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NABCA Monthly Report - September 2026 Control States Results

Control state results rebounded in September, aided by the timing of the Labor Day holiday, which fell in September this year compared with August in the prior year. Michigan was the only state with fewer selling days than last year, with one less day, but still posted modest growth. Montana, Alabama, and North Carolina each reported double-digit gains. Spirits sales improved considerably in September, with 9L volume increasing +3.2% and $Vol rising +1.4%, resulting in a -1.8% price mix. Despite the monthly improvement, rolling 12-month results remained negative, with 9L volume down -0.6% and $Vol down -2.7%, producing a -2.1% price mix.

Spirits - Markets	9L CMTY 2026-09	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,038,151**	**3.2%**	**$ 1,048,638,284**	**1.4%**	**60,395,312**	**-0.6%**	**$13,007,018,369**	**-2.7%**
Alabama	321,919	13.3%	$ 64,544,734	6.1%	3,698,082	2.5%	$ 796,792,859	-0.9%
Iowa	222,400	0.5%	$ 35,610,684	1.4%	2,614,501	-3.2%	$ 417,512,172	-3.3%
Idaho	106,856	3.3%	$ 23,728,072	4.2%	1,310,388	-2.7%	$ 293,850,339	-1.8%
Mont Co	42,861	2.9%	$ 8,446,172	-5.0%	518,395	0.7%	$ 110,369,279	-5.2%
Maine	114,279	0.4%	$ 23,916,994	1.4%	1,345,493	-3.0%	$ 279,072,549	-3.6%
Michigan	726,859	0.5%	$ 167,620,480	0.6%	8,418,895	-3.8%	$ 1,958,359,346	-5.3%
Mississippi	174,226	-4.1%	$ 28,947,917	-3.8%	2,238,154	1.0%	$ 368,768,383	-1.9%
Montana	95,741	19.1%	$ 17,729,511	18.7%	1,097,209	1.8%	$ 205,525,924	-0.9%
North Carolina	661,337	10.4%	$ 141,680,621	2.8%	7,974,755	3.3%	$ 1,817,159,325	-1.5%
New Hampshire	162,568	-11.0%	$ 31,458,938	-8.5%	2,279,866	2.2%	$ 444,951,825	2.5%
Ohio	526,755	1.1%	$ 131,454,472	0.8%	6,487,175	-3.1%	$ 1,647,825,940	-3.9%
Oregon	279,199	1.8%	$ 61,413,658	0.9%	3,445,837	-2.2%	$ 771,581,536	-3.6%
Pennsylvania	804,994	4.2%	$ 144,953,676	2.8%	9,675,681	0.3%	$ 1,833,323,659	-1.7%
Utah	131,193	3.5%	$ 24,952,219	-0.3%	1,654,286	1.3%	$ 321,277,745	-2.8%
Virginia	450,286	2.6%	$ 109,374,637	2.2%	5,657,139	-0.4%	$ 1,410,068,307	-1.9%
Vermont	31,714	0.4%	$ 7,375,780	-0.2%	399,593	-3.5%	$ 94,079,794	-3.6%
West Virginia	122,419	1.3%	$ 15,887,956	-8.1%	876,897	1.5%	$ 126,487,082	-3.4%
Wyoming	62,544	-1.9%	$ 9,541,764	-6.1%	702,966	-1.5%	$ 110,012,306	-3.5%

Category performance was mixed. Cocktails, led by canned ready-to-drink (RTD) products, continued to be the strongest growth driver, with 9L volume increasing +28.6% and $Vol rising +23.1%. Cachaca, Cordials, and Tequila also posted gains, while all other major categories declined during the month.

Spirits - Categorie	9L CMTY 2026-09	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg	R12 Price Mix
Total Control	**5,038,151**	**3.2%**	**$ 1,048,638,284**	**1.4%**	**60,395,312**	**-0.6%**	**$13,007,018,369**	**-2.7%**	**-2.1%**
BRANDY / COGNA	166,674	-3.1%	$ 49,427,656	-1.8%	2,171,831	-6.8%	$ 637,468,110	-7.4%	-0.6%
CACHACA	703	2.9%	$ 181,908	3.0%	9,682	7.3%	$ 2,460,794	11.7%	4.4%
CANADIAN	319,730	-4.6%	$ 68,766,084	-6.4%	3,782,900	-8.4%	$ 831,543,461	-9.2%	-0.8%
COCKTAILS	610,691	28.6%	$ 47,282,669	23.1%	6,152,995	23.0%	$ 504,770,558	22.0%	-1.0%
CORDIALS	352,825	5.3%	$ 76,505,102	6.0%	4,424,750	-0.3%	$ 9,606,962	-0.5%	-0.2%
DOMESTIC WHISK	845,446	-0.1%	$ 238,460,195	0.8%	10,427,123	-3.0%	$ 3,007,824,444	-2.4%	0.7%
GIN	147,182	-2.5%	$ 32,247,336	0.4%	1,824,775	-4.2%	$ 397,346,123	-3.0%	1.2%
IRISH	70,188	-1.5%	$ 24,085,857	-0.5%	913,344	-3.5%	$ 317,997,666	-4.0%	-0.5%
NEUTRAL GRAIN S	5,067	2.8%	$ 1,084,309	1.9%	57,036	-1.6%	$ 12,462,333	-2.0%	-0.5%
OTHER IMPORTED	2,627	0.7%	$ 1,780,779	0.9%	34,020	-6.5%	$ 23,710,849	-8.0%	-1.5%
RUM	353,911	-2.6%	$ 55,093,872	-1.2%	4,418,228	-5.9%	$ 694,783,110	-5.6%	0.2%
SCOTCH	72,526	-4.1%	$ 30,049,127	-4.2%	929,290	-5.3%	$ 401,062,645	-6.3%	-1.0%
TEQUILA	599,600	9.5%	$ 199,762,823	4.6%	7,229,519	2.1%	$ 2,475,848,699	-2.2%	-4.3%
VODKA	1,490,932	-0.6%	$ 223,834,782	-0.8%	18,019,472	-1.9%	$ 2,719,340,193	-2.8%	-1.0%

