



News Release

FOR IMMEDIATE RELEASE

NABCA Releases Control States Nine-Liter Spirits Sales for November

Control State results for nine-liter beverage sales for November 2013.

ALEXANDRIA, VA (December 18, 2013)-- During November, nine-liter spirits case sales in the control states fell 2.8% compared to sales during the same period last year. Rolling-twelve month volume growth of 0.8% slipped from October's 1.9%. Alabama, Montgomery County Maryland, North Carolina, New Hampshire, Ohio, Pennsylvania, and Vermont reported monthly growth rates exceeding their twelve month trends.

Control state spirits shelf dollars slipped 0.3% during November while trending at 3.6% during the past twelve months. Alabama, Montgomery County Maryland, North Carolina, New Hampshire, Ohio, Oregon, Pennsylvania, Virginia, and Vermont reported growth rates that exceeded their twelve month trends.

Price/Mix for November was 2.5%, down from October's 3.7%.

November's Control State spirits sales appear soft. For context, consider:

- Last November's nine-liter case growth rate, 10.3%, was a tough comp.
- Michigan, with 16% of the Control States' spirits and dollars volumes, reported four weeks of sales during this November against five weeks last year, artificially deflating sales and skewing Control States results. Michigan had seven fewer selling days during this year's November.
- Utah, with 2% of Control State spirits volume, reported four weeks of sales against five weeks last year: there were 6 fewer selling days during this year's November.
- After normalizing nine-liter spirits case sales for Michigan and Utah, November's nine-liter case growth is 1.2%, and rolling-twelve month volumes show an increase of 1.1%. Likewise, after normalizing shelf dollars, November's shelf dollar growth rate in the control states is 4.0%, and its twelve-month trend is 4.0%.
- November's normalized Price/Mix is 2.8%.

During November, Irish Whiskey, with 0.8% share of the control states spirits market, was the fastest growing category with 3.3% growth reported and a twelve month growth trend of 11.9%. Vodka, with 33% share, grew during the same periods at -1.7% and 1.0%. During November the Cocktails category grew at a rate that exceeded its twelve-month trend.

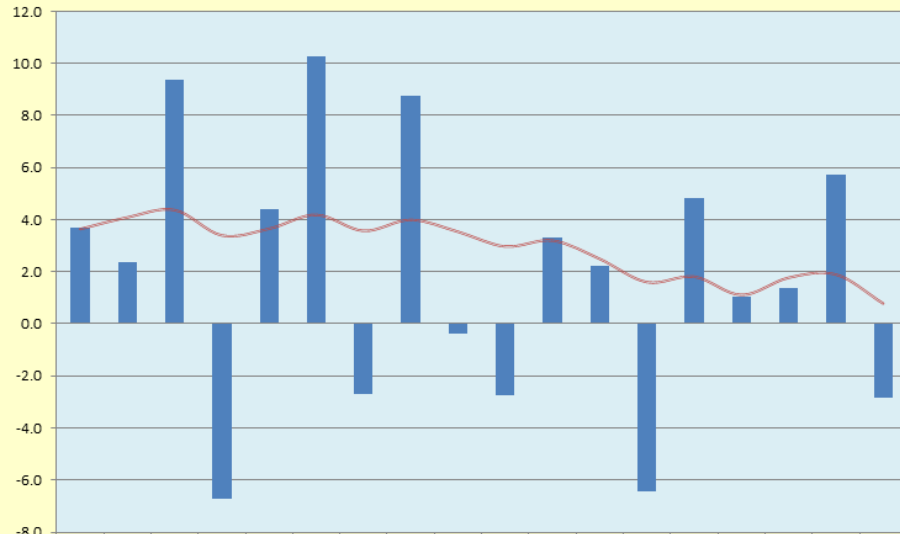
November's nine-liter wine case sales growth rate was 0.7%. Pennsylvania, New Hampshire, Utah, Mississippi, Montgomery County Maryland, and Wyoming reported 4.3%, -5.0%, -15.0%, 2.8%, -2.7%, and -3.2%, respectively. November's rolling-twelve month wine volume growth, 0.6%, is down from October's 0.9%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	-2.8	-0.3	2.5%	
Central Region	-5.9	-4.1	1.8%	IA, MD, MI, OH, PA, WV
NE Region	-0.4	4.1	3.7%	ME, NH, VT
NW Region	-3.7	-0.8	2.9%	ID, MT, OR, UT, WY
Southern Region	2.4	5.7	3.5%	AL, MS, NC, VA

