NABCA

NABCA Monthly Report - May 2026 Control States Results

Control states reported softer spirits and wine performance in May, driven in part by fewer selling days across several markets. Spirits sales declined, with 9L volume down -1.7% and $Vol down -4.4%, resulting in a -2.7% price mix. The calendar shift included five fewer selling days overall, with four less selling days in Utah and one less selling day each in Alabama, Mississippi, Montana, and North Carolina. Michigan reported three additional selling days. On a rolling 12-month basis, spirits remained down -1.1% in 9L volume and -3.1% in $Vol yielding a -2.0% price mix.

Spirits - Markets	9L CMTY 2026-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,177,912**	**-1.7%**	**$ 1,096,230,153**	**-4.4%**	**60,140,622**	**-1.1%**	**$ 13,041,534,507**	**-3.1%**
Alabama	311,063	-2.9%	$ 66,604,895	-5.4%	3,622,753	1.1%	$ 794,029,160	-1.2%
Iowa	229,223	1.3%	$ 34,629,762	-2.5%	2,636,626	-3.4%	$ 418,502,454	-4.0%
Idaho	112,099	-3.0%	$ 25,207,029	-1.6%	1,315,552	-3.0%	$ 293,569,782	-2.3%
Mont Co	45,907	-5.5%	$ 9,721,066	-7.7%	517,909	4.4%	$ 112,293,175	-3.9%
Maine	108,553	-6.9%	$ 22,565,605	-7.7%	1,349,614	-3.2%	$ 280,147,147	-3.9%
Michigan	699,657	1.3%	$ 159,828,878	-0.7%	8,468,095	-3.2%	$ 1,975,451,187	-5.0%
Mississippi	191,897	6.5%	$ 31,061,143	5.6%	2,273,354	3.0%	$ 376,518,037	-0.1%
Montana	90,491	-2.9%	$ 16,462,452	-6.4%	1,071,129	-0.9%	$ 203,279,165	-3.0%
North Carolina	710,881	1.0%	$ 158,414,903	-4.4%	7,791,168	1.5%	$ 1,817,527,082	-1.9%
New Hampshire	166,586	-3.8%	$ 31,402,475	-5.8%	2,228,755	-2.4%	$ 432,753,163	-3.1%
Ohio	563,417	-5.2%	$ 143,217,555	-6.4%	6,524,252	-3.7%	$ 1,657,426,401	-4.6%
Oregon	295,607	-3.5%	$ 64,668,140	-6.1%	3,446,240	-2.9%	$ 775,918,655	-4.2%
Pennsylvania	848,852	-2.0%	$ 157,490,404	-4.3%	9,655,923	0.6%	$ 1,838,635,074	-1.7%
Utah	145,246	-5.4%	$ 27,378,791	-9.7%	1,645,696	1.2%	$ 323,854,783	-2.0%
Virginia	495,362	-2.1%	$ 120,558,157	-5.2%	5,634,648	-1.2%	$ 1,408,364,711	-2.9%
Vermont	32,867	-5.3%	$ 7,623,183	-5.9%	402,993	-3.7%	$ 94,974,327	-3.4%
West Virginia	74,846	-4.2%	$ 10,843,112	-6.7%	857,129	-1.0%	$ 127,872,523	-3.6%
Wyoming	55,357	-8.1%	$ 8,552,602	-7.5%	698,786	-1.6%	$ 110,417,680	-3.3%

Category performance was broadly negative, with cocktails (led by canned RTDs) the only segment posting growth, up +21.8% in 9L volume and +21.7% in $Vol. Tequila remained relatively stable, down just -0.2%, while Scotch continued to contract across nearly all states except Oregon.

Spirits - Categories	9L CMTY 2026-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,177,912**	**-1.7%**	**$ 1,096,230,153**	**-4.4%**	**60,140,622**	**-1.1%**	**$ 13,041,534,507**	**-3.1%**
BRANDY / COGNAC	178,925	-6.7%	$ 52,990,757	-6.0%	2,215,346	-7.1%	$ 648,256,620	-8.5%
CACHACA	987	10.7%	$ 254,981	21.5%	9,267	1.8%	$ 2,334,311	4.6%
CANADIAN	306,248	-7.4%	$ 65,840,746	-9.5%	3,876,605	-7.3%	$ 854,890,268	-7.7%
COCKTAILS	590,316	21.8%	$ 47,535,966	21.7%	5,647,461	22.8%	$ 468,837,479	22.6%
CORDIALS	358,218	-2.9%	$ 77,804,284	-2.5%	4,398,861	-1.5%	$ 970,811,687	-1.9%
DOMESTIC WHISKE	840,448	-5.6%	$ 238,733,995	-4.7%	10,497,891	-3.2%	$ 3,013,481,878	-2.8%
GIN	159,056	-6.9%	$ 35,072,597	-5.5%	1,848,954	-4.8%	$ 400,625,806	-3.7%
IRISH	68,451	-5.9%	$ 24,071,276	-6.0%	912,052	-4.5%	$ 318,114,667	-5.5%
NEUTRAL GRAIN SI	4,232	-5.3%	$ 933,417	-4.5%	56,735	-4.9%	$ 12,444,100	-5.0%
OTHER IMPORTED	2,706	-2.0%	$ 1,819,347	-4.0%	34,391	-5.8%	$ 24,328,579	-6.6%
RUM	378,475	-6.5%	$ 59,052,587	-7.3%	4,486,767	-6.3%	$ 704,159,581	-6.7%
SCOTCH	71,403	-8.1%	$ 31,042,646	-7.9%	940,365	-6.1%	$ 406,158,085	-7.1%
TEQUILA	675,466	-0.2%	$ 229,222,413	-4.2%	7,119,703	1.1%	$ 2,475,065,000	-2.5%
VODKA	1,542,939	-3.1%	$ 231,789,203	-5.6%	18,095,884	-2.2%	$ 2,741,192,866	-2.9%