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Wine trends improved from August but remained negative in September. 9L volume declined -2.9% and $Vol decreased -0.7%, resulting in a positive +2.2% price mix. Rolling 12-month wine results continued to show softness, with 9L volume down -4.2% and $Vol decreasing -2.2%, producing a positive +2.0% price mix.

Wine	9L CMTY 2026-09	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,129,220**	**-2.9%**	**$ 134,410,860**	**-0.7%**	**14,309,094**	**-4.2%**	**$ 1,724,909,375**	**-2.2%**
Alabama	1,667	-4.9%	$ 129,034	-0.3%	23,022	-4.9%	$ 1,786,573	0.2%
Idaho	550	6.1%	$ 97,527	14.0%	7,062	-2.2%	$ 1,220,129	3.0%
Mont Co	61,514	-3.9%	$ 8,934,231	-7.0%	755,734	-5.7%	$ 115,299,211	-5.7%
Mississippi	100,194	0.6%	$ 9,715,261	5.0%	1,262,755	-4.6%	$ 117,954,381	-2.9%
Montana	545	72.6%	$ 112,281	92.7%	5,518	7.1%	$ 1,030,561	14.4%
New Hampshire	206,299	0.0%	$ 26,290,074	6.0%	2,481,105	-3.8%	$ 311,898,555	-1.1%
Pennsylvania	616,318	-4.7%	$ 70,077,216	-4.8%	7,994,126	-4.3%	$ 944,784,720	-2.4%
Utah	105,708	-1.4%	$ 14,986,498	8.7%	1,365,209	-2.5%	$ 186,117,180	0.0%
Virginia	2,254	2.9%	$ 448,578	7.0%	29,470	-3.9%	$ 5,830,567	-2.0%
Vermont	576	-0.9%	$ 97,017	5.7%	7,688	-4.4%	$ 1,276,095	1.8%
West Virginia	321	-5.4%	$ 25,478	1.5%	4,384	-5.5%	$ 329,664	-1.8%
Wyoming	33,272	-1.3%	$ 3,497,413	1.6%	373,013	-4.6%	$ 37,380,018	-3.3%

The on-premise spirits channel also improved in September, with 9L volume increasing +5.0% and $Vol rising +2.0%. Rolling 12-month performance remained mixed, however, with 9L volume up +0.5% and $Vol down -1.8%, resulting in a -2.3% price mix.

On-premise wine showed stronger dollar performance despite continued volume pressure. 9L volume declined -1.3%, while $Vol increased +5.6%, generating a positive +6.9% price mix. Longer-term trends remained challenging, with rolling 12-month 9L volume down -4.1% and $Vol decreasing -1.8%, resulting in a positive +2.3% price mix.

Spirits - On Premise	9L CMTY 2026-09	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**799,257**	**5.0%**	**$ 186,200,334**	**2.0%**	**9,301,883**	**0.5%**	**$ 2,223,525,825**	**-1.8%**
Alabama	58,462	20.0%	$ 11,040,618	6.8%	625,611	5.4%	$ 132,303,766	1.1%
Idaho	19,717	5.1%	$ 4,850,272	5.3%	234,576	1.7%	$ 58,025,748	2.7%
Michigan	111,295	1.7%	$ 27,077,736	-0.1%	1,309,106	-1.6%	$ 322,287,338	-2.9%
Mississippi	13,954	-14.2%	$ 2,124,514	-12.4%	161,814	-12.1%	$ 24,552,168	-12.3%
Mont Co	9,489	6.5%	$ 2,107,723	-4.4%	108,404	0.8%	$ 26,571,919	-3.7%
New Hampshire	26,943	-2.7%	$ 5,649,244	-4.2%	325,353	-1.6%	$ 67,636,675	-3.8%
North Carolina	105,639	16.4%	$ 24,851,447	6.2%	1,172,925	7.2%	$ 293,287,200	0.7%
Ohio	139,671	1.7%	$ 35,085,711	0.8%	1,631,701	-1.3%	$ 414,859,439	-2.8%
Oregon	62,736	4.1%	$ 14,393,060	2.6%	713,504	-0.1%	$ 165,487,905	-2.1%
Pennsylvania	137,950	3.7%	$ 31,791,398	2.3%	1,663,128	0.8%	$ 388,491,029	-1.9%
Utah	12,467	8.3%	$ 3,529,285	6.2%	149,270	0.4%	$ 43,107,833	-1.8%
Vermont	7,575	2.3%	$ 2,054,579	-0.5%	91,176	-2.2%	$ 24,935,321	-2.1%
Virginia	84,318	2.6%	$ 19,993,575	1.9%	1,013,913	-0.6%	$ 243,560,155	-1.6%
Wyoming	9,039	1.7%	$ 1,651,173	-1.3%	101,401	-2.7%	$ 18,419,329	-4.4%