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NABCA Releases Control States Nine-Liter Spirits Sales for March

Control State results for nine-liter beverage sales for March 2018

ALEXANDRIA, VIRGINIA - **End-Of-Quarter Results** - During Q1 2018 nine-liter case spirits sales in the control states grew at 2.8%, up from Q1 2017's 2.0% but lagging Q1 2016's 4.0%. Shelf Dollars grew at 5.6%, 3.8%, and 6.6% during Q1 2018, Q1 2017, and Q1 2016, respectively.

Q1 2018's volumetric growth, 2.8%, nearly mirrors its rolling-twelve-month growth of 2.7%, while shelf dollars grew during Q1 2018 at 5.6% compared to 5.1% during its previous twelve months.

During this year's first quarter Irish Whiskey outpaced all other categories with a growth rate of 16.7%, improving upon Q1 2017's reported 14.8%. During the same time, Brandy/Cognac, Canadian Whiskey, Cocktails, Cordials, Domestic Whiskey, Gin, Irish Whiskey, Rum, Scotch, Tequila, and Vodka grew at -0.4%, 1.2%, 1.2%, 0.8%, 5.8%, -0.1%, 16.7%, 1.4%, 1.1%, 7.6%, and 2.7%, respectively.

The Southern Control States (Alabama, Mississippi, North Carolina, Virginia) grew volumes at 4.7% during Q1 2018, the North West Control States (Idaho, Montana, Oregon, Utah, Wyoming) reported growth of 4.2%, the Central Control States (Iowa, Montgomery County Maryland, Michigan, Ohio, Pennsylvania, West Virginia) reported 1.5%, and the North East Control States (Maine, New Hampshire, Vermont) reported 0.9%. The four regions (Southern, North West, North East, and Central) grew Shelf Dollars during the quarter at 7.2%, 5.8%, 3.8%, and 4.9%, respectively.

End-Of-March Results

During March nine-liter control states spirits case sales grew 4.4% over same period sales last year. Alabama (3.4%), Idaho (6.4%),

Montgomery County Maryland (3.6%), Michigan (5.1%), North Carolina (9.4%), New Hampshire (14.1%), Ohio (6.3%), Oregon (4.8%), Utah (6.7%), Vermont (5.2%), Virginia (6.5%), and West Virginia (2.0%) reported monthly growth rates that exceeded their twelve-month trends. The growth rates for Iowa (-2.4%), Maine (-2.8%), Mississippi (2.4%), Montana (-4.7%), Pennsylvania (1.6%), and Wyoming (-5.9%) fell short of matching their twelve-month trends. Control state rolling-twelve-month volume growth, 2.7%, was up from February's reported 2.3%. Rolling-twelve-month spirits volumes grew 2.8% year-to-date compared to 2.0% a year ago.

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4401 Ford Avenue, Suite 700, Alexandria, VA 22302

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

Control state spirits shelf dollars were up 7.9% during March while trending at 5.1% during the past twelve months. Alabama (6.3%), Idaho (9.7%), Montgomery County Maryland (9.6%), Michigan (7.6%), North Carolina (12.5%), New Hampshire (22.3%), Ohio (9.5%), Oregon (7.1%), Pennsylvania (7.5%), Virginia (8.8%), Vermont (8.5%), and West Virginia (5.5%) reported growth rates exceeding their twelve-month trends. Iowa (-0.4%), Maine (2.6%), Mississippi (-1.4%), Montana (-5.4%), Utah (4.9%), and Wyoming (-2.7%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 5.6% year-to-date compared to 3.8% last year.

Price/Mix for March is 3.5%, lapping February's 2.4%.

