



# News Release

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FOR IMMEDIATE RELEASE

## **NABCA Releases Control State End-of-Year Nine-Liter Spirits Sales Results**

*Control State results for nine-liter beverage sales for December 2014*

ALEXANDRIA, VA (January 26, 2015)--END-OF-YEAR RESULTS

During 2014, nine-liter spirits case sales in the control states grew at 2.5%, more than doubling 2013's growth rate of 1.1%, but lagging 2012's 3.6%. Shelf Dollars grew at 5.1%, eclipsing 2013's 4.0% and pursuing 2012's 5.6%.

As reported for 2013, 2014's volumetric growth, although improved, remained soft relative to Control States average growth during the past fifteen years. On the other hand, growth is trending up, which suggests 2015 will be a more robust year than that delivered by 2013 or 2014.

Brandy/Cognac's 7.4% annual growth rate, compared to 2013's 2.0%, is noteworthy. However, once again, Irish Whiskey lapped all categories with an annual growth rate of 11.6%, down slightly from 2013's 12.0%. During the year, Cordials, Tequila, Domestic Whiskey, Vodka, Rum, Scotch, Canadian Whiskey, Gin, and Cocktails grew at 8.0%, 4.4%, 3.8%, 2.2%, -0.1%, -0.5%, -0.6%, -2.1%, and -6.1%, respectively.

The Central Control States—comprising Iowa, Montgomery County Maryland, Michigan, Ohio, Pennsylvania, and West Virginia—and the Southern Control States—comprising Alabama, Mississippi, North Carolina, and Virginia—grew volumes at 2.7% during 2014. They were followed by the North Western Control States (Idaho, Montana, Oregon, Utah, and Wyoming) and North Eastern Control States (Maine, New Hampshire, and Vermont), which reported annual volumetric growth of 2.2% and 1.4%, respectively. The four regions (Central, Southern, North Western, and North Eastern Control States) grew Shelf Dollars at 5.6%, 4.9%, 4.5%, and 3.6%.

### **END-OF-DECEMBER RESULTS**

During December, nine-liter spirits case sales in the control states grew at an 8.0% rate, partially facilitated by a weak comp, compared to same period sales last year. Rolling-twelve month volume growth of 2.5% was up from November's 1.8%. Alabama, Iowa, Idaho, Maine, Michigan, Mississippi, Montana, North Carolina, New Hampshire, Ohio, Virginia, Vermont, West Virginia, and Wyoming reported monthly growth rates exceeding their twelve month trends.

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Alabama | Idaho | Iowa | Maine | MD - Montgomery County | MD - Worcester County | Michigan | Mississippi | Montana  
New Hampshire | North Carolina | Ohio | Oregon | Pennsylvania | Utah | Vermont | Virginia | West Virginia | Wyoming

## DecJanCS Results Add 1

Control state spirits shelf dollars were up 10.9% during December while trending at 5.1% during the past twelve months. Alabama, Iowa, Idaho, Maine, Michigan, Mississippi, Montana, North Carolina, New Hampshire, Ohio, Pennsylvania, Virginia, West Virginia, and Wyoming reported growth rates exceeding their twelve month trends.

Price/Mix for December is 2.9%, up smartly from November's 2.4%.

December's Control State spirits growth was affected, to some extent, by 2014's calendar:

- December, 2013, had five Sundays in contrast to this December's four. Spirits are not sold on Sundays in six Control States: Alabama, Mississippi, Montana, North Carolina, Utah, and West Virginia.
- Michigan, with 16% of Control States' spirits and dollars volume, reported five weeks of sales this year versus four weeks of sales during December, 2013, artificially inflating sales and skewing Control States results. Michigan had seven more selling days during this year's December than last year's.
- After normalizing nine-liter spirits case sales, December's volumetric growth is 5.5%, and rolling-twelve month volumes are up 2.4%. Likewise, after normalizing shelf dollars, December's control states shelf dollar growth rate is 8.3% with a twelve-month trend of 5.0%.
- December's normalized Price/Mix is 2.8%.

During December, Irish Whiskey, with 1.0% share of the control states spirits market, was the fastest growing category with 18.8% reported and a twelve month trend of 11.6%. Vodka, with 35% share, grew during the same periods at 7.7% and 2.2%. All categories—Brandy/Cognac, Canadian, Cocktails, Cordials, Domestic Whiskey, Gin, Irish Whiskey, Rum, Scotch, Tequila, and Vodka grew at rates exceeding their twelve-month trends.

