

NABCA Monthly Report

March 2023 Control States Results

Total Control States spirits sales declined by -0.2% in 9L volume with +3.1% in \$Vol showing a resultant +3.3% price mix. The rolling 12-month results declined by -0.4% in 9L volume with +2.4% in \$Vol.

This month there were no selling day changes vs March 2022.

Spirits - Markets	9L CMTY 2023-03	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,073,885	-0.2%	\$ 1,114,898,389	3.1%	61,715,231	-0.4%	\$ 13,353,859,893	2.4%
Alabama	314,256	3.0%	\$ 69,301,619	7.0%	3,541,165	1.4%	\$ 775,181,661	4.6%
Iowa	235,910	-3.4%	\$ 36,303,794	-1.7%	2,819,531	-1.3%	\$ 442,567,748	2.9%
Idaho	114,083	0.0%	\$ 24,250,897	6.1%	1,428,704	-1.1%	\$ 300,569,407	4.6%
Mont Co	41,793	3.9%	\$ 10,043,921	6.8%	514,950	5.5%	\$ 120,949,691	5.2%
Maine	110,464	-1.8%	\$ 22,263,443	2.2%	1,452,379	-0.8%	\$ 291,988,733	5.3%
Michigan	810,553	-3.0%	\$ 186,565,351	-2.1%	9,098,529	-2.8%	\$ 2,114,357,132	-2.7%
Mississippi	202,564	-10.1%	\$ 33,063,101	-11.6%	2,223,224	-9.7%	\$ 375,162,967	-4.8%
Montana	88,442	-10.1%	\$ 16,926,358	-5.3%	1,077,221	-2.3%	\$ 205,520,439	1.7%
North Carolina	634,201	3.9%	\$ 152,553,586	7.8%	7,596,687	2.4%	\$ 1,789,504,916	7.5%
New Hampshire	150,509	-1.5%	\$ 29,604,570	4.2%	2,332,004	-5.5%	\$ 444,489,031	-4.0%
Ohio	588,838	-0.6%	\$ 149,085,267	2.1%	7,156,121	-1.1%	\$ 1,776,398,183	1.7%
Oregon	317,674	3.5%	\$ 72,385,189	7.0%	3,768,143	-1.0%	\$ 848,378,251	3.1%
Pennsylvania	645,163	1.7%	\$ 134,101,826	7.4%	9,061,751	3.3%	\$ 1,771,391,691	3.6%
Utah	165,220	0.9%	\$ 31,878,012	1.4%	1,737,049	3.4%	\$ 327,766,016	3.2%
Virginia	484,120	1.9%	\$ 116,986,489	5.4%	5,855,522	0.0%	\$ 1,420,900,044	4.6%
Vermont	37,135	-1.0%	\$ 8,523,669	5.8%	457,755	-2.5%	\$ 100,898,672	1.9%
West Virginia	74,324	-2.0%	\$ 11,540,771	0.6%	878,970	-0.2%	\$ 134,614,192	3.4%
Wyoming	58,635	-2.2%	\$ 9,520,527	2.1%	715,526	0.2%	\$ 113,221,119	3.6%

Cocktails, driven by Canned RTDs, continue to dominate the category growth of +18.0% 9L volume. Tequila slowed to +6.9% 9L volume. Irish Whiskey recovered from February's large decline posting a +5.2% 9L volume increase and +10.0% \$Vol. Domestic Whiskey, Canadian Whiskey, Gin, Brandy/Cognac, Rum, Scotch (driven by Single Malt at -16.0%) and Vodka remain with negative volume for the month.

Spirits - Categories	9L CMTY 2023-03	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,073,885	-0.2%	\$ 1,114,898,389	3.1%	61,715,231	-0.4%	\$ 13,353,859,893	2.4%
BRANDY / COGNAC	241,184	-2.9%	\$ 78,633,436	-0.3%	2,899,722	-12.4%	\$ 933,089,210	-13.1%
CACHACA	781	18.1%	\$ 190,349	27.4%	9,326	0.5%	\$ 2,205,803	-3.7%
CANADIAN	504,872	-5.9%	\$ 101,599,855	-5.0%	6,171,605	-2.9%	\$ 1,236,418,862	-0.2%
COCKTAILS	213,882	18.0%	\$ 17,761,829	21.2%	3,058,246	29.3%	\$ 250,144,070	29.0%
CORDIALS	375,995	1.5%	\$ 79,891,365	7.0%	4,517,778	-0.2%	\$ 959,996,399	3.0%
DOMESTIC WHISKEY	808,280	-1.5%	\$ 229,092,748	2.3%	9,714,336	-0.3%	\$ 2,755,108,607	5.8%
GIN	168,294	-4.3%	\$ 34,410,168	4.4%	2,157,733	-5.2%	\$ 431,393,777	1.0%
IRISH	119,428	5.2%	\$ 42,552,168	10.0%	1,042,352	-0.5%	\$ 368,335,943	3.8%
NEUTRAL GRAIN SPIRIT	4,856	-12.6%	\$ 1,062,085	-9.4%	69,290	-13.7%	\$ 14,747,877	-10.5%
OTHER IMPORTED WHISKY	2,940	3.2%	\$ 1,973,917	17.1%	40,087	6.8%	\$ 28,863,415	17.3%
RUM	438,102	-3.6%	\$ 68,027,962	0.3%	5,510,369	-4.5%	\$ 842,778,311	-1.6%
SCOTCH	87,946	-4.8%	\$ 36,417,836	-2.6%	1,152,104	-7.1%	\$ 2,483,312,201	-4.6%
TEQUILA	519,384	6.9%	\$ 184,414,471	10.3%	6,084,477	8.3%	\$ 1,245,636,064	12.6%
VODKA	1,587,940	-0.5%	\$ 238,868,738	1.6%	19,287,803	-1.6%	\$ 2,901,826,723	-0.2%

