

NABCA Monthly Report

October 2022 Control States Results

Total Control States spirits sales declined by -1.9% in 9L volume with a positive +0.1% in \$Vol showing a resultant +2.0% price mix. The rolling 12-month results are trending down from September with +0.2% in 9L volume and +3.0% in \$Vol.

The only selling days change vs last year was 1 less selling day in Michigan.

Spirits - Markets	9L CMTY 2022-10	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,017,138	-1.9%	\$ 1,081,075,819	0.1%	61,671,496	0.2%	\$ 13,144,221,775	3.0%
Alabama	284,528	-2.0%	\$ 61,871,912	1.0%	3,508,987	1.8%	\$ 754,443,669	4.3%
Iowa	246,031	1.5%	\$ 39,635,724	4.1%	2,835,965	0.1%	\$ 438,155,183	4.2%
Idaho	117,329	-3.2%	\$ 24,705,000	2.1%	1,432,107	-1.3%	\$ 294,397,985	4.1%
Mont Co	43,696	3.3%	\$ 10,194,260	2.7%	505,606	10.1%	\$ 117,610,534	9.8%
Maine	108,722	-1.3%	\$ 22,646,721	6.3%	1,457,450	-0.2%	\$ 287,326,630	5.8%
Michigan	719,885	-7.3%	\$ 164,380,163	-8.1%	9,175,543	-1.8%	\$ 2,123,791,256	-0.9%
Mississippi	198,845	-3.3%	\$ 33,104,585	-2.0%	2,344,497	-2.9%	\$ 390,068,901	3.9%
Montana	81,852	-0.7%	\$ 15,615,014	4.2%	1,094,108	1.0%	\$ 205,520,680	5.5%
North Carolina	620,730	-0.3%	\$ 146,539,977	4.3%	7,501,008	2.4%	\$ 1,727,307,712	7.9%
New Hampshire	215,420	-11.8%	\$ 40,527,956	-17.6%	2,353,468	-7.1%	\$ 440,871,287	-7.1%
Ohio	590,109	-3.0%	\$ 144,969,379	0.0%	7,158,137	-0.8%	\$ 1,751,817,532	2.0%
Oregon	309,721	-3.0%	\$ 69,585,984	-0.6%	3,773,537	-0.7%	\$ 837,736,867	4.4%
Pennsylvania	689,177	5.6%	\$ 133,157,979	6.8%	8,939,151	3.8%	\$ 1,726,523,498	3.9%
Utah	134,910	6.7%	\$ 24,831,806	5.0%	1,710,123	6.3%	\$ 321,013,769	6.6%
Virginia	495,107	-1.9%	\$ 121,684,941	3.6%	5,816,099	-1.5%	\$ 1,382,766,782	2.5%
Vermont	37,015	-6.2%	\$ 8,089,385	-1.4%	463,462	0.2%	\$ 99,638,369	4.3%
West Virginia	67,135	-0.8%	\$ 10,444,444	3.8%	887,309	0.5%	\$ 134,183,070	4.2%
Wyoming	56,926	-0.8%	\$ 9,090,588	-0.3%	714,939	-0.1%	\$ 111,048,050	2.7%

Tequila and Cocktails (driven by canned cocktails) continue to be the growth drivers in October. The decline in Brandy/Cognac is mostly in the Cognac category -31.9% 9L volume (leading to the large negative price mix) and is across multiple brands.

Spirits - Categories	9L CMTY 2022-10	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,017,138	-1.9%	\$ 1,081,075,819	0.1%	61,671,496	0.2%	\$ 13,144,221,775	3.0%
BRANDY / COGNAC	227,250	-17.7%	\$ 70,891,264	-22.1%	3,012,131	-15.1%	\$ 962,499,742	-16.8%
CACHACA	759	11.9%	\$ 178,304	14.5%	8,622	-4.4%	\$ 2,033,402	-8.8%
CANADIAN	528,705	-2.2%	\$ 106,099,092	1.2%	6,264,499	-2.1%	\$ 1,238,542,056	0.7%
COCKTAILS	239,320	24.9%	\$ 20,387,233	26.5%	2,857,670	32.9%	\$ 231,323,659	30.3%
CORDIALS	365,572	-1.1%	\$ 77,408,503	1.6%	4,483,703	1.3%	\$ 934,817,630	2.6%
DOMESTIC WHISKEY	808,324	-0.8%	\$ 229,066,990	4.7%	9,725,427	0.5%	\$ 2,689,302,787	7.1%
GIN	171,481	-4.1%	\$ 33,547,934	0.5%	2,195,436	-4.1%	\$ 425,895,857	1.7%
IRISH	87,087	2.7%	\$ 30,037,512	6.4%	1,047,118	2.4%	\$ 360,233,478	5.3%
NEUTRAL GRAIN SPIRIT	6,753	-16.9%	\$ 1,430,320	-15.8%	73,606	-13.6%	\$ 15,538,352	-8.9%
OTHER IMPORTED WHISKY	3,155	3.1%	\$ 2,347,185	14.6%	39,404	14.5%	\$ 27,199,537	22.6%
RUM	425,106	-6.6%	\$ 64,675,421	-4.8%	5,590,167	-3.6%	\$ 844,285,388	-0.8%
SCOTCH	97,436	-6.6%	\$ 40,385,077	-4.9%	1,194,256	-4.7%	\$ 494,224,398	-1.4%
TEQUILA	479,938	5.6%	\$ 168,686,007	9.5%	5,844,325	11.4%	\$ 2,032,347,413	16.5%
VODKA	1,576,247	-3.4%	\$ 235,926,349	-3.0%	19,335,104	-1.4%	\$ 2,885,908,498	0.5%

