



News Release

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FOR IMMEDIATE RELEASE

NABCA Releases Control States Nine-Liter Spirits Sales Results for October

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

ALEXANDRIA, VA (November 21, 2018) — During October 2018 nine-liter spirits case sales in the control states grew 4.6% over same period sales last year. October's growth rate, which exceeded its twelve-month moving average trend, was robust despite a relatively strong comp. Control state rolling-twelve-month volume growth, 2.2%, was nearly flat with September's 2.1%. Spirit volumes in the control states grew 2.4% year-to-date compared to 2.8% a year ago.

October's control state spirits volume growth was influenced in two ways by the calendar. First, West Virginia's Holiday Trade Show sales are normally booked during September, the month during which the Trade Show occurs. The timing of this year's Trade Show required its sales to be reported during October rather than during September, artificially inflating the state's October growth rate. Second, during this year's October there were four Sundays versus five last year. Retail outlets selling alcoholic beverages in six control states (Alabama, Mississippi, Montana, North Carolina, Utah, West Virginia) are closed on Sunday. Overall, five states (Alabama, Michigan, North Carolina, Montana, West Virginia) reported sales for an additional selling day this year while one state, Michigan, reported for one fewer selling day. On net, there were 0.8% more selling days during this year's October compared to last year's.

Alabama (4.6%), Iowa(6.5%), Idaho (5.9%), Montgomery County Maryland (-1.6%), Maine (10.2%), Mississippi (5.4%), Montana (6.5%), North Carolina (3.9%), New Hampshire (2.7%), Ohio (5.4%), Oregon (4.3%), Pennsylvania (2.0%), Virginia (3.5%), Vermont (3.3%), West Virginia (101.5%), and Wyoming (10.8%) reported spirits growth rates exceeding their twelve-month trends, while Michigan (-1.9%) and Utah (4.2%) fell short of theirs.

*****October 2018 Spirits Shelf Dollar Growth in the Control States*****

Control state spirits shelf dollars were up 7.2% during October while trending at 4.9% during the past twelve months. Shelf dollars in the control states are growing at 5.2% year-to-date, up slightly from year-to-date growth, 5.0%, reported a year ago.

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4401 Ford Avenue, Suite 700, Alexandria, VA 22302

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

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Alabama (8.6%), Iowa (12.3%), Idaho (8.9%), Maine (14.0%), Mississippi (6.0%), Montana (6.3%), North Carolina (6.4%), New Hampshire (4.8%), Ohio (9.1%), Oregon (6.6%), Pennsylvania (3.4%), Virginia (7.4%), Vermont (5.3%), West Virginia (110.1%), and Wyoming (13.2%) grew shelf dollars at rates exceeding their twelve-month trends, while Montgomery County Maryland (1.3%), Michigan (2.1%), and Utah (5.6%) fell short of theirs.

Price/Mix for October is 2.6%, down from September's 3.4%.

