

NABCA Monthly Report

January 2024 Control States Results

Total Control States spirits sales 9L volume declined of -0.3% compared to January last year generating a +0.9% \$Vol gain driven by a +1.2% price mix. Over the past 12 months the 9L volume grew by +0.1% accompanied by a +2.5% in \$Vol. During January there were 8 additional selling days with New Hampshire -7 days, Michigan +7 days, Pennsylvania +3 days, North Carolina + 2 days and Alabama, Mississippi, Montana all +1 day . Pennsylvania data includes a selling day anomaly for this month. The fiscal month of January 2023 includes the week prior to New Year's Eve (December 26th – January 22nd) vs the calendar month of January 2024.

| Spirits - Markets | 9L CMTY 2024-01 | 9L % Chg | Shelf \$ CMTY | Shelf \$ % Chg | 9L R12TY | 9L R12 % | Shelf \$ R12TY | Shelf \$ % Chg |
|----------------------|--------------------|--------------|-----------------------|-------------------|-------------------|-------------|--------------------------|-------------------|
| Total Control | 4,324,777 | -0.3% | \$ 948,780,896 | 0.9% | 61,780,338 | 0.1% | \$ 13,653,585,618 | 2.5% |
| Alabama | 260,765 | 3.8% | \$ 58,137,838 | 4.7% | 3,599,419 | 2.0% | \$ 802,166,219 | 4.5% |
| Iowa | 208,673 | 1.7% | \$ 32,922,407 | 1.2% | 2,786,147 | -1.7% | \$ 447,101,660 | 0.8% |
| Idaho | 98,346 | -3.6% | \$ 20,907,420 | -2.0% | 1,401,723 | -2.1% | \$ 303,053,437 | 1.4% |
| Mont Co | 40,276 | 14.0% | \$ 8,661,855 | -0.9% | 509,351 | -0.4% | \$ 123,464,808 | 3.0% |
| Maine | 96,584 | 0.1% | \$ 20,033,357 | 2.9% | 1,440,284 | -0.8% | \$ 296,644,135 | 2.1% |
| Michigan | 712,501 | 24.0% | \$ 164,149,197 | 25.6% | 9,176,683 | 0.1% | \$ 2,146,530,602 | 0.8% |
| Mississippi | 158,078 | -12.4% | \$ 26,442,605 | -11.8% | 2,207,873 | -2.1% | \$ 374,802,867 | -1.4% |
| Montana | 72,303 | 4.1% | \$ 13,995,645 | 6.2% | 1,093,004 | -0.4% | \$ 211,216,015 | 1.5% |
| North Carolina | 528,026 | 1.4% | \$ 126,335,496 | 3.5% | 7,651,966 | 1.2% | \$ 1,834,669,060 | 3.6% |
| New Hampshire | 126,485 | -31.6% | \$ 24,099,683 | -36.2% | 2,331,911 | -0.6% | \$ 451,841,144 | 1.6% |
| Ohio | 495,644 | -3.7% | \$ 122,280,078 | -2.0% | 7,046,491 | -1.7% | \$ 1,788,548,482 | 0.9% |
| Oregon | 257,527 | -5.7% | \$ 57,321,300 | -5.7% | 3,686,532 | -2.3% | \$ 838,788,591 | -0.8% |
| Pennsylvania | 609,098 | -7.6% | \$ 125,606,333 | -6.1% | 9,365,849 | 3.6% | \$ 1,904,179,889 | 7.4% |
| Utah | 110,092 | -1.3% | \$ 23,291,998 | -0.3% | 1,638,140 | 0.8% | \$ 334,052,873 | 2.4% |
| Virginia | 404,474 | -2.7% | \$ 98,678,521 | -3.0% | 5,813,643 | -0.6% | \$ 1,445,105,536 | 2.6% |
| Vermont | 32,479 | -5.1% | \$ 7,532,878 | -3.1% | 439,748 | -4.4% | \$ 100,329,946 | -0.1% |
| West Virgina | 61,779 | 3.6% | \$ 9,786,649 | 6.0% | 874,709 | -0.7% | \$ 135,171,165 | 0.7% |
| Wyoming | 51,648 | 6.5% | \$ 8,597,636 | 13.9% | 716,866 | -0.1% | \$ 115,919,189 | 2.7% |

Scotch, Rum and Gin experienced the largest 9L volume declines of the major categories with corresponding \$Vol decreases. Within the Scotch subcategory, Single Malts were -14.4% vs Blends - 8.3% in 9L volume. Cocktails continue to dominate, lead by Canned RTDs +20.9%. Brandy Cognac declines continue with a negative price mix due to the Cognac subcategory declining at -7.5% in 9L vol and -11.5% in \$Vol.