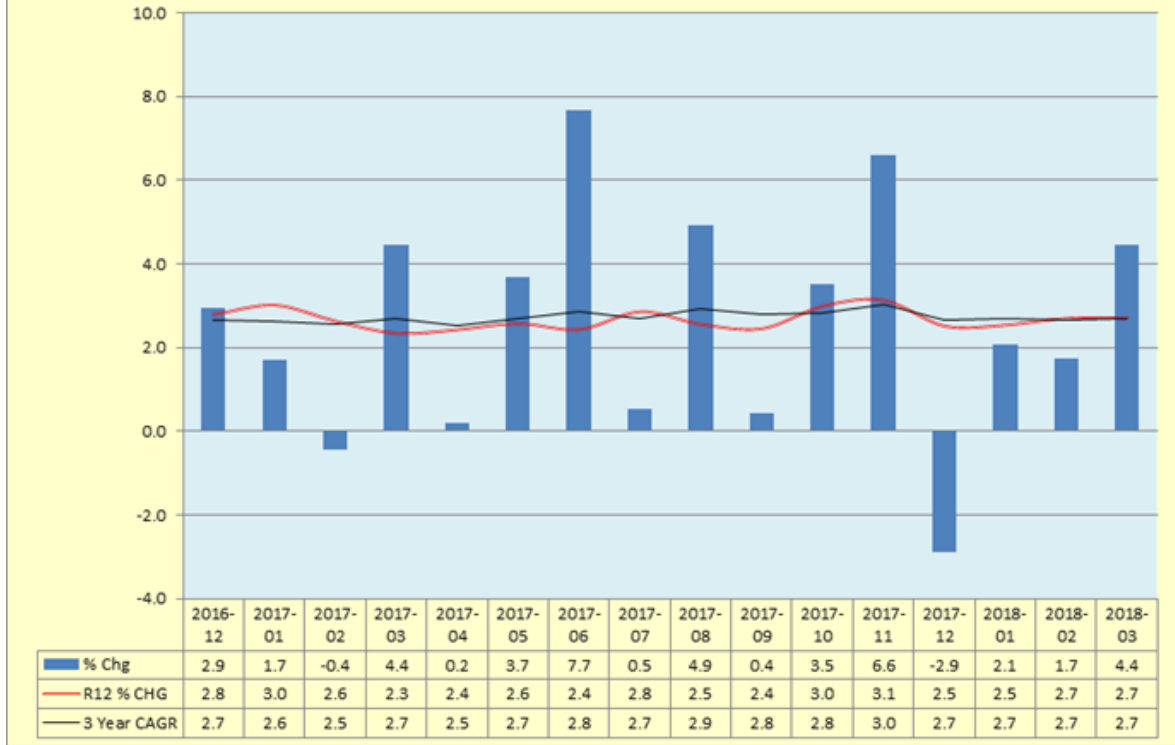
Irish Whiskey, with 1% share of the nine-liter case control states spirits market, was March's fastest growing category with 18.7% reported and a twelve-month trend of 14.7%. Vodka, with 35% share, grew during the same periods at 4.2% and 2.2%, respectively. All categories—Brandy/Cognac (2.9%), Canadian Whiskey (2.1%), Cocktails (4.2%), Cordials (2.4%), Domestic Whiskey (6.8%), Gin (1.4%), Irish Whiskey (18.7%), Rum (2.8%), Scotch (4.2%), Tequila (9.7%), and Vodka (4.2%)--grew at rates greater than their twelve-month trends.

March's nine-liter wine case sales growth rate was 4.2%. Pennsylvania (reporting 6.6% nine-liter case growth for wines), New Hampshire (4.4%), Utah (4.1%), Mississippi (-6.9%), Montgomery County Maryland (-0.2%), and Wyoming (-1.2%) are the control states that are the sole wholesalers of wines and spirits within their geographical boundaries. Rolling-twelve-month wine volume growth in these six control states was 1.8%, improving on February's reported 1.4%.

