NABCA Monthly Report
September 2022 Control State Results

Total Control States spirits sales grew by +1.7% in 9L volume with a positive +5.0% in $Vol showing a resultant +3.3% price mix (up from 1.5% in August). The rolling 12-month results are trending slightly down from August with +0.3% in 9L volume and +3.3% in $Vol. The only selling days change vs last year was 1 additional selling day in Michigan.

Spirits - Markets	9L CMTY 2022-09	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,249,025**	**1.7%**	**$ 1,116,897,823**	**5.0%**	**61,772,501**	**0.3%**	**$ 13,142,035,673**	**3.3%**
Alabama	298,807	6.6%	$ 63,774,954	11.0%	3,514,710	2.0%	$ 753,437,923	4.5%
Iowa	237,444	-1.1%	$ 36,547,319	2.0%	2,832,345	-0.1%	$ 436,520,835	3.9%
Idaho	116,671	0.8%	$ 24,546,987	7.1%	1,435,994	-1.2%	$ 293,861,108	4.1%
Mont Co	42,304	5.6%	$ 9,461,513	4.0%	504,206	10.5%	$ 117,343,368	10.7%
Maine	121,470	0.5%	$ 24,924,019	7.2%	1,458,925	-0.5%	$ 285,974,585	5.3%
Michigan	869,858	0.8%	$ 198,536,866	1.3%	9,232,164	-1.7%	$ 2,138,152,119	-0.6%
Mississippi	190,474	-13.2%	$ 32,016,665	-4.8%	2,351,337	-2.8%	$ 390,782,738	4.3%
Montana	86,181	-5.9%	$ 16,402,596	-4.5%	1,098,248	0.4%	$ 204,832,858	4.9%
North Carolina	634,810	7.4%	$ 146,461,510	11.0%	7,502,831	2.4%	$ 1,721,207,913	8.1%
New Hampshire	176,965	-4.2%	$ 34,681,080	2.0%	2,382,301	-5.7%	$ 449,511,965	-4.0%
Ohio	598,648	0.9%	$ 147,293,753	4.2%	7,176,657	-0.6%	$ 1,751,863,976	2.2%
Oregon	311,672	-0.2%	$ 69,523,866	6.0%	3,783,162	-0.7%	$ 838,204,558	4.7%
Pennsylvania	696,542	1.9%	$ 132,488,057	1.7%	8,902,762	3.9%	$ 1,717,571,099	4.1%
Utah	165,400	7.8%	$ 29,880,295	6.2%	1,701,699	4.3%	$ 319,833,362	5.1%
Virginia	483,029	3.7%	$ 114,525,571	8.8%	5,825,518	-1.3%	$ 1,378,377,303	2.5%
Vermont	37,228	-1.3%	$ 8,258,060	4.0%	465,925	0.7%	$ 99,748,403	4.6%
West Virgina	120,131	13.8%	$ 17,752,428	21.0%	888,300	0.8%	$ 133,805,655	3.8%
Wyoming	61,391	-1.6%	$ 9,822,285	3.2%	715,417	-0.3%	$ 111,005,905	3.2%

Tequila and Cocktails (driven by canned cocktails) continue to be the growth drivers in September. The growth in Other Imported Whisky +17.3% is driven predominantly by 2 brands one of which is new to market (with no sales in 2021).

Spirits - Categories	9L CMTY 2022-09	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**5,249,025**	**1.7%**	**$ 1,116,897,823**	**5.0%**	**61,772,501**	**0.3%**	**$ 13,142,035,673**	**3.3%**
BRANDY / COGNAC	235,415	-5.4%	$ 76,199,169	-4.2%	3,061,139	-14.8%	$ 982,559,282	-15.8%
CACHACA	727	-4.5%	$ 168,141	-12.8%	8,541	-4.7%	$ 2,009,946	-9.5%
CANADIAN	533,135	-1.2%	$ 105,647,176	1.7%	6,276,385	-2.3%	$ 1,237,233,329	0.3%
COCKTAILS	274,863	37.2%	$ 21,686,876	36.5%	2,813,531	33.8%	$ 226,902,635	30.8%
CORDIALS	362,220	2.1%	$ 75,440,551	5.2%	4,488,178	1.5%	$ 933,445,231	2.6%
DOMESTIC WHISKEY	797,021	0.2%	$ 221,262,403	6.4%	9,732,163	0.3%	$ 2,678,756,162	7.0%
GIN	186,652	-3.8%	$ 37,406,712	2.8%	2,202,785	-4.3%	$ 425,738,396	1.6%
IRISH	83,157	2.7%	$ 28,739,182	6.3%	1,044,855	2.5%	$ 358,412,731	5.2%
NEUTRAL GRAIN SPIRIT	5,954	-14.2%	$ 1,253,755	-9.7%	74,975	-13.0%	$ 15,805,419	-8.0%
OTHER IMPORTED WHISKY	3,256	17.3%	$ 2,638,311	45.3%	39,308	15.4%	$ 26,897,031	22.8%
RUM	474,022	-1.7%	$ 71,741,188	1.3%	5,619,937	-3.4%	$ 847,460,211	-0.6%
SCOTCH	94,921	-4.5%	$ 38,358,748	-3.2%	1,201,150	-4.7%	$ 496,275,258	-1.1%
TEQUILA	522,468	11.1%	$ 183,981,985	15.5%	5,819,105	12.2%	$ 2,017,416,948	17.2%
VODKA	1,675,210	-0.6%	$ 252,360,599	1.5%	19,390,415	-1.3%	$ 2,893,016,237	1.0%

Wine declined by -6.2% in 9L volume and -6.3% in $Vol for the month showing a flat price mix of -0.1%. The rolling 12-month result is -6.1% in 9L volume and -2.6% in $Vol. The six markets where the state is the sole wholesaler for wines (highlighted in the table below) account for 99.4% of the $Vol.