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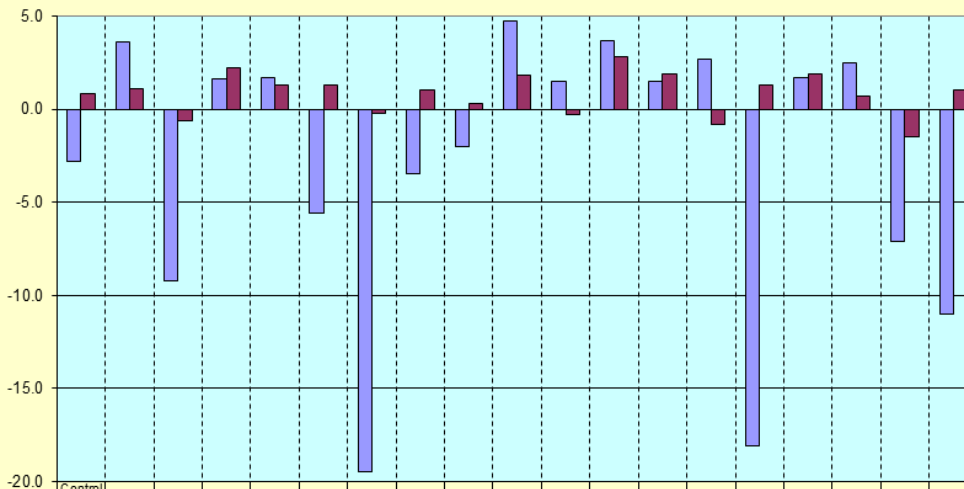
Alabama | Idaho | Iowa | Maine | MD - Montgomery County | MD - Worcester County | Michigan | Mississippi | Montana
New Hampshire | North Carolina | Ohio | Oregon | Pennsylvania | Utah | Vermont | Virginia | West Virginia | Wyoming

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



CM % CHG	3.7	2.4	9.4	-6.7	4.4	10.3	-2.7	8.7	-0.4	-2.7	3.3	2.2	-6.4	4.8	1.1	1.4	5.7	-2.8
R12 % CHG	3.6	4.1	4.4	3.4	3.7	4.2	3.6	4.0	3.5	3.0	3.2	2.5	1.6	1.8	1.1	1.8	1.9	0.8

