

NABCA Monthly Report

September 2023 Control States Results

Total Control States spirits sales 9L volume decreased by -5.8% over September last year and -3.5% in \$Vol showing a resultant +2.3% price mix. The rolling 12-month 9L volume results remain positive at +0.1% and +3.0% in \$Vol.

During September, selling days were -10 days vs last year with Michigan -6 days, Utah -6 days and Pennsylvania +2 days. Pennsylvania is now on a calendar month since July 1st, but the previous year data is on their fiscal month. The large decline in West Virginia comes after a huge August result from the Vendor Sales Program.

Spirits - Markets	9L CMTY 2023-09	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,933,625	-5.8%	\$ 1,079,517,731	-3.5%	61,751,420	0.1%	\$ 13,549,543,678	3.0%
Alabama	289,878	-3.0%	\$ 62,802,553	-2.1%	3,579,982	1.9%	\$ 793,759,950	5.4%
Iowa	221,216	-6.8%	\$ 35,034,502	-4.4%	2,802,090	-1.1%	\$ 446,458,937	2.3%
Idaho	114,606	-1.8%	\$ 24,910,170	1.4%	1,417,473	-1.3%	\$ 303,668,003	3.3%
Mont Co	41,099	-2.7%	\$ 9,870,847	4.5%	521,624	3.7%	\$ 125,267,955	6.9%
Maine	114,551	-5.7%	\$ 24,001,917	-3.7%	1,444,169	-1.0%	\$ 295,311,484	3.3%
Michigan	702,210	-19.3%	\$ 164,463,407	-17.2%	9,052,231	-2.0%	\$ 2,104,278,035	-1.6%
Mississippi	179,761	-5.7%	\$ 29,717,086	-7.0%	2,243,588	-4.6%	\$ 376,638,350	-3.6%
Montana	83,239	-3.4%	\$ 16,215,613	-1.6%	1,092,151	-0.2%	\$ 209,425,887	2.3%
North Carolina	632,471	-0.4%	\$ 149,013,544	1.7%	7,677,114	2.3%	\$ 1,830,868,689	6.4%
New Hampshire	170,029	-3.9%	\$ 32,936,007	-5.0%	2,261,398	-5.1%	\$ 433,708,867	-3.5%
Ohio	586,354	-2.1%	\$ 148,110,289	0.6%	7,094,792	-1.1%	\$ 1,787,655,700	2.0%
Oregon	301,934	-3.1%	\$ 68,463,070	-1.5%	3,735,761	-1.3%	\$ 847,231,615	1.1%
Pennsylvania	765,372	10.1%	\$ 150,128,658	12.8%	9,354,644	5.2%	\$ 1,879,091,591	8.3%
Utah	120,433	-21.4%	\$ 23,790,086	-20.4%	1,639,992	1.8%	\$ 332,904,715	4.1%
Virginia	468,304	-3.1%	\$ 114,398,261	-0.2%	5,837,545	0.2%	\$ 1,438,123,993	4.3%
Vermont	35,440	-4.8%	\$ 8,091,247	-2.0%	446,434	-4.2%	\$ 100,931,550	1.2%
West Virgina	63,645	-47.0%	\$ 9,889,776	-44.3%	841,095	-5.3%	\$ 129,855,468	-3.0%
Wyoming	43,083	-29.8%	\$ 7,680,698	-22.4%	709,337	-0.9%	\$ 114,362,887	3.0%

With the large decreases across most states, all spirit categories were negative with the exception of Cocktails +14.3%, driven by Canned Cocktails +30%, and Tequila +3.3%.

Spirits - Categories	9L CMTY 2023-09	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,933,625	-5.8%	\$ 1,079,517,731	-3.5%	61,751,420	0.1%	\$ 13,549,543,678	3.0%
BRANDY / COGNAC	204,793	-13.0%	\$ 62,846,877	-17.6%	2,725,698	-11.0%	\$ 854,773,048	-13.1%
CACHACA	723	-0.6%	\$ 181,748	7.6%	10,029	17.4%	\$ 2,489,847	23.8%
CANADIAN	469,579	-11.9%	\$ 96,448,878	-8.7%	6,032,603	-3.9%	\$ 1,228,248,610	-0.8%
COCKTAILS	300,264	14.3%	\$ 25,132,184	14.9%	3,286,238	20.8%	\$ 283,979,705	24.9%
CORDIALS	342,753	-5.4%	\$ 74,486,060	-1.5%	4,552,399	1.5%	\$ 987,417,887	5.6%
DOMESTIC WHISKEY	750,764	-5.8%	\$ 218,654,711	-1.4%	9,705,111	-0.3%	\$ 2,813,808,288	5.0%
GIN	167,981	-10.0%	\$ 35,572,298	-4.8%	2,112,020	-4.1%	\$ 436,692,992	2.5%
IRISH	78,171	-6.0%	\$ 27,653,082	-3.8%	1,026,879	-1.7%	\$ 369,676,590	3.0%
NEUTRAL GRAIN SPIRI	5,523	-7.2%	\$ 1,214,947	-3.2%	67,544	-9.9%	\$ 14,712,720	-6.9%
OTHER IMPORTED WH	3,023	-7.2%	\$ 2,554,766	-3.2%	38,851	-1.2%	\$ 29,354,443	9.0%
RUM	413,735	-12.7%	\$ 65,246,148	-9.1%	5,369,983	-4.5%	\$ 838,185,312	-1.3%
SCOTCH	86,365	-9.0%	\$ 36,432,586	-5.1%	1,120,145	-6.7%	\$ 477,881,901	-3.8%
TEQUILA	539,803	3.3%	\$ 192,091,991	4.2%	6,392,633	9.8%	\$ 2,276,290,640	12.7%
VODKA	1,570,131	-6.2%	\$ 240,976,300	-4.6%	19,311,229	-0.4%	\$ 2,935,932,274	1.3%