| Spirits - Categories | 9L CMTY 2024-01 | 9L % Chg | Shelf \$ CMTY | Shelf \$ % Chg | 9L R12TY | 9L R12 % | Shelf \$ R12TY | Shelf \$ % Chg |
|-----------------------|--------------------|--------------|-----------------------|-------------------|-------------------|-------------|--------------------------|-------------------|
| Total Control | 4,324,777 | -0.3% | \$ 948,780,896 | 0.9% | 61,780,338 | 0.1% | \$ 13,653,585,618 | 2.5% |
| BRANDY / COGNAC | 200,502 | -4.8% | \$ 59,162,145 | -9.1% | 2,677,414 | -8.6% | \$ 834,255,016 | -11.4% |
| CACHACA | 559 | -12.1% | \$ 136,986 | -10.2% | 9,772 | 7.4% | \$ 2,445,494 | 14.4% |
| CANADIAN | 434,645 | -1.4% | \$ 87,346,829 | -0.6% | 5,908,929 | -5.1% | \$ 1,208,743,389 | -2.7% |
| COCKTAILS | 173,914 | 6.8% | \$ 15,234,799 | 6.5% | 3,398,191 | 18.0% | \$ 294,853,316 | 20.8% |
| CORDIALS | 325,517 | -2.2% | \$ 71,268,225 | 0.7% | 4,549,501 | 0.6% | \$ 998,169,086 | 4.5% |
| DOMESTIC WHISKEY | 727,339 | 1.0% | \$ 211,351,411 | 4.1% | 9,722,420 | -0.4% | \$ 2,861,635,869 | 4.0% |
| GIN | 137,517 | -6.9% | \$ 27,918,993 | -3.9% | 2,075,207 | -4.6% | \$ 434,812,568 | 1.1% |
| IRISH | 71,643 | -3.5% | \$ 25,972,337 | -3.5% | 1,019,969 | -2.4% | \$ 368,747,400 | 0.7% |
| NEUTRAL GRAIN SPIRIT | 4,250 | -4.5% | \$ 939,647 | -2.1% | 66,521 | -5.7% | \$ 14,698,858 | -1.7% |
| OTHER IMPORTED WHISKY | 2,727 | -7.1% | \$ 1,902,656 | -7.2% | 37,948 | -4.6% | \$ 28,785,559 | 2.2% |
| RUM | 349,359 | -6.3% | \$ 55,429,081 | -3.6% | 5,295,354 | -4.4% | \$ 835,656,241 | -1.1% |
| SCOTCH | 74,718 | -8.8% | \$ 31,401,754 | -7.9% | 1,106,517 | -5.1% | \$ 476,590,975 | -2.3% |
| TEQUILA | 437,572 | 5.2% | \$ 154,364,289 | 6.5% | 6,545,386 | 8.8% | \$ 2,340,602,584 | 10.8% |
| VODKA | 1,384,490 | 1.1% | \$ 206,301,852 | 1.4% | 19,367,090 | 0.3% | \$ 2,953,149,657 | 1.7% |

Wines declined at -11.4% in 9L Volume with -13.2% in \$Vol returning a rare negative price mix -1.8% heavily influenced by Pennsylvania at -79,000 9L cases due to the calendar anomaly. Rolling 12-month 9L volume was -4.5% with \$Vol at +0.4% resulting in a +4.9% price mix.

