



News Release

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FOR IMMEDIATE RELEASE

NABCA Releases Control States Nine-Liter Spirits Sales Results for June *Control State results for nine-liter beverage sales for June 2019*

ALEXANDRIA, VA (July 22, 2019) — During June, nine-liter control states spirits case sales grew -0.8% over same period sales last year despite a weak -5.4% comp. Montgomery County Maryland(-0.8%) reported a monthly growth rate for June that exceeded its twelve-month trend. Alabama(-4.7%), Iowa(-2.5%), Idaho(0.3%), Maine(-2.7%), Michigan(2.3%), Mississippi(0.3%), Montana(-1.7%), New Hampshire(-12.2%), North Carolina(-0.8%), Ohio(-3.4%), Oregon(1.3%), Pennsylvania(1.9%), Utah(2.8%), Vermont(-3.7%), Virginia(1.0%), West Virginia(2.0%), and Wyoming(-1.0%) grew at rates that fell short of their twelve-month trends. Control state rolling-twelve-month volume growth, 3.4%, improved upon May's reported 3.0%. Spirits volumes grew 3.3% year-to-date compared to 2.1% a year ago.

Control state spirits shelf dollars grew at 2.0% during June while trending at 6.4% during the past twelve months. Montgomery County Maryland(1.8%) grew shelf dollars during June at a rate exceeding its twelve-month trend. Alabama(-3.8%), Iowa(1.2%), Idaho(2.1%), Maine(-1.1%), Michigan(4.9%), Mississippi(3.2%), Montana(-0.7%), New Hampshire(-6.9%), North Carolina(3.0%), Ohio(-0.5%), Oregon(3.0%), Pennsylvania(4.1%), Utah(5.5%), Vermont(0.0%), Virginia(4.5%), West Virginia(4.8%), and Wyoming(-7.9%) grew shelf dollars at rates lagging their twelve-month trends. Shelf dollars in the control states are up 6.1% year-to-date compared to 4.8% last year-to-date.

Price/Mix for June is 2.8%, nearly flat with May's 2.9%.

- June's growth rate was effected by calendar related reporting anomalies in the control States and a restatement of sales in Ohio. Specifically,
- This year's June had five Sundays versus four last year. There are five control states—Alabama, Mississippi, Montana, North Carolina, Utah—whose retail outlets that sell spirits are closed on Sundays.
- 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 four additional selling days during this year's June compared to last year's.
- New Hampshire reported four weeks of sales this June compared to five weeks last year, artificially deflating sales and skewing state results.
- There were six fewer selling days, 1.2% fewer, in the control states during this year's June compared to June last year.
- June 2018 had five Fridays and four Sundays versus four Fridays and five Sundays this June. On average, Sunday's weekly share of business is 8% whereas Friday's is 22%.

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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

JuneCS Add 1

- Some sales in Ohio made during the period September 2017 through November 2018 were inadvertently underreported and reported in arrears during January 2019. Sales underreported during September 2017 through June 2018 were applied in arrears to June 2018 sales. The applied volume—20,500 nine-liter cases—artificially inflated June 2018's growth rate by 3.8% thereby artificially deflating June 2019's state growth rate. Underreported sales made during the period July through November 2018 did not have significant volumes and were applied in arrears to the months during which the sales were made.
- After equalizing selling day variations between this year's June and last year's, June's nine-liter case spirits growth rate is 0.9% with a rolling-twelve-month trend of 3.4%. June's shelf-dollar growth rate is 3.7% with a rolling-twelve-month trend of 6.4%.
- Equalized price mix for June is 2.8%.

Irish Whiskey, with 2% share of the nine-liter case control states spirits market, was June's fastest growing category with 7.7% reported and a twelve-month trend of 11.8%. Tequila, with 6% share, reported 6.7% growth and a 9.8% twelve-month trend. Vodka, with 35% share, grew during the same periods at -1.4% and 3.0%, respectively. Brandy/Cognac(4.1%) grew at a rate exceeding its twelve-month trend, while Canadian Whiskey(-2.2%), Cocktails(-0.6), Cordials(-1.8%), Domestic Whiskey(2.7%), Gin(-5.8%), Irish Whiskey(7.7%), Rum(-6.0%), Scotch(-4.4%), Tequila(6.7%), and Vodka(-1.4%) grew at rates lagging theirs.

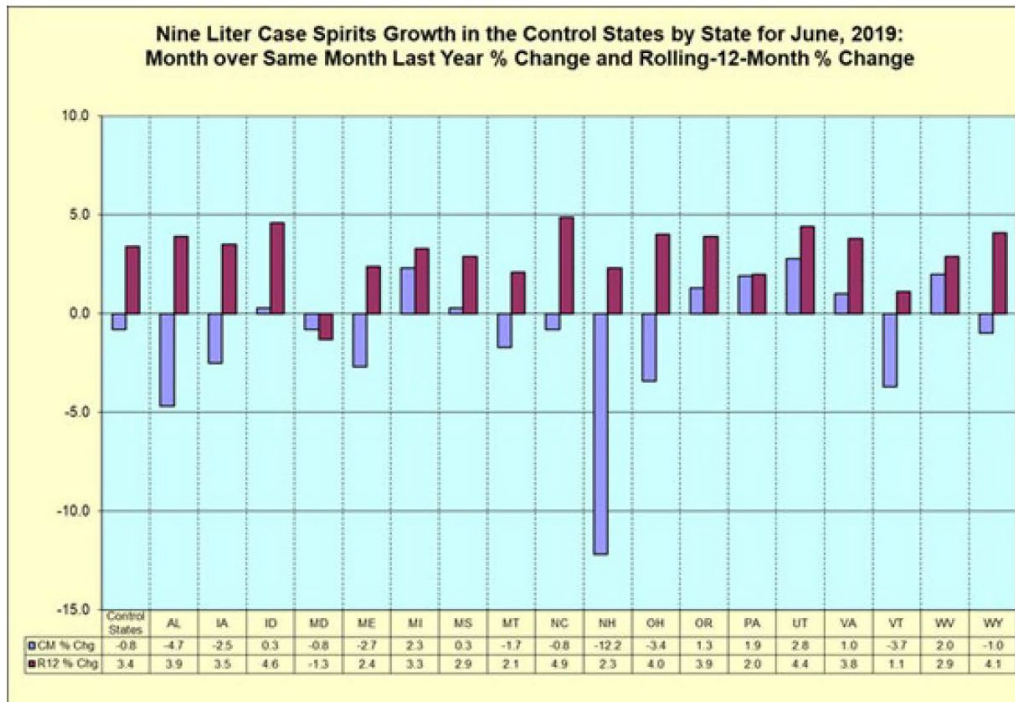
