



News Release

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FOR IMMEDIATE RELEASE

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

Control State results for nine-liter beverage sales for July 2019

ALEXANDRIA, VA (August 20, 2019) — During July, nine-liter control states spirits case sales grew 6.2% over same period sales last year opposite a fairly robust 4.6% comp. Alabama(8.8%), Iowa(17.6%), Idaho(7.4%), Maine(10.7%), Montgomery County Maryland(8.6%), Mississippi(13.1%), Montana(12.1%), North Carolina(9.9%), Ohio(7.0%), Oregon(5.3%), Pennsylvania(3.8%), Utah(7.9%), Vermont(2.5%), Virginia(6.5%), West Virginia(12.2%), and Wyoming(9.6%) reported monthly growth rates for July that exceeded their twelve-month trends, while Michigan(2.1%) and New Hampshire(-6.0%) grew at rates that fell short of their twelve-month trends. Control state rolling-twelve-month volume growth, 3.5%, improved slightly upon June's reported 3.4%. Spirits volumes grew 3.8% year-to-date compared to 2.5% a year ago.

Control state spirits shelf dollars grew at 8.5% during July while trending at 6.5% during the past twelve months. Alabama(9.9%), Iowa(18.5%), Idaho(9.7%), Maine(12.5%), Montgomery County Maryland(11.8%), Mississippi(16.1%), Montana(17.0%), North Carolina(13.2%), Ohio(9.9%), Oregon(7.6%), Pennsylvania(5.9%), Utah(9.0%), Vermont(7.2%), Virginia(8.1%), and West Virginia(14.9%) grew shelf dollars during July at rates exceeding their twelve-month trends. Michigan(3.9%), New Hampshire(1.2%), and Wyoming(7.1%) grew shelf dollars at rates lagging their twelve-month trends. Shelf dollars in the control states are up 6.4% year-to-date compared to 5.1% a year ago.

Price/Mix for July is 2.3%, lagging June's 2.8%.

July's growth rate was effected by calendar related reporting anomalies in the control States.

- This year's July had four Sundays versus five last year. There are five control states—Alabama, Mississippi, Montana, North Carolina, Utah—whose retail outlets that sell spirits are closed on Sundays. Alabama, Mississippi, Montana, and North Carolina spirits outlets each had an additional selling day during July.
- As of March 2019, retail outlets in West Virginia, which previously were closed on Sunday, are now open for business. Spirit retailers in West Virginia had five additional selling days during this year's July compared to last year's.
- New Hampshire reported four weeks of sales this July compared to five weeks last year, artificially deflating sales and skewing state results. New Hampshire's stores had eight fewer selling days during July this year compared to last year.

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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

JulyCS Add 1

- On net, there was one additional selling day during July in the control states, 0.2% more, compared to last year's July.
- After equalizing selling day variations between this year's July and last year's, July's nine-liter case spirits growth rate is 6.6% with a rolling-twelve-month trend of 3.7%. July's shelf-dollar growth rate is 9.0% with a rolling-twelve-month trend of 6.7%.
- Equalized price mix for July is 2.4%.

Cocktails, with 2% share of the nine-liter case control states spirits market, was July's fastest growing category with 17.6% reported and a twelve-month trend of 6.9%. Tequila, with 6% share, reported 13.8% growth and a 10.2% twelve-month trend. Domestic Whiskey, with 15% share, reported 10.3% monthly growth and a twelve-month trend of 6.2%. Vodka, with 34% share, grew during the same periods at 4.2% and 2.9%, respectively. Brandy/Cognac(9.7%, 3.4%), Canadian Whiskey(6.4%, 3.2%), Cocktails(17.6%, 6.9%), Cordials(4.2%, 2.1%), Domestic Whiskey(10.3%, 6.2%), Gin(1.9%, -0.2%), Rum(2.5%, 0.1%), Scotch(2.9%, 0.3%), Tequila(13.8%, 10.2%), and Vodka(4.2%, 2.9%) grew at rates exceeding their twelve-month trends, while Irish Whiskey(7.6%, 11.1%) grew at a monthly rate that lagged its twelve-month trend.

