

NABCA Monthly Report

February 2024 Control States Results

Total Control States spirits sales 9L volume declined of -1.3% compared to February last year generating a +0.1% \$Vol gain driven by a +1.4% price mix. Over the past 12 months the 9L volume grew by +0.2% accompanied by a +2.4% in \$Vol. During February there were 8 additional selling days with all states having 1 additional day (leap year) except for Michigan, Utah and New Hampshire which had zero change and Pennsylvania -6 days (calendar month in 2024 vs fiscal month in 2023).

Spirits - Markets	9L CMTY 2024-02	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,469,804	-1.3%	\$ 999,295,926	0.1%	61,719,896	0.2%	\$ 13,655,446,378	2.4%
Alabama	282,526	5.2%	\$ 63,452,329	5.4%	3,613,398	2.3%	\$ 805,848,778	4.6%
Iowa	216,896	4.9%	\$ 35,055,679	9.1%	2,796,203	-1.2%	\$ 450,094,241	1.6%
Idaho	101,542	0.3%	\$ 22,112,459	2.5%	1,401,997	-1.9%	\$ 303,610,181	1.5%
Mont Co	35,548	-1.4%	\$ 8,864,866	2.0%	508,853	-0.6%	\$ 123,650,433	3.0%
Maine	108,770	1.1%	\$ 22,218,363	3.1%	1,441,431	-0.9%	\$ 297,315,583	2.0%
Michigan	620,672	2.4%	\$ 144,836,271	3.9%	9,191,018	0.7%	\$ 2,152,041,703	1.6%
Mississippi	160,759	-7.9%	\$ 27,198,322	-9.1%	2,194,119	-2.3%	\$ 372,113,482	-2.0%
Montana	82,488	3.3%	\$ 16,376,181	4.9%	1,095,639	0.8%	\$ 211,996,473	2.7%
North Carolina	564,126	3.6%	\$ 138,504,393	5.6%	7,671,477	1.3%	\$ 1,842,010,517	3.6%
New Hampshire	145,150	-3.7%	\$ 28,224,294	-2.2%	2,326,323	-0.3%	\$ 451,223,145	1.8%
Ohio	519,578	1.4%	\$ 132,771,055	3.1%	7,053,795	-1.5%	\$ 1,792,534,599	1.1%
Oregon	269,792	5.3%	\$ 61,968,942	5.9%	3,700,138	-1.5%	\$ 842,191,059	-0.2%
Pennsylvania	647,479	-18.0%	\$ 133,961,043	-18.3%	9,223,734	1.9%	\$ 1,874,447,529	5.2%
Utah	122,865	0.1%	\$ 25,904,965	-2.2%	1,638,278	0.9%	\$ 333,485,787	1.9%
Virginia	436,176	2.7%	\$ 110,517,896	4.6%	5,824,976	-0.4%	\$ 1,450,023,879	2.5%
Vermont	34,473	-1.3%	\$ 8,166,440	1.2%	439,303	-4.1%	\$ 100,426,724	0.0%
West Virginia	65,780	6.7%	\$ 10,085,633	5.2%	878,828	-0.2%	\$ 135,675,373	0.9%
Wyoming	55,183	6.8%	\$ 9,076,796	8.9%	720,386	0.5%	\$ 116,756,893	3.3%

Most spirit categories declined in February with the exceptions of Cocktails +7.2% in 9L volume led by Canned RTDs +17.2%. Domestic Whiskey 9L volume declined by -1.4% but was positive in \$Vol at +1.3%. Tequila grew by 9.3% in 9L volume and +8.4% in \$Vol showing negative price mix and 9L volume shift from the Super +3.9% and Ultra Premium +2.1% segments to the lower priced Premium +16.6% segment.

Spirits - Categories	9L CMTY 2024-02	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,469,804	-1.3%	\$ 999,295,926	0.1%	61,719,896	0.2%	\$ 13,655,446,378	2.4%
BRANDY / COGNAC	201,224	-7.0%	\$ 61,048,549	-9.3%	2,662,252	-8.4%	\$ 827,975,441	-11.4%
CACHACA	710	6.6%	\$ 171,753	2.3%	9,816	6.6%	\$ 2,449,755	13.1%
CANADIAN	447,254	-2.8%	\$ 92,817,658	-0.3%	5,896,929	-4.7%	\$ 1,208,591,982	-2.3%
COCKTAILS	194,206	7.2%	\$ 17,008,550	6.8%	3,411,148	17.0%	\$ 295,976,837	19.5%
CORDIALS	334,491	0.8%	\$ 73,831,823	3.1%	4,552,307	0.9%	\$ 1,000,456,420	4.7%
DOMESTIC WHISKEY	739,449	-1.4%	\$ 218,440,897	1.3%	9,710,928	-0.3%	\$ 2,864,600,930	3.8%
GIN	143,003	-3.3%	\$ 29,942,836	-0.7%	2,070,299	-4.4%	\$ 434,555,709	0.9%
IRISH	80,330	-5.0%	\$ 29,104,075	-4.9%	1,015,729	-2.0%	\$ 367,257,811	0.7%
NEUTRAL GRAIN SPIRIT	4,165	-6.8%	\$ 917,339	-6.2%	66,218	-5.4%	\$ 14,641,166	-1.5%
OTHER IMPORTED WHISKY	3,065	2.6%	\$ 1,968,759	-2.7%	38,027	-4.9%	\$ 28,733,164	0.4%
RUM	348,439	-8.9%	\$ 55,732,074	-6.7%	5,261,449	-4.8%	\$ 831,729,986	-1.5%
SCOTCH	75,270	-10.5%	\$ 32,010,802	-8.8%	1,097,729	-5.1%	\$ 473,571,995	-2.4%
TEQUILA	486,917	9.3%	\$ 172,437,286	8.4%	6,586,883	8.9%	\$ 2,354,355,393	10.5%
VODKA	1,411,253	-1.9%	\$ 213,793,194	-1.5%	19,340,048	0.2%	\$ 2,950,050,341	1.6%

