



News Release

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FOR IMMEDIATE RELEASE

NABCA Releases Control States Nine-Liter Spirits Sales for March

Control State results for nine-liter beverage sales for March 2013

ALEXANDRIA, VA (June 25, 2013)-- During March, nine-liter spirits case sales in the control states fell 2.7% compared to same month last year sales. Rolling-twelve month reported volumes grew at 3.0%, down from February's 3.5%. Mississippi, Vermont, and West Virginia reported monthly growth rates exceeding their twelve month trends.

Control state spirits shelf dollars were up 0.5% during March while trending at 5.9% during the past twelve months. Alabama, Vermont, and West Virginia reported growth rates exceeding their twelve month trends.

Price/Mix for March grew to 3.2% from February's 3.0%.

March's Control State spirits sales appear soft. However, consider that:

- The March, 2013, calendar has five Sundays compared to four last year. Retail outlets in six control jurisdictions—Alabama, Montana, Mississippi, North Carolina, Utah, West Virginia—are closed on Sundays. Easter, 2013, was celebrated on Sunday, March 31; Easter, 2012, was celebrated in April. Many retail outlets, which are normally open Sundays, in the Control States were closed to celebrate the Easter holiday.
- Michigan, with 16% of the Control States' spirits and dollars volumes, reported four weeks of sales this March against five weeks last year, artificially deflating sales and skewing Control States results. Michigan had seven fewer selling days—21% fewer—during this year's March compared to last year's. Utah, with 2% of Control State spirits volume, reported four weeks of sales against five weeks the previous year: there were 6 fewer selling days—21% fewer—during this year's March. Overall, considering Easter's position in this year's calendar, there were 21 fewer selling days in the control states this March than last. After normalizing nine-liter spirits case sales for Michigan and Utah reporting, March's nine-liter case growth is 2.9%, and rolling-twelve month volumes show an increase of 3.4%. Likewise, after normalizing shelf dollars, March's control states shelf dollar growth rate is 6.4%, and its twelve-month trend is 6.4%.
- March's normalized Price/Mix is 3.5%.

During March, Irish Whiskey, with 0.8% share of the control states spirits market, was the fastest growing category with 6.7% growth reported and a twelve month growth trend of 17.6%. Vodka, with

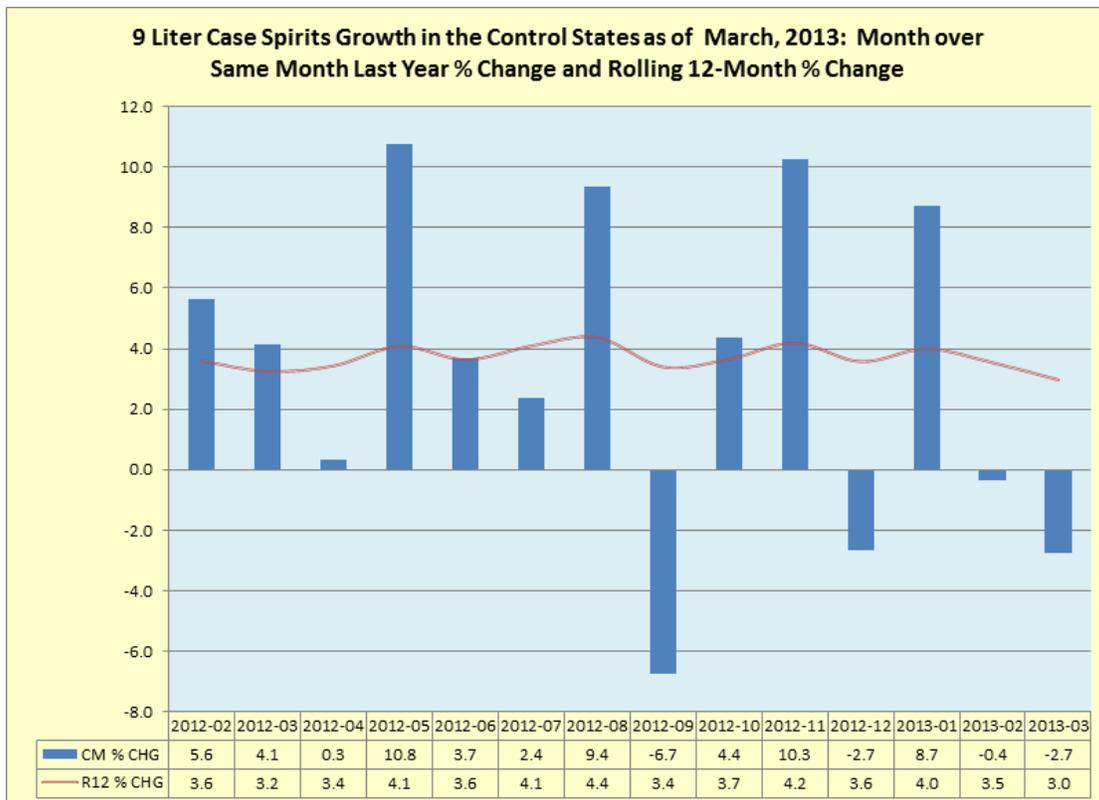
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Alabama | Idaho | Iowa | Maine | MD - Montgomery County | MD - Worcester County | Michigan | Mississippi | Montana
New Hampshire | North Carolina | Ohio | Oregon | Pennsylvania | Utah | Vermont | Virginia | West Virginia | Wyoming

34% share, grew during the same periods at -2.9% and 4.5%. During March, Neutral Grain Spirits, a relatively small category recently included in control states sales reporting, grew at a rate that exceeded its twelve-month trend.

