NABCA Monthly Report - March 2026 Control States Results

March Control States spirits sales improved versus February, with 9L volume increasing +1.2% and $Vol decreasing -1.6%, resulting in a -2.8% price mix. Performance was impacted by five additional selling days with two additional selling days in Utah and three additional selling days in Michigan. On a rolling 12-month basis, spirits finished down -1.0% in 9L volume and down -2.7% in $Vol, yielding a -1.7% price mix.

Spirits - Markets	9L CMTY 2026-03	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**4,709,599**	**1.2%**	**$ 1,018,624,616**	**-1.6%**	**60,291,095**	**-1.0%**	**$ 13,132,585,919**	**-2.7%**
Alabama	297,317	3.6%	$ 63,892,197	-0.7%	3,625,961	1.2%	$ 797,489,078	-0.9%
Iowa	209,719	-1.9%	$ 33,838,978	1.1%	2,651,744	-3.7%	$ 421,152,202	-4.5%
Idaho	99,589	-5.2%	$ 21,917,670	-4.9%	1,321,159	-2.9%	$ 294,018,021	-2.1%
Mont Co	37,595	-1.1%	$ 8,205,738	-6.6%	519,243	6.0%	$ 113,280,123	-3.0%
Maine	96,660	3.1%	$ 19,799,079	1.5%	1,360,303	-3.6%	$ 282,584,573	-4.3%
Michigan	655,234	4.3%	$ 153,128,105	2.4%	8,581,340	-2.3%	$ 2,008,973,144	-3.7%
Mississippi	212,347	11.5%	$ 35,446,761	10.9%	2,231,884	1.1%	$ 373,287,930	-1.0%
Montana	86,451	3.3%	$ 15,836,388	0.4%	1,074,582	-1.0%	$ 205,253,550	-2.6%
North Carolina	601,342	0.2%	$ 140,132,530	-4.1%	7,750,254	1.4%	$ 1,825,738,258	-1.2%
New Hampshire	188,125	20.7%	$ 36,625,648	21.7%	2,253,424	-2.4%	$ 438,356,463	-3.1%
Ohio	514,815	-4.6%	$ 130,914,154	-6.7%	6,565,557	-3.6%	$ 1,669,300,732	-4.4%
Oregon	265,783	-4.1%	$ 59,963,299	-5.2%	3,462,526	-2.7%	$ 782,298,544	-3.6%
Pennsylvania	714,819	0.3%	$ 137,526,895	-3.4%	9,645,035	1.1%	$ 1,843,934,557	-1.4%
Utah	132,084	8.3%	$ 25,996,331	2.1%	1,641,886	0.9%	$ 326,064,906	-1.6%
Virginia	439,167	-2.5%	$ 108,693,356	-5.0%	5,638,012	-1.4%	$ 1,415,139,346	-2.7%
Vermont	30,907	-4.7%	$ 7,275,829	-5.6%	405,731	-3.8%	$ 95,595,140	-3.3%
West Virginia	68,707	0.0%	$ 10,450,715	1.2%	856,916	-1.1%	$ 128,806,523	-3.3%
Wyoming	58,939	10.6%	$ 8,980,943	3.7%	705,539	-0.8%	$ 111,312,830	-3.1%

Other categories besides Cocktails (driven by Canned RTDs), Tequila, and Scotch saw some improvement with prior months. Cocktails, Tequila, Scotch, Cordials, Gin, and modestly Vodka saw positive 9L volume growth. Scotch continued to see significant growth +11.4% in 9L volume and +2.2% $Vol. This significant growth again was driven primarily by New Hampshire (+256.8%) supported by strong promotional activity.

Spirits - Categories	9L CMTY 2026-03	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg	R12 Price Mix
Total Control	**4,709,599**	**1.2%**	**$ 1,018,624,616**	**-1.6%**	**60,291,095**	**-1.0%**	**$ 13,132,585,919**	**-2.7%**	**-1.7%**
BRANDY / COGNAC	181,995	-5.0%	$ 52,942,179	-7.5%	2,245,051	-6.9%	$ 658,425,007	-8.5%	-1.6%
CACHACA	742	12.2%	$ 184,072	17.8%	9,064	-2.4%	$ 2,253,517	-1.9%	0.5%
CANADIAN	291,480	-8.8%	$ 62,858,743	-9.2%	3,931,787	-7.1%	$ 867,550,060	-7.5%	-0.4%
COCKTAILS	386,437	30.1%	$ 32,307,511	28.4%	5,421,471	22.7%	$ 450,752,432	22.2%	-0.5%
CORDIALS	343,790	0.8%	$ 73,349,510	-0.7%	4,419,971	-1.2%	$ 975,500,498	-1.7%	-0.5%
DOMESTIC WHISKE	827,400	-1.0%	$ 235,817,121	-0.6%	10,574,186	-2.9%	$ 3,030,393,321	-2.4%	0.5%
GIN	145,977	1.6%	$ 30,420,589	0.8%	1,868,344	-4.7%	$ 403,642,846	-3.7%	1.0%
IRISH	96,344	-5.6%	$ 32,782,764	-6.2%	919,982	-4.3%	$ 321,078,768	-5.7%	-1.4%
NEUTRAL GRAIN SP	3,987	-0.3%	$ 856,109	-2.3%	56,846	-6.1%	$ 12,466,041	-6.4%	-0.2%
OTHER IMPORTED \	2,593	-10.2%	$ 1,702,422	-5.4%	34,691	-5.0%	$ 24,575,043	-5.6%	-0.6%
RUM	349,541	-1.4%	$ 54,355,464	-2.2%	4,547,840	-6.0%	$ 713,745,970	-6.7%	-0.7%
SCOTCH	80,188	11.4%	$ 31,390,325	2.2%	953,900	-5.8%	$ 411,643,691	-6.6%	-0.8%
TEQUILA	576,105	1.9%	$ 196,879,209	-3.5%	7,119,612	1.9%	$ 2,494,726,152	-1.1%	-3.0%
VODKA	1,422,979	0.1%	$ 212,675,555	-0.8%	18,188,031	-2.1%	$ 2,764,904,524	-2.5%	-0.4%