Wines declined at -6.2% in 9L Volume with -4.6% in \$Vol returning a positive price mix +1.6%. Rolling 12-month 9L volume was -3.0% with \$Vol at +1.5% resulting in a +4.5% price mix.

Wine	9L CMTY 2023-09	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,225,096	-6.2%	\$ 133,138,156	-4.6%	16,949,894	-3.0%	\$ 1,879,028,638	1.5%
Alabama	2,512	-2.5%	\$ 155,435	0.9%	30,336	-4.9%	\$ 1,882,422	5.0%
Idaho	616	-7.2%	\$ 90,509	-1.3%	8,547	-12.2%	\$ 1,248,396	-4.7%
Mont Co	67,403	-9.4%	\$ 9,760,376	-4.7%	887,847	-1.8%	\$ 126,203,058	1.9%
Mississippi	105,006	-15.2%	\$ 9,693,002	-9.3%	1,476,211	-5.3%	\$ 132,958,379	1.4%
Montana	421	0.2%	\$ 102,956	9.0%	4,957	-3.0%	\$ 917,557	5.0%
New Hampshire	213,850	-5.3%	\$ 24,631,186	-0.7%	2,861,076	-4.7%	\$ 332,731,876	-0.3%
Pennsylvania	699,636	0.3%	\$ 72,404,280	-0.2%	9,711,197	-2.0%	\$ 1,045,995,616	2.4%
Utah	104,896	-25.2%	\$ 13,010,601	-21.7%	1,489,812	-3.8%	\$ 188,058,092	-0.2%
Virginia	2,504	-4.4%	\$ 421,167	-0.9%	32,220	2.1%	\$ 5,417,086	6.7%
Vermont	669	-28.0%	\$ 96,078	-4.3%	9,071	-6.4%	\$ 1,273,613	-0.5%
West Virginia	430	15.4%	\$ 27,783	21.3%	5,859	15.9%	\$ 358,780	20.7%
Wyoming	27,153	-28.0%	\$ 2,744,631	-26.2%	432,756	-6.4%	\$ 41,982,760	-0.5%

The On-Premise spirits channel was -5.6% in September with -3.1% growth in \$vol resulting in a +2.5% price mix. Pennsylvania +8.7% in 9L volume reflects the additional selling days. The On-Premise wine channel was -4.4% 9L volume with \$vol at +1.5% and +5.9% price mix.

Spirits - Markets	9L CMTY 2023-09	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	760,528	-5.6%	\$ 187,732,778	-3.1%	9,435,882	3.1%	\$ 2,324,793,475	7.9%
Alabama	47,545	-4.8%	\$ 10,431,723	-4.3%	578,583	4.3%	\$ 129,500,022	7.7%
Idaho	19,593	-3.4%	\$ 4,718,798	-1.8%	243,777	-0.4%	\$ 58,138,276	4.8%
Michigan	106,106	-19.8%	\$ 26,270,892	-17.6%	1,363,809	2.4%	\$ 335,582,232	6.2%
Mississippi	13,744	-0.2%	\$ 2,187,810	8.7%	169,663	0.9%	\$ 25,624,600	9.6%
Mont Co	8,812	-6.2%	\$ 2,311,956	-0.8%	111,218	8.2%	\$ 29,400,152	10.9%
New Hampshire	25,916	1.1%	\$ 5,463,169	1.5%	333,945	3.8%	\$ 69,056,907	7.3%
North Carolina	86,005	-3.3%	\$ 23,980,369	-0.8%	1,041,720	6.2%	\$ 291,291,739	11.6%
Ohio	144,188	-4.8%	\$ 37,122,165	-2.8%	1,743,610	0.7%	\$ 449,563,965	4.8%
Oregon	61,372	-7.6%	\$ 14,696,679	-6.8%	743,923	2.9%	\$ 177,892,477	5.8%
Pennsylvania	138,523	8.7%	\$ 33,888,916	13.2%	1,716,950	5.0%	\$ 419,713,852	11.7%
Utah	10,732	-21.7%	\$ 3,110,202	-19.2%	150,311	5.0%	\$ 44,012,133	9.7%
Vermont	7,878	-5.5%	\$ 2,133,413	-2.6%	94,962	3.3%	\$ 25,292,659	8.4%
Virginia	82,859	-6.6%	\$ 20,006,937	-3.2%	1,035,159	2.5%	\$ 249,891,852	7.5%
Wyoming	7,254	-23.2%	\$ 1,409,750	-17.9%	108,255	-2.9%	\$ 19,832,611	-0.1%