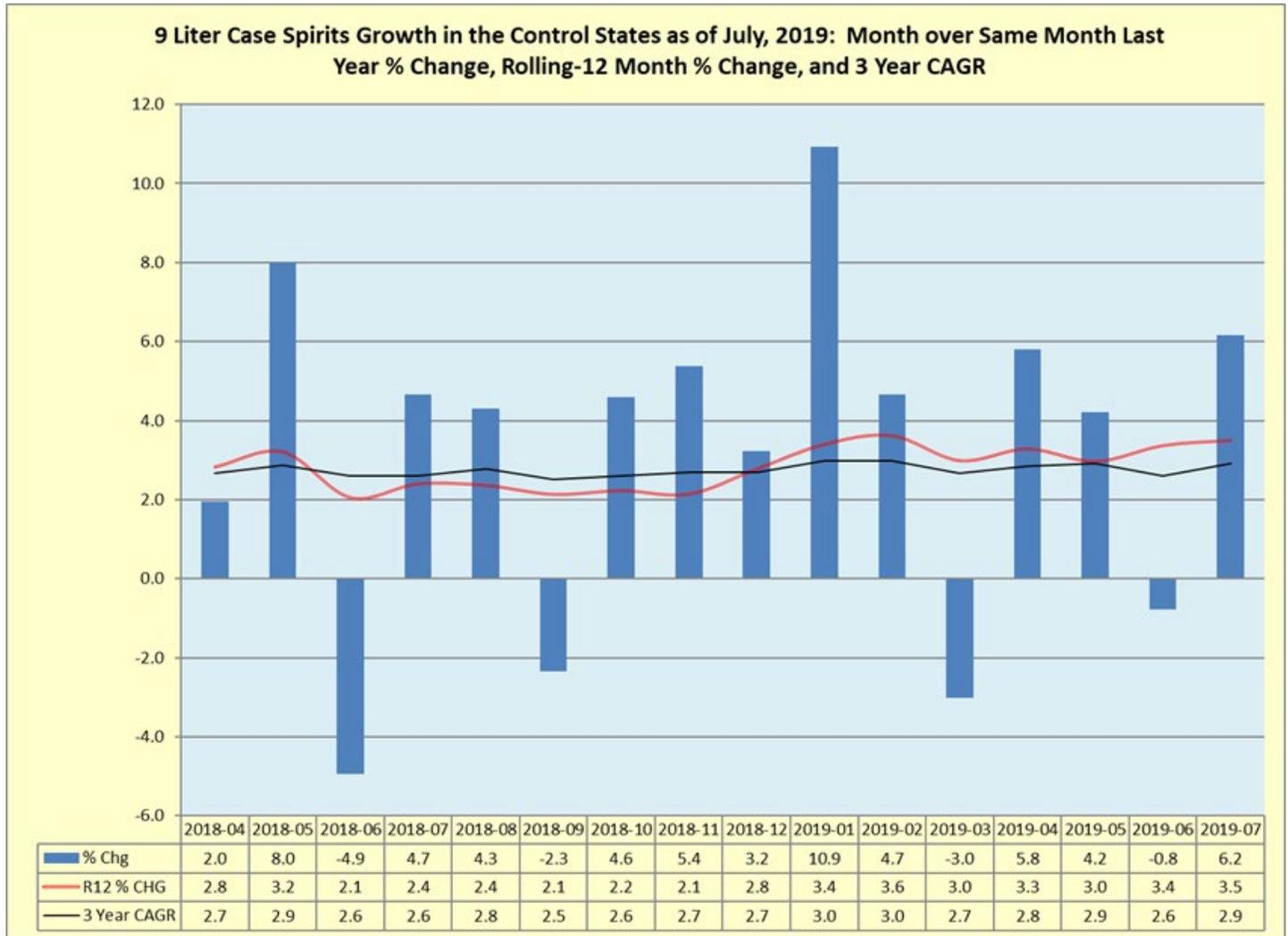
July's nine-liter wine case sales growth rate was -5.4%. Pennsylvania (reporting -2.2% nine-liter case growth for wines), New Hampshire (-22.2%), Utah (3.3%), Mississippi (8.4%), Montgomery County Maryland (4.2%), and Wyoming (0.8%) are the control states that are the sole wholesalers of wines and spirits within their geographical boundaries. Rolling-twelve-month wine volume growth in these six control states was -1.9%, slipping from June's reported -1.1%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	6.2	8.5	2.3%	
Central Region	5.7	7.5	1.8%	IA, MD, MI, OH, PA, WV
NE Region	-0.9	4.7	5.6%	ME, NH, VT
NW Region	7.3	9.2	1.9%	ID, MT, OR, UT, WY
Southern Region	9.0	11.1	2.1%	AL, MS, NC, VA

