

# NABCA CONTROL STATE RESULTS

## Control Results for March 2019

### Control State Results

April 18, 2019

During March nine-liter control states spirits case sales growth was down 3.0% over same period sales last year. New Hampshire(15.0%) reported a monthly growth rate for March exceeding its twelve-month trend. Alabama(1.2%), Iowa(-1.4%), Idaho(2.6%), Montgomery County Maryland(-6.8%), Maine(-0.7%), Michigan(-18.1%), Mississippi(-3.4%), Montana(0.1%), North Carolina(-1.0%), Ohio(1.0%), Oregon(1.6%), Pennsylvania(-0.4%), Utah(-17.3%), Virginia(0.1%), Vermont(-2.6%), West Virginia(0.2%), and Wyoming(2.8%) grew at rates that fell short of their twelve-month trends. Control state rolling-twelve-month volume growth, 3.0%, slipped from February's reported 3.7%. Spirits volumes grew 3.7% year-to-date compared to 2.8% a year ago.

Control state spirits shelf dollar growth was down 0.6% during March while trending at 5.9% during the past twelve months. Montana(6.5%), New Hampshire(13.4%), and West Virginia(6.3%) reported growth rates exceeding their twelve-month trends. Alabama(5.0%), Iowa(0.6%), Idaho(4.3%), Montgomery County Maryland(-6.0%), Maine(-0.8%), Michigan(-14.8%), Mississippi(-1.1%), North Carolina(1.5%), Ohio(4.8%), Oregon(4.1%), Pennsylvania(0.7%), Utah(-14.3%), Virginia(3.0%), Vermont(-1.3%), and Wyoming(-0.8%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 6.4% year-to-date compared to 5.7% last year-to-date.

Price/Mix for March is 2.4%, slipping from February's reported 3.0%.

March's Control State spirits nine-liter case and shelf dollar growth rates were effected by a strong comp and reporting calendar anomalies in the Control States.

Michigan, with 15% of Control States' spirits nine-liter case volumes and 17% of Control States' dollars, reported four weeks of sales this March versus five weeks of sales during March 2018, artificially deflating sales and skewing Control States results. Michigan had seven fewer selling days during this year's March than during last year's.

Utah, with 3% of Control States' spirits nine-liter case volumes and 2% of Control States' dollars, reported four weeks of sales this March versus five weeks of sales during March 2018, artificially deflating sales and skewing Control States results. Utah had six fewer selling days during this year's March than during last year's.

Retail outlets selling spirits in five states—Alabama, Mississippi, Montana, North Carolina, and Utah—are closed on Sundays. March, 2019 had five Sundays versus four during March, 2018. For your information, please note that effective March, 2019, retailers in West Virginia are open for business on Sundays; West Virginia had four additional selling days during this year's March.

Overall, March 2019 had twelve fewer selling days, 2.3% fewer, than last year's March.

After equalizing nine-liter spirits case sales with respect to selling-day variations, March's volumetric growth is 1.2%, and rolling-twelve-month volume is up 3.2%. Likewise, after equalizing shelf dollars, March's shelf dollar growth rate is 4.0% with a twelve-month trend of 6.1%.

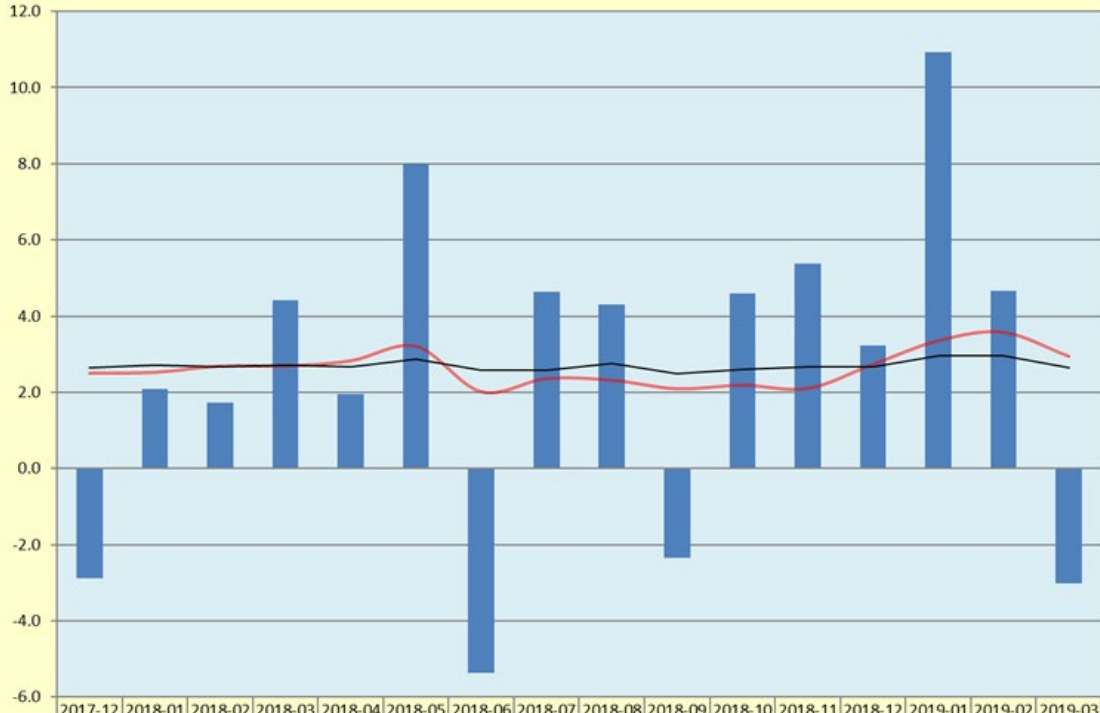
March's equalized Price/Mix is 2.8%.