December's nine-liter wine case sales growth rate was 1.0%. Pennsylvania, New Hampshire, Utah, Mississippi, Montgomery County Maryland, and Wyoming reported 0.1%, -2.7%, 2.4%, 8.4%, 5.2%, and 9.6%, respectively. Rolling-twelve month wine volume growth was 1.9%, flat with November's 1.9%.

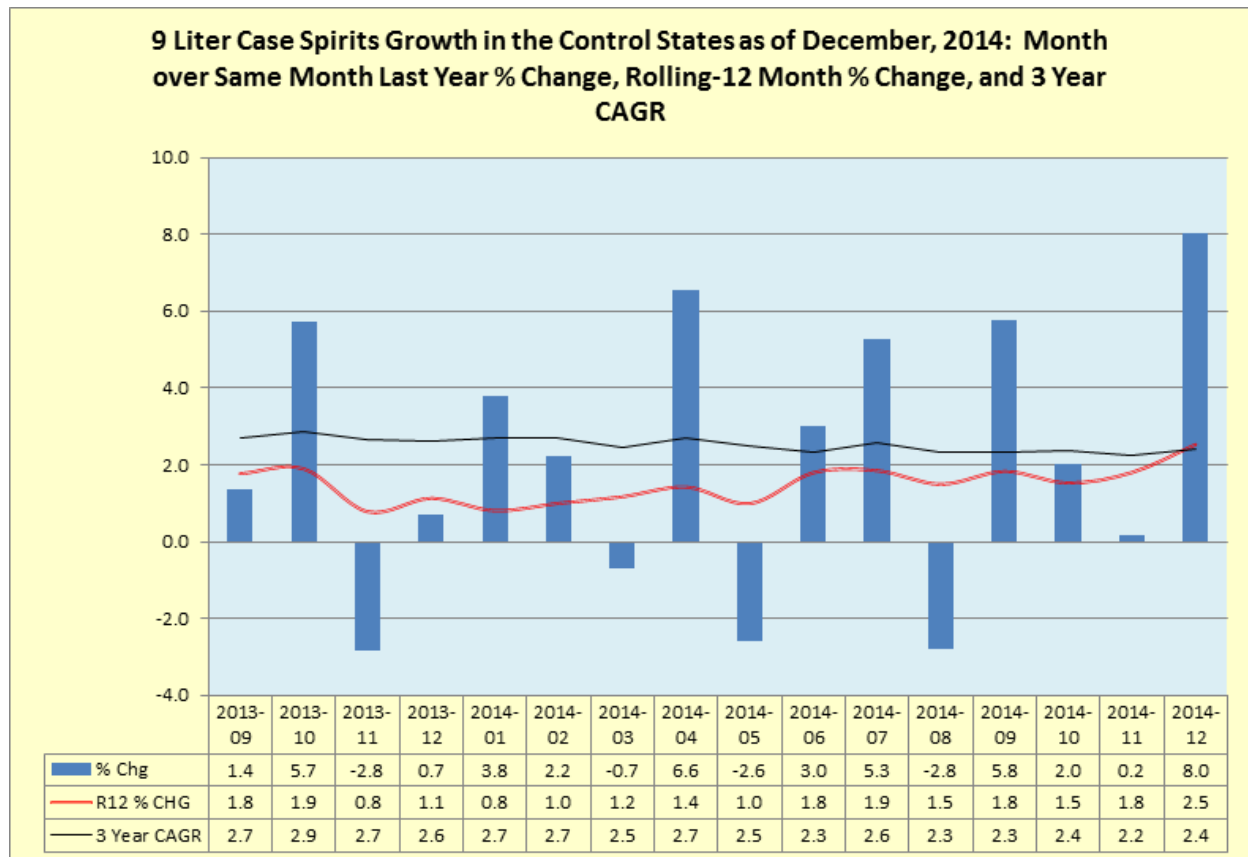
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
<b>Total Control States</b>	8.0	10.9	2.9%	
<b>Central Region</b>	11.2	14.2	3.0%	IA, MD, MI, OH, PA, WV
<b>NE Region</b>	3.6	6.3	2.7%	ME, NH, VT
<b>NW Region</b>	3.0	5.5	2.5%	ID, MT, OR, UT, WY
<b>Southern Region</b>	6.4	9.1	2.7%	AL, MS, NC, VA

