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NABCA Monthly Report - July 2025 Control States Results

In July, Control State spirits sales rebounded, with 9L volume up **+1.4%** compared to the same month last year, although $Vol fell by **-0.4%**, resulting in a negative price mix of **-1.8%**. On a 12-month rolling basis, spirits remained downward, with 9L volume decreasing **-1.0%** and $Vol falling **-1.8%**, producing a price mix of **-0.8%**. The impact of selling days in July was minimal, with only Utah benefiting from three additional days. Notably, nine jurisdictions reported positive growth in both 9L volume and $Vol for the month.

Spirits - Markets	9L CMTY 2025-07	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,522,863**	**1.4%**	**$ 1,167,553,133**	**-0.4%**	**60,756,398**	**-1.0%**	**$ 13,402,685,924**	**-1.8%**
Alabama	314,340	2.8%	$ 66,395,930	0.2%	3,596,471	-0.3%	$ 803,960,952	-0.4%
Iowa	229,423	-2.7%	$ 35,943,994	-4.3%	2,718,630	-2.1%	$ 433,605,551	-3.2%
Idaho	124,276	-0.8%	$ 27,515,138	0.7%	1,351,710	-2.4%	$ 300,052,727	-0.9%
Mont Co	47,507	14.8%	$ 9,643,229	2.2%	505,365	2.9%	$ 116,626,671	-1.6%
Maine	151,570	-2.3%	$ 30,965,656	-3.6%	1,392,654	-2.7%	$ 291,015,200	-2.2%
Michigan	849,286	-2.2%	$ 199,778,446	-3.1%	8,705,738	-4.7%	$ 2,061,614,782	-4.7%
Mississippi	165,602	-5.8%	$ 27,427,960	-7.4%	2,203,868	2.3%	$ 374,968,473	1.8%
Montana	112,059	3.8%	$ 21,721,094	1.5%	1,084,480	-1.0%	$ 209,545,894	-1.8%
North Carolina	699,709	3.9%	$ 157,253,404	1.4%	7,687,105	0.1%	$ 1,847,669,749	-0.1%
New Hampshire	227,865	2.8%	$ 43,026,117	3.1%	2,278,683	-1.5%	$ 445,105,927	-2.2%
Ohio	575,977	-2.4%	$ 144,036,429	-2.5%	6,731,390	-3.7%	$ 1,724,555,678	-3.4%
Oregon	317,813	-1.3%	$ 70,183,618	-2.0%	3,534,799	-2.9%	$ 805,560,215	-2.9%
Pennsylvania	906,949	7.3%	$ 157,818,128	2.6%	9,651,345	4.5%	$ 1,869,985,050	0.5%
Utah	139,370	11.6%	$ 27,199,660	10.2%	1,642,843	0.5%	$ 332,831,543	-0.1%
Virginia	479,426	1.1%	$ 118,314,708	1.0%	5,684,822	-1.7%	$ 1,442,036,058	-1.2%
Vermont	37,315	-1.7%	$ 8,592,018	-1.3%	416,632	-3.5%	$ 97,963,067	-1.9%
West Virginia	71,804	3.4%	$ 10,568,947	2.6%	859,894	-2.1%	$ 131,576,307	-3.3%
Wyoming	72,574	-1.7%	$ 11,168,658	-3.6%	709,972	-1.2%	$ 114,012,079	-2.0%

Cocktails, Irish, Other Imported Whisky and Tequila all reported positive 9L volume but experienced negative price mix, suggesting depremiumization. Conversely, Domestic Whiskey with 9L volume **-1.8%** had a positive **+0.3%** $Vol and **+2.1%** price mix. The Other Imported Whisky growth was driven by the top Japanese Whisky brands.

Spirits - Categories	9L CMTY 2025-07	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg	R12 Price Mix
Total Control	**5,522,863**	**1.4%**	**$ 1,167,553,133**	**-0.4%**	**60,756,398**	**-1.0%**	**$ 13,402,685,924**	**-1.8%**	**-0.8%**
BRANDY / COGNAC	180,286	-9.1%	$ 53,484,461	-11.1%	2,350,311	-8.6%	$ 695,390,536	-11.5%	-2.9%
CACHACA	969	-2.1%	$ 245,431	-3.1%	9,135	-6.2%	$ 2,220,668	-8.6%	-2.4%
CANADIAN	453,040	-2.3%	$ 92,363,215	-1.6%	5,590,603	-4.5%	$ 1,161,179,920	-4.1%	0.3%
COCKTAILS	645,282	31.4%	$ 49,737,290	29.5%	4,805,774	28.2%	$ 397,814,413	25.4%	-2.8%
CORDIALS	376,793	-0.2%	$ 81,990,219	-0.2%	4,465,101	-2.3%	$ 988,546,435	-2.2%	0.1%
DOMESTIC WHISKEY	743,718	-1.8%	$ 223,273,352	0.3%	9,345,917	-2.6%	$ 2,844,800,144	-0.9%	1.6%
GIN	185,410	-3.9%	$ 40,804,169	-2.8%	1,924,070	-5.1%	$ 412,715,414	-4.1%	1.1%
IRISH	77,523	3.0%	$ 26,584,190	0.0%	955,946	-3.7%	$ 335,087,305	-6.6%	-2.9%
NEUTRAL GRAIN SPIRIT	4,892	-7.5%	$ 1,079,596	-7.8%	58,747	-9.2%	$ 12,900,477	-9.7%	-0.5%
OTHER IMP WHISKY	2,707	7.4%	$ 1,903,029	2.0%	36,558	0.0%	$ 26,017,443	-0.9%	-1.0%
RUM	443,647	-4.7%	$ 69,164,994	-5.7%	4,734,139	-7.0%	$ 744,575,936	-8.0%	-1.1%
SCOTCH	76,642	-6.0%	$ 32,177,240	-6.4%	989,823	-6.9%	$ 431,696,272	-6.6%	0.3%
TEQUILA	680,154	3.4%	$ 239,513,860	1.2%	7,063,776	4.2%	$ 2,536,746,541	4.1%	-0.1%
VODKA	1,651,759	-1.6%	$ 255,076,649	-1.4%	18,426,194	-3.0%	$ 2,812,087,517	-3.2%	-0.3%

