

NABCA Monthly Report

October 2023 Control States Results

Total Control States spirits sales 9L volume grew by +0.5% over October last year and +2.6% in \$Vol showing a resultant +2.1% price mix. The rolling 12-month 9L volume results continue to be positive at +0.4% and +3.2% in \$Vol.

During October, selling days were +2 days vs last year with Michigan -1 day, and Pennsylvania +3 days. Pennsylvania has been on a calendar month since July 1st, but the previous year's data is on their fiscal month. The large growth in West Virginia was driven by the September trade show sales shipping in October.

Spirits - Markets	9L CMTY 2023-10	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,032,619	0.5%	\$ 1,113,597,531	2.6%	61,783,301	0.4%	\$ 13,578,737,655	3.2%
Alabama	297,195	4.5%	\$ 65,740,714	5.8%	3,592,649	2.4%	\$ 797,764,213	5.8%
Iowa	238,628	-3.1%	\$ 40,243,847	1.4%	2,794,585	-1.5%	\$ 447,080,800	2.0%
Idaho	114,165	-2.7%	\$ 24,706,222	-0.1%	1,414,308	-1.2%	\$ 303,660,959	3.1%
Mont Co	37,107	-15.0%	\$ 9,497,362	-6.8%	515,068	2.1%	\$ 124,575,687	6.1%
Maine	111,762	2.8%	\$ 23,605,300	4.2%	1,447,208	-0.7%	\$ 296,266,772	3.1%
Michigan	696,943	-3.2%	\$ 164,789,533	-0.2%	9,029,217	-1.6%	\$ 2,103,973,211	-1.0%
Mississippi	188,434	-5.3%	\$ 32,994,281	-0.4%	2,233,120	-4.8%	\$ 376,526,590	-3.5%
Montana	91,880	12.3%	\$ 17,953,636	14.4%	1,102,179	0.7%	\$ 211,739,866	3.0%
North Carolina	615,108	-0.9%	\$ 147,781,053	0.8%	7,671,482	2.3%	\$ 1,832,109,226	6.1%
New Hampshire	206,422	-4.2%	\$ 39,427,266	-2.7%	2,252,405	-4.3%	\$ 432,594,883	-1.9%
Ohio	575,283	-2.5%	\$ 144,259,860	-0.5%	7,079,966	-1.1%	\$ 1,786,944,544	2.0%
Oregon	301,560	-2.6%	\$ 69,316,116	-0.4%	3,727,600	-1.2%	\$ 846,969,286	1.1%
Pennsylvania	738,725	7.5%	\$ 150,274,278	10.3%	9,406,141	5.3%	\$ 1,893,617,631	8.6%
Utah	125,704	0.5%	\$ 25,247,416	1.6%	1,640,592	1.6%	\$ 333,350,772	3.8%
Virginia	491,911	-0.7%	\$ 123,660,689	1.5%	5,834,348	0.3%	\$ 1,439,953,705	4.1%
Vermont	35,054	-5.3%	\$ 7,913,651	-2.2%	444,473	-4.1%	\$ 100,755,027	1.1%
West Virgina	105,708	57.5%	\$ 16,294,487	56.0%	879,668	-0.9%	\$ 135,705,744	1.1%
Wyoming	61,031	7.2%	\$ 9,891,821	8.0%	718,291	0.5%	\$ 115,148,738	3.6%

Brandy/Cognac continues to decline but the 9L and \$Vol decrease is shifting from Cognac to Domestic Brandy. Scotch declined at -8.6% with both the 9L volume and \$Vol declines distributed nearly evenly between Blends and Single Malt. Tequila while still growing is experiencing a shift in growth from Super and Ultra Premium to Premium, lowering the price mix to 1.1% vs R12 at +2.7%.

Spirits - Categories	9L CMTY 2023-10	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,032,619	0.5%	\$ 1,113,597,531	2.6%	61,783,301	0.4%	\$ 13,578,737,655	3.2%
BRANDY / COGNAC	212,887	-6.3%	\$ 66,891,468	-6.7%	2,711,340	-10.0%	\$ 850,017,639	-11.8%
CACHACA	664	-12.5%	\$ 163,908	-8.8%	9,934	15.2%	\$ 2,475,631	21.6%
CANADIAN	499,646	-5.4%	\$ 102,137,457	-3.7%	5,994,783	-4.2%	\$ 1,218,572,499	-1.2%
COCKTAILS	263,845	15.0%	\$ 23,751,164	15.5%	3,323,794	20.4%	\$ 287,262,246	23.9%
CORDIALS	368,066	0.7%	\$ 80,725,363	3.8%	4,555,240	1.6%	\$ 990,419,889	5.8%
DOMESTIC WHISKEY	813,545	0.5%	\$ 242,523,177	5.3%	9,719,665	-0.2%	\$ 2,832,281,100	5.0%
GIN	160,694	-6.3%	\$ 33,564,385	-0.1%	2,101,319	-4.3%	\$ 436,628,544	2.4%
IRISH	80,767	-7.3%	\$ 29,108,929	-3.3%	1,020,570	-2.5%	\$ 368,712,600	2.2%
NEUTRAL GRAIN SPIR	6,416	-5.0%	\$ 1,423,495	-0.5%	67,207	-8.7%	\$ 14,706,567	-5.4%
OTHER IMPORTED WH	2,865	-9.2%	\$ 2,092,230	-11.0%	38,561	-2.1%	\$ 29,097,682	6.9%
RUM	417,134	-1.9%	\$ 65,995,478	1.5%	5,362,049	-4.1%	\$ 839,166,611	-0.8%
SCOTCH	89,026	-8.6%	\$ 38,671,289	-4.8%	1,111,741	-6.9%	\$ 475,979,182	-3.8%
TEQUILA	518,468	8.0%	\$ 184,594,163	9.1%	6,431,146	10.0%	\$ 2,291,999,461	12.7%
VODKA	1,598,570	1.5%	\$ 241,891,307	2.2%	19,335,873	0.0%	\$ 2,941,260,224	1.7%