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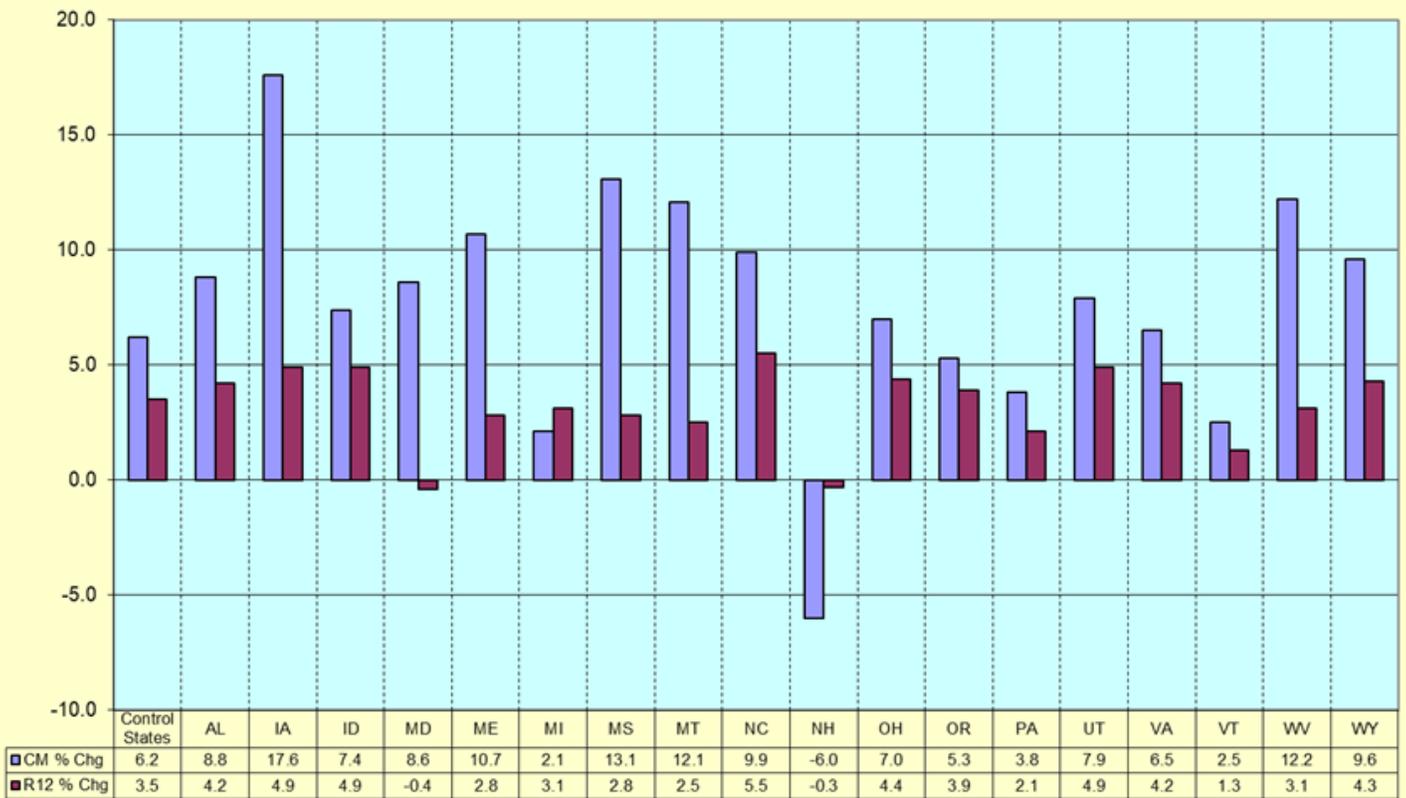