Wines declined at -5.4% in 9L Volume (slight improvement vs February) with -5.1% in \$Vol returning to a positive price mix +0.3%. Rolling 12 9L volume was -4.3% with \$Vol at -1.0%. The six table wine states all posted negative 9L volume results for the month with only Wyoming posting positive \$Vol results.

Wine	9L CMTY 2023-03	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,268,336	-5.4%	\$ 133,988,661	-5.1%	17,200,176	-4.3%	\$ 1,845,145,401	-1.0%
Alabama	2,708	-1.1%	\$ 165,073	8.3%	31,414	-3.4%	\$ 1,866,945	5.2%
Idaho	740	-8.1%	\$ 104,899	-6.0%	9,113	-8.3%	\$ 1,269,976	-3.9%
Mont Co	76,624	-4.7%	\$ 10,739,364	-0.2%	895,120	-2.4%	\$ 124,782,219	0.6%
Mississippi	123,814	-9.4%	\$ 10,880,644	-4.0%	1,513,616	-7.0%	\$ 133,431,303	1.0%
Montana	426	-14.1%	\$ 76,457	4.5%	4,948	-12.4%	\$ 888,230	1.8%
New Hampshire	192,014	-6.3%	\$ 21,140,380	-5.1%	2,919,973	-6.1%	\$ 331,588,635	-2.2%
Pennsylvania	684,814	-4.9%	\$ 67,550,736	-7.4%	9,810,740	-3.2%	\$ 1,013,334,233	-1.1%
Utah	147,614	-4.3%	\$ 19,418,115	-1.7%	1,518,829	-5.1%	\$ 188,801,604	-0.3%
Virginia	2,538	6.8%	\$ 419,661	12.3%	32,209	-22.5%	\$ 5,323,469	-4.7%
Vermont	781	-6.0%	\$ 106,951	3.2%	9,100	-6.5%	\$ 1,243,759	1.9%
West Virginia	484	39.1%	\$ 27,131	45.9%	5,809	24.0%	\$ 345,990	23.7%
Wyoming	35,780	-4.1%	\$ 3,359,198	1.8%	449,299	-6.8%	\$ 42,268,035	-3.1%

The On-Premise channel was flat (-0.03%) for March but continued to post a very positive \$Vol of +5.4% resulting in the same percentage price mix. Only Alabama +5.0%, Vermont +4.4%, North Carolina +3.6% and Oregon +1.5% posted positive volume results. With small negative volumes, Mississippi posted a +10.3% price mix and Pennsylvania +9.9%.

Spirits - Markets	9L CMTY 2023-03	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	848,800	0.0%	\$ 211,428,953	5.4%	9,379,521	5.6%	\$ 2,266,123,652	11.4%
Alabama	56,365	5.0%	\$ 12,643,293	10.3%	572,437	6.7%	\$ 126,653,495	11.0%
Idaho	21,501	-1.6%	\$ 5,170,689	6.3%	247,189	1.4%	\$ 57,916,080	9.3%
Michigan	131,401	-1.9%	\$ 32,358,499	1.9%	1,356,649	6.6%	\$ 327,633,857	10.6%
Mississippi	16,137	-0.5%	\$ 2,474,480	9.8%	167,460	-5.0%	\$ 24,766,454	4.7%
Mont Co	9,827	-0.7%	\$ 2,617,051	4.6%	108,420	13.9%	\$ 28,328,645	15.1%
New Hampshire	24,038	-1.4%	\$ 4,974,915	1.6%	330,115	3.0%	\$ 67,232,149	7.2%
North Carolina	98,541	3.6%	\$ 27,709,692	8.8%	1,028,630	10.3%	\$ 282,645,265	18.5%
Ohio	160,885	-0.7%	\$ 41,902,431	3.6%	1,760,541	2.8%	\$ 446,347,609	7.9%
Oregon	67,184	1.5%	\$ 16,168,606	4.7%	749,005	11.9%	\$ 177,739,652	19.4%
Pennsylvania	133,906	-1.2%	\$ 33,637,845	8.7%	1,669,183	4.2%	\$ 393,599,160	9.6%
Utah	16,155	-0.8%	\$ 4,714,317	2.1%	149,311	5.6%	\$ 43,013,610	12.4%
Vermont	8,686	4.4%	\$ 2,395,521	9.0%	94,896	7.8%	\$ 24,745,477	12.7%
Virginia	95,238	-0.3%	\$ 22,987,568	5.0%	1,036,711	5.6%	\$ 245,826,441	12.1%
Wyoming	8,937	-10.7%	\$ 1,674,046	-9.1%	108,976	-4.7%	\$ 19,675,758	-1.0%