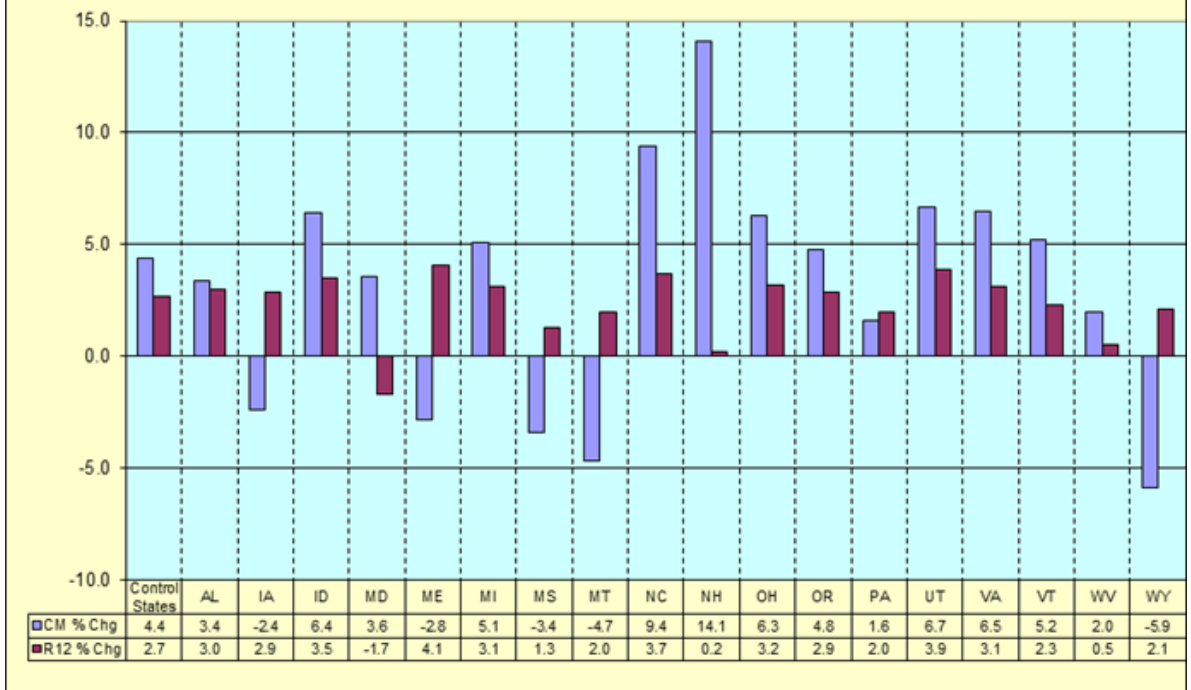
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	4.4	7.9	3.5%	
Central Region	3.6	7.5	3.9%	IA, MD, MI, OH, PA, WV
NE Region	7.2	14.0	6.8%	ME, NH, VT
NW Region	3.4	5.0	1.6%	ID, MT, OR, UT, WY
Southern Region	5.6	8.6	3.0%	AL, MS, NC, VA

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9 Liter Case Spirits Growth in the Control States as of March, 2018: Month over Same Month Last Year % Change, Rolling-12 Month % Change, and 3 Year CAGR



