NABCA Monthly Report
May 2024 Control States Results

Total Control States spirits sales 9L volume declined by -0.9% compared to May last year generating a +0.3% $Vol growth and a positive a +1.2% price mix reflecting a continuing deceleration of premiumization. Over the past 12 months the 9L volume declined by -0.4% with a +1.4% gain in $Vol. During May there were 4 additional selling days overall with 5 additional days in Utah, 3 additional days in New Hampshire and 4 fewer days in Pennsylvania.

Spirits - Markets	9L CMTY 2024-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,499,398**	**-0.9%**	**$ 1,210,718,058**	**0.3%**	**61,486,545**	**-0.4%**	**$ 13,649,714,958**	**1.4%**
Alabama	327,074	2.6%	$ 71,782,969	1.9%	3,616,396	1.9%	$ 808,483,535	3.5%
Iowa	248,034	-3.2%	$ 39,276,956	-2.2%	2,791,267	-0.9%	$ 450,485,115	1.2%
Idaho	117,679	0.0%	$ 25,626,725	2.3%	1,395,765	-1.9%	$ 303,892,976	0.8%
Mont Co	45,174	-4.0%	$ 10,846,254	0.5%	500,714	-3.2%	$ 120,121,962	-0.7%
Maine	125,821	-2.5%	$ 26,396,631	-0.3%	1,433,595	-1.5%	$ 297,177,182	1.1%
Michigan	874,109	-1.0%	$ 205,001,781	0.0%	8,994,547	-2.7%	$ 2,118,300,484	-1.2%
Mississippi	182,779	-5.4%	$ 30,287,379	-5.1%	2,167,520	-2.8%	$ 369,376,884	-2.0%
Montana	96,897	0.5%	$ 18,692,058	3.4%	1,091,239	1.1%	$ 212,018,907	3.0%
North Carolina	688,284	4.4%	$ 163,357,935	4.8%	7,702,326	1.3%	$ 1,855,570,981	3.1%
New Hampshire	185,467	3.8%	$ 37,215,705	12.1%	2,328,439	0.5%	$ 456,049,025	3.4%
Ohio	618,636	0.2%	$ 157,371,897	0.3%	7,040,902	-1.3%	$ 1,793,896,874	0.8%
Oregon	309,582	-2.0%	$ 69,365,957	-2.4%	3,663,724	-2.5%	$ 834,296,517	-1.6%
Pennsylvania	833,341	-9.4%	$ 162,854,713	-11.2%	9,251,308	1.5%	$ 1,878,171,253	3.5%
Utah	155,780	21.4%	$ 31,223,657	22.4%	1,665,301	2.3%	$ 339,160,920	2.8%
Virginia	516,023	2.4%	$ 131,929,099	7.7%	5,816,848	-0.5%	$ 1,460,660,101	2.3%
Vermont	36,229	-2.3%	$ 8,240,069	0.7%	435,134	-4.2%	$ 100,033,835	-1.1%
West Virgina	77,197	-6.7%	$ 11,632,235	-8.2%	876,237	-0.4%	$ 135,417,022	0.2%
Wyoming	61,291	-5.7%	$ 9,616,040	-3.8%	715,285	-0.5%	$ 116,601,386	2.2%

There was a mixed result across the spirit categories in May with Tequila +5.0% and Cocktails +7.9% in 9L volume led by Canned RTDs +18.0%. Cordials posted a positive +0.7% in 9L volume with +3.5% in $Vol. All other major categories were negative with the largest 9L volume declines being Scotch -8.1%, Brandy/Cognac -7.4%, Rum -6.9% and Irish -3.5%.

Spirits - Categories	9L CMTY 2024-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,499,398**	**-0.9%**	**$ 1,210,718,058**	**0.3%**	**61,486,545**	**-0.4%**	**$ 13,649,714,958**	**1.4%**
BRANDY / COGNAC	216,948	-7.4%	$ 65,702,527	-10.1%	2,602,513	-8.4%	$ 799,460,351	-12.1%
CACHACA	995	0.5%	$ 249,310	-1.9%	9,820	4.7%	$ 2,445,302	8.6%
CANADIAN	500,789	-2.5%	$ 102,670,125	-0.6%	5,860,426	-4.3%	$ 1,212,831,098	-1.4%
COCKTAILS	368,745	7.9%	$ 30,978,622	8.4%	3,493,677	14.7%	$ 300,690,734	15.3%
CORDIALS	391,692	0.7%	$ 85,457,792	3.5%	4,552,345	0.4%	$ 1,004,527,020	3.4%
DOMESTIC WHISKEY	820,195	-0.7%	$ 241,454,928	2.1%	9,670,540	-0.7%	$ 2,872,726,912	3.2%
GIN	186,920	-2.9%	$ 40,404,381	-0.2%	2,046,401	-5.0%	$ 432,307,122	-0.8%
IRISH	77,770	-3.5%	$ 28,259,744	-3.6%	1,000,175	-3.5%	$ 361,412,321	-2.2%
NEUTRAL GRAIN SPIRIT	4,923	-10.8%	$ 1,085,690	-11.3%	65,212	-4.9%	$ 14,418,715	-2.0%
OTHER IMPORTED WHISKY	2,914	-3.7%	$ 2,051,383	-20.6%	38,018	-4.5%	$ 28,098,330	-4.8%
RUM	457,977	-6.9%	$ 72,695,655	-4.9%	5,160,152	-6.0%	$ 820,195,766	-3.1%
SCOTCH	86,133	-8.1%	$ 36,560,260	-5.7%	1,077,200	-5.8%	$ 467,087,244	-3.0%
TEQUILA	679,700	5.0%	$ 241,953,294	5.7%	6,694,365	7.9%	$ 2,399,883,417	9.0%
VODKA	1,703,659	-1.6%	$ 261,119,078	-1.6%	19,215,524	-0.6%	$ 2,932,953,209	0.3%