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Wine sales improved in March, with 9L volume down -1.8% and $Vol declining -1.9%, resulting in a -0.1% price mix. Utah's two additional selling days has impacted this. On a rolling 12-month basis, wine trends are modestly improving, with 9L volume at -4.4%, $Vol at -3.1%, and price mix remaining flat at +1.4%.

Wine	9L CMTY 2026-03	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,130,666**	**-1.8%**	**$ 130,734,450**	**-1.9%**	**14,632,755**	**-4.4%**	**$ 1,738,942,744**	**-3.1%**
Alabama	1,802	-11.8%	$ 136,007	-9.4%	23,659	-7.8%	$ 1,783,715	0.6%
Idaho	538	-8.0%	$ 89,415	-8.2%	7,023	-3.7%	$ 1,183,843	1.8%
Mont Co	60,673	-3.5%	$ 8,933,061	-5.9%	776,500	-4.3%	$ 118,769,657	-3.1%
Mississippi	111,991	1.3%	$ 10,248,818	3.4%	1,306,338	-3.8%	$ 120,039,862	-3.8%
Montana	460	7.1%	$ 91,406	9.4%	5,491	11.2%	$ 983,532	12.2%
New Hampshire	183,840	0.7%	$ 21,844,724	1.6%	2,522,061	-5.0%	$ 311,096,357	-4.5%
Pennsylvania	627,069	-3.7%	$ 70,684,541	-3.6%	8,182,414	-4.9%	$ 955,657,758	-3.0%
Utah	113,061	2.7%	$ 15,396,908	-0.2%	1,387,241	-0.9%	$ 184,473,601	-0.5%
Virginia	2,221	-5.8%	$ 427,903	-3.3%	29,713	-4.5%	$ 5,781,818	-2.1%
Vermont	583	-4.0%	$ 96,238	0.7%	7,867	-5.2%	$ 1,254,255	-1.7%
West Virginia	402	-2.4%	$ 30,575	9.4%	4,462	-5.7%	$ 330,189	0.9%
Wyoming	28,027	2.6%	$ 2,754,631	2.8%	379,978	-4.0%	$ 37,586,064	-4.3%

On-Premise channel spirit sales improved, with 9L volume increasing +2.4% and $Vol flat, as only 5 of the 14 reporting states recorded declines. Rolling 12-month on-premise results are mixed, with 9L volume up +0.6% and $Vol down -1.4%, resulting in a -2.0% price mix.

On-Premise wine 9L volume declined -5.2% and $Vol decreased -4.3%, generating a +0.9% price mix. On a rolling 12-month basis, on-premise wine finished down -3.6% in 9L volume and -2.7% in $Vol yielding a +0.9% price mix.

Spirits - On Premise	9L CMTY 2026-03	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**786,059**	**2.4%**	**$ 188,808,643**	**0.0%**	**9,248,693**	**0.6%**	**$ 2,239,905,716**	**-1.4%**
Alabama	55,101	15.4%	$ 11,612,424	9.4%	612,104	5.8%	$ 132,996,190	3.3%
Idaho	19,021	0.8%	$ 4,664,636	0.6%	231,037	0.0%	$ 56,714,883	0.6%
Michigan	107,949	5.6%	$ 26,348,984	4.2%	1,316,530	-0.7%	$ 327,020,181	-0.8%
Mississippi	14,002	-20.9%	$ 2,117,287	-19.8%	179,409	-0.5%	$ 27,220,186	-1.2%
Mont Co	8,688	2.3%	$ 2,171,515	-1.1%	106,901	0.4%	$ 27,164,700	-1.5%
New Hampshire	26,336	-0.9%	$ 5,448,453	-3.3%	328,253	-0.2%	$ 69,299,459	-1.2%
North Carolina	101,930	10.4%	$ 26,018,542	5.2%	1,118,318	5.8%	$ 291,595,868	0.7%
Ohio	140,660	0.6%	$ 36,027,987	-1.8%	1,638,613	-2.0%	$ 419,665,484	-3.3%
Oregon	56,532	-4.7%	$ 13,402,845	-5.9%	712,087	-0.4%	$ 167,299,163	-1.8%
Pennsylvania	142,080	1.8%	$ 33,223,040	-1.1%	1,652,565	0.5%	$ 390,021,844	-2.8%
Utah	13,567	2.0%	$ 3,965,726	-2.7%	147,723	1.1%	$ 43,039,335	-1.1%
Vermont	7,324	1.9%	$ 2,027,522	0.9%	91,901	-1.9%	$ 25,205,199	-1.5%
Virginia	85,033	-1.1%	$ 20,309,898	-2.8%	1,011,834	-0.2%	$ 244,010,933	-1.9%
Wyoming	7,835	-4.3%	$ 1,469,784	-5.4%	101,419	-2.7%	$ 18,652,291	-3.8%