Irish Whiskey, with 2% share of the nine-liter case control states spirits market, was March's fastest growing category with 4.7% reported and a twelve-month trend of 12.0%. Tequila, with 6% share, reported 4.2% growth and a 9.9% twelve-month trend. Vodka, with 34% share, grew during the same periods at -3.9% and 2.6%, respectively. Brandy/Cognac(-5.3%), Canadian Whiskey(-1.4%), Cocktails(0.1), Cordials(-6.4%), Domestic Whiskey(-0.2%), Gin(-5.2%), Irish Whiskey(4.7%), Rum(-7.5%), Scotch(-3.4%), Tequila(4.2%), and Vodka(-3.9%) grew at rates below their twelve-month trends.

March's nine-liter wine case sales growth rate was -9.7%. Pennsylvania (reporting -10.5% nine-liter case growth for wines), New Hampshire (-2.7%), Utah (-21.4%), Mississippi (-0.6%), Montgomery County Maryland (-12.1%), and Wyoming (-5.8%) 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%, down from February's reported -0.7%.

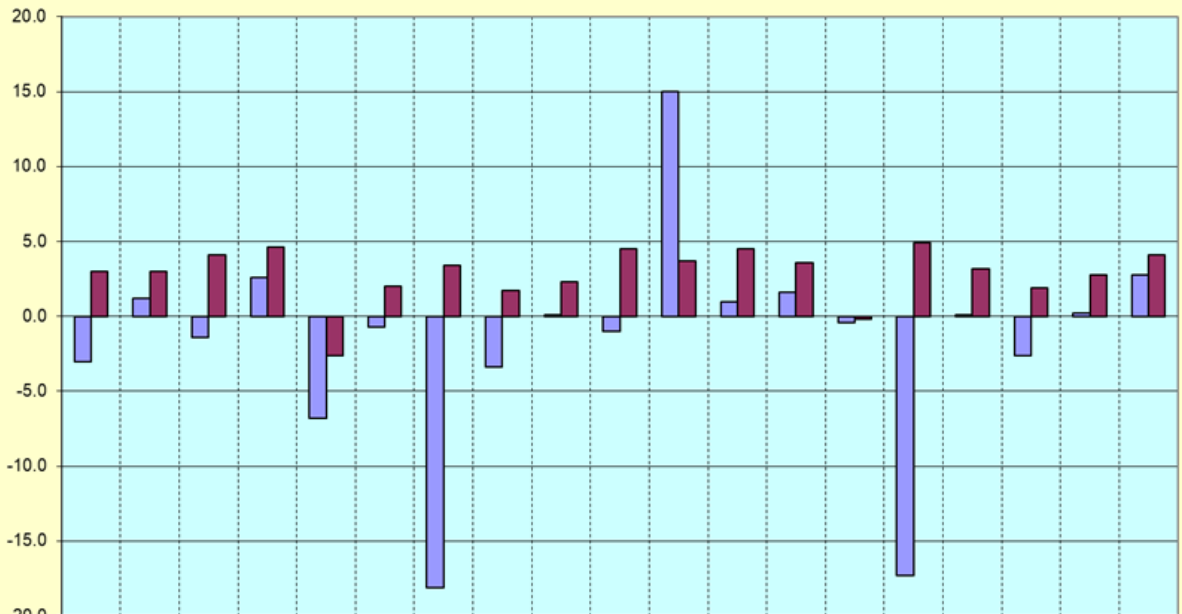
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	-3.0	-0.6	2.4%	
Central Region	-6.4	-3.9	2.5%	IA, MD, MI, OH, PA, WV
NE Region	8.1	7.4	-0.7%	ME, NH, VT
NW Region	-2.3	0.3	2.6%	ID, MT, OR, UT, WY
Southern Region	-0.6	2.4	3.0%	AL, MS, NC, VA

**9 Liter Case Spirits Growth in the Control States as of March, 2019: Month over Same Month Last Year % Change, Rolling-12 Month % Change, and 3 Year CAGR**



