

# NABCA Monthly Report

## February 2023 Control States Results

Total Control States spirits sales declined by -1.9% in 9L volume with +1.1% in \$Vol showing a resultant +3.0% price mix. The rolling 12-month results declined by -0.5% in 9L volume with +2.3% in \$Vol.

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

Spirits - Markets	9L CMTY 2023-02	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>4,538,191</b>	<b>-1.9%</b>	<b>\$ 992,039,301</b>	<b>1.1%</b>	<b>61,726,022</b>	<b>-0.5%</b>	<b>\$ 13,319,040,539</b>	<b>2.3%</b>
Alabama	268,547	0.5%	\$ 59,792,991	4.5%	3,532,050	1.4%	\$ 770,246,193	4.3%
Iowa	206,759	-2.8%	\$ 32,053,613	-1.3%	2,827,768	-1.1%	\$ 443,106,104	3.0%
Idaho	101,268	-3.2%	\$ 21,555,573	1.2%	1,428,710	-1.3%	\$ 299,154,524	4.1%
Mont Co	36,161	2.2%	\$ 8,712,650	2.8%	513,383	6.4%	\$ 120,314,637	5.7%
Maine	107,622	1.9%	\$ 21,546,900	4.4%	1,454,447	-0.8%	\$ 291,504,038	5.3%
Michigan	606,337	-6.2%	\$ 139,336,045	-7.0%	9,123,493	-2.8%	\$ 2,118,395,270	-2.4%
Mississippi	174,514	-5.0%	\$ 29,897,342	-2.4%	2,245,896	-9.5%	\$ 379,510,406	-3.8%
Montana	79,835	-11.7%	\$ 15,562,756	-9.3%	1,087,149	-1.2%	\$ 206,418,295	2.5%
North Carolina	544,615	1.7%	\$ 131,174,927	6.7%	7,572,859	2.1%	\$ 1,778,400,938	7.3%
New Hampshire	150,774	-6.6%	\$ 28,851,195	-4.7%	2,334,316	-6.2%	\$ 443,292,758	-5.3%
Ohio	512,273	-2.2%	\$ 128,440,338	1.1%	7,159,514	-1.3%	\$ 1,773,377,838	1.4%
Oregon	256,186	-6.1%	\$ 58,502,212	-3.0%	3,757,439	-1.5%	\$ 843,598,612	2.8%
Pennsylvania	789,619	1.2%	\$ 158,627,850	3.8%	9,051,263	3.2%	\$ 1,761,641,292	3.0%
Utah	130,596	1.1%	\$ 26,475,757	4.7%	1,735,527	5.7%	\$ 327,307,792	5.5%
Virginia	424,844	0.3%	\$ 105,572,765	5.9%	5,846,778	-0.2%	\$ 1,414,820,802	4.2%
Vermont	34,918	-5.5%	\$ 8,067,732	0.5%	458,126	-2.2%	\$ 100,430,645	2.0%
West Virginia	61,661	0.1%	\$ 9,583,857	3.3%	880,482	-0.1%	\$ 134,545,029	3.3%
Wyoming	51,663	-1.8%	\$ 8,284,799	1.8%	716,824	0.7%	\$ 112,975,365	3.8%

Cocktails, driven by Canned RTDs continue to dominate the category growth of +23.9% 9L volume. Tequila slowed to +8.4% 9L volume and was the only major category other than Cocktails to show positive volume results for the month. Domestic Whiskey, Cordials, Gin and Vodka remained positive in \$Vol.

Spirits - Categories	9L CMTY 2023-02	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>4,538,191</b>	<b>-1.9%</b>	<b>\$ 992,039,301</b>	<b>1.1%</b>	<b>61,726,022</b>	<b>-0.5%</b>	<b>\$ 13,319,040,539</b>	<b>2.3%</b>
BRANDY / COGNAC	216,387	-9.4%	\$ 67,014,748	-9.9%	2,906,950	-14.2%	\$ 933,278,733	-15.3%
CACHACA	666	19.1%	\$ 167,719	20.0%	9,206	-1.6%	\$ 2,164,652	-6.6%
CANADIAN	461,275	-7.9%	\$ 93,210,280	-5.9%	6,203,133	-2.7%	\$ 1,241,687,437	0.1%
COCKTAILS	189,118	23.9%	\$ 15,738,354	27.2%	3,025,663	30.2%	\$ 246,956,101	29.5%
CORDIALS	331,889	-3.6%	\$ 71,144,495	0.1%	4,512,411	-0.3%	\$ 954,620,937	2.4%
DOMESTIC WHISKEY	748,794	-2.5%	\$ 214,072,789	2.8%	9,726,564	-0.1%	\$ 2,749,660,570	6.3%
GIN	147,913	-6.3%	\$ 29,957,034	2.2%	2,165,343	-5.1%	\$ 429,934,435	0.8%
IRISH	84,572	-9.6%	\$ 30,428,592	-4.5%	1,036,434	-1.0%	\$ 364,406,189	3.2%
NEUTRAL GRAIN SPIRIT	4,469	-11.5%	\$ 970,057	-9.0%	69,991	-14.0%	\$ 14,857,356	-10.6%
OTHER IMPORTED WHISKY	2,987	8.3%	\$ 2,014,428	27.9%	39,997	7.5%	\$ 28,575,589	17.0%
RUM	382,344	-3.4%	\$ 58,935,994	-1.1%	5,526,889	-4.4%	\$ 842,520,728	-1.6%
SCOTCH	84,059	-9.7%	\$ 34,829,333	-7.1%	1,156,550	-7.3%	\$ 484,257,329	-4.7%
TEQUILA	445,421	8.4%	\$ 158,067,175	12.3%	6,051,200	8.9%	\$ 2,128,092,450	13.4%
VODKA	1,438,295	-1.5%	\$ 215,484,796	0.4%	19,295,668	-1.7%	\$ 2,897,977,477	-0.3%