Spirits - Categories	9L CMTY 2022-09	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**1,306,236**	**-6.2%**	**$ 134,062,970**	**-6.3%**	**17,473,886**	**-6.1%**	**$ 1,834,999,644**	**-2.6%**
Alabama	2,578	0.4%	$ 153,740	11.0%	31,914	-4.8%	$ 1,793,132	-1.2%
Idaho	664	-13.5%	$ 90,015	-8.0%	9,730	-8.5%	$ 1,307,731	-4.2%
Mont Co	74,300	-0.1%	$ 10,220,656	1.9%	902,895	-2.9%	$ 123,647,792	0.9%
Mississippi	123,479	-10.6%	$ 10,670,114	-1.9%	1,555,414	-5.5%	$ 131,077,695	1.2%
Montana	420	-22.0%	$ 92,380	3.6%	5,111	-9.2%	$ 871,911	8.2%
New Hampshire	225,756	-6.8%	$ 24,789,258	-4.6%	3,002,103	-6.1%	$ 333,743,354	-2.5%
Pennsylvania	697,420	-6.1%	$ 67,271,441	-10.3%	9,904,506	-6.5%	$ 1,005,097,565	-4.5%
Utah	140,218	-3.3%	$ 16,557,069	0.3%	1,554,084	-4.1%	$ 188,749,010	4.6%
Virginia	2,620	-32.5%	$ 424,821	-7.8%	31,567	-35.4%	$ 5,077,295	-18.0%
Vermont	723	-6.0%	$ 100,429	-1.8%	9,318	-7.6%	$ 1,208,458	-1.2%
West Virgina	372	23.5%	$ 22,900	45.0%	5,054	1.8%	$ 297,171	-1.3%
Wyoming	37,685	-9.6%	$ 3,670,063	-1.9%	462,079	-9.3%	$ 42,124,279	-5.7%

For spirits, the On-Premise channel grew +5.4% in 9L volume with more than double $Vol growth of +11.6% showing a positive price mix of +6.3%. Rolling 12-month 9L volume is at +23.7% with $Vol at +30.4%. The channel represents 17.3% of the total Control States spirits value for September up from 16.4% for Rolling 12-months. Wines in the channel were -4.8% in 9L volume and -0.4% in $Vol.

Spirits - Markets	9L CMTY 2022-09	9L % Chg	Shelf $ CMTY	Shelf $ % Chg	9L R12TY	9L R12 %	Shelf $ R12TY	Shelf $ % Chg
Total Control	**805,677**	**5.4%**	**$ 193,774,641**	**11.6%**	**9,151,616**	**23.7%**	**$ 2,152,685,251**	**30.4%**
Alabama	49,965	13.6%	$ 10,901,955	20.2%	554,954	13.0%	$ 120,192,430	16.8%
Idaho	20,276	3.8%	$ 4,805,377	13.2%	244,867	8.0%	$ 55,485,549	15.7%
Michigan	132,299	7.6%	$ 31,875,308	12.3%	1,331,878	37.1%	$ 316,082,567	42.6%
Mississippi	13,770	-12.2%	$ 2,012,098	-6.6%	168,159	-1.1%	$ 23,378,600	1.7%
Mont Co	9,390	11.0%	$ 2,330,420	12.1%	102,797	44.1%	$ 26,506,948	48.1%
New Hampshire	25,644	0.2%	$ 5,382,041	7.0%	321,608	12.6%	$ 64,363,048	16.8%
North Carolina	88,913	12.9%	$ 24,171,147	20.4%	981,045	28.5%	$ 261,039,710	37.8%
Ohio	151,393	1.5%	$ 38,180,185	6.6%	1,731,772	13.3%	$ 428,931,666	18.8%
Oregon	66,382	9.9%	$ 15,774,109	22.5%	722,873	44.7%	$ 168,071,179	58.1%
Pennsylvania	127,464	0.9%	$ 29,917,391	5.0%	1,635,040	29.5%	$ 372,955,776	33.8%
Utah	13,716	8.0%	$ 3,846,764	14.8%	143,692	22.5%	$ 40,102,079	29.6%
Vermont	8,333	7.3%	$ 2,190,758	12.3%	91,911	41.2%	$ 23,338,401	47.4%
Virginia	88,683	6.1%	$ 20,670,573	12.2%	1,009,562	20.9%	$ 232,391,238	28.1%
Wyoming	9,448	-3.0%	$ 1,716,516	3.3%	111,458	2.0%	$ 19,846,059	7.4%