644	-4.1%	8,206,444	-5.4%	$ 956,113,664	-3.6%
Utah	110,316	-19.4%	$ 16,013,201	-20.0%	1,384,281	-3.5%	$ 184,318,780	-2.7%
Virginia	2,120	-5.0%	$ 414,301	-1.6%	29,851	-4.6%	$ 5,796,292	-1.9%
Vermont	646	-2.3%	$ 102,013	-2.9%	7,892	-6.2%	$ 1,253,566	-2.4%
West Virginia	341	-12.5%	$ 24,345	-20.4%	4,472	-5.3%	$ 327,573	0.5%
Wyoming	27,769	-2.2%	$ 2,687,956	-3.3%	379,277	-4.9%	$ 37,486,985	-5.1%

The On-Premise channel posted a mixed result, with 9L volume declining -1.2% and $Vol also down -1.2%, as only 4 of the 14 reporting states recorded declines. Rolling 12-month On-Premise performance is now flat in 9L volume and -1.9% in $Vol, resulting in a -1.9% price mix.

On-Premise wine posted similar monthly results to retail sales, with 9L volume declining -4.6% and $Vol decreasing -7.1%, generating a -2.5% price mix. On a rolling 12-month basis, On-Premise wine finished at -4.3% in 9L volume and -3.3% in $Vol, yielding a +1.0% price mix.

Spirits - On Premise	9L CMTY 2026-02	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**676,257**	**1.2%**	**$ 162,960,573**	**-1.2%**	**9,230,084**	**0.0%**	**$ 2,239,914,522**	**-1.9%**
Alabama	49,055	4.5%	$ 10,511,601	1.6%	604,755	4.0%	$ 131,999,045	1.8%
Idaho	16,979	0.8%	$ 4,157,768	1.2%	230,894	-0.2%	$ 56,687,977	0.5%
Michigan	91,453	1.3%	$ 22,215,970	-0.5%	1,310,774	-1.5%	$ 325,961,297	-1.5%
Mississippi	12,599	-9.9%	$ 1,922,395	-8.8%	183,107	3.4%	$ 27,743,609	2.2%
Mont Co	7,092	2.3%	$ 1,869,811	0.3%	106,704	-0.3%	$ 27,188,919	-2.2%
New Hampshire	23,177	0.1%	$ 4,832,278	-3.6%	328,496	-1.2%	$ 69,485,433	-1.9%
North Carolina	79,657	2.7%	$ 20,634,815	-1.2%	1,108,734	4.9%	$ 290,313,388	-0.2%
Ohio	121,390	2.6%	$ 30,683,836	0.8%	1,637,811	-2.4%	$ 420,318,525	-3.6%
Oregon	51,181	0.8%	$ 12,253,772	-1.2%	714,865	-0.3%	$ 168,133,444	-1.6%
Pennsylvania	123,147	2.4%	$ 28,913,389	-1.4%	1,650,139	-0.1%	$ 390,410,081	-3.3%
Utah	12,548	-20.6%	$ 3,822,379	-23.6%	147,458	-0.8%	$ 43,150,744	-2.4%
Vermont	8,015	-2.3%	$ 2,265,339	-2.1%	91,767	-2.4%	$ 25,187,878	-1.8%
Virginia	72,793	1.0%	$ 17,517,533	0.7%	1,012,816	-0.5%	$ 244,597,305	-2.1%
Wyoming	7,171	-3.4%	$ 1,359,688	-5.3%	101,766	-2.0%	$ 18,736,878	-3.0%