Wines declined at -3.4% in 9L Volume with -2.2% in \$Vol (an improvement over previous months) returning a positive price mix +1.2%. Rolling 12-month 9L volume was -3.2% with \$Vol at +1.4% resulting in a +4.6% price mix.

Wine	9L CMTY 2023-10	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,350,688	-3.4%	\$ 147,979,477	-2.2%	16,904,046	-3.2%	\$ 1,881,232,289	1.4%
Alabama	2,309	-6.1%	\$ 145,390	-3.2%	30,186	-4.7%	\$ 1,878,052	4.5%
Idaho	602	-14.5%	\$ 91,448	-6.7%	8,445	-12.2%	\$ 1,244,451	-4.4%
Mont Co	71,593	-4.5%	\$ 10,432,363	-0.6%	884,506	-2.1%	\$ 126,146,565	1.6%
Mississippi	118,574	-11.6%	\$ 11,023,774	-11.2%	1,460,698	-5.6%	\$ 131,590,765	0.2%
Montana	361	-14.6%	\$ 55,329	-32.1%	4,895	-5.1%	\$ 893,235	1.1%
New Hampshire	271,535	-4.1%	\$ 33,244,377	1.9%	2,849,410	-4.8%	\$ 333,372,360	0.0%
Pennsylvania	736,592	-1.9%	\$ 75,568,433	-3.3%	9,697,167	-2.3%	\$ 1,048,761,251	2.2%
Utah	109,449	-2.3%	\$ 13,489,330	1.0%	1,487,276	-3.5%	\$ 188,301,938	0.0%
Virginia	2,667	-5.7%	\$ 450,306	-4.4%	32,059	1.5%	\$ 5,396,573	5.8%
Vermont	729	2.1%	\$ 101,788	-8.6%	8,994	-5.3%	\$ 1,264,029	-0.4%
West Virginia	434	0.1%	\$ 28,406	25.7%	5,860	16.8%	\$ 364,705	25.8%
Wyoming	35,843	2.1%	\$ 3,348,472	0.8%	434,547	-5.3%	\$ 42,017,337	-0.4%

The on-premise spirits channel began to grow again in October with +3.0% in 9L volume and +5.9% in \$vol resulting in a +2.9% price mix. The largest decrease was in Mississippi at -19.1% in 9L volume. 60% of the decline is coming from the recreation trade channel (mostly casinos). The on-premise wine channel was +0.6% 9L volume with \$vol at +4.6% with a +4.0% price mix. The wine on-premise data now excludes the Pennsylvania WEP accounts.

Spirits - Markets	9L CMTY 2023-10	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	765,403	3.0%	\$ 191,971,291	5.9%	9,458,633	3.3%	\$ 2,335,449,030	7.8%
Alabama	49,385	8.6%	\$ 10,880,653	9.5%	582,475	4.9%	\$ 130,442,347	8.1%
Idaho	18,867	-1.6%	\$ 4,510,926	0.8%	243,471	-0.6%	\$ 58,174,491	4.3%
Michigan	101,096	-1.5%	\$ 25,050,151	0.4%	1,362,307	2.6%	\$ 335,689,130	6.3%
Mississippi	10,859	-19.1%	\$ 1,686,352	-17.2%	167,095	-0.1%	\$ 25,274,819	7.8%
Mont Co	8,662	0.9%	\$ 2,401,003	2.5%	111,298	8.0%	\$ 29,458,346	10.7%
New Hampshire	31,352	1.5%	\$ 6,686,894	4.7%	334,404	3.7%	\$ 69,354,431	7.1%
North Carolina	87,511	6.2%	\$ 25,082,009	9.1%	1,046,884	6.2%	\$ 293,395,074	11.2%
Ohio	142,860	2.1%	\$ 37,195,057	3.9%	1,746,561	0.9%	\$ 450,942,691	4.6%
Oregon	61,333	0.6%	\$ 15,095,862	3.2%	744,277	2.2%	\$ 178,366,060	4.9%
Pennsylvania	140,987	7.8%	\$ 35,439,445	12.8%	1,727,101	5.5%	\$ 423,743,593	12.0%
Utah	10,982	-3.1%	\$ 3,221,760	3.1%	149,954	3.8%	\$ 44,109,651	8.9%
Vermont	7,662	2.9%	\$ 2,045,661	5.4%	95,180	3.8%	\$ 25,397,008	8.5%
Virginia	85,706	4.4%	\$ 21,160,535	6.4%	1,038,758	3.1%	\$ 251,168,460	7.8%
Wyoming	8,140	2.6%	\$ 1,514,983	7.1%	108,868	-2.0%	\$ 19,932,930	0.7%