

NABCA Monthly Report

June 2023 Control States Results

Total Control States spirits sales 9L volume increased by +2.3% over June last years and +4.9% in \$Vol showing a resultant +2.6% price mix. The rolling 12-month 9L volume results remain positive at +0.5% and +3.4% in \$Vol.

During June, selling days were flat vs last year with Michigan -7 days, Pennsylvania +5 days and New Hampshire and Utah +1 day each. Pennsylvania sales also impacted by the pending July 3rd ERP update causing licensees to purchase inventory in advance.

Spirits - Markets	9L CMTY 2023-06	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,505,435	2.3%	\$ 1,190,065,782	4.9%	62,001,333	0.5%	\$ 13,517,599,395	3.4%
Alabama	322,668	7.0%	\$ 69,501,986	9.6%	3,569,022	2.1%	\$ 787,272,832	5.8%
Iowa	259,677	4.0%	\$ 41,166,742	6.6%	2,826,805	-0.6%	\$ 447,536,287	3.5%
Idaho	124,089	2.2%	\$ 26,732,080	5.9%	1,425,028	-0.8%	\$ 303,047,417	4.9%
Mont Co	50,153	10.4%	\$ 11,368,554	10.7%	521,784	4.8%	\$ 123,164,327	5.4%
Maine	133,241	-0.9%	\$ 27,555,589	3.1%	1,454,781	0.0%	\$ 294,910,357	5.3%
Michigan	773,778	-18.1%	\$ 180,262,065	-16.8%	9,069,837	-2.2%	\$ 2,108,497,689	-2.2%
Mississippi	186,852	5.1%	\$ 30,322,812	4.4%	2,239,453	-7.7%	\$ 378,089,802	-3.9%
Montana	105,277	6.7%	\$ 19,728,874	7.0%	1,086,261	-0.6%	\$ 207,192,226	2.2%
North Carolina	688,686	7.6%	\$ 161,482,658	11.4%	7,649,816	3.1%	\$ 1,816,568,858	7.8%
New Hampshire	220,745	-1.7%	\$ 41,427,812	3.5%	2,313,618	-4.4%	\$ 442,421,457	-2.3%
Ohio	611,388	1.2%	\$ 153,991,681	5.3%	7,137,298	-0.8%	\$ 1,787,585,771	2.5%
Oregon	325,309	1.1%	\$ 72,741,291	2.6%	3,761,162	-0.4%	\$ 849,933,261	2.8%
Pennsylvania	878,583	25.9%	\$ 173,207,709	30.9%	9,295,279	5.3%	\$ 1,855,249,381	7.4%
Utah	144,047	-5.2%	\$ 28,396,100	2.9%	1,738,625	3.8%	\$ 330,586,475	4.6%
Virginia	493,527	2.1%	\$ 120,508,800	5.6%	5,857,617	0.4%	\$ 1,433,870,315	5.0%
Vermont	38,186	-3.4%	\$ 8,528,826	3.2%	452,793	-3.7%	\$ 101,409,984	1.8%
West Virginia	77,826	6.2%	\$ 11,553,993	6.1%	884,504	1.3%	\$ 135,852,934	4.4%
Wyoming	71,404	-1.2%	\$ 11,588,208	3.1%	717,650	1.5%	\$ 114,410,024	5.4%

Cocktails, driven by Canned RTDs (+46.5% 9L volume and now 68% share of the category), continue to dominate the category growth of +25.6% 9L volume. Brandy/Cognac, Canadian, Gin, Irish, Other Imported Whiskey, Rum and Scotch all declined in 9L volume in June although only Scotch -1.2% and Brandy/Cognac -13.9% declined in \$ Vol.

Spirits - Categories	9L CMTY 2023-06	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,505,435	2.3%	\$ 1,190,065,782	4.9%	62,001,333	0.5%	\$ 13,517,599,395	3.4%
BRANDY / COGNAC	218,744	-10.3%	\$ 68,899,586	-13.9%	2,817,031	-11.0%	\$ 898,623,728	-12.0%
CACHACA	1,020	21.7%	\$ 254,655	29.8%	9,562	5.5%	\$ 2,311,070	5.0%
CANADIAN	497,653	-1.3%	\$ 100,735,278	4.6%	6,132,810	-2.6%	\$ 1,241,279,363	0.5%
COCKTAILS	377,098	25.6%	\$ 30,748,156	30.1%	3,242,863	26.5%	\$ 269,090,234	28.8%
CORDIALS	375,235	3.5%	\$ 80,417,270	8.7%	4,544,974	1.1%	\$ 977,560,871	5.2%
DOMESTIC WHISKEY	802,944	1.0%	\$ 232,392,190	5.8%	9,727,585	-0.1%	\$ 2,789,703,541	5.5%
GIN	199,828	-2.4%	\$ 42,301,107	4.0%	2,148,512	-3.6%	\$ 437,450,599	3.0%
IRISH	79,908	-1.8%	\$ 28,626,098	1.6%	1,034,969	-1.3%	\$ 369,855,880	3.5%
NEUTRAL GRAIN SPIRIT	5,524	-1.9%	\$ 1,228,292	3.5%	68,454	-11.5%	\$ 14,748,159	-8.4%
OTHER IMPORTED WHISKY	3,049	-1.7%	\$ 2,642,067	29.7%	39,773	3.9%	\$ 30,128,787	19.8%
RUM	494,380	-3.4%	\$ 77,798,394	0.4%	5,471,887	-3.6%	\$ 846,480,680	-0.4%
SCOTCH	92,997	-5.3%	\$ 38,948,561	-1.2%	1,137,803	-6.7%	\$ 480,935,141	-4.1%
TEQUILA	606,426	10.6%	\$ 216,092,474	12.3%	6,262,739	9.7%	\$ 2,225,443,694	13.8%
VODKA	1,750,616	1.7%	\$ 268,967,354	3.5%	19,362,352	-0.5%	\$ 2,933,947,902	1.2%