October 2018 Spirits Category Growth in the Control States

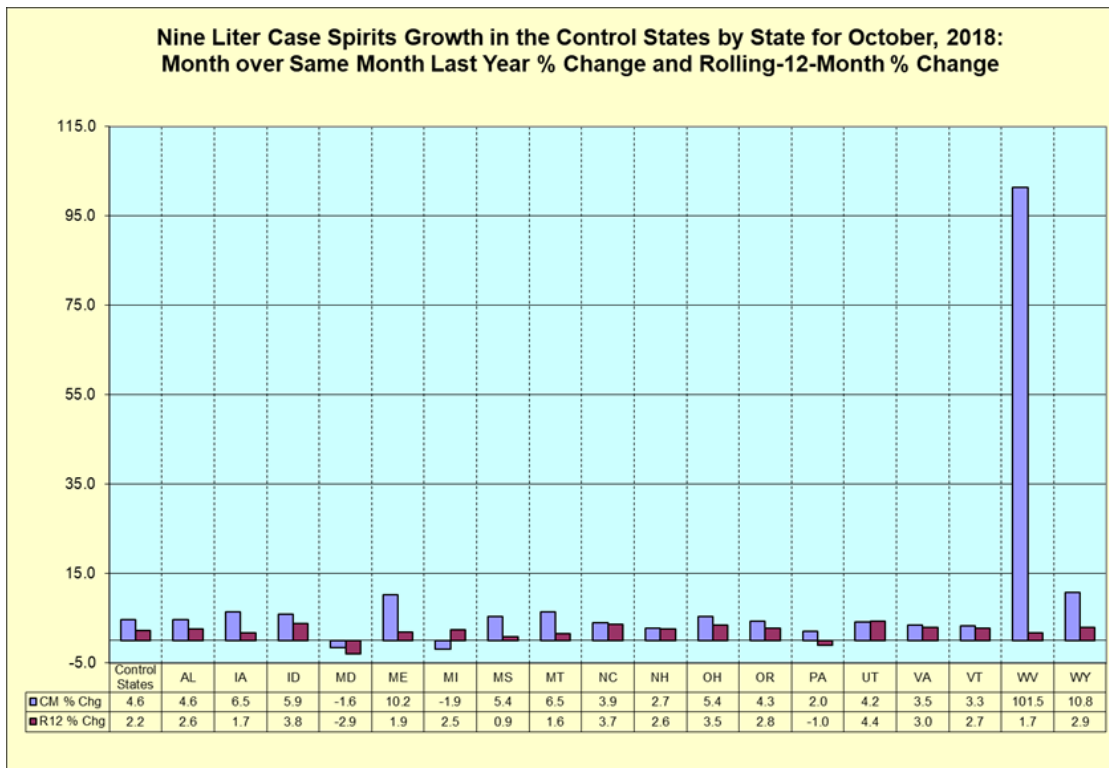
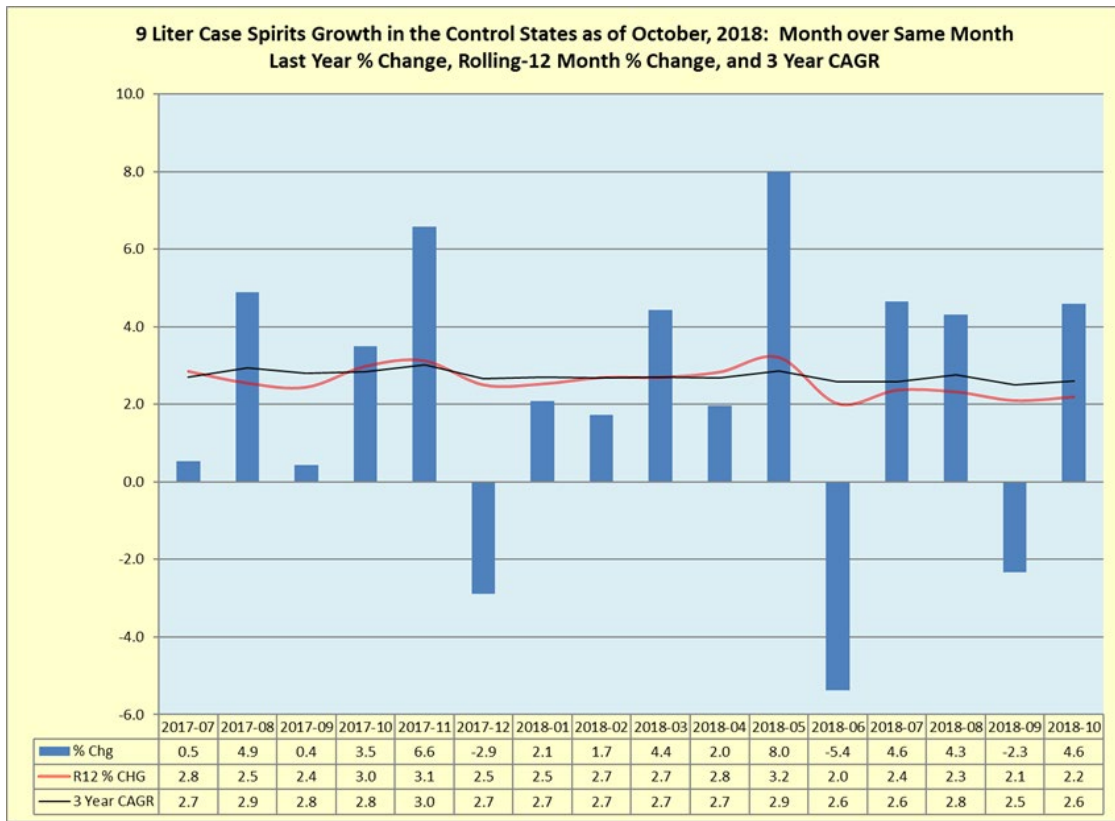
Irish Whiskey, with 1% share of the nine-liter case control states spirits market, was October's fastest growing category with 21.4% growth reported and a twelve-month trend of 13.2%. Vodka, with 35% share, grew during the same periods at 4.0% and 2.0%, respectively. During October, Brandy/Cognac (3.1%), Canadian Whiskey (6.5%), Cocktails (7.0%), Cordials (2.9%), Domestic Whiskey (7.5%), Gin (-0.2%), Irish Whiskey (21.4%), Rum (0.4%), Scotch (4.5%), and Vodka (4.0%) grew at rates exceeding their twelve-month trends, while Tequila (7.5%) fell short.