March's nine-liter wine case sales growth rate was 8.2%. Pennsylvania, New Hampshire, Utah, Mississippi, Montgomery County Maryland, and Wyoming reported 11.5%, 15.1%, -12.7%, 4.7%, 1.6%, and 2.2%, respectively. March's rolling-twelve month wine volume growth, 5.1%, is up from February's 4.3%.

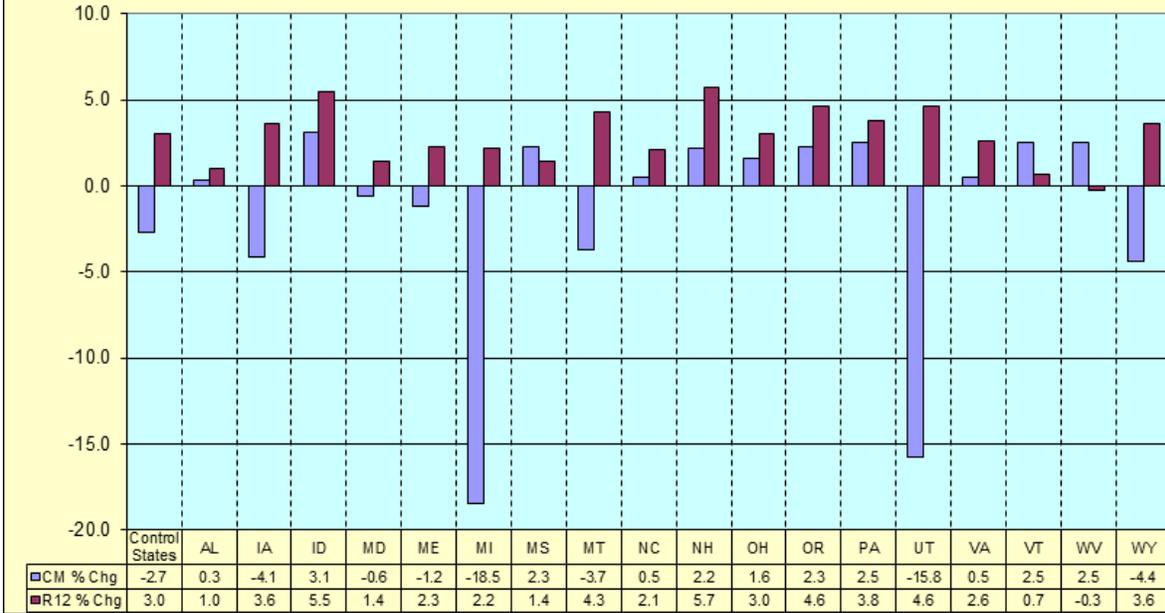
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	-2.7	0.5	3.2%	
Central Region	-5.5	-2.3	3.2%	IA, MD, MI, OH, PA, WV
NE Region	1.1	6.4	5.3%	ME, NH, VT
NW Region	-2.4	0.9	3.3%	ID, MT, OR, UT, WY
Southern Region	0.7	3.6	2.9%	AL, MS, NC, VA



