

NABCA Monthly Report - December 2025 Control States Results

December closed 2025 on a modestly positive note for spirits, with 9L volume increasing +0.4%, despite \$Vol declining -1.4%, resulting in a negative price mix of -1.8%. The volume gain was primarily calendar-driven, reflecting 10 additional selling days versus last year. Michigan and Utah each benefited from three extra days, while Alabama, Mississippi, Montana, and North Carolina each added one day. Excluding these added-day impacts, Pennsylvania, West Virginia, Wyoming, Iowa, and Montgomery County also delivered positive 9L volume performance in December. For full year 2025, spirits ended down -1.4% in 9L volume and -2.8% in \$Vol, yielding a -1.4% price mix.

Spirits - Markets	9L CMTY 2025-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	6,016,635	0.4%	\$ 1,402,638,325	-1.4%	60,381,056	-1.4%	\$ 13,214,508,346	-2.8%
Alabama	352,127	2.6%	\$ 85,260,204	0.0%	3,612,564	0.2%	\$ 799,142,791	-1.5%
Iowa	245,659	1.9%	\$ 41,597,819	1.0%	2,674,411	-4.0%	\$ 424,414,578	-5.1%
Idaho	136,389	-2.2%	\$ 32,174,166	-3.2%	1,331,796	-2.9%	\$ 295,472,036	-2.3%
Mont Co	52,049	8.1%	\$ 12,429,173	-2.3%	523,525	6.4%	\$ 115,153,597	-2.4%
Maine	129,264	-3.1%	\$ 27,787,483	-3.6%	1,361,881	-4.6%	\$ 283,807,061	-4.8%
Michigan	829,535	6.9%	\$ 200,800,536	4.2%	8,691,846	-1.9%	\$ 2,042,685,433	-3.0%
Mississippi	212,996	-3.4%	\$ 37,251,664	-4.0%	2,198,307	0.4%	\$ 369,132,360	-1.6%
Montana	104,475	-3.5%	\$ 20,647,898	-4.7%	1,071,777	-1.9%	\$ 205,398,377	-3.4%
North Carolina	782,822	1.0%	\$ 199,936,838	-1.5%	7,720,100	0.2%	\$ 1,832,122,516	-1.8%
New Hampshire	202,361	-18.6%	\$ 43,912,481	-17.7%	2,193,110	-5.1%	\$ 426,192,368	-6.2%
Ohio	658,413	-2.8%	\$ 177,131,352	-3.3%	6,609,968	-4.3%	\$ 1,685,843,842	-4.8%
Oregon	352,370	-2.5%	\$ 84,581,501	-3.7%	3,485,007	-3.2%	\$ 789,179,955	-3.9%
Pennsylvania	1,005,386	0.6%	\$ 211,069,805	-1.4%	9,631,225	1.3%	\$ 1,851,774,421	-1.3%
Utah	173,275	16.3%	\$ 35,875,951	12.1%	1,648,682	1.3%	\$ 331,797,752	0.2%
Virginia	591,664	-0.2%	\$ 157,791,275	-1.5%	5,647,271	-1.9%	\$ 1,423,811,388	-2.7%
Vermont	42,661	-3.4%	\$ 10,730,914	-2.1%	409,104	-4.0%	\$ 96,466,286	-2.9%
West Virginia	80,838	10.3%	\$ 12,921,668	6.9%	862,664	-1.2%	\$ 129,855,999	-3.9%
Wyoming	64,351	0.3%	\$ 10,737,598	-3.7%	707,817	-0.8%	\$ 112,257,587	-3.3%

Despite the positive December 9L volume result, category growth remained narrow. Only Cocktails (led by canned RTDs), Cordials, and Tequila posted positive 9L volume. On a full-year basis, Cocktails and Tequila were the only categories to remain positive in both 9L volume and \$Vol, while Domestic Whiskey, Gin, and Scotch were the only segments to sustain a positive price mix.

Spirits - Categories	9L CMTY 2025-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg	R12 Price Mix
Total Control	6,016,635	0.4%	\$ 1,402,638,325	-1.4%	60,381,056	-1.4%	\$ 13,214,508,346	-2.8%	-1.4%
BRANDY / COGNAC	231,614	-4.7%	\$ 68,182,090	-6.0%	2,278,856	-7.9%	\$ 670,706,642	-9.9%	-2.0%
CACHACA	782	-3.2%	\$ 201,022	2.9%	8,950	-5.8%	\$ 2,204,450	-6.5%	-0.7%
CANADIAN	431,901	-1.4%	\$ 100,976,450	-2.0%	4,020,482	-6.5%	\$ 886,726,388	-7.2%	-0.7%
COCKTAILS	480,677	22.8%	\$ 44,692,586	22.2%	5,218,924	23.2%	\$ 434,428,588	22.6%	-0.6%
CORDIALS	544,474	0.9%	\$ 129,068,021	0.4%	4,438,973	-1.7%	\$ 979,806,546	-2.1%	-0.4%
DOMESTIC WHISKEY	1,164,283	-1.5%	\$ 359,867,554	-0.9%	10,643,817	-3.4%	\$ 3,050,612,041	-2.5%	0.9%
GIN	170,778	-1.8%	\$ 38,102,495	-0.8%	1,879,374	-5.5%	\$ 404,777,569	-4.6%	0.9%
IRISH	98,466	-5.7%	\$ 35,431,914	-6.1%	934,733	-3.8%	\$ 326,169,256	-6.2%	-2.4%
NEUTRAL GRAIN SPIRIT	6,496	-2.8%	\$ 1,424,807	-2.8%	56,990	-8.0%	\$ 12,527,446	-8.0%	-0.1%
OTHER IMP WHISKY	4,801	-4.6%	\$ 3,572,013	-3.4%	35,288	-4.5%	\$ 24,852,769	-5.4%	-1.0%
RUM	447,949	-5.1%	\$ 72,944,374	-5.2%	4,591,479	-6.7%	\$ 720,194,332	-7.8%	-1.1%
SCOTCH	107,288	-10.1%	\$ 53,583,148	-9.6%	948,021	-8.3%	\$ 412,549,478	-8.2%	0.2%
TEQUILA	646,531	3.3%	\$ 234,018,519	-0.7%	7,090,404	2.2%	\$ 2,510,488,769	0.2%	-2.1%
VODKA	1,680,548	-0.8%	\$ 260,491,237	-1.6%	18,234,476	-2.8%	\$ 2,777,587,730	-3.1%	-0.4%

