

NABCA Monthly Report

January 2023 Control States Results

Total Control States spirits sales grew by +3.7% in 9L volume with +7.8% in \$Vol showing a resultant +4.1% price mix. The rolling 12-month results declined by -0.1% in 9L volume with +2.7% in \$Vol.

The selling days change vs last year was -2 days, 1 less day in North Carolina and Utah.

Spirits - Markets	9L CMTY 2023-01	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,344,470	3.7%	\$ 935,854,715	7.8%	61,811,753	-0.1%	\$ 13,307,491,399	2.7%
Alabama	251,119	7.2%	\$ 55,153,582	11.5%	3,530,663	1.8%	\$ 767,301,149	4.5%
Iowa	205,184	12.4%	\$ 32,459,162	17.6%	2,833,676	-0.5%	\$ 443,434,477	3.8%
Idaho	102,051	0.1%	\$ 21,322,096	6.0%	1,432,026	-1.1%	\$ 298,874,415	4.5%
Mont Co	35,480	6.6%	\$ 8,767,593	12.7%	512,614	7.6%	\$ 120,074,068	7.2%
Maine	96,493	3.4%	\$ 19,475,161	10.7%	1,452,417	-0.9%	\$ 290,586,244	5.5%
Michigan	574,620	-0.4%	\$ 130,742,156	2.3%	9,163,567	-2.2%	\$ 2,128,904,126	-1.4%
Mississippi	180,484	-7.3%	\$ 29,940,077	-5.4%	2,254,980	-9.2%	\$ 380,233,665	-2.9%
Montana	69,467	1.4%	\$ 13,132,217	7.4%	1,097,694	0.8%	\$ 207,964,394	4.9%
North Carolina	520,833	3.7%	\$ 122,104,254	10.7%	7,564,028	2.3%	\$ 1,770,162,320	7.7%
New Hampshire	184,830	3.6%	\$ 37,763,911	12.7%	2,345,009	-6.0%	\$ 444,711,918	-5.3%
Ohio	514,926	3.0%	\$ 124,763,800	7.5%	7,171,228	-1.1%	\$ 1,772,022,157	1.5%
Oregon	273,194	4.3%	\$ 60,745,452	7.9%	3,774,142	-1.0%	\$ 845,368,730	3.5%
Pennsylvania	659,518	9.9%	\$ 130,057,692	11.3%	9,041,624	3.5%	\$ 1,755,538,752	3.1%
Utah	118,181	3.7%	\$ 23,338,935	5.3%	1,734,058	6.4%	\$ 326,092,317	6.0%
Virginia	415,782	1.6%	\$ 101,577,909	6.8%	5,845,680	0.0%	\$ 1,408,810,061	4.3%
Vermont	34,222	-2.0%	\$ 7,775,156	3.7%	460,145	-1.2%	\$ 100,392,984	2.9%
West Virgina	59,608	0.4%	\$ 9,231,778	3.1%	880,407	-0.9%	\$ 134,235,978	2.6%
Wyoming	48,478	8.3%	\$ 7,503,785	8.2%	717,795	1.1%	\$ 112,783,642	4.3%

Cocktails, driven by Canned RTDs continue to dominate the category growth of +36.9% 9L volume. Tequila was + 22.9% 9L volume after a slower December of +6.1% 9L volume and Gin was +3.3% 9L volume after a December decline with +9.8% in \$Vol showing a very positive price mix of +6.5%. The Brandy/Cognac category continues to decline driven mainly by Cognac.

Spirits - Categories	9L CMTY 2023-01	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	4,344,470	3.7%	\$ 935,854,715	7.8%	61,811,753	-0.1%	\$ 13,307,491,399	2.7%
BRANDY / COGNAC	210,497	-6.6%	\$ 64,864,959	-1.7%	2,929,299	-14.9%	\$ 940,642,485	-16.0%
CACHACA	636	49.5%	\$ 151,332	37.6%	9,100	-2.0%	\$ 2,135,687	-7.2%
CANADIAN	441,779	-4.4%	\$ 87,927,147	-0.7%	6,242,752	-2.0%	\$ 1,247,440,977	0.9%
COCKTAILS	169,538	36.9%	\$ 14,004,751	37.4%	2,989,143	31.1%	\$ 243,411,567	29.8%
CORDIALS	332,926	7.8%	\$ 70,402,832	9.9%	4,524,578	0.6%	\$ 954,404,239	2.9%
DOMESTIC WHISKEY	719,194	1.7%	\$ 201,913,971	7.3%	9,746,148	0.3%	\$ 2,743,535,258	6.8%
GIN	147,663	3.3%	\$ 29,003,969	9.8%	2,175,214	-4.8%	\$ 429,354,238	0.9%
IRISH	74,235	-0.7%	\$ 26,818,010	6.5%	1,045,403	1.2%	\$ 365,827,031	5.1%
NEUTRAL GRAIN SPIRIT	4,450	-10.4%	\$ 956,914	-9.4%	70,571	-14.3%	\$ 14,952,605	-10.7%
OTHER IMPORTED WHISKY	2,937	16.4%	\$ 2,046,764	34.3%	39,767	7.7%	\$ 28,136,253	15.9%
RUM	372,712	-0.8%	\$ 57,205,365	2.6%	5,540,233	-4.2%	\$ 843,143,002	-1.4%
SCOTCH	81,940	-9.2%	\$ 33,874,911	-4.8%	1,165,616	-6.7%	\$ 486,883,110	-4.0%
TEQUILA	415,992	22.9%	\$ 144,154,375	26.9%	6,016,516	9.8%	\$ 2,110,493,786	14.5%
VODKA	1,369,969	2.8%	\$ 202,526,935	5.7%	19,317,391	-1.5%	\$ 2,897,077,684	0.0%

