NABCA Monthly Report
March 2025 Control States Results

Total Control States spirits sales experienced a -4.0% decline in 9L volume compared to March of the previous year. Along with this 9L volume decline, $Vol saw an even steeper drop of -5.4%, resulting in a negative price mix of -1.4%. Over the past 12 months, the decline in 9L volume was -1.0%, while dollar volume dropped -1.0%, yielding a flat price mix.

A factor impacting March's performance was the number of selling days. There were 3 fewer selling days compared to the previous year, with most states having the same number of days. The exceptions were Utah with 6 fewer days (-21.6% in 9L volume) and New Hampshire, which had 3 additional days but still declined by -7.1% running against a large increase in 2024.

Spirits - Markets	9L CMTY 2025-03	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,651,969**	**-4.0%**	**$ 1,034,498,394**	**-5.4%**	**60,877,045**	**-1.0%**	**$ 13,490,553,736**	**-1.0%**
Alabama	287,010	-2.1%	$ 63,883,632	-4.0%	3,581,562	-0.3%	$ 804,597,882	0.2%
Iowa	213,686	-0.3%	$ 33,423,725	-2.2%	2,753,231	-0.9%	$ 440,859,385	-1.6%
Idaho	105,061	-3.9%	$ 23,005,787	-3.5%	1,360,382	-2.6%	$ 300,419,118	-0.9%
Mont Co	38,012	-0.1%	$ 8,785,678	-6.5%	489,967	-3.0%	$ 116,807,027	-3.3%
Maine	93,791	-4.7%	$ 19,515,933	-3.6%	1,410,722	-1.3%	$ 295,115,753	-0.1%
Michigan	628,339	-3.1%	$ 149,585,603	-3.2%	8,780,868	-2.8%	$ 2,086,793,578	-1.6%
Mississippi	190,444	2.5%	$ 31,952,201	0.7%	2,207,966	1.4%	$ 377,028,813	1.7%
Montana	83,709	9.9%	$ 15,748,467	8.1%	1,084,891	0.1%	$ 210,762,792	0.5%
North Carolina	599,938	-5.3%	$ 146,309,510	-6.2%	7,640,296	-0.4%	$ 1,847,446,760	0.1%
New Hampshire	155,856	-7.1%	$ 30,119,146	-9.9%	2,307,999	-1.5%	$ 452,532,432	-0.6%
Ohio	539,446	-7.2%	$ 140,289,362	-7.7%	6,810,886	-3.3%	$ 1,745,220,105	-2.8%
Oregon	277,269	-5.5%	$ 63,211,910	-5.6%	3,558,176	-3.2%	$ 811,547,154	-3.1%
Pennsylvania	712,451	-1.3%	$ 142,194,793	-5.2%	9,545,195	2.6%	$ 1,868,928,532	-1.1%
Utah	121,927	-21.6%	$ 25,460,411	-21.1%	1,627,994	-0.7%	$ 331,253,643	-0.8%
Virginia	450,613	-4.8%	$ 114,399,629	-5.1%	5,717,330	-1.7%	$ 1,454,373,418	0.1%
Vermont	32,431	-5.4%	$ 7,706,221	-3.4%	421,877	-3.3%	$ 98,888,431	-1.0%
West Virginia	68,707	-0.1%	$ 10,322,015	-4.6%	866,600	-0.8%	$ 133,207,464	-1.3%
Wyoming	53,278	6.1%	$ 8,584,371	4.6%	711,104	-0.1%	$ 114,771,450	-0.6%

As per previous months, all categories except Cocktails (driven by RTDs) and Tequila declined in March. This underscores the ongoing momentum of the Canned RTD segment +33.7%, which continues to gain traction as consumer preferences shift toward convenience and pre-mixed options. Only Domestic Whiskey, Gin, and Scotch reported positive price mix results.

Spirits - Categories	9L CMTY 2025-03	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,651,969**	**-4.0%**	**$ 1,034,498,394**	**-5.4%**	**60,877,045**	**-1.0%**	**$ 13,490,553,736**	**-1.0%**
BRANDY / COGNAC	191,599	-10.5%	$ 57,198,015	-13.6%	2,412,669	-8.4%	$ 719,577,041	-11.8%
CACHACA	662	-9.8%	$ 155,808	-13.3%	9,282	-5.0%	$ 2,296,163	-5.9%
CANADIAN	429,253	-10.5%	$ 87,594,866	-14.7%	5,698,526	-3.4%	$ 1,186,595,396	-2.2%
COCKTAILS	296,912	24.1%	$ 25,156,774	21.6%	4,418,726	25.0%	$ 369,002,052	22.0%
CORDIALS	341,463	-5.4%	$ 73,802,981	-6.1%	4,479,169	-1.8%	$ 992,821,404	-1.1%
DOMESTIC WHISKEY	726,304	-5.9%	$ 218,817,361	-4.8%	9,423,069	-2.1%	$ 2,855,818,123	0.0%
GIN	143,643	-7.4%	$ 30,134,888	-6.9%	1,959,757	-4.7%	$ 418,911,739	-3.2%
IRISH	102,042	-4.1%	$ 34,911,649	-8.5%	961,455	-4.2%	$ 340,312,253	-6.2%
NEUTRAL GRAIN SPIRIT	3,997	-11.3%	$ 875,343	-11.8%	60,551	-8.1%	$ 13,311,021	-8.7%
OTHER IMPORTED WHISKY	2,886	-0.6%	$ 1,797,338	-3.9%	36,520	-0.9%	$ 26,032,975	-5.1%
RUM	354,539	-8.7%	$ 55,576,593	-10.3%	4,840,082	-7.1%	$ 765,303,689	-7.3%
SCOTCH	71,958	-12.6%	$ 30,667,492	-11.6%	1,012,069	-7.4%	$ 440,456,653	-6.7%
TEQUILA	564,931	3.4%	$ 203,519,364	2.9%	6,985,313	5.6%	$ 2,522,676,291	6.5%
VODKA	1,421,745	-4.7%	$ 214,238,189	-5.7%	18,579,583	-3.0%	$ 2,836,794,042	-3.3%