Wines declined at -15.0% in 9L Volume with -14.4% in \$Vol returning a positive price mix - 0.6% heavily influenced by Pennsylvania at -171,100 9L cases due to the calendar anomaly. Rolling 12-month 9L volume was -5.2% with \$Vol at -0.5% resulting in a +4.7% price mix.

Wine	9L CMTY 2024-02	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,196,506	-15.0%	\$ 131,678,462	-14.4%	16,379,196	-5.2%	\$ 1,858,544,120	-0.5%
Alabama	2,210	-3.2%	\$ 140,412	-2.5%	29,480	-6.3%	\$ 1,846,885	-0.4%
Idaho	588	-13.0%	\$ 89,994	-7.9%	7,991	-12.9%	\$ 1,202,443	-5.8%
Mont Co	66,622	-1.0%	\$ 9,754,687	3.3%	868,712	-3.5%	\$ 125,852,192	0.6%
Mississippi	111,155	-9.5%	\$ 10,109,690	-9.5%	1,398,030	-8.7%	\$ 127,652,739	-4.7%
Montana	356	4.1%	\$ 63,793	28.7%	4,709	-6.2%	\$ 865,182	-2.2%
New Hampshire	173,372	-10.6%	\$ 20,762,146	-3.1%	2,824,776	-3.7%	\$ 335,695,029	0.9%
Pennsylvania	693,508	-19.8%	\$ 71,064,704	-22.0%	9,310,729	-5.4%	\$ 1,028,580,018	-0.4%
Utah	115,608	-3.3%	\$ 16,240,791	-3.0%	1,464,249	-4.0%	\$ 188,114,299	-0.5%
Virginia	2,399	2.3%	\$ 421,257	7.8%	31,811	-0.7%	\$ 5,428,426	2.9%
Vermont	733	-7.4%	\$ 99,634	-0.9%	8,867	-5.8%	\$ 1,245,642	-1.2%
West Virginia	420	-22.7%	\$ 28,047	-25.9%	5,263	-7.2%	\$ 343,395	1.8%
Wyoming	29,535	-7.4%	\$ 2,903,222	-6.9%	424,575	-5.8%	\$ 41,716,902	-1.2%

The on-premise spirits channel declined at -0.9% in 9L volume (an improvement vs January) and -0.5% in \$Vol resulting in a +0.4% price mix. The on-premise wine channel was -10.1% 9L volume with \$vol at -8.0% with a +2.1% price mix. The wine on-premise data excludes the Pennsylvania WEP accounts.

Spirits - Markets	9L CMTY 2024-02	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	734,696	-0.9%	\$ 183,827,494	-0.5%	9,447,815	0.7%	\$ 2,346,435,376	3.9%
Alabama	49,495	5.8%	\$ 11,107,753	6.5%	584,776	2.6%	\$ 131,348,641	4.7%
Idaho	18,446	-0.7%	\$ 4,486,047	1.2%	240,022	-3.0%	\$ 57,618,793	0.0%
Michigan	98,616	2.5%	\$ 24,391,570	3.6%	1,385,058	1.9%	\$ 343,437,243	5.0%
Mississippi	13,833	3.4%	\$ 2,129,910	5.3%	164,838	-1.6%	\$ 25,377,866	3.4%
Mont Co	8,255	3.8%	\$ 2,281,906	6.8%	110,679	2.0%	\$ 29,475,719	4.5%
New Hampshire	24,031	-4.3%	\$ 5,079,908	-3.6%	335,340	1.5%	\$ 69,993,765	4.2%
North Carolina	81,741	4.0%	\$ 23,247,059	4.8%	1,050,279	2.4%	\$ 295,315,754	5.3%
Ohio	135,361	2.1%	\$ 35,163,712	3.0%	1,741,898	-1.1%	\$ 452,275,830	1.7%
Oregon	57,757	4.1%	\$ 14,111,541	3.5%	740,158	-1.1%	\$ 177,289,437	0.2%
Pennsylvania	135,441	-13.7%	\$ 33,842,385	-14.0%	1,702,903	1.9%	\$ 421,912,384	6.9%
Utah	12,421	-9.5%	\$ 3,830,176	-12.7%	147,714	-0.9%	\$ 43,589,122	1.6%
Vermont	9,111	7.4%	\$ 2,541,046	8.9%	96,218	1.8%	\$ 25,825,776	5.2%
Virginia	81,486	2.8%	\$ 19,912,224	3.3%	1,039,282	0.2%	\$ 252,829,005	3.3%
Wyoming	8,703	4.1%	\$ 1,702,258	9.1%	108,650	-1.3%	\$ 20,146,042	1.5%