Wines declined at -5.9% in 9L Volume but were -7.0% in \$Vol leading to a negative price mix. Rolling 12 9L volume was -4.2% with \$Vol at -0.9%. The six table wine states all posted negative 9L volume results for the month with only Montgomery County, Mississippi and Wyoming posting positive \$Vol results.

Wine	9L CMTY 2023-02	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>1,406,809</b>	<b>-5.9%</b>	<b>\$ 143,387,533</b>	<b>-7.0%</b>	<b>17,273,017</b>	<b>-4.2%</b>	<b>\$ 1,846,067,625</b>	<b>-0.9%</b>
Alabama	2,283	-2.6%	\$ 143,713	9.6%	31,445	-3.4%	\$ 1,854,081	4.6%
Idaho	676	-15.2%	\$ 96,244	-9.1%	9,178	-8.2%	\$ 1,275,157	-3.4%
Mont Co	67,183	-1.2%	\$ 9,427,443	3.5%	898,919	-1.9%	\$ 124,817,835	1.1%
Mississippi	122,666	-0.1%	\$ 11,164,326	8.2%	1,526,434	-6.4%	\$ 133,876,538	1.4%
Montana	342	-5.7%	\$ 48,853	-18.5%	5,018	-10.8%	\$ 884,215	2.5%
New Hampshire	193,955	-7.9%	\$ 21,420,528	-3.9%	2,932,790	-6.2%	\$ 332,729,843	-2.2%
Pennsylvania	864,595	-6.6%	\$ 80,837,778	-12.1%	9,845,985	-3.4%	\$ 1,012,575,519	-1.6%
Utah	119,552	-5.8%	\$ 16,615,610	-0.2%	1,525,488	-3.0%	\$ 189,003,621	2.5%
Virginia	2,345	3.7%	\$ 390,886	9.1%	32,048	-26.3%	\$ 5,277,635	-7.7%
Vermont	764	2.4%	\$ 100,581	9.4%	9,150	-5.8%	\$ 1,240,431	2.1%
West Virginia	543	49.0%	\$ 37,856	77.8%	5,673	18.8%	\$ 337,451	17.6%
Wyoming	31,906	-5.7%	\$ 3,103,629	1.3%	450,819	-6.7%	\$ 42,192,638	-3.4%

The On-Premise channel remained positive after a large January increase with +3.8% in 9L volume and +10.0% in \$Vol. Montgomery County lead the volume growth with +12.2% after a huge January increase. Mississippi, Idaho and Wyoming posted small negative volume declines. All states were positive in \$Vol except for Wyoming at -3.0%.

Spirits - Markets	9L CMTY 2023-02	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
<b>Total Control</b>	<b>741,373</b>	<b>3.8%</b>	<b>\$ 183,696,184</b>	<b>10.0%</b>	<b>9,379,758</b>	<b>7.6%</b>	<b>\$ 2,255,304,898</b>	<b>13.7%</b>
Alabama	46,797	6.5%	\$ 10,432,884	10.7%	569,742	7.8%	\$ 125,471,004	11.9%
Idaho	18,568	-1.9%	\$ 4,432,778	4.3%	247,534	2.3%	\$ 57,611,274	10.2%
Michigan	96,198	1.2%	\$ 23,555,121	5.5%	1,359,253	9.5%	\$ 327,047,544	13.8%
Mississippi	13,374	-1.6%	\$ 2,023,232	8.8%	167,546	-6.0%	\$ 24,546,262	3.1%
Mont Co	7,957	12.2%	\$ 2,136,375	13.2%	108,485	19.0%	\$ 28,213,756	19.7%
New Hampshire	25,104	5.5%	\$ 5,268,011	9.7%	330,452	4.1%	\$ 67,155,342	8.4%
North Carolina	78,583	7.2%	\$ 22,187,662	14.4%	1,025,229	13.0%	\$ 280,401,790	21.6%
Ohio	132,592	5.9%	\$ 34,101,049	11.3%	1,761,729	3.8%	\$ 444,890,531	9.1%
Oregon	55,467	1.9%	\$ 13,638,374	6.4%	748,024	14.7%	\$ 177,008,393	23.1%
Pennsylvania	156,893	3.7%	\$ 38,354,600	11.9%	1,670,755	6.5%	\$ 390,911,215	11.5%
Utah	13,738	6.6%	\$ 4,389,072	17.8%	149,438	10.3%	\$ 42,917,975	17.7%
Vermont	8,481	1.9%	\$ 2,333,920	6.9%	94,529	12.5%	\$ 24,547,383	17.9%
Virginia	79,263	2.5%	\$ 19,282,666	8.9%	1,036,999	8.1%	\$ 244,738,686	14.7%
Wyoming	8,359	-5.3%	\$ 1,560,439	-3.0%	110,044	-3.3%	\$ 19,843,744	1.0%