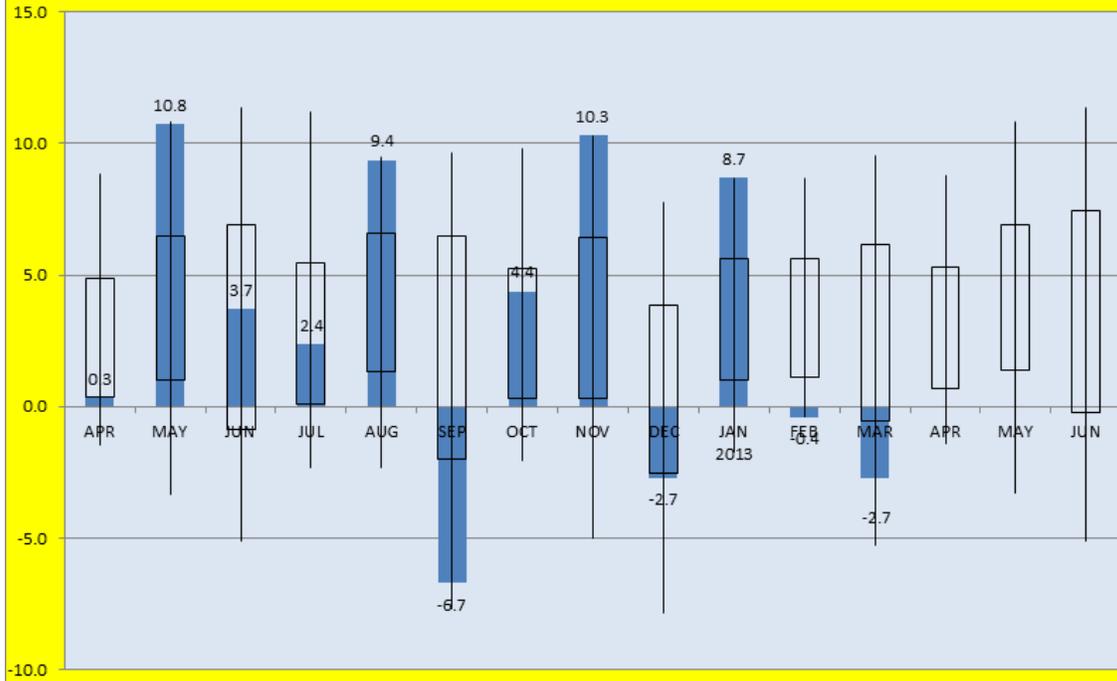
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9 Liter Case Spirits Growth in the Control States by State: Month over Same Month Last Year % Change and Rolling 12-Month % Change as of March, 2013

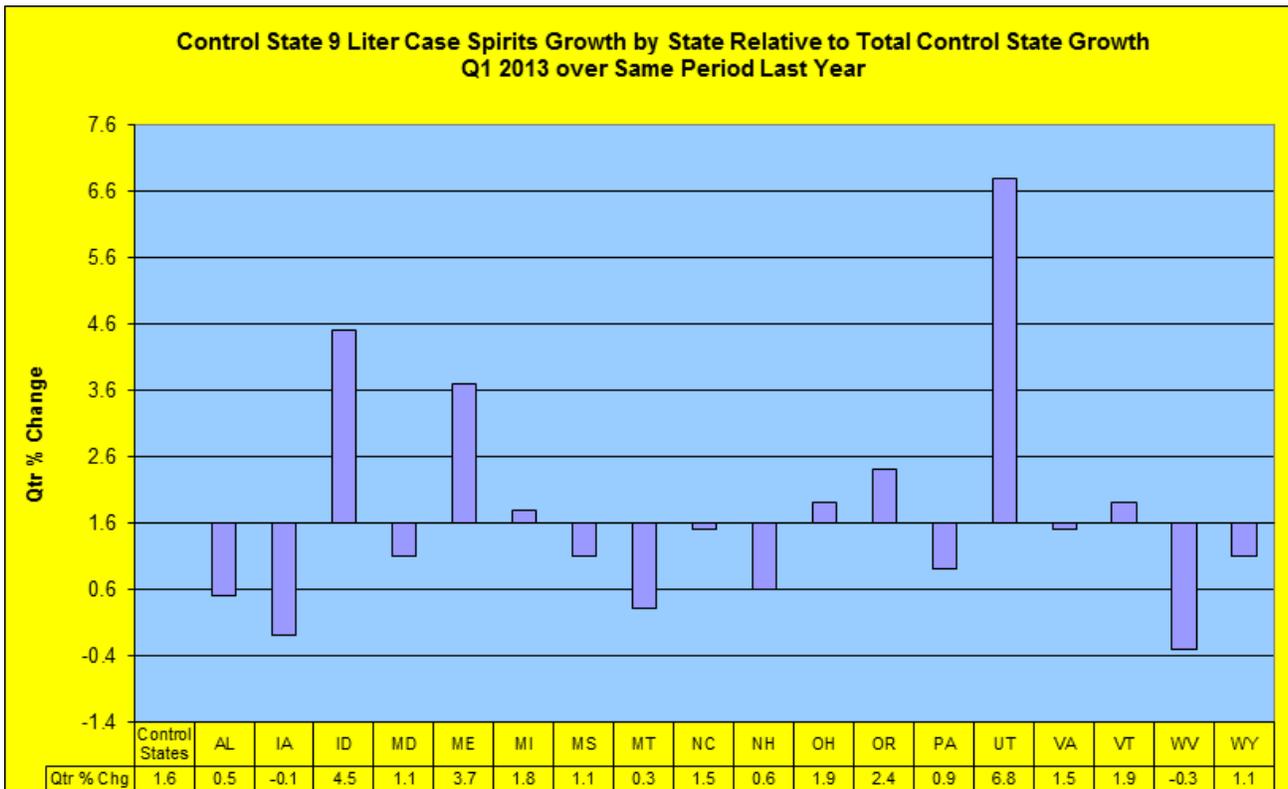


Control State 9L Cases % Chg over Same Month Last Year Through March, 2013, with Monthly Avg High and Low, as well as All-Time High and Low, Growth Rates



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For more information about the NABCA, visit 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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