NABCA Monthly Report
May 2025 Control States Results

In May, Control State spirits sales declined, with 9L volume down -4.2% compared to the same month last year. $Vol dropped even further, by -5.5%, leading to a negative price mix of -1.3%. On a 12-month rolling basis, 9L volume decreased by -1.1%, while dollar sales fell -1.4%, resulting in a -0.3% price mix. The overall decline in May was partly driven by fewer selling days, most notably in Michigan, which had seven fewer days than the previous year. As the largest volume Control State, Michigan's reduced selling days had a significant impact on the month's results.

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Spirits - Markets	9L CMTY 2025-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,268,366**	**-4.2%**	**$ 1,145,681,985**	**-5.5%**	**60,800,272**	**-1.1%**	**$ 13,456,384,116**	**-1.4%**
Alabama	320,427	-2.0%	$ 69,899,393	-3.5%	3,583,281	-0.9%	$ 803,423,571	-0.7%
Iowa	226,340	-8.8%	$ 35,490,291	-9.9%	2,728,189	-2.3%	$ 436,055,171	-3.2%
Idaho	115,573	-1.8%	$ 25,575,708	-0.3%	1,356,469	-2.8%	$ 300,360,051	-1.2%
Mont Co	48,563	7.5%	$ 10,526,568	-3.0%	496,107	-0.9%	$ 116,897,541	-2.7%
Maine	116,635	-7.3%	$ 24,441,062	-7.4%	1,393,951	-2.8%	$ 291,599,781	-1.9%
Michigan	690,999	-21.0%	$ 161,027,415	-21.5%	8,750,460	-2.7%	$ 2,079,550,094	-1.8%
Mississippi	180,128	-1.5%	$ 29,412,108	-3.0%	2,207,206	1.8%	$ 376,718,992	2.0%
Montana	93,193	-3.8%	$ 17,554,852	-6.3%	1,080,309	-1.0%	$ 209,603,447	-1.2%
North Carolina	703,788	2.3%	$ 165,739,372	1.5%	7,673,336	-0.4%	$ 1,851,976,207	-0.2%
New Hampshire	173,126	-6.7%	$ 33,350,558	-10.4%	2,284,402	-1.9%	$ 446,639,134	-2.1%
Ohio	594,541	-3.9%	$ 153,143,264	-2.7%	6,771,204	-3.8%	$ 1,737,500,810	-3.1%
Oregon	306,288	-1.1%	$ 68,817,235	-0.8%	3,550,027	-3.1%	$ 810,187,333	-2.9%
Pennsylvania	866,223	4.0%	$ 164,356,734	0.7%	9,600,946	3.8%	$ 1,869,943,894	-0.5%
Utah	153,522	-1.5%	$ 30,322,385	-2.9%	1,625,888	-2.4%	$ 330,418,135	-2.6%
Virginia	505,955	-2.0%	$ 127,101,102	-3.8%	5,704,474	-1.9%	$ 1,450,420,073	-0.7%
Vermont	34,697	-4.2%	$ 8,100,216	-1.7%	418,591	-3.8%	$ 98,334,264	-1.7%
West Virginia	78,139	1.2%	$ 11,625,765	-0.5%	865,353	-1.2%	$ 132,622,920	-2.1%
Wyoming	60,230	-1.7%	$ 9,197,957	-4.8%	710,082	-0.7%	$ 114,132,698	-2.2%

Cocktails +26.3%, driven by Canned RTDs +35.6%, was the only positive category. All other categories declined in 9L volume and $Vol. Outside of Cocktails, Tequila remained the only positive category on a 12-month rolling basis at +5.1% in 9L volume and +5.7% in $Vol.

Spirits - Categories	9L CMTY 2025-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,268,366**	**-4.2%**	**$ 1,145,681,985**	**-5.5%**	**60,800,272**	**-1.1%**	**$ 13,456,384,116**	**-1.4%**
BRANDY / COGNAC	191,749	-11.6%	$ 56,514,513	-14.0%	2,383,776	-8.4%	$ 708,435,757	-11.4%
CACHACA	891	-10.5%	$ 208,708	-16.7%	9,107	-7.3%	$ 2,229,505	-8.9%
CANADIAN	448,254	-11.0%	$ 91,956,598	-10.8%	5,633,600	-4.3%	$ 1,171,255,478	-3.7%
COCKTAILS	484,395	26.3%	$ 39,040,161	22.6%	4,597,666	27.7%	$ 382,338,749	24.4%
CORDIALS	369,245	-5.9%	$ 79,808,143	-6.5%	4,467,371	-2.3%	$ 990,128,524	-1.9%
DOMESTIC WHISKEY	772,423	-5.4%	$ 231,121,608	-4.3%	9,389,164	-2.4%	$ 2,855,758,457	-0.3%
GIN	170,637	-8.7%	$ 37,073,953	-8.3%	1,941,490	-5.1%	$ 415,626,335	-3.9%
IRISH	72,728	-6.5%	$ 25,612,300	-9.4%	955,029	-4.5%	$ 336,533,161	-6.9%
NEUTRAL GRAIN SPIRIT	4,467	-9.3%	$ 977,852	-9.8%	59,652	-8.5%	$ 13,105,229	-9.1%
OTHER IMPORTED WHISK	2,761	-3.1%	$ 1,893,529	-4.8%	36,482	-1.0%	$ 26,043,758	-3.1%
RUM	404,873	-11.6%	$ 63,707,846	-12.4%	4,786,606	-7.2%	$ 754,860,068	-8.0%
SCOTCH	77,659	-9.9%	$ 33,653,212	-8.2%	1,001,732	-7.1%	$ 436,865,879	-6.5%
TEQUILA	676,510	-0.5%	$ 238,707,165	-1.6%	7,037,227	5.1%	$ 2,538,145,794	5.7%
VODKA	1,591,740	-5.8%	$ 245,330,429	-5.8%	18,501,079	-3.2%	$ 2,824,235,214	-3.5%

