NABCA Monthly Report
January 2025 Control States Results

Total Control States spirits sales 9L volume grew by +0.4% compared to January last year with a +0.2% $Vol increase resulting in a negative -0.2% price mix. Over the past 12 months, the 9L volume declined by -0.8% with a -0.4% decline in $Vol providing a +0.4% price mix. During January 2025, there were 3 additional selling days all in New Hampshire. Pennsylvania continues to enjoy the new distribution of Canned RTDs in the grocery and convenience sub-channel with 38,000 additional cases vs January 2024.

Spirits - Markets	9L CMTY 2025-01	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,343,367**	**0.4%**	**$ 951,605,714**	**0.2%**	**61,266,273**	**-0.8%**	**$ 13,603,044,857**	**-0.4%**
Alabama	258,227	-1.0%	$ 57,423,831	-1.9%	3,603,208	0.1%	$ 810,370,960	1.0%
Iowa	196,825	-5.7%	$ 31,055,229	-5.9%	2,774,700	-0.5%	$ 445,405,497	-0.4%
Idaho	97,562	-0.8%	$ 21,010,394	0.4%	1,370,666	-2.2%	$ 302,375,732	-0.2%
Mont Co	37,218	-7.6%	$ 8,384,947	-3.8%	488,866	-4.0%	$ 117,616,457	-3.0%
Maine	94,822	-1.8%	$ 19,787,852	-1.2%	1,425,175	-1.1%	$ 297,758,441	0.4%
Michigan	694,285	-2.6%	$ 160,346,370	-2.3%	8,839,623	-3.7%	$ 2,102,000,700	-2.1%
Mississippi	168,011	6.3%	$ 27,478,162	3.8%	2,198,598	-0.4%	$ 376,188,048	0.4%
Montana	66,256	-8.4%	$ 12,901,681	-8.0%	1,086,736	-0.6%	$ 211,498,831	0.1%
North Carolina	529,112	0.2%	$ 126,898,187	0.4%	7,705,286	0.7%	$ 1,865,842,818	1.7%
New Hampshire	139,893	10.6%	$ 26,767,052	11.1%	2,325,257	-0.3%	$ 456,773,650	1.1%
Ohio	486,182	-1.9%	$ 119,551,401	-2.2%	6,897,264	-2.1%	$ 1,767,618,641	-1.2%
Oregon	255,159	-0.9%	$ 56,889,813	-0.7%	3,597,085	-2.4%	$ 820,703,312	-2.2%
Pennsylvania	642,840	5.5%	$ 129,274,426	2.7%	9,539,616	1.9%	$ 1,878,678,727	-1.4%
Utah	115,941	5.3%	$ 24,572,750	5.4%	1,633,106	-0.3%	$ 332,473,845	-0.5%
Virginia	415,409	2.7%	$ 103,964,176	5.3%	5,768,821	-0.8%	$ 1,467,973,898	1.6%
Vermont	32,521	0.1%	$ 7,829,050	3.9%	426,063	-3.1%	$ 99,615,227	-0.7%
West Virginia	62,587	1.3%	$ 9,610,160	-1.8%	874,152	-0.1%	$ 134,934,395	-0.2%
Wyoming	50,516	-2.2%	$ 7,860,234	-9.6%	712,051	-0.7%	$ 115,215,679	-0.7%

Most spirit categories declined in December except for Cocktails at +34.6% (Canned Cocktails +53,700 9L cases) and Tequila at +7.3% in 9L volume and +6.9% in $Vol continuing the depremiumization of this category resulting in a negative -0.4% price mix. Canadian, Cordials, Domestic Whiskey, Gin and Scotch maintained a positive price mix in January with Domestic Whiskey showing a positive $Vol growth of +0.5%.

Spirits - Categories	9L CMTY 2025-01	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg	R12 Price Mix
Total Control	**4,343,367**	**0.4%**	**$ 951,605,714**	**0.2%**	**61,266,273**	**-0.8%**	**$ 13,603,044,857**	**-0.4%**	**0.5%**
BRANDY / COGNAC	181,911	-9.3%	$ 51,501,898	-13.0%	2,455,144	-8.3%	$ 736,913,848	-11.7%	-3.4%
CACHACA	536	-4.1%	$ 130,872	-4.8%	9,475	-3.1%	$ 2,350,147	-3.9%	-0.9%
CANADIAN	425,276	-2.2%	$ 87,214,787	-0.2%	5,751,037	-2.7%	$ 1,205,091,671	-0.3%	2.4%
COCKTAILS	238,626	34.6%	$ 20,469,010	31.6%	4,297,551	23.3%	$ 358,914,384	20.3%	-3.0%
CORDIALS	330,048	0.8%	$ 73,217,836	1.9%	4,539,056	-0.9%	$ 1,013,527,218	0.8%	1.7%
DOMESTIC WHISKEY	716,372	-1.2%	$ 212,087,037	0.5%	9,523,207	-1.7%	$ 2,869,077,881	0.6%	2.3%
GIN	133,181	-3.2%	$ 27,439,491	-1.5%	1,984,427	-4.4%	$ 423,842,494	-2.5%	1.9%
IRISH	71,440	-0.5%	$ 25,079,450	-3.7%	971,507	-4.8%	$ 346,673,266	-6.0%	-1.2%
NEUTRAL GRAIN SPIRIT	3,863	-9.1%	$ 856,077	-9.1%	61,531	-7.5%	$ 13,536,100	-7.9%	-0.4%
OTHER IMPORTED WHISKY	2,577	-3.0%	$ 1,721,303	-6.2%	36,899	0.5%	$ 26,264,150	-4.7%	-5.2%
RUM	333,207	-4.6%	$ 52,150,981	-6.0%	4,904,368	-7.4%	$ 777,603,650	-7.0%	0.4%
SCOTCH	70,971	-5.1%	$ 30,231,171	-4.0%	1,030,264	-7.0%	$ 447,981,112	-6.1%	0.9%
TEQUILA	469,831	7.3%	$ 165,464,004	6.9%	6,967,325	6.4%	$ 2,516,216,259	7.4%	1.0%
VODKA	1,365,494	-1.1%	$ 203,971,226	-1.1%	18,734,228	-2.8%	$ 2,864,399,862	-2.8%	0.0%