Wine declined by -1.0% in 9L volume and -1.4% in \$Vol for the month showing a negative price mix of -0.4%. The rolling 12-month result is -5.5% in 9L volume and -2.0% in \$Vol. The six markets where the state is the sole wholesaler for wines (highlighted in the table below) account for 99.5% of the \$Vol.

Spirits - Categories	9L CMTY 2022-10	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,397,098	-1.0%	\$ 143,229,336	-1.4%	17,459,441	-5.5%	\$ 1,838,612,680	-2.0%
Alabama	2,460	-8.7%	\$ 149,811	3.0%	31,679	-4.6%	\$ 1,797,815	-0.1%
Idaho	704	-13.9%	\$ 96,467	-8.6%	9,616	-7.9%	\$ 1,300,308	-3.5%
Mont Co	74,897	0.0%	\$ 10,479,177	3.4%	902,872	-1.7%	\$ 123,991,118	2.0%
Mississippi	133,641	-8.5%	\$ 12,403,725	2.1%	1,543,044	-6.6%	\$ 131,344,822	0.3%
Montana	423	12.7%	\$ 79,703	11.2%	5,158	-6.8%	\$ 882,032	7.3%
New Hampshire	283,197	-3.6%	\$ 32,624,214	-0.5%	2,991,574	-5.8%	\$ 333,587,820	-2.2%
Pennsylvania	750,606	2.7%	\$ 70,200,141	-3.1%	9,924,021	-5.7%	\$ 1,008,309,011	-3.8%
Utah	111,985	-6.1%	\$ 13,289,238	-1.3%	1,546,799	-2.5%	\$ 188,643,176	6.0%
Virginia	2,828	1.0%	\$ 470,819	5.3%	31,595	-34.8%	\$ 5,101,078	-16.8%
Vermont	807	-5.4%	\$ 111,318	3.8%	9,272	-7.2%	\$ 1,212,514	-0.9%
West Virginia	434	-7.9%	\$ 22,596	-24.1%	5,017	0.8%	\$ 290,005	-3.7%
Wyoming	35,117	-8.8%	\$ 3,302,090	-0.7%	458,686	-9.0%	\$ 42,148,902	-5.1%

For spirits, the On-Premise channel grew +1.0% in 9L volume with \$Vol growth of +6.8% showing a positive price mix of +5.8%. Rolling 12-month 9L volume is at +20.8% with \$Vol at +27.4%. The channel represents 16.7% of the total Control States spirits value for October up from 16.5% for Rolling 12-months. Wines in the channel were +1.2% in 9L volume and +7.3% in \$Vol.

Spirits - Markets	9L CMTY 2022-10	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	743,127	1.0%	\$ 180,827,055	6.8%	9,159,226	20.8%	\$ 2,164,240,495	27.4%
Alabama	45,493	1.0%	\$ 9,938,329	4.7%	555,388	11.2%	\$ 120,641,416	15.1%
Idaho	19,172	0.1%	\$ 4,474,712	6.7%	244,878	6.9%	\$ 55,765,883	14.7%
Michigan	102,597	-3.9%	\$ 24,943,253	-1.6%	1,327,681	34.0%	\$ 315,678,512	38.9%
Mississippi	13,427	-6.7%	\$ 2,036,133	3.6%	167,197	-3.3%	\$ 23,449,727	0.1%
Mont Co	8,583	3.1%	\$ 2,342,809	5.3%	103,056	39.2%	\$ 26,624,559	41.6%
New Hampshire	30,893	3.2%	\$ 6,389,369	7.2%	322,568	10.9%	\$ 64,790,710	15.1%
North Carolina	82,405	5.9%	\$ 22,993,032	13.8%	985,600	24.7%	\$ 263,835,402	34.0%
Ohio	139,908	-0.1%	\$ 35,816,331	6.7%	1,731,600	11.2%	\$ 431,170,417	16.8%
Oregon	60,979	10.2%	\$ 14,622,279	14.9%	728,523	42.0%	\$ 169,970,770	54.1%
Pennsylvania	130,837	1.9%	\$ 30,906,664	9.3%	1,637,445	24.7%	\$ 375,580,842	29.4%
Utah	11,347	12.5%	\$ 3,124,242	14.0%	144,951	22.6%	\$ 40,485,864	29.2%
Vermont	7,444	-2.5%	\$ 1,941,312	3.3%	91,718	36.2%	\$ 23,399,975	42.3%
Virginia	82,107	-2.4%	\$ 19,883,927	3.4%	1,007,527	17.7%	\$ 233,041,641	24.6%
Wyoming	7,933	-4.4%	\$ 1,414,663	-2.8%	111,095	1.5%	\$ 19,804,778	6.4%