Wines declined by -6.8% in 9L volume and -8.9% in $Vol (not impacted by Michigan) with -2.1% price mix. The 12-month results were -6.2% in 9L volume and -4.4% in $Vol with a positive price mix of +1.8%.

Wine	9L CMTY 2025-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,273,602**	**-6.8%**	**$ 143,154,821**	**-8.9%**	**15,200,752**	**-6.2%**	**$ 1,780,466,407**	**-4.4%**
Alabama	2,319	-11.2%	$ 166,679	4.0%	25,129	-12.3%	$ 1,786,782	-1.2%
Idaho	556	-4.6%	$ 91,661	2.1%	7,267	-4.8%	$ 1,168,755	-0.1%
Mont Co	70,509	-5.9%	$ 10,675,978	-5.1%	803,711	-6.4%	$ 122,583,131	-1.9%
Mississippi	109,297	-11.2%	$ 9,559,846	-12.6%	1,342,103	-2.7%	$ 122,932,462	-2.5%
Montana	437	10.0%	$ 68,551	4.8%	5,070	7.0%	$ 905,148	5.3%
New Hampshire	206,386	-9.1%	$ 24,653,995	-13.0%	2,637,602	-6.4%	$ 321,469,096	-5.5%
Pennsylvania	723,386	-6.1%	$ 78,819,644	-8.7%	8,547,250	-6.8%	$ 978,002,213	-4.9%
Utah	125,508	-3.2%	$ 15,571,985	-3.0%	1,395,573	-5.4%	$ 185,189,796	-2.8%
Virginia	2,560	0.4%	$ 488,102	8.1%	31,035	-2.2%	$ 5,959,494	8.6%
Vermont	611	-12.2%	$ 93,266	-6.0%	8,169	-7.5%	$ 1,268,065	1.0%
West Virginia	334	-16.0%	$ 23,794	-9.5%	4,662	-7.7%	$ 326,471	-4.0%
Wyoming	31,697	-8.8%	$ 2,941,164	-10.9%	393,172	-5.8%	$ 38,872,573	-5.7%

The performance of the On-Premise spirits channel closely mirrored the overall spirits trend in May, with 9L volume down -4.5% and $Vol declining -6.0%, resulting in a negative price mix of -1.5%. On a 12-month basis, spirits in the On-Premise channel saw a -2.3% drop in volume and a -3.3% decline in $Vol. Wine in the On-Premise channel also underperformed, with May showing a -6.6% decline in 9L volume and a -7.0% drop in $Vol, yielding a -0.4% price mix. Over the past 12 months, wine volume fell -7.2%, while $Vol was down -4.9%.

Spirits - Markets	9L CMTY 2025-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**854,519**	**-4.5%**	**$ 207,755,857**	**-6.0%**	**9,194,017**	**-2.3%**	**$ 2,264,327,319**	**-3.3%**
Alabama	57,115	1.6%	$ 12,497,546	-1.6%	582,275	-0.5%	$ 128,944,136	-2.1%
Idaho	20,265	-5.0%	$ 4,890,778	-4.0%	229,525	-3.5%	$ 56,122,369	-1.9%
Michigan	109,108	-19.7%	$ 27,365,936	-18.6%	1,323,447	-2.3%	$ 329,642,185	-2.1%
Mississippi	16,126	3.5%	$ 2,425,395	-0.6%	181,111	9.9%	$ 27,620,865	8.1%
Mont Co	10,503	-8.1%	$ 2,702,774	-8.1%	106,207	-3.5%	$ 27,680,397	-4.3%
New Hampshire	30,600	-0.3%	$ 6,422,142	-5.0%	328,794	-3.4%	$ 69,867,046	-2.5%
North Carolina	106,073	2.2%	$ 27,892,019	-1.6%	1,067,680	1.0%	$ 289,713,893	-2.5%
Ohio	153,608	-5.8%	$ 39,921,569	-5.6%	1,661,316	-4.2%	$ 430,588,540	-4.5%
Oregon	64,700	-3.9%	$ 15,123,425	-4.1%	714,501	-2.6%	$ 170,305,723	-2.9%
Pennsylvania	155,528	-1.1%	$ 37,132,593	-3.5%	1,641,662	-3.7%	$ 398,410,769	-5.6%
Utah	14,405	0.7%	$ 3,982,867	-4.0%	146,552	-1.9%	$ 43,426,470	-2.1%
Vermont	8,038	-1.8%	$ 2,155,107	-0.9%	93,313	-2.4%	$ 25,497,201	-0.9%
Virginia	99,178	-1.2%	$ 23,581,219	-4.2%	1,014,013	-2.1%	$ 247,279,160	-2.4%
Wyoming	9,272	-1.8%	$ 1,662,487	-4.4%	103,621	-4.2%	$ 19,228,566	-4.6%