Wines declined at -8.4% in 9L Volume with -6.6% in $Vol returning a positive price mix - 1.8% heavily influenced by Pennsylvania at -150,600 9L cases due to the reduced number of selling days. Rolling 12-month 9L volume was -5.1% with $Vol at -0.5% resulting in a +4.6% price mix.

Wine	9L CMTY 2024-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,367,027**	**-8.4%**	**$ 151,658,705**	**-6.6%**	**16,209,571**	**-5.1%**	**$ 1,856,626,140**	**-0.5%**
Alabama	2,610	-8.5%	$ 159,741	-7.3%	28,665	-6.9%	$ 1,807,258	-3.0%
Idaho	583	-8.1%	$ 87,112	-4.9%	7,633	-14.0%	$ 1,167,569	-6.9%
Mont Co	74,922	-1.6%	$ 11,245,081	3.5%	858,304	-4.0%	$ 124,939,343	-0.5%
Mississippi	123,089	-3.4%	$ 10,938,251	-5.5%	1,379,851	-8.1%	$ 126,128,508	-5.4%
Montana	397	21.3%	$ 65,391	15.9%	4,739	-1.8%	$ 859,901	0.4%
New Hampshire	226,990	6.1%	$ 28,368,452	19.0%	2,818,827	-2.8%	$ 340,170,680	2.6%
Pennsylvania	770,309	-16.4%	$ 80,952,397	-17.9%	9,173,194	-5.7%	$ 1,022,830,166	-1.1%
Utah	129,716	19.3%	$ 15,976,970	21.8%	1,475,480	-2.2%	$ 190,439,948	1.1%
Virginia	2,551	-0.6%	$ 451,611	6.1%	31,730	-1.5%	$ 5,488,072	2.5%
Vermont	696	4.1%	$ 99,243	11.4%	8,828	-3.4%	$ 1,256,079	-0.6%
West Virgina	397	-18.3%	$ 26,124	-14.0%	5,053	-13.2%	$ 339,752	-2.2%
Wyoming	34,767	-6.0%	$ 3,288,175	-5.9%	417,265	-6.4%	$ 41,197,542	-2.7%

The on-premise spirits channel declined by -0.6% in 9L volume and was flat in $Vol resulting in a positive +0.6% price mix. The declines were across the board in all categories with only Tequila posting a positive 9L volume result of +2.0%.

The on-premise wine channel also declined in 9L volume by -4.7% but with a positive $Vol result of +1.0%. In 9L volume New Hampshire was +7.7%, Mississippi +2.4%, Utah +19.6%. The total result was impacted by the reduced number of selling days in Pennsylvania (47% share of the control state 9L volume on-premise wine) with -15.2%.

Spirits - Markets	9L CMTY 2024-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**895,136**	**-0.6%**	**$ 221,166,713**	**0.0%**	**9,414,450**	**0.0%**	**$ 2,341,547,570**	**2.0%**
Alabama	56,211	4.8%	$ 12,697,327	6.0%	585,335	2.0%	$ 131,691,371	3.2%
Idaho	21,334	-0.8%	$ 5,096,478	0.3%	237,847	-3.3%	$ 57,184,285	-1.9%
Michigan	135,931	-3.4%	$ 33,611,039	-3.4%	1,355,120	-2.0%	$ 336,786,475	0.2%
Mississippi	15,579	4.2%	$ 2,438,941	9.2%	164,746	-1.5%	$ 25,554,863	2.8%
Mont Co	11,433	2.7%	$ 2,941,444	6.0%	110,106	0.3%	$ 28,933,413	1.4%
New Hampshire	30,698	8.4%	$ 6,758,297	15.5%	340,219	2.9%	$ 71,655,856	5.8%
North Carolina	103,764	7.3%	$ 28,346,965	6.7%	1,056,983	2.3%	$ 297,123,320	3.8%
Ohio	163,095	0.4%	$ 42,304,981	0.4%	1,734,180	-1.3%	$ 451,082,907	0.6%
Oregon	67,298	-0.1%	$ 15,776,785	-1.2%	733,657	-2.0%	$ 175,471,786	-1.6%
Pennsylvania	157,531	-10.6%	$ 38,520,308	-10.7%	1,707,192	2.0%	$ 422,526,284	4.9%
Utah	14,312	23.5%	$ 4,148,574	25.4%	149,431	-0.2%	$ 44,345,686	2.2%
Vermont	8,181	2.4%	$ 2,173,770	5.6%	95,568	0.5%	$ 25,722,352	2.9%
Virginia	100,329	2.0%	$ 24,613,026	4.5%	1,035,888	-0.3%	$ 253,324,317	2.1%
Wyoming	9,440	-4.5%	$ 1,738,779	-2.2%	108,179	-1.1%	$ 20,144,654	1.7%