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Wine sales improved from recent months, falling **-4.6%** in 9L volume and **-4.6%** in $Vol, with a flat price mix for July. On a 12-month basis, wine sales dropped **-5.7%** in 9L volume but **-3.8%** in $Vol, supported by a positive price mix of **+1.9%**.

Wine	9L CMTY 2025-07	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,177,992**	**-4.6%**	**$ 133,943,863**	**-4.6%**	**15,051,952**	**-5.7%**	**$ 1,770,405,254**	**-3.8%**
Alabama	2,076	-9.0%	$ 150,841	6.3%	24,611	-11.9%	$ 1,796,187	1.6%
Idaho	582	-2.8%	$ 97,056	2.4%	7,234	-3.4%	$ 1,176,779	1.9%
Mont Co	62,897	-0.9%	$ 9,345,139	-0.3%	803,030	-5.0%	$ 122,470,786	-1.3%
Mississippi	99,776	-8.6%	$ 8,763,201	-9.4%	1,325,505	-3.7%	$ 121,696,258	-3.5%
Montana	515	32.9%	$ 80,048	8.7%	5,227	8.0%	$ 912,534	3.4%
New Hampshire	234,085	-3.4%	$ 28,393,138	-1.7%	2,615,172	-5.8%	$ 319,480,438	-5.0%
Pennsylvania	629,074	-6.8%	$ 68,681,005	-7.9%	8,426,828	-6.6%	$ 969,727,071	-4.5%
Utah	109,867	11.4%	$ 14,168,192	10.2%	1,409,336	-2.1%	$ 186,874,441	-0.2%
Virginia	2,296	-3.4%	$ 439,111	-1.0%	30,870	-1.9%	$ 5,964,709	8.1%
Vermont	615	-0.2%	$ 95,461	2.5%	8,111	-7.2%	$ 1,266,347	0.9%
West Virginia	386	4.3%	$ 27,593	18.7%	4,641	-7.4%	$ 333,441	-0.8%
Wyoming	35,824	-8.8%	$ 3,702,015	-10.0%	391,378	-5.5%	$ 38,702,304	-5.5%

For the second month in a row On-Premise spirits sales grew in July, with 9L volume up **+3.7%** compared to last year, and $Vol was also positive with **+1.8%**, leading to a **-1.9%** price mix. On a 12-month basis, On-Premise spirits were still in decline, down **-1.4%** in volume and **-2.7% in $Vol**. On-Premise wine sales performed above the 12-month average with 9L volume **-0.2%** and $Vol **-0.4%**, resulting in a **-0.2%** price mix. Over the last 12 months, On-Premise wine sales declined **-5.3%** in volume and **-3.1%** in $Vol.

Spirits - Markets	9L CMTY 2025-07	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**836,374**	**3.7%**	**$ 201,045,833**	**1.8%**	**9,229,534**	**-1.4%**	**$ 2,266,796,700**	**-2.7%**
Alabama	52,547	9.8%	$ 11,439,864	7.3%	589,005	1.1%	$ 130,155,815	-0.6%
Idaho	23,187	4.4%	$ 5,769,912	5.6%	230,580	-2.2%	$ 56,461,226	-0.8%
Michigan	133,693	0.1%	$ 33,548,496	1.1%	1,323,409	-3.8%	$ 330,369,108	-3.5%
Mississippi	15,673	0.2%	$ 2,335,090	-3.4%	182,377	9.1%	$ 27,776,430	7.0%
Mont Co	9,425	9.8%	$ 2,310,956	6.1%	107,064	-0.9%	$ 27,728,493	-2.4%
New Hampshire	31,115	-1.0%	$ 6,555,572	-0.4%	329,785	-1.9%	$ 70,175,577	-1.3%
North Carolina	98,360	10.5%	$ 25,371,392	4.5%	1,082,430	3.0%	$ 291,010,403	-1.4%
Ohio	145,903	0.7%	$ 37,328,706	-1.3%	1,656,310	-3.9%	$ 428,100,167	-4.6%
Oregon	67,866	2.8%	$ 15,656,419	1.5%	715,658	-2.4%	$ 170,117,077	-3.0%
Pennsylvania	137,007	3.7%	$ 31,716,833	0.5%	1,649,045	-1.5%	$ 398,324,907	-3.8%
Utah	12,224	16.3%	$ 3,517,409	13.7%	148,846	2.3%	$ 44,099,647	2.1%
Vermont	8,546	1.2%	$ 2,284,380	1.9%	93,534	-1.5%	$ 25,561,217	-0.3%
Virginia	88,632	5.0%	$ 21,052,094	3.5%	1,016,996	-1.1%	$ 247,574,550	-1.7%
Wyoming	12,197	0.7%	$ 2,158,711	-1.4%	104,497	-3.0%	$ 19,342,084	-3.5%