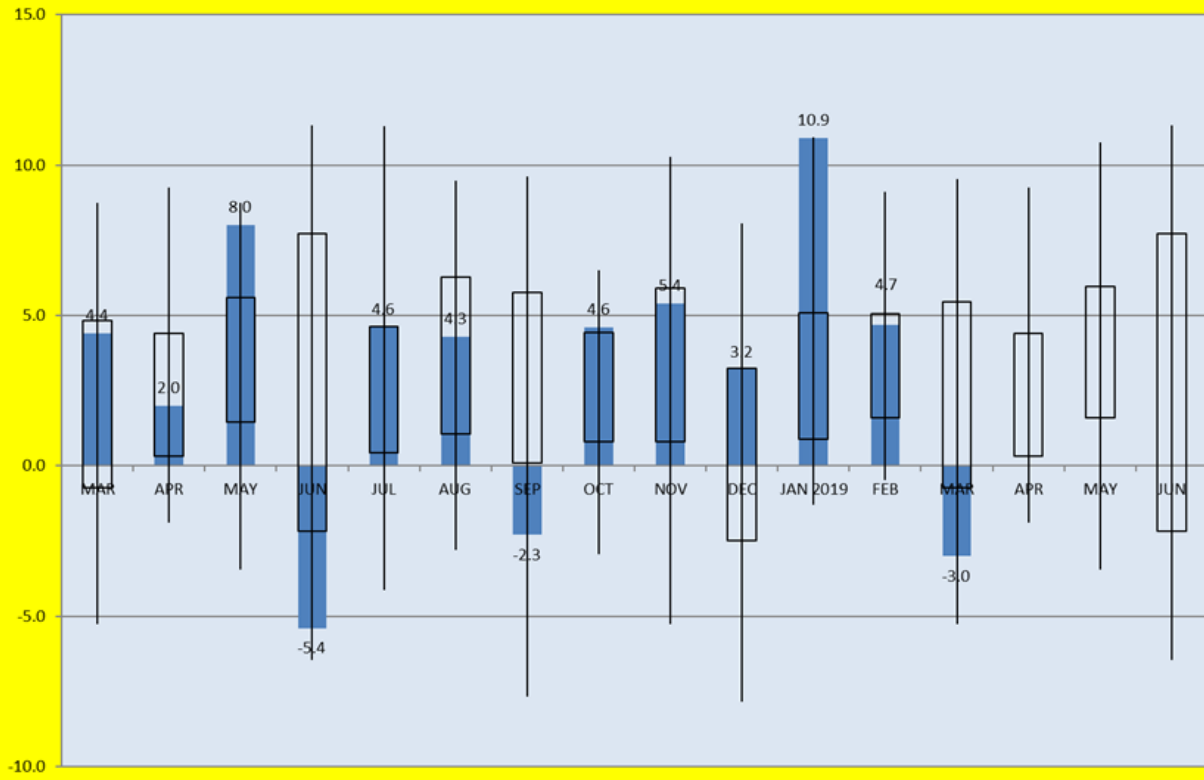
	2017-12	2018-01	2018-02	2018-03	2018-04	2018-05	2018-06	2018-07	2018-08	2018-09	2018-10	2018-11	2018-12	2019-01	2019-02	2019-03
<b>% Chg</b>	-2.9	2.1	1.7	4.4	2.0	8.0	-5.4	4.6	4.3	-2.3	4.6	5.4	3.2	10.9	4.7	-3.0
<b>R12 % CHG</b>	2.5	2.5	2.7	2.7	2.8	3.2	2.0	2.4	2.3	2.1	2.2	2.1	2.7	3.4	3.6	2.9
<b>3 Year CAGR</b>	2.7	2.7	2.7	2.7	2.7	2.9	2.6	2.6	2.8	2.5	2.6	2.7	2.7	3.0	3.0	2.7

**Nine Liter Case Spirits Growth in the Control States by State for March, 2019: Month over Same Month Last Year % Change and Rolling-12-Month % Change**



Control States	AL	IA	ID	MD	ME	MI	MS	MT	NC	NH	OH	OR	PA	UT	VA	VT	WV	WY	
<b>CM % Chg</b>	-3.0	1.2	-1.4	2.6	-6.8	-0.7	-18.1	-3.4	0.1	-1.0	15.0	1.0	1.6	-0.4	-17.3	0.1	-2.6	0.2	2.8
<b>R12 % Chg</b>	3.0	3.0	4.1	4.6	-2.6	2.0	3.4	1.7	2.3	4.5	3.7	4.5	3.6	-0.2	4.9	3.2	1.9	2.8	4.1

**Control State 9L Cases % Chg over Same Month Last Year Through March, 2019  
with Monthly Avg High and Low, as well as All-Time High and Low, Growth Rates**



**Price/Mix for Spirits in the Control States From January, 2009 Through March, 2019 with a Six Month Moving Average Trend Line**