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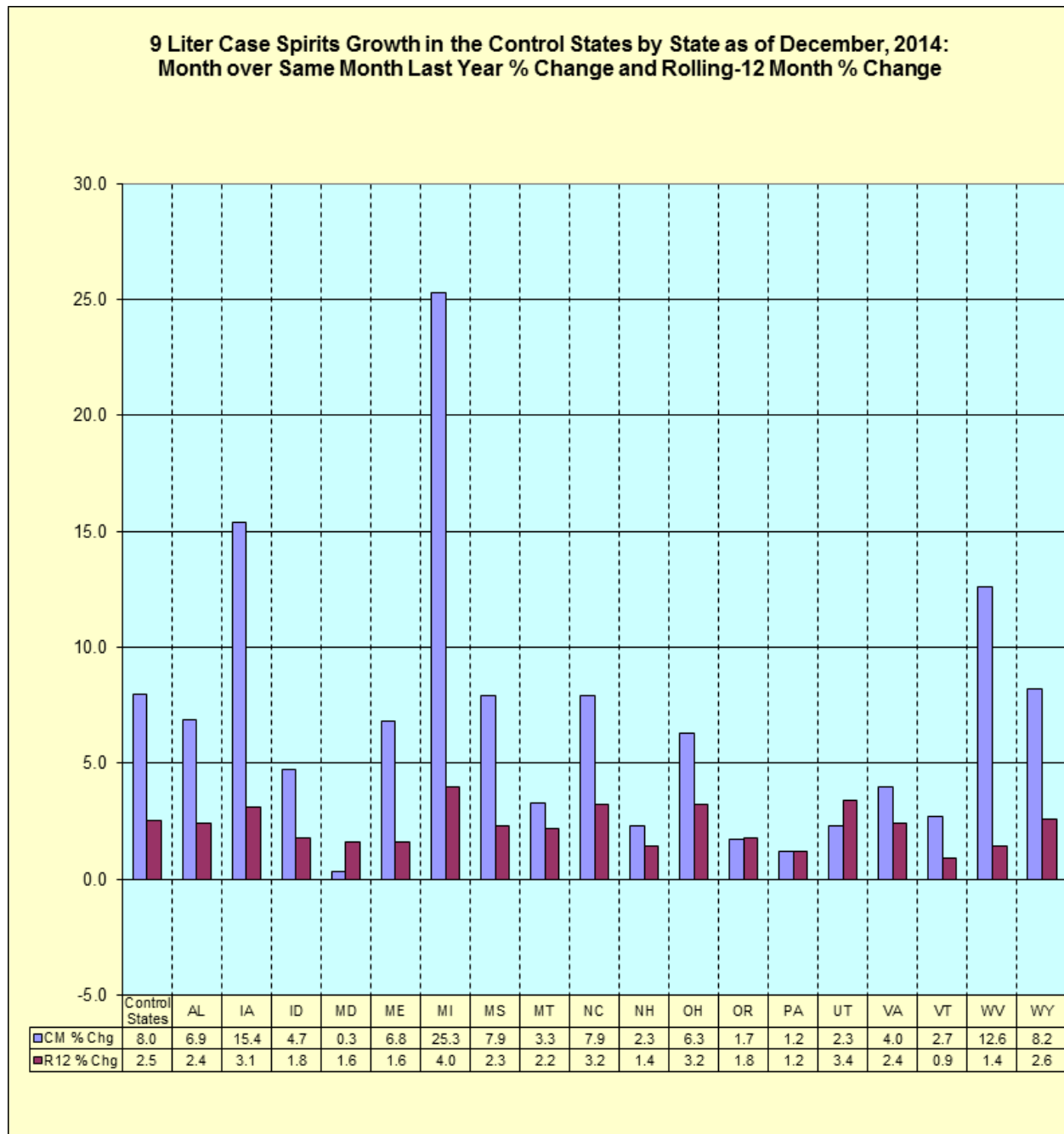
## DecJanCS Results Add 2