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Wine showed improvement versus prior months in December, with 9L volume up -3.0%, though \$Vol declined -4.4%, resulting in a -1.4% price mix. For the full year, wine remained challenged, finishing down -5.7% in 9L volume and -4.3% in \$Vol, producing a +1.4% price mix.

Wine	9L CMTY 2025-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,671,449	-3.0%	\$ 213,438,406	-4.4%	14,709,960	-5.7%	\$ 1,740,775,068	-4.3%
Alabama	2,419	1.5%	\$ 185,703	1.3%	23,952	-9.6%	\$ 1,769,789	0.1%
Idaho	847	-1.0%	\$ 143,899	3.8%	7,112	-3.0%	\$ 1,183,668	2.7%
Mont Co	81,085	-4.2%	\$ 13,554,138	-3.8%	786,453	-4.8%	\$ 120,311,233	-2.9%
Mississippi	134,485	-8.4%	\$ 12,952,452	-9.6%	1,298,938	-5.6%	\$ 119,388,924	-5.1%
Montana	566	13.9%	\$ 95,910	13.8%	5,269	8.5%	\$ 944,531	12.5%
New Hampshire	265,801	-5.0%	\$ 36,374,640	-3.2%	2,540,004	-6.6%	\$ 313,113,838	-5.9%
Pennsylvania	985,606	-3.9%	\$ 123,069,654	-7.1%	8,215,275	-6.5%	\$ 951,119,283	-4.9%
Utah	156,580	13.2%	\$ 22,032,942	13.6%	1,407,005	-0.3%	\$ 187,620,929	1.3%
Virginia	3,690	-5.3%	\$ 756,299	-5.8%	30,004	-4.3%	\$ 5,805,837	-0.6%
Vermont	982	-4.2%	\$ 173,535	3.5%	7,928	-7.0%	\$ 1,252,857	-2.0%
West Virginia	481	-4.5%	\$ 35,249	-2.0%	4,528	-5.3%	\$ 332,799	3.0%
Wyoming	38,906	-1.3%	\$ 4,063,585	-1.4%	383,482	-4.8%	\$ 37,928,323	-5.3%

The On-Premise channel posted a meaningful rebound in December, with 9L volume increasing +3.2% and \$Vol up +1.3%, supported by positive 9L volume results in 10 of the 14 reporting states. Full year On-Premise performance remained slightly negative, ending at -0.3% in 9L volume and -2.1% in \$Vol, resulting in a -1.8% price mix. On-Premise wine also strengthened in December, with 9L volume down just -0.4% and \$Vol increasing +1.3%, generating a +1.7% price mix. Full year On-Premise wine finished at -4.5% in 9L volume, -2.7% in \$Vol, and a +1.8% price mix.

Spirits - Markets	9L CMTY 2025-12	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	778,269	3.2%	\$ 193,728,506	1.3%	9,257,149	-0.3%	\$ 2,254,160,695	-2.1%
Alabama	45,067	7.1%	\$ 10,875,127	7.0%	601,198	2.9%	\$ 131,876,260	1.0%
Idaho	20,277	2.7%	\$ 4,982,909	0.8%	230,982	-0.6%	\$ 56,562,239	-0.1%
Michigan	106,257	8.1%	\$ 26,931,431	7.4%	1,327,369	-0.8%	\$ 330,567,828	-0.8%
Mississippi	13,890	-7.5%	\$ 2,172,933	-7.8%	183,394	4.3%	\$ 27,835,254	2.9%
Mont Co	8,974	4.2%	\$ 2,428,440	0.4%	107,432	-0.2%	\$ 27,373,005	-2.5%
New Hampshire	28,133	-2.0%	\$ 5,906,547	-4.2%	329,338	-0.9%	\$ 69,820,050	-1.2%
North Carolina	93,450	7.4%	\$ 25,241,865	2.9%	1,107,016	4.3%	\$ 291,740,998	-0.8%
Ohio	136,764	-1.1%	\$ 35,837,515	-2.9%	1,642,693	-3.3%	\$ 422,344,518	-4.5%
Oregon	61,956	7.5%	\$ 14,673,370	5.7%	715,619	-0.8%	\$ 168,867,205	-1.8%
Pennsylvania	148,227	1.9%	\$ 35,418,545	-0.8%	1,650,994	-0.7%	\$ 392,908,223	-3.8%
Utah	12,945	13.4%	\$ 3,811,287	11.1%	149,860	3.4%	\$ 44,271,235	3.0%
Vermont	8,672	0.9%	\$ 2,438,723	4.4%	92,554	-1.9%	\$ 25,417,362	-0.9%
Virginia	85,257	0.7%	\$ 21,386,992	-1.3%	1,015,771	-1.1%	\$ 245,591,244	-2.7%
Wyoming	8,400	-0.3%	\$ 1,622,822	-0.8%	102,930	-2.9%	\$ 18,985,276	-3.9%