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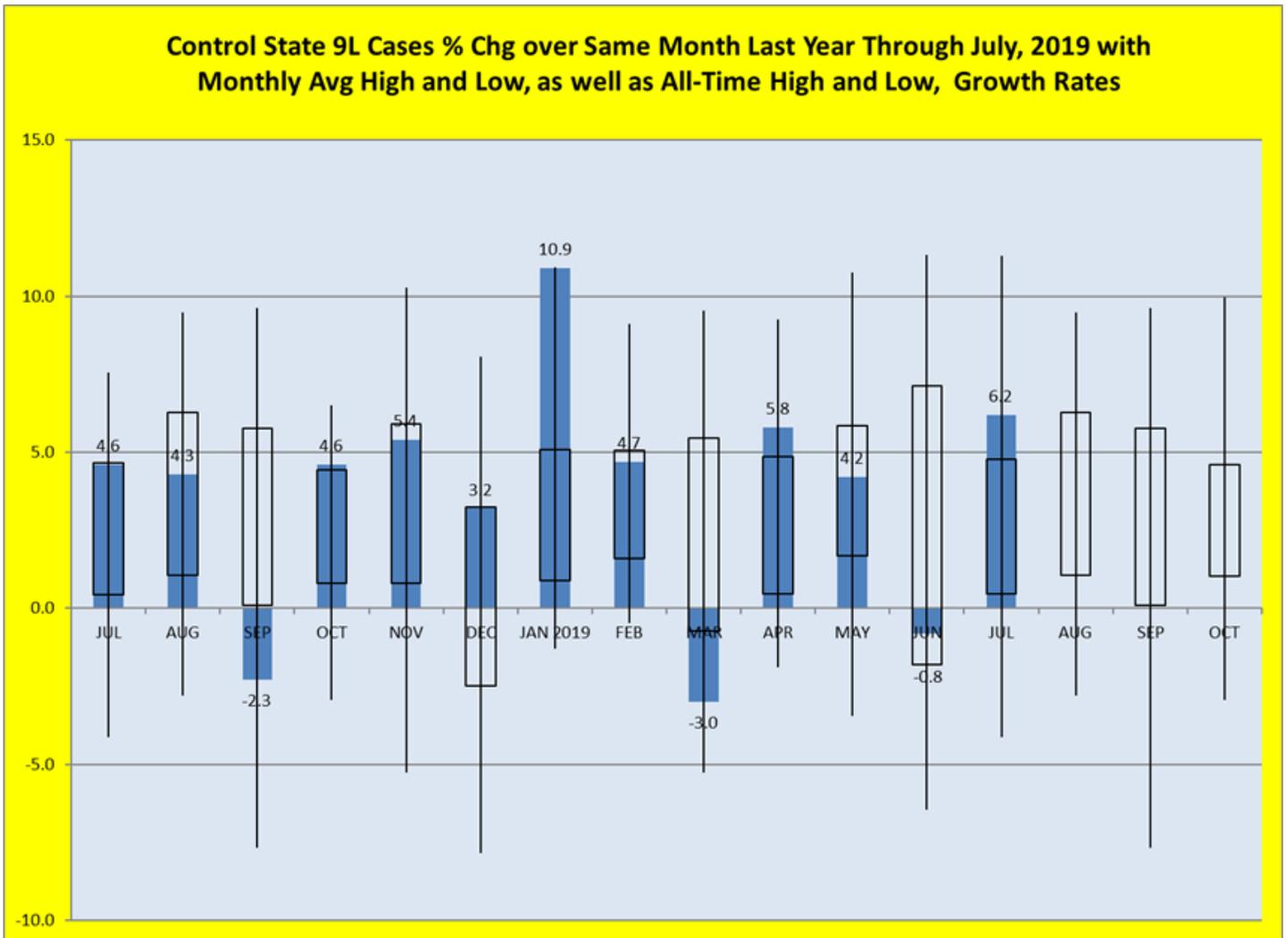
**Nine Liter Case Spirits Growth in the Control States by State for July, 2019:
Month over Same Month Last Year % Change and Rolling-12-Month % Change**