NABCA

NABCA Monthly Report - May 2026 Control States Results

Wine sales also faced continued pressure in May, with 9L volume down -8.8% and $Vol down -8.5%. Performance was impacted by fewer selling days, particularly in Utah, and the presence of five Sundays during the month. Over the past 12 months, wine 9L volume has declined -4.8% with $Vol down -3.3%, though price mix remains slightly positive at +0.3.

Wine	9L CMTY 2026-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,160,992**	**-8.8%**	**$ 135,132,311**	**-8.5%**	**14,470,508**	**-4.8%**	**$ 1,726,076,768**	**-3.3%**
Alabama	2,159	-6.9%	$ 163,234	-2.7%	23,484	-6.6%	$ 1,783,197	-0.3%
Idaho	561	0.8%	$ 94,808	1.0%	7,024	-3.4%	$ 1,191,845	1.8%
Mont Co	61,844	-12.3%	$ 9,507,510	-10.9%	767,039	-4.6%	$ 117,577,374	-4.1%
Mississippi	94,747	-13.3%	$ 8,656,878	-12.0%	1,282,915	-4.4%	$ 118,596,889	-3.8%
Montana	329	-24.6%	$ 54,289	-21.0%	5,439	7.3%	$ 980,757	8.3%
New Hampshire	197,163	-4.5%	$ 24,281,578	-1.5%	2,494,965	-5.4%	$ 309,497,259	-3.7%
Pennsylvania	661,386	-8.6%	$ 74,970,587	-9.5%	8,095,240	-5.3%	$ 948,112,053	-3.5%
Utah	111,988	-10.8%	$ 14,141,684	-10.1%	1,379,668	-1.1%	$ 183,867,518	-0.8%
Virginia	2,439	-4.7%	$ 480,557	-1.6%	29,530	-4.9%	$ 5,776,011	-3.1%
Vermont	577	-5.7%	$ 97,034	4.0%	7,775	-4.8%	$ 1,255,311	-1.0%
West Virginia	305	-8.7%	$ 23,620	-0.7%	4,430	-5.0%	$ 329,816	1.0%
Wyoming	27,494	-13.3%	$ 2,660,530	-10.3%	372,995	-5.1%	$ 37,107,111	-4.6%

In the on-premise channel, spirits sales declined -3.1% in 9L volume and -5.2% in $Vol, with most states reporting decreases. Exceptions included Idaho, Michigan, and North Carolina. Rolling 12-month results show modest 9L volume growth of +0.4% but continued softness in $Vol down -1.7% resulting in a -2.1% price mix.

On-premise wine trends were similarly challenged, with May 9L volume down -9.8% and $Vol declining -6.2%. Despite this, price mix improved +3.7%. Rolling 12-month results for on-premise wine have declined modestly, with 9L volume down -4.2% and dollar sales down -2.7% yielding a +1.5% price mix.

Spirits - On Premise	9L CMTY 2026-05	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**828,093**	**-3.1%**	**$ 196,845,338**	**-5.3%**	**9,227,218**	**0.4%**	**$ 2,225,652,082**	**-1.7%**
Alabama	51,700	-9.5%	$ 11,123,420	-11.0%	613,782	5.4%	$ 132,646,035	2.9%
Idaho	20,863	3.0%	$ 5,202,253	6.4%	232,083	1.1%	$ 57,249,278	2.0%
Michigan	114,540	5.0%	$ 28,319,780	3.5%	1,305,724	-1.3%	$ 323,283,426	-1.9%
Mississippi	12,423	-23.0%	$ 1,945,018	-19.8%	172,888	-4.5%	$ 26,192,166	-5.2%
Mont Co	10,058	-4.2%	$ 2,453,547	-9.2%	107,208	0.9%	$ 26,927,200	-2.7%
New Hampshire	28,573	-6.6%	$ 5,851,608	-8.9%	325,196	-1.1%	$ 68,337,542	-2.2%
North Carolina	109,298	3.0%	$ 26,784,919	-4.0%	1,129,840	5.8%	$ 291,237,336	0.5%
Ohio	144,945	-5.6%	$ 36,921,416	-7.5%	1,630,506	-1.9%	$ 416,079,639	-3.4%
Oregon	61,587	-4.8%	$ 13,916,264	-8.0%	707,973	-0.9%	$ 165,504,513	-2.8%
Pennsylvania	150,373	-3.3%	$ 34,936,517	-5.9%	1,653,381	0.7%	$ 388,569,347	-2.5%
Utah	12,405	-13.9%	$ 3,467,167	-13.0%	146,459	-0.1%	$ 42,587,149	-1.9%
Vermont	7,512	-6.6%	$ 1,998,608	-7.3%	91,234	-2.2%	$ 25,034,955	-1.8%
Virginia	95,102	-4.1%	$ 22,384,184	-5.1%	1,010,366	-0.4%	$ 243,548,753	-1.5%
Wyoming	8,715	-6.0%	$ 1,540,638	-7.3%	100,578	-2.9%	$ 18,454,744	-4.0%