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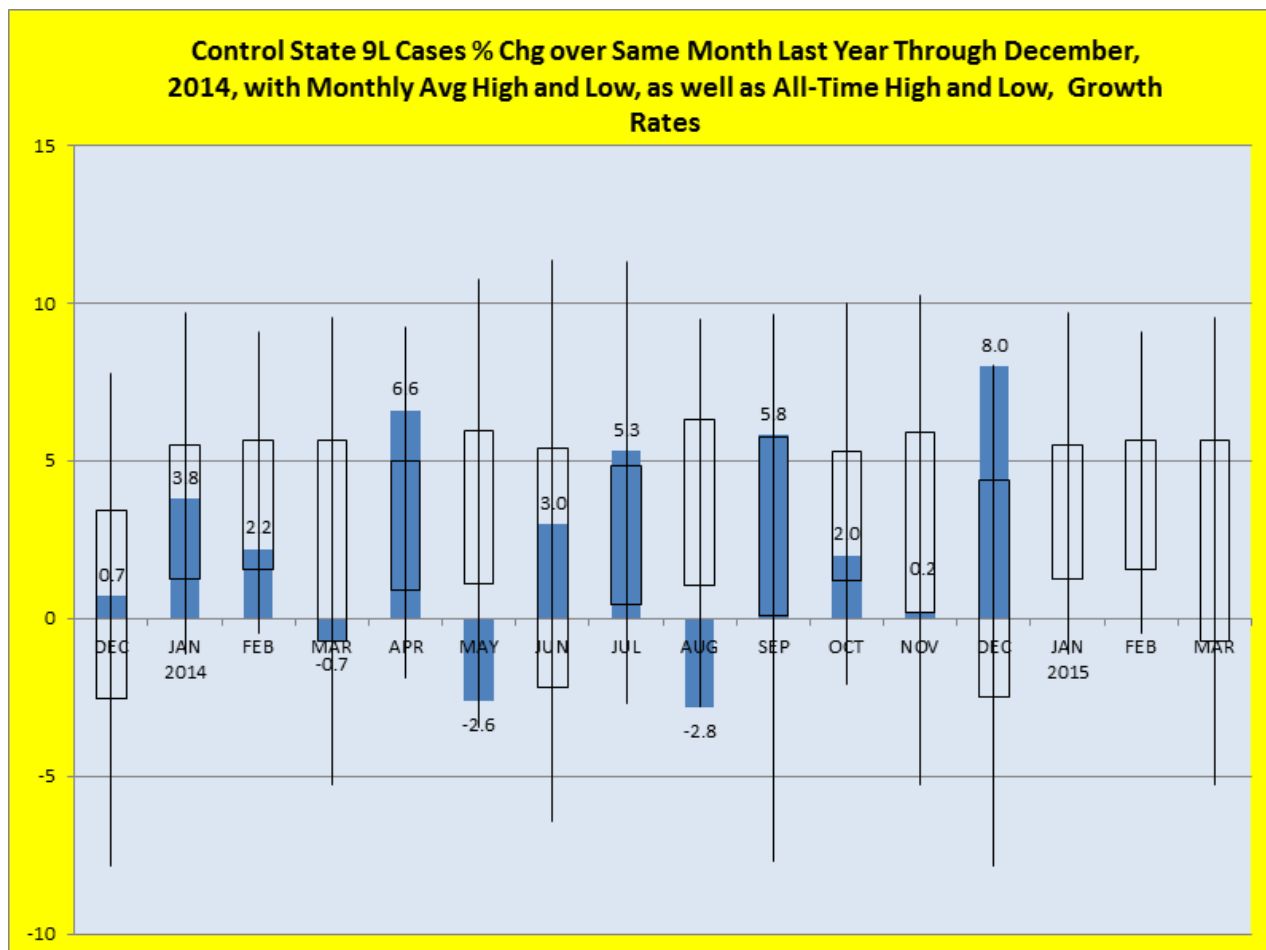
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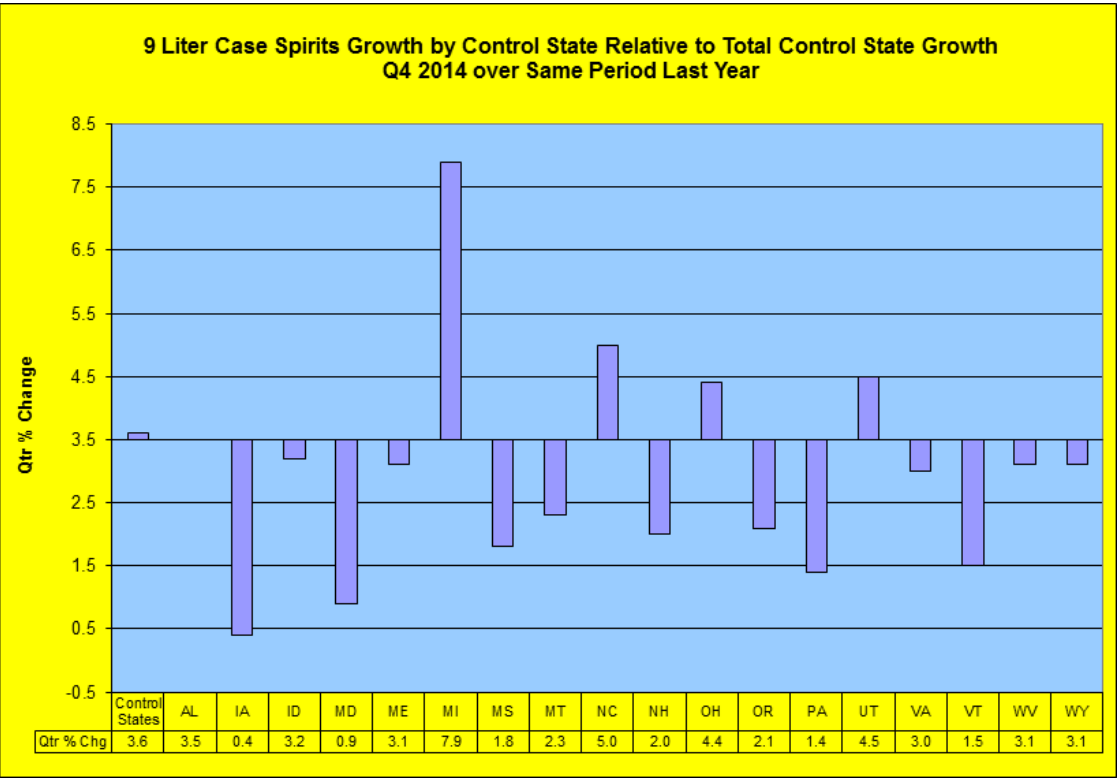
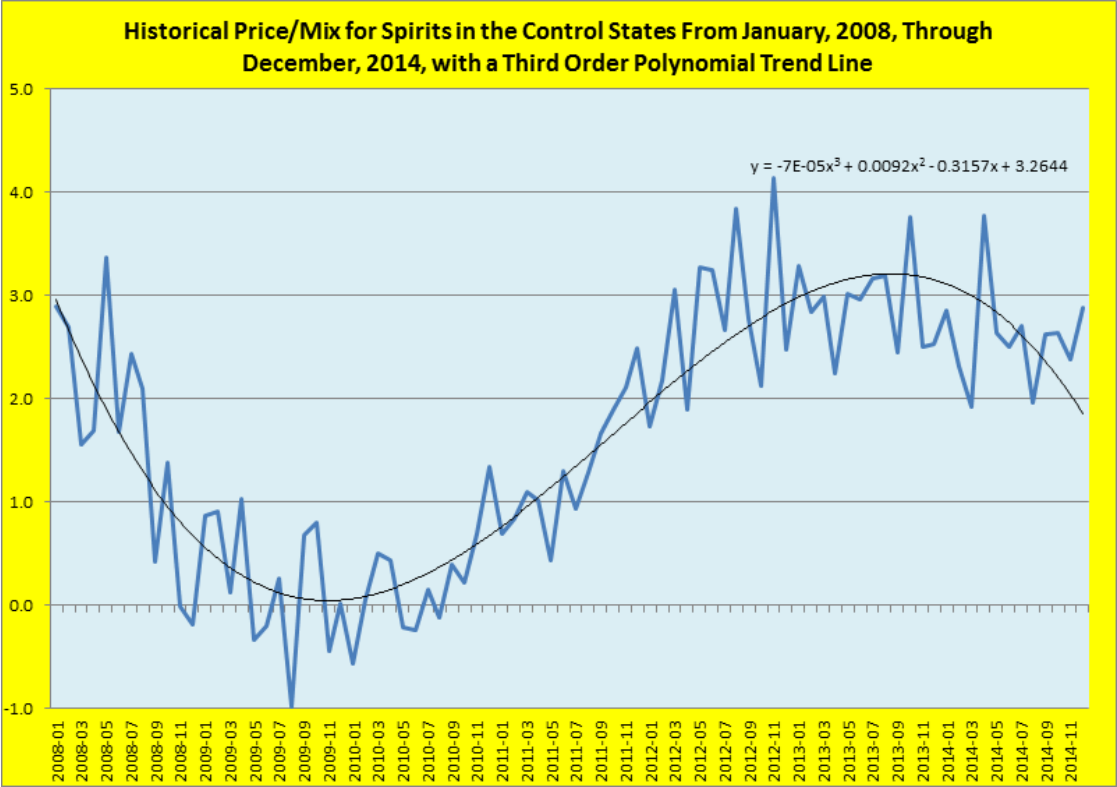
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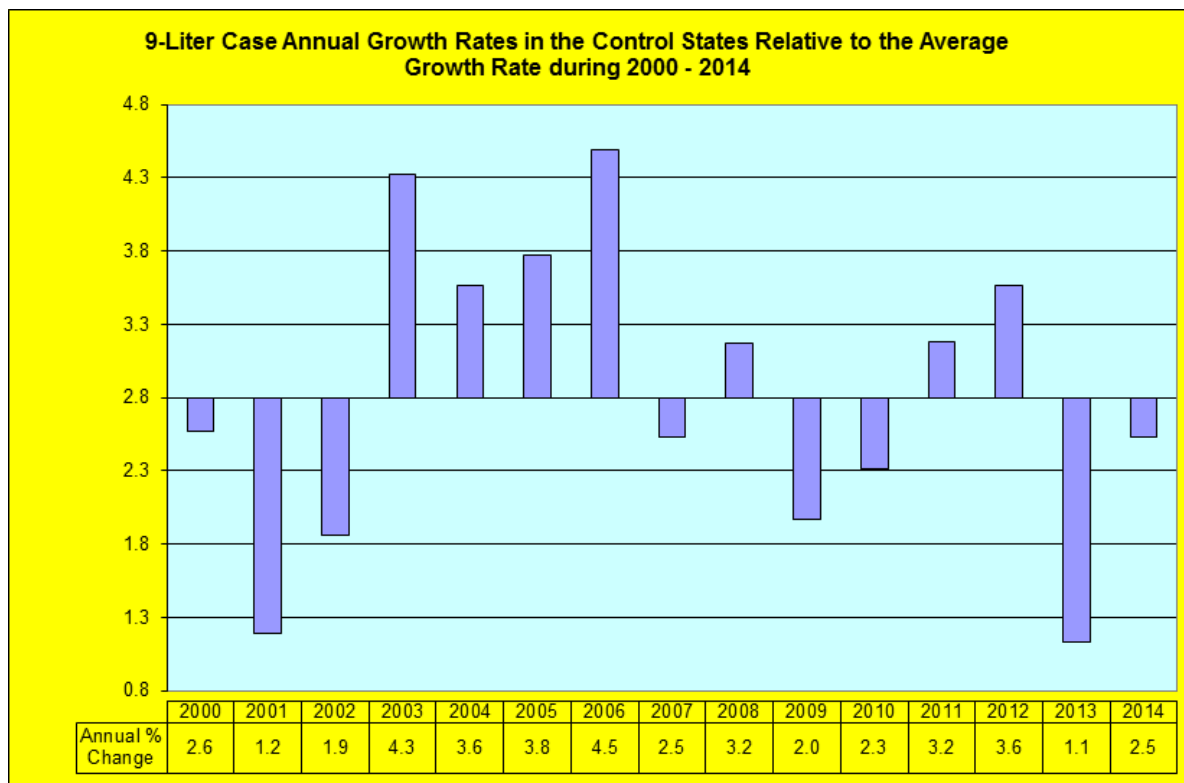
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For more information about the NABCA, visit [www.nabca.org](http://www.nabca.org).

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**ABOUT NABCA:**

Established in 1938, NABCA is the national association representing the Control State Systems - those jurisdictions that directly control the distribution and sale of beverage alcohol within their borders. Headquartered in Alexandria, VA, NABCA's mission is to support member jurisdictions in their efforts to protect public health and safety and assure responsible and efficient systems for beverage alcohol distribution and sales.

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