

NABCA Monthly Report

May 2023 Control States Results

Total Control States spirits sales 9L volume increased by +6.4% over May last years and +9.1% in \$Vol showing a resultant +2.7% price mix. The rolling 12-month results returned to positive 9L volume with +0.1% and grew +3.0% in \$Vol.

During May there were 11 additional selling days vs May 2022 with Michigan +7 days and Alabama, Mississippi, Montana and North Carolina all +1 additional day each.

Spirits - Markets	9L CMTY 2023-05	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,559,875	6.4%	\$ 1,206,721,153	9.1%	61,878,232	0.1%	\$ 13,461,338,507	3.0%
Alabama	318,834	8.5%	\$ 69,934,908	11.6%	3,547,870	1.6%	\$ 780,674,565	5.1%
Iowa	255,237	6.5%	\$ 40,079,646	11.5%	2,816,793	-1.5%	\$ 444,914,271	2.9%
Idaho	117,646	0.7%	\$ 25,026,666	5.2%	1,422,419	-1.2%	\$ 301,531,157	4.6%
Mont Co	47,077	9.4%	\$ 11,648,498	16.0%	517,054	4.6%	\$ 122,064,544	4.8%
Maine	129,013	4.7%	\$ 26,479,242	8.7%	1,456,017	-0.2%	\$ 294,088,788	5.3%
Michigan	883,198	21.3%	\$ 205,085,523	22.3%	9,240,552	-0.8%	\$ 2,144,875,245	-0.9%
Mississippi	193,128	6.7%	\$ 31,909,963	3.7%	2,230,348	-9.1%	\$ 376,829,802	-4.7%
Montana	96,400	6.1%	\$ 18,037,806	5.0%	1,079,675	-2.2%	\$ 205,850,017	0.9%
North Carolina	659,607	5.8%	\$ 155,803,451	9.1%	7,601,274	2.6%	\$ 1,800,025,023	7.3%
New Hampshire	178,741	-2.0%	\$ 33,213,332	-2.0%	2,317,334	-5.2%	\$ 441,016,725	-4.5%
Ohio	617,740	1.3%	\$ 156,849,106	4.2%	7,130,377	-1.1%	\$ 1,779,841,323	2.0%
Oregon	315,992	2.3%	\$ 71,151,357	4.9%	3,757,674	-0.9%	\$ 848,199,887	2.7%
Pennsylvania	919,809	4.2%	\$ 182,829,745	7.9%	9,114,293	3.5%	\$ 1,813,893,200	5.0%
Utah	138,656	4.2%	\$ 25,497,018	3.9%	1,746,571	5.1%	\$ 329,758,138	5.1%
Virginia	503,948	2.0%	\$ 122,391,468	5.2%	5,847,330	0.2%	\$ 1,427,434,531	4.8%
Vermont	37,078	-4.1%	\$ 8,181,220	3.1%	454,129	-3.4%	\$ 101,147,356	1.8%
West Virgina	82,755	9.2%	\$ 12,660,945	10.8%	879,983	0.2%	\$ 135,183,082	3.7%
Wyoming	65,017	11.0%	\$ 9,941,260	14.1%	718,539	1.6%	\$ 114,010,854	5.4%

Cocktails, driven by Canned RTDs (+47.7% 9L volume), continue to dominate the category growth of +25.7% 9L volume. Only Brandy/Cognac -7.7% (driven primarily by Cognac -16.9%), Scotch -1.6% and Other Imported Whisky -0.6% declined during May.

Spirits - Categories	9L CMTY 2023-05	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	5,559,875	6.4%	\$ 1,206,721,153	9.1%	61,878,232	0.1%	\$ 13,461,338,507	3.0%
BRANDY / COGNAC	234,180	-7.7%	\$ 73,089,689	-10.7%	2,842,129	-11.6%	\$ 909,760,443	-12.5%
CACHACA	991	7.7%	\$ 252,817	20.2%	9,381	0.8%	\$ 2,251,310	-0.8%
CANADIAN	515,123	2.1%	\$ 103,716,995	5.0%	6,139,567	-2.9%	\$ 1,236,758,087	-0.1%
COCKTAILS	352,506	25.7%	\$ 29,268,468	33.8%	3,165,981	27.3%	\$ 261,765,875	29.0%
CORDIALS	388,298	8.7%	\$ 82,495,889	12.6%	4,532,353	0.5%	\$ 971,032,986	4.3%
DOMESTIC WHISKEY	824,674	5.0%	\$ 235,725,940	8.7%	9,719,540	-0.2%	\$ 2,776,591,128	5.4%
GIN	192,446	3.0%	\$ 40,562,962	10.4%	2,153,471	-4.1%	\$ 435,916,322	2.4%
IRISH	80,590	1.1%	\$ 29,313,294	5.1%	1,036,401	-1.2%	\$ 369,404,943	3.4%
NEUTRAL GRAIN SPIRIT	5,521	3.3%	\$ 1,222,434	7.9%	68,560	-12.5%	\$ 14,706,367	-9.4%
OTHER IMPORTED WHISKY	3,027	-0.6%	\$ 2,583,564	29.1%	39,825	4.6%	\$ 29,523,953	18.2%
RUM	491,658	1.8%	\$ 76,317,407	5.1%	5,489,506	-3.9%	\$ 846,108,115	-0.8%
SCOTCH	93,749	-1.6%	\$ 38,712,273	0.5%	1,143,033	-6.9%	\$ 481,375,878	-4.6%
TEQUILA	647,026	19.7%	\$ 228,449,044	22.3%	6,204,584	9.3%	\$ 2,201,401,355	13.6%
VODKA	1,730,076	5.0%	\$ 264,983,613	7.1%	19,333,888	-1.0%	\$ 2,924,712,427	0.7%