Wines grew at +7.8% in 9L Volume with +9.4% in \$Vol returning a positive price mix +1.6% mainly due to the additional selling days and advance purchases in Pennsylvania. Rolling 12-month 9L volume was -3.2% with \$Vol at +1.0 resulting in a +4.2% price mix.

Wine	9L CMTY 2023-06	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,440,847	7.8%	\$ 155,118,699	9.4%	17,170,620	-3.2%	\$ 1,879,870,695	1.0%
Alabama	2,716	-1.3%	\$ 165,364	7.9%	30,764	-4.5%	\$ 1,875,942	5.6%
Idaho	665	-16.8%	\$ 96,847	-9.3%	8,738	-12.2%	\$ 1,244,587	-6.2%
Mont Co	77,298	0.0%	\$ 10,901,909	3.5%	894,160	-2.0%	\$ 125,987,024	1.5%
Mississippi	108,931	-4.6%	\$ 9,865,476	0.9%	1,492,376	-6.9%	\$ 133,486,040	1.1%
Montana	426	11.8%	\$ 83,048	20.5%	4,871	-11.1%	\$ 870,258	-0.9%
New Hampshire	281,057	2.2%	\$ 33,387,918	8.0%	2,904,689	-5.2%	\$ 334,038,076	-0.7%
Pennsylvania	802,838	16.1%	\$ 81,261,145	14.9%	9,842,055	-1.7%	\$ 1,044,765,420	1.8%
Utah	122,088	-3.6%	\$ 14,729,852	-1.8%	1,503,371	-3.9%	\$ 188,178,037	-0.1%
Virginia	2,503	5.9%	\$ 417,670	11.1%	32,340	-10.6%	\$ 5,396,207	2.4%
Vermont	692	-7.8%	\$ 96,393	11.0%	9,148	-6.7%	\$ 1,273,164	-0.9%
West Virgina	419	-14.3%	\$ 27,536	-14.0%	5,751	16.8%	\$ 343,024	19.6%
Wyoming	41,215	-7.8%	\$ 4,085,543	1.7%	442,353	-6.7%	\$ 42,412,036	-0.9%

The On-Premise spirits channel was +3.6% in June with +7.8% growth in \$vol resulting in a +4.2% price mix. Pennsylvania +32.5% in 9L volume reflects the advance purchasing by on-premise licensees ahead of the ERP implementation. The On-Premise wine channel was +11.0% 9L volume with \$vol also being negative at +16.9% and +5.9% price mix primarily driven by Pennsylvania but also aided by New Hampshire +7.9%.

Spirits - Markets	9L CMTY 2023-06	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	866,526	3.6%	\$ 213,130,605	7.8%	9,445,933	3.8%	\$ 2,310,753,602	9.3%
Alabama	52,387	9.2%	\$ 11,704,883	12.4%	578,272	6.4%	\$ 128,860,519	10.6%
Idaho	22,271	-0.4%	\$ 5,347,979	2.5%	245,936	0.8%	\$ 58,395,059	8.3%
Michigan	116,269	-16.2%	\$ 28,887,976	-11.8%	1,359,930	2.7%	\$ 332,091,321	6.8%
Mississippi	13,568	-0.8%	\$ 2,066,561	6.9%	167,059	-3.6%	\$ 24,988,735	6.0%
Mont Co	12,153	7.4%	\$ 3,041,775	7.3%	110,575	8.6%	\$ 28,904,741	10.1%
New Hampshire	35,416	6.6%	\$ 7,348,511	11.1%	332,727	2.7%	\$ 68,433,889	7.1%
North Carolina	97,141	5.7%	\$ 26,784,329	9.7%	1,038,810	8.5%	\$ 288,583,117	15.6%
Ohio	156,622	0.4%	\$ 40,545,463	3.7%	1,756,821	1.4%	\$ 449,893,967	6.3%
Oregon	63,263	-5.5%	\$ 14,856,840	-4.3%	745,149	5.2%	\$ 177,685,848	10.3%
Pennsylvania	169,336	32.5%	\$ 41,462,346	40.1%	1,715,271	4.8%	\$ 414,790,812	11.0%
Utah	14,508	7.3%	\$ 4,187,368	10.6%	150,792	5.3%	\$ 43,801,618	11.4%
Vermont	8,909	6.5%	\$ 2,344,284	12.3%	95,627	3.9%	\$ 25,245,774	9.3%
Virginia	93,108	0.2%	\$ 22,418,784	4.4%	1,039,489	3.2%	\$ 249,174,283	9.0%
Wyoming	11,575	1.2%	\$ 2,133,507	4.8%	109,476	-2.4%	\$ 19,903,919	1.2%