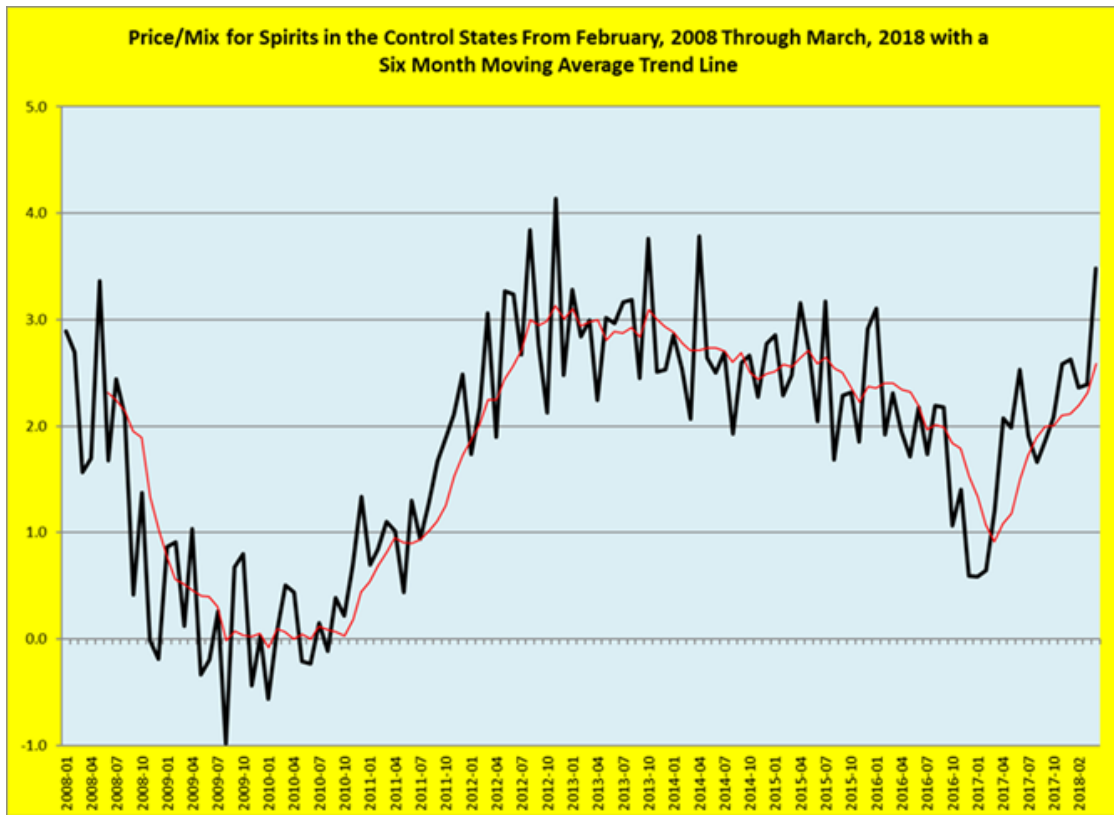
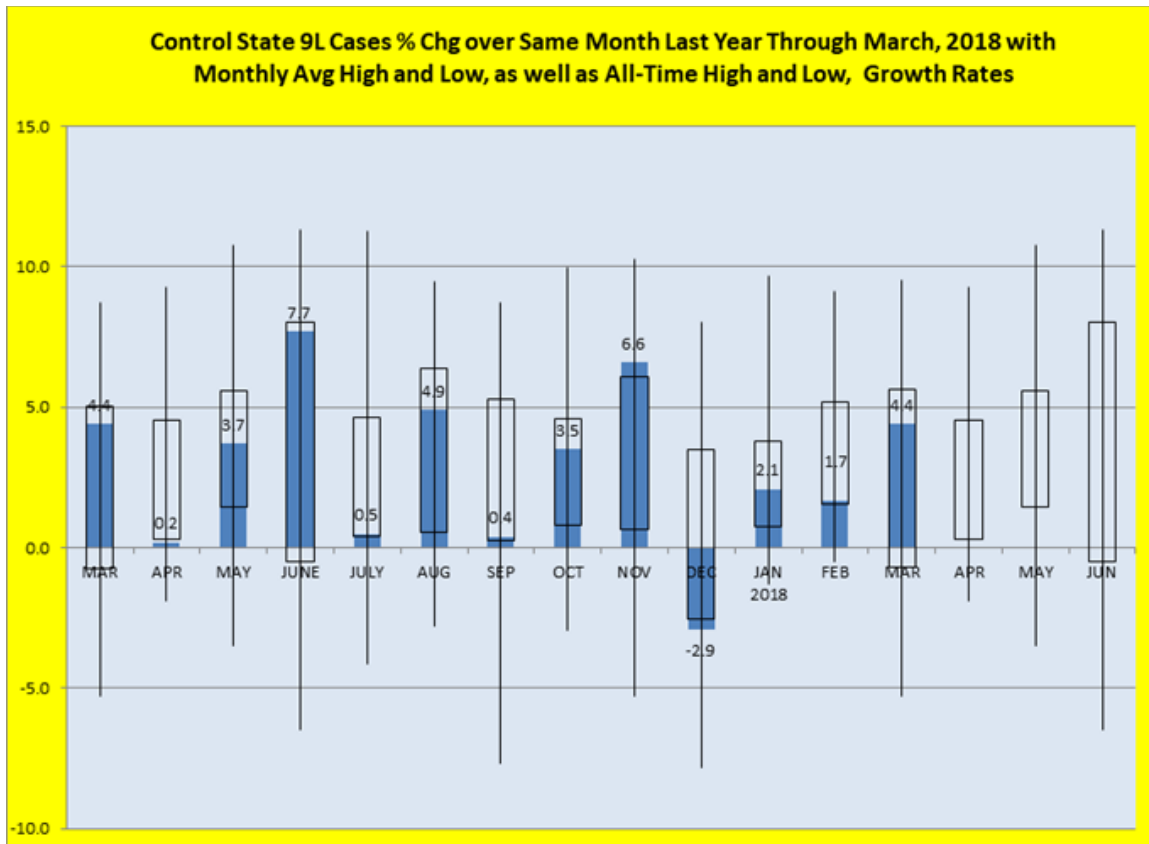
9 Liter Case Spirits Growth in the Control States by State for March, 2018: Month over Same Month Last Year % Change and Rolling-12-Month % Change



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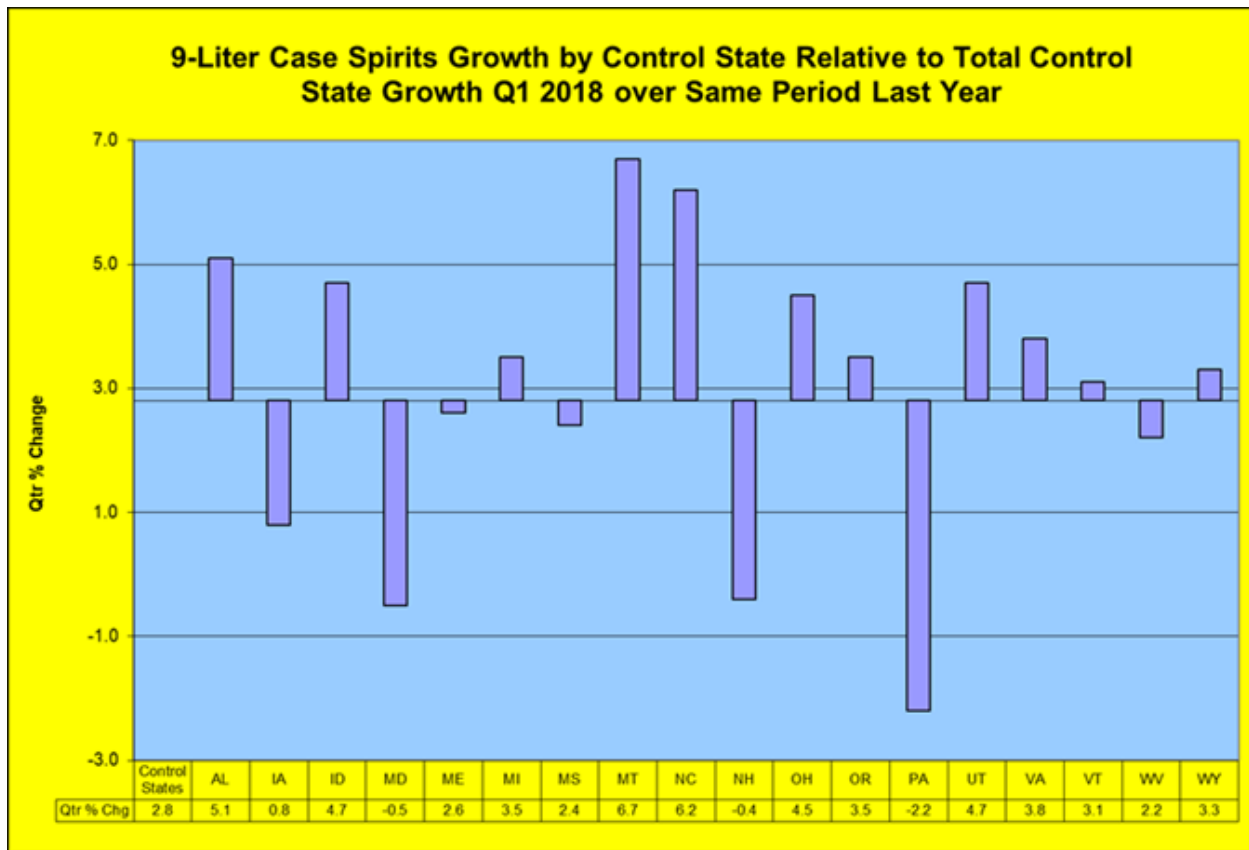
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For more information about the NABCA, visit www.nabca.org.

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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 alcohol control systems by providing credible resources, compiling research and fostering relationships to address policy for the responsible sale and consumption of alcoholic beverages.