Wines declined at -1.4% in 9L Volume but were +0.1% in \$Vol leading to a positive price mix of +1.5%. Rolling 12 9L volume was -4.2% with \$Vol at -0.9%. Pennsylvania and Wyoming posted positive 9L volume results for the month.

Wine	9L CMTY 2023-01	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	1,274,005	-1.4%	\$ 135,027,650	0.1%	17,361,043	-4.2%	\$ 1,851,468,619	-0.9%
Alabama	1,992	2.6%	\$ 125,617	12.8%	31,505	-2.9%	\$ 1,841,290	4.3%
Idaho	677	-9.7%	\$ 96,371	-10.5%	9,299	-7.6%	\$ 1,283,312	-3.2%
Mont Co	62,958	-4.2%	\$ 8,553,613	0.9%	899,699	-1.8%	\$ 124,501,610	1.2%
Mississippi	120,688	-3.9%	\$ 10,161,278	6.1%	1,526,533	-6.6%	\$ 133,020,153	1.2%
Montana	461	10.9%	\$ 80,625	12.0%	5,039	-10.3%	\$ 894,015	3.0%
New Hampshire	244,415	-4.2%	\$ 29,309,534	1.9%	2,949,392	-6.1%	\$ 333,576,916	-2.3%
Pennsylvania	701,626	0.2%	\$ 69,143,658	-2.3%	9,907,312	-3.5%	\$ 1,018,540,154	-1.5%
Utah	105,822	-2.4%	\$ 14,107,544	1.7%	1,532,863	-2.6%	\$ 188,866,996	3.6%
Virginia	2,331	1.2%	\$ 384,841	7.8%	31,965	-28.7%	\$ 5,245,103	-9.8%
Vermont	757	-2.2%	\$ 103,488	8.2%	9,131	-6.8%	\$ 1,231,767	0.4%
West Virginia	494	17.7%	\$ 31,570	23.4%	5,494	13.9%	\$ 320,833	10.9%
Wyoming	31,785	5.3%	\$ 2,929,512	10.6%	452,738	-7.4%	\$ 42,143,746	-3.8%

The On-Premise channel returned to large spirit growth after a small December decline with +23.8% in 9L volume and +31.7% in \$Vol. All categories and all states were positive with most states posting larger than 20% growth (Montgomery County was +41.4% in 9L volume and against a positive previous January result).

Spirits - Markets	9L CMTY 2023-01	9L % Chg	Shelf \$ CMTY	Shelf \$ % Chg	9L R12TY	9L R12 %	Shelf \$ R12TY	Shelf \$ % Chg
Total Control	695,705	23.8%	\$ 170,073,108	31.7%	9,352,397	10.3%	\$ 2,238,552,466	16.4%
Alabama	42,984	23.6%	\$ 9,787,127	31.1%	566,878	8.9%	\$ 124,465,432	13.0%
Idaho	19,011	14.3%	\$ 4,529,773	22.6%	247,887	3.6%	\$ 57,428,734	11.7%
Michigan	93,858	17.6%	\$ 22,728,878	24.5%	1,358,076	13.2%	\$ 325,828,038	17.7%
Mississippi	15,134	21.4%	\$ 2,213,929	40.9%	167,763	-4.6%	\$ 24,382,272	3.9%
Mont Co	7,467	41.4%	\$ 2,048,121	47.3%	107,621	24.1%	\$ 27,965,425	25.2%
New Hampshire	28,608	14.7%	\$ 6,086,494	19.9%	329,149	5.3%	\$ 66,690,475	9.6%
North Carolina	73,234	39.9%	\$ 20,629,960	49.0%	1,019,979	16.3%	\$ 277,616,648	25.2%
Ohio	131,983	20.5%	\$ 33,414,015	26.9%	1,754,291	4.6%	\$ 441,440,406	9.8%
Oregon	57,838	31.1%	\$ 13,812,688	37.6%	747,004	19.8%	\$ 176,191,180	29.1%
Pennsylvania	123,490	21.3%	\$ 29,323,627	28.0%	1,665,174	9.7%	\$ 386,842,489	14.3%
Utah	12,257	23.5%	\$ 3,816,453	33.2%	148,593	13.3%	\$ 42,255,687	20.5%
Vermont	7,751	27.2%	\$ 2,154,694	34.5%	94,374	18.9%	\$ 24,396,281	24.5%
Virginia	74,292	30.3%	\$ 18,107,100	41.2%	1,035,100	11.5%	\$ 243,158,125	18.2%
Wyoming	7,797	9.4%	\$ 1,420,250	12.4%	110,507	-2.1%	\$ 19,891,273	2.7%