Wines declined at -4.0% in 9L Volume with -3.3% in \$Vol returning a positive price mix +0.7%. Rolling 12-month 9L volume was -4.1% with \$Vol at -0.2%. Five of the six table wine states posted negative 9L volume with only Montgomery County posting a positive 9L volume of +2.8% and \$Vol result at +6.3%.

Wine	9L CMTY 2023-05	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,491,203	-4.0%	\$ 155,808,016	-3.3%	17,066,693	-4.1%	\$ 1,860,012,163	-0.2%
Alabama	2,854	-4.7%	\$ 172,329	3.7%	30,799	-4.5%	\$ 1,863,854	5.2%
Idaho	635	-19.4%	\$ 89,268	-14.0%	8,872	-10.6%	\$ 1,252,212	-5.2%
Mont Co	76,114	2.8%	\$ 10,867,516	6.3%	894,189	-2.0%	\$ 125,614,173	1.4%
Mississippi	127,053	-2.1%	\$ 11,573,649	2.1%	1,497,616	-7.9%	\$ 133,388,918	0.2%
Montana	327	-22.0%	\$ 56,167	-37.0%	4,826	-13.3%	\$ 855,922	-4.4%
New Hampshire	213,860	-4.6%	\$ 23,824,371	-0.9%	2,898,688	-5.8%	\$ 331,550,039	-1.6%
Pennsylvania	920,926	-4.7%	\$ 92,173,710	-5.8%	9,730,787	-3.2%	\$ 1,027,827,768	0.0%
Utah	108,728	-4.9%	\$ 13,032,217	-3.8%	1,507,901	-3.4%	\$ 188,368,579	0.6%
Virginia	2,566	2.8%	\$ 425,525	6.6%	32,200	-14.8%	\$ 5,354,617	-0.2%
Vermont	668	-0.3%	\$ 89,125	15.4%	9,142	-6.6%	\$ 1,263,662	-1.8%
West Virgina	486	24.6%	\$ 30,389	26.7%	5,821	21.5%	\$ 347,523	26.2%
Wyoming	36,986	-0.3%	\$ 3,473,726	5.2%	445,849	-6.6%	\$ 42,323,970	-1.8%

The On-Premise spirits channel was +8.8% for May with a positive +13.2% growth in \$vol resulting in a +4.4% price mix. All states were positive in both 9L and \$vol with Michigan +24.7% coming from the additional selling days. The On-Premise wine channel was -6.0% 9L volume with \$vol also being negative at -1.1% resulting in a +4.9% price mix.

Spirits - Markets	9L CMTY 2023-05	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	900,799	8.8%	\$ 221,331,124	13.2%	9,415,543	3.8%	\$ 2,295,403,641	9.4%
Alabama	53,640	7.2%	\$ 11,982,589	9.7%	573,868	5.8%	\$ 127,568,764	10.0%
Idaho	21,508	2.6%	\$ 5,079,322	7.4%	246,034	0.5%	\$ 58,262,905	8.5%
Michigan	140,649	24.7%	\$ 34,786,056	30.0%	1,382,390	4.6%	\$ 335,968,171	8.5%
Mississippi	14,948	5.2%	\$ 2,233,397	10.2%	167,165	-5.3%	\$ 24,855,443	3.9%
Mont Co	11,134	19.4%	\$ 2,914,129	20.0%	109,742	10.0%	\$ 28,697,167	11.0%
New Hampshire	28,323	3.6%	\$ 5,850,716	6.0%	330,546	2.3%	\$ 67,700,084	6.5%
North Carolina	96,717	11.3%	\$ 26,574,736	15.4%	1,033,545	8.7%	\$ 286,207,161	16.1%
Ohio	162,519	6.3%	\$ 42,143,408	10.3%	1,756,136	1.5%	\$ 448,437,451	6.5%
Oregon	67,357	6.4%	\$ 15,967,871	8.6%	748,856	7.3%	\$ 178,359,334	13.1%
Pennsylvania	176,162	2.9%	\$ 43,110,792	8.9%	1,673,703	2.3%	\$ 402,918,266	8.2%
Utah	11,597	5.2%	\$ 3,308,348	7.6%	149,802	5.6%	\$ 43,401,936	12.1%
Vermont	7,988	1.7%	\$ 2,057,677	8.5%	95,080	3.8%	\$ 24,988,665	9.2%
Virginia	98,372	7.5%	\$ 23,544,220	11.6%	1,039,333	3.7%	\$ 248,232,288	9.6%
Wyoming	9,886	12.0%	\$ 1,777,863	14.4%	109,344	-2.9%	\$ 19,806,007	0.6%