Wine sales declined sharply in 9L volume by -12.5% and $Vol dropping by -13.6% in March, leading to a negative price mix of -1.1%. The rolling 12-month trend for wine sales showed a -6.8% decline in 9L volume and a -4.5% decline in $Vol, still showing a positive price mix of +2.3%.

Wine	9L CMTY 2025-03	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,150,994**	**-12.5%**	**$ 129,275,021**	**-13.6%**	**15,310,585**	**-6.8%**	**$ 1,790,050,803**	**-4.5%**
Alabama	2,042	-12.8%	$ 149,609	1.0%	25,652	-11.9%	$ 1,772,930	-3.1%
Idaho	584	0.5%	$ 95,206	7.1%	7,295	-6.9%	$ 1,160,441	-2.2%
Mont Co	62,843	-7.6%	$ 9,498,182	-5.0%	811,340	-5.7%	$ 122,527,512	-2.1%
Mississippi	110,594	-3.3%	$ 9,889,287	-2.1%	1,358,338	-2.1%	$ 124,692,567	-1.7%
Montana	429	-1.8%	$ 80,924	11.5%	4,936	4.6%	$ 873,685	1.4%
New Hampshire	182,598	-20.1%	$ 21,489,349	-16.8%	2,655,786	-7.2%	$ 325,832,063	-4.3%
Pennsylvania	651,099	-9.9%	$ 69,695,432	-13.3%	8,607,320	-7.9%	$ 981,381,754	-5.7%
Utah	110,101	-24.1%	$ 15,157,133	-22.6%	1,399,992	-4.2%	$ 185,057,208	-1.7%
Virginia	2,358	-6.1%	$ 442,376	-0.1%	31,123	-2.1%	$ 5,905,256	8.3%
Vermont	607	-15.7%	$ 95,549	-8.7%	8,297	-5.8%	$ 1,275,329	2.6%
West Virginia	412	2.5%	$ 27,959	4.8%	4,729	-8.7%	$ 327,125	-4.6%
Wyoming	27,326	-9.7%	$ 2,653,776	-8.6%	395,769	-5.6%	$ 39,242,780	-4.9%

The On-Premise spirits channel performance improved in March in both 9L volume at -3.7% and $Vol -5.2%, leading to a negative price mix of -1.8%. Over 12 months, the declines were less steep at -2.1% in volume and -2.6% in value. On-premise wine decreased in line with the overall category performance in 9L volume at -13.8%, and $Vol -11.7%, resulting in a positive price mix of +2.1%. Over the 12-month period, wine 9L volume was down -7.8%, but $Vol fell only -5.0%.

Spirits - Markets	9L CMTY 2025-03	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**767,419**	**-3.7%**	**$ 188,814,748**	**-5.5%**	**9,198,089**	**-2.1%**	**$ 2,272,440,767**	**-2.6%**
Alabama	47,752	-6.0%	$ 10,615,279	-8.3%	578,735	-0.1%	$ 128,733,345	-1.2%
Idaho	18,877	-1.6%	$ 4,637,730	0.0%	230,955	-2.8%	$ 56,395,900	-1.2%
Michigan	102,193	-4.6%	$ 25,290,100	-4.8%	1,325,377	-2.6%	$ 329,788,497	-2.3%
Mississippi	17,699	23.2%	$ 2,640,710	18.8%	180,365	10.6%	$ 27,554,959	9.7%
Mont Co	8,490	-5.5%	$ 2,195,734	-8.9%	106,491	-3.1%	$ 27,577,493	-4.6%
New Hampshire	26,579	-11.8%	$ 5,634,427	-11.2%	328,824	-3.7%	$ 70,132,583	-1.7%
North Carolina	92,346	-0.1%	$ 24,736,062	-5.3%	1,056,716	1.2%	$ 289,527,470	-1.4%
Ohio	139,858	-4.3%	$ 36,681,029	-5.0%	1,672,345	-3.2%	$ 433,904,114	-3.4%
Oregon	59,311	-3.4%	$ 14,237,126	-3.4%	714,936	-2.7%	$ 170,393,003	-3.1%
Pennsylvania	139,624	-4.2%	$ 33,608,577	-6.9%	1,645,354	-4.0%	$ 401,332,792	-5.3%
Utah	13,301	-15.5%	$ 4,077,134	-14.7%	146,154	-0.8%	$ 43,514,751	-0.3%
Vermont	7,190	-3.8%	$ 2,010,201	-2.0%	93,697	-1.4%	$ 25,595,735	0.5%
Virginia	86,014	-4.1%	$ 20,896,269	-5.3%	1,013,909	-1.9%	$ 248,602,465	-1.3%
Wyoming	8,183	4.4%	$ 1,554,371	4.5%	104,233	-3.1%	$ 19,387,660	-2.9%