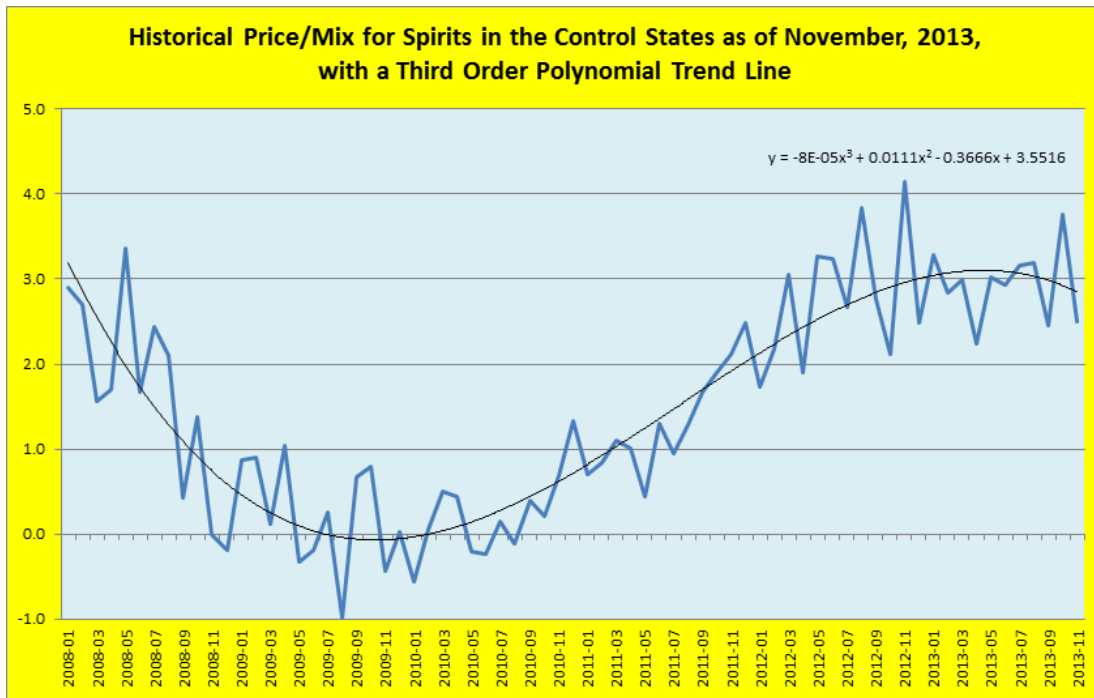
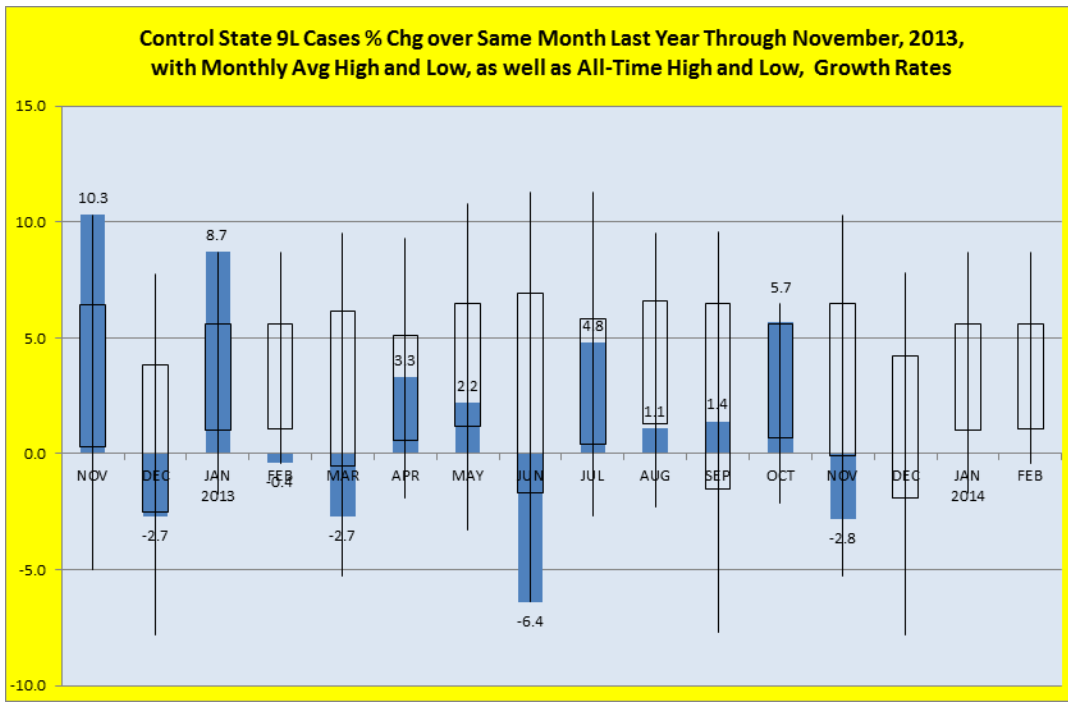
9 Liter Case Spirits Growth in the Control States by State as of November, 2013: Month over Same Month Last Year % Change and Rolling-12 Month % Change



CM % Chg	-2.8	3.6	-9.2	1.6	1.7	-5.6	-19.5	-3.5	-2.0	4.7	1.5	3.7	1.5	2.7	-18.1	1.7	2.5	-7.1	-11.0
R12 % Chg	0.8	1.1	-0.6	2.2	1.3	1.3	-0.2	1.0	0.3	1.8	-0.3	2.8	1.9	-0.8	1.3	1.9	0.7	-1.5	1.0

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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



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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. For more information about the NABCA, visit www.nabca.org.

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