| Wine | 9L CMTY 2024-01 | 9L % Chg | Shelf \$ CMTY | Shelf \$ % Chg | 9L R12TY | 9L R12 % | Shelf \$ R12TY | Shelf \$ % Chg |
|----------------------|--------------------|---------------|-----------------------|-------------------|-------------------|--------------|-------------------------|-------------------|
| Total Control | 1,129,253 | -11.4% | \$ 124,329,953 | -13.2% | 16,589,770 | -4.5% | \$ 1,876,160,887 | 0.4% |
| Alabama | 1,811 | -9.1% | \$ 118,322 | -5.9% | 29,552 | -6.2% | \$ 1,850,242 | 0.5% |
| Idaho | 582 | -14.0% | \$ 87,359 | -10.7% | 8,079 | -13.1% | \$ 1,208,302 | -6.0% |
| Mont Co | 61,854 | -2.0% | \$ 8,897,429 | 3.6% | 869,389 | -3.5% | \$ 125,539,432 | 0.6% |
| Mississippi | 104,713 | -13.7% | \$ 9,017,352 | -11.3% | 1,409,629 | -7.9% | \$ 128,705,537 | -3.3% |
| Montana | 341 | -26.1% | \$ 59,884 | -26.9% | 4,695 | -6.8% | \$ 850,528 | -5.0% |
| New Hampshire | 203,335 | -16.8% | \$ 25,238,975 | -14.0% | 2,845,404 | -3.5% | \$ 336,362,326 | 0.8% |
| Pennsylvania | 622,252 | -11.3% | \$ 63,371,579 | -17.9% | 9,481,841 | -4.3% | \$ 1,044,307,343 | 0.9% |
| Utah | 99,790 | -5.7% | \$ 13,914,160 | -2.5% | 1,468,191 | -4.2% | \$ 188,447,979 | -0.3% |
| Virginia | 2,248 | -3.6% | \$ 381,816 | -0.8% | 31,757 | -0.7% | \$ 5,398,056 | 2.9% |
| Vermont | 726 | -2.0% | \$ 102,002 | -1.4% | 8,898 | -5.7% | \$ 1,246,556 | -0.6% |
| West Virginia | 439 | -11.1% | \$ 29,252 | -7.5% | 5,386 | -2.0% | \$ 353,204 | 10.1% |
| Wyoming | 31,161 | -2.0% | \$ 3,111,691 | 5.9% | 426,946 | -5.7% | \$ 41,890,473 | -0.6% |

The on-premise spirits channel declined after a positive December with -3.4% in 9L volume and -1.3% in \$Vol resulting in a +2.1% price mix. The on-premise wine channel was -8.4% 9L volume with \$Vol at -5.7% with a +2.7% price mix. The wine on-premise data now excludes the Pennsylvania WEP accounts.

| Spirits - Markets | 9L CMTY 2024-01 | 9L % Chg | Shelf \$ CMTY | Shelf \$ % Chg | 9L R12TY | 9L R12 % | Shelf \$ R12TY | Shelf \$ % Chg |
|----------------------|--------------------|--------------|-----------------------|-------------------|------------------|-------------|-------------------------|-------------------|
| Total Control | 671,794 | -3.4% | \$ 168,549,520 | -1.3% | 9,454,477 | 1.1% | \$ 2,347,332,258 | 4.7% |
| Alabama | 42,294 | -1.6% | \$ 9,656,478 | -1.3% | 582,078 | 2.7% | \$ 130,673,772 | 5.0% |
| Idaho | 16,787 | -11.7% | \$ 4,025,485 | -11.1% | 240,143 | -3.1% | \$ 57,565,524 | 0.2% |
| Michigan | 107,319 | 14.3% | \$ 26,435,212 | 16.3% | 1,382,640 | 1.8% | \$ 342,599,954 | 5.2% |
| Mississippi | 11,850 | -21.7% | \$ 1,920,274 | -13.3% | 164,380 | -2.0% | \$ 25,271,189 | 3.7% |
| Mont Co | 6,862 | -8.1% | \$ 1,821,356 | -11.1% | 110,380 | 2.6% | \$ 29,330,033 | 4.9% |
| New Hampshire | 22,803 | -20.3% | \$ 4,923,515 | -19.1% | 336,412 | 2.2% | \$ 70,181,660 | 5.2% |
| North Carolina | 71,961 | -1.7% | \$ 20,569,189 | -0.3% | 1,047,121 | 2.7% | \$ 294,256,357 | 6.0% |
| Ohio | 123,210 | -6.7% | \$ 32,180,910 | -3.7% | 1,739,129 | -0.9% | \$ 451,264,565 | 2.2% |
| Oregon | 50,337 | -13.0% | \$ 12,029,722 | -12.9% | 737,868 | -1.2% | \$ 176,816,270 | 0.4% |
| Pennsylvania | 120,029 | -2.8% | \$ 30,063,922 | 0.2% | 1,724,350 | 3.6% | \$ 427,402,306 | 9.6% |
| Utah | 11,658 | -4.9% | \$ 3,740,892 | -2.0% | 149,024 | 0.6% | \$ 44,148,310 | 4.5% |
| Vermont | 7,649 | -1.3% | \$ 2,147,222 | -0.4% | 95,587 | 1.3% | \$ 25,618,650 | 5.0% |
| Virginia | 70,664 | -4.9% | \$ 17,434,720 | -3.7% | 1,037,059 | 0.2% | \$ 252,199,447 | 3.7% |
| Wyoming | 8,370 | 7.4% | \$ 1,600,623 | 12.7% | 108,306 | -2.0% | \$ 20,004,223 | 0.6% |