Wines sales declined at nearly identical results to December with -5.7% in 9L Volume and -6.1% in $Vol returning a negative -0.4% price mix. Rolling 12-month 9L volume was -6.3% with $Vol at -3.7% resulting in a positive +2.6% price mix.

Wine	9L CMTY 2025-01	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,064,890**	**-5.7%**	**$ 121,020,980**	**-6.1%**	**15,542,058**	**-6.3%**	**$ 1,811,474,099**	**-3.7%**
Alabama	1,665	-8.1%	$ 125,572	6.0%	26,345	-10.9%	$ 1,775,079	-4.1%
Idaho	568	-2.6%	$ 88,337	-1.0%	7,320	-9.4%	$ 1,151,433	-4.9%
Mont Co	61,135	-1.2%	$ 8,969,047	0.8%	825,338	-5.1%	$ 123,928,938	-1.3%
Mississippi	103,558	-1.1%	$ 9,134,282	1.3%	1,374,270	-2.5%	$ 125,854,966	-2.2%
Montana	444	30.3%	$ 95,780	58.8%	4,959	5.6%	$ 875,321	2.9%
New Hampshire	184,837	-9.1%	$ 22,975,783	-9.0%	2,702,144	-5.0%	$ 330,557,985	-1.7%
Pennsylvania	579,179	-6.9%	$ 61,720,906	-8.8%	8,743,387	-7.8%	$ 994,521,013	-5.2%
Utah	102,059	2.3%	$ 14,616,166	3.8%	1,413,760	-3.7%	$ 185,679,667	-1.6%
Virginia	2,326	3.5%	$ 449,425	17.7%	31,444	-1.0%	$ 5,905,684	9.4%
Vermont	686	-5.6%	$ 102,710	0.7%	8,483	-4.7%	$ 1,278,971	2.6%
West Virginia	407	-7.3%	$ 29,591	1.2%	4,749	-11.8%	$ 323,322	-8.5%
Wyoming	28,025	-10.1%	$ 2,713,089	-14.0%	399,851	-6.4%	$ 39,619,809	-5.5%

The on-premise spirits channel improved on last month's results with 9L volume +0.8% and -0.7% in $Vol resulting in a negative -1.5% price mix. The 12-month results were -1.7% in 9L volume and -1.9% in $Vol, The on-premise wine channel declined in 9L volume at -6.3% and declined -3.9% in $Vol resulting in a positive +2.4% price mix. The 12-month results were -6.4% in 9L volume and -4.3% in $Vol.

Spirits - Markets	9L CMTY 2025-01	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**677,182**	**0.8%**	**$ 167,351,561**	**-0.7%**	**9,293,865**	**-1.7%**	**$ 2,302,111,623**	**-1.9%**
Alabama	42,227	-0.2%	$ 9,557,991	-1.0%	584,311	0.4%	$ 130,452,360	-0.2%
Idaho	17,273	2.9%	$ 4,185,299	4.0%	232,848	-3.0%	$ 56,774,046	-1.4%
Michigan	107,531	0.2%	$ 26,501,003	0.3%	1,338,626	-3.2%	$ 333,128,547	-2.8%
Mississippi	12,878	8.7%	$ 2,038,091	6.1%	176,880	7.6%	$ 27,160,230	7.5%
Mont Co	7,479	9.0%	$ 1,950,247	7.0%	108,302	-1.9%	$ 28,209,178	-2.7%
New Hampshire	23,898	4.8%	$ 5,183,249	5.3%	333,264	-0.9%	$ 70,913,309	1.0%
North Carolina	71,813	-0.2%	$ 19,828,174	-3.6%	1,060,975	1.3%	$ 293,251,748	-0.3%
Ohio	120,085	-2.5%	$ 30,562,392	-5.0%	1,695,611	-2.5%	$ 440,565,780	-2.4%
Oregon	53,163	5.6%	$ 12,602,707	4.8%	724,032	-1.9%	$ 172,592,638	-2.4%
Pennsylvania	122,592	2.3%	$ 29,957,454	-0.2%	1,666,774	-3.2%	$ 408,275,926	-4.4%
Utah	11,881	1.9%	$ 3,801,144	1.6%	145,213	-2.6%	$ 43,043,985	-2.5%
Vermont	8,165	6.8%	$ 2,368,962	10.3%	94,888	-0.7%	$ 25,863,544	1.0%
Virginia	70,643	0.0%	$ 17,371,763	-0.4%	1,026,970	-1.0%	$ 252,293,238	0.0%
Wyoming	7,555	-9.7%	$ 1,443,085	-9.8%	105,172	-2.9%	$ 19,587,093	-2.1%