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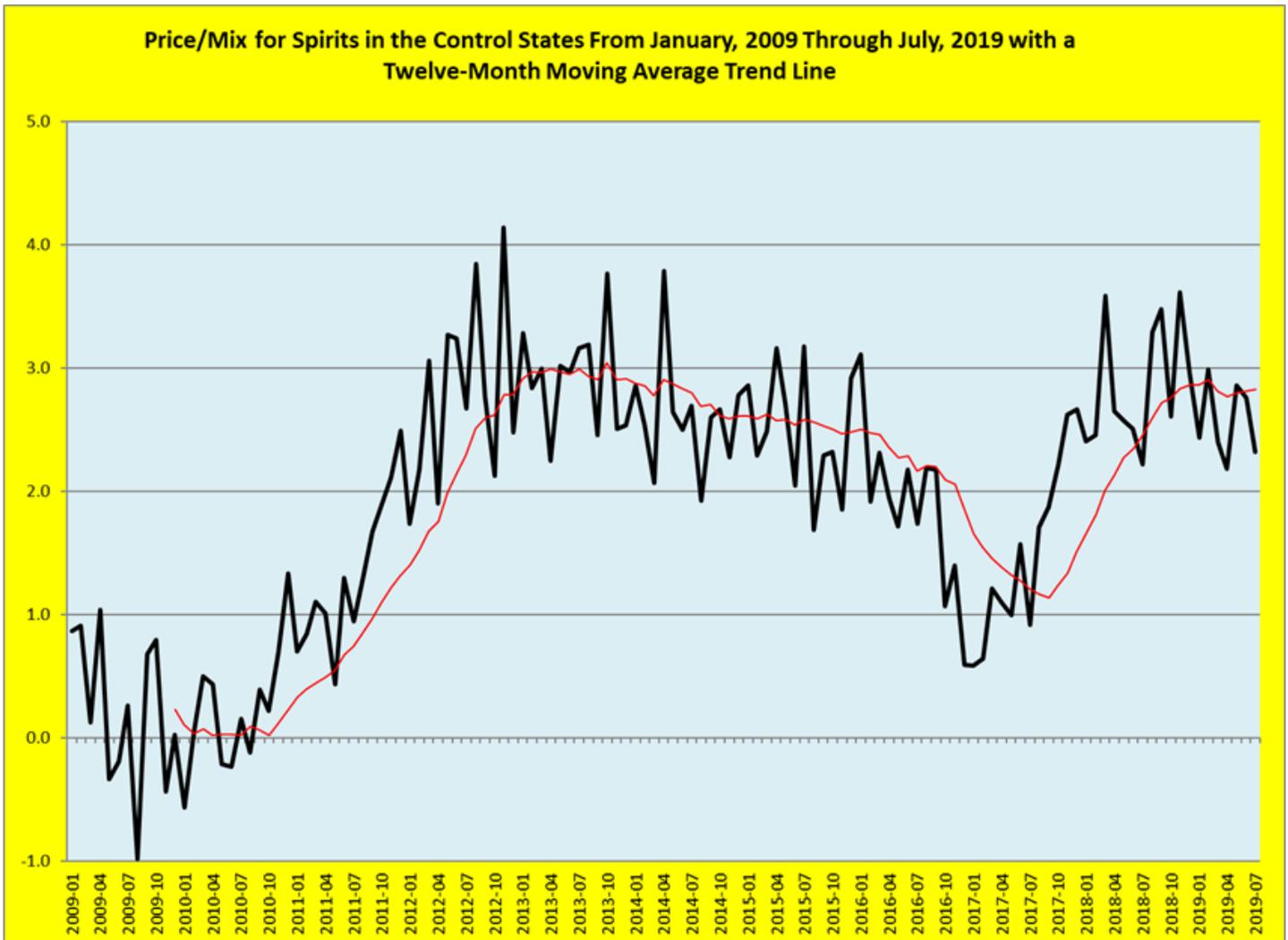
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For more information about the NABCA, visit www.nabca.org.

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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 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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