October 2018 Nine-Liter Case Wine Growth in the Control States

October's nine-liter wine case sales growth rate was -1.8%. Pennsylvania (reporting -1.4% nine-liter case growth for wines), New Hampshire (-6.6%), Utah (0.6%), Mississippi (1.2%), Montgomery County Maryland (1.2%), and Wyoming (5.9%) 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 -1.6%, slipping slightly from September's reported -1.4%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	4.6	7.2	2.6%	
Central Region	4.6	7.2	2.6%	IA, MD, MI, OH, PA, WV
NE Region	4.8	7.4	2.6%	ME, NH, VT
NW Region	5.3	7.1	1.8%	ID, MT, OR, UT, WY
Southern Region	4.1	7.1	3.0%	AL, MS, NC, VA

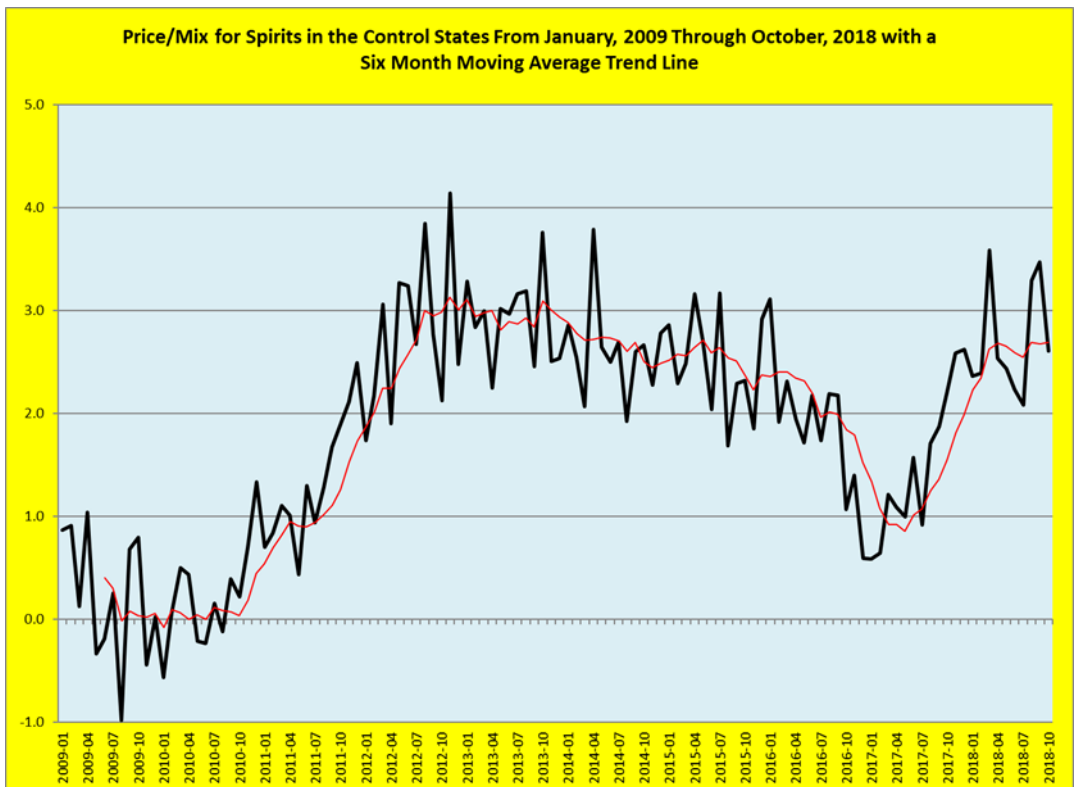
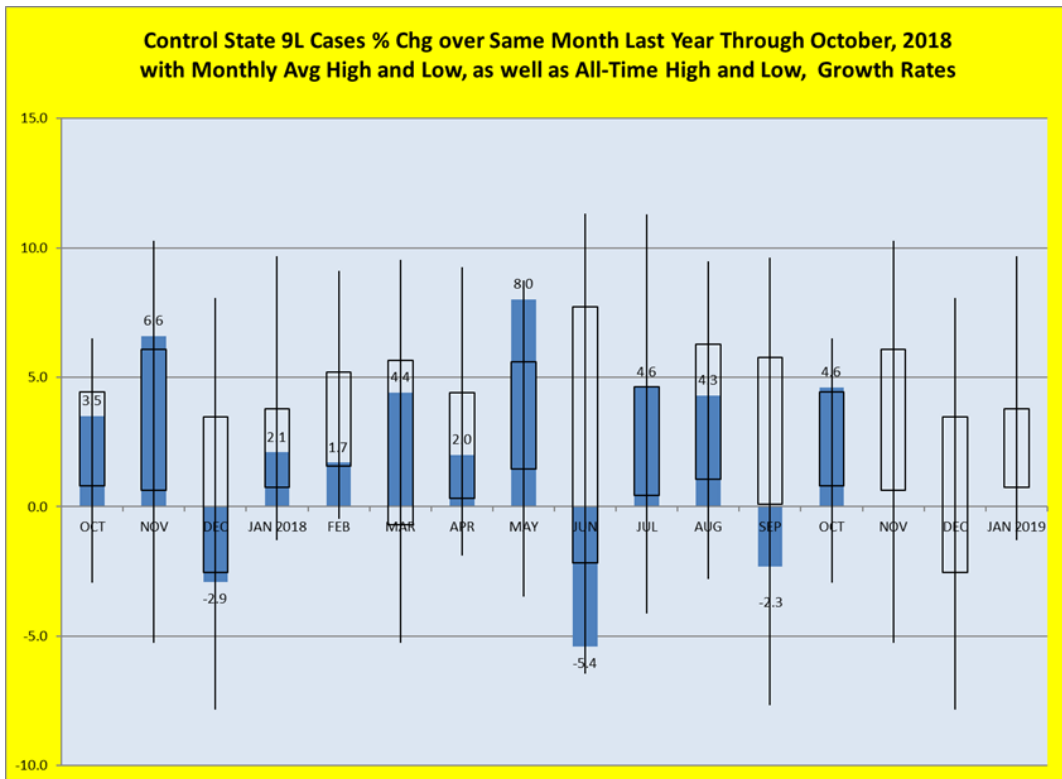
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For more information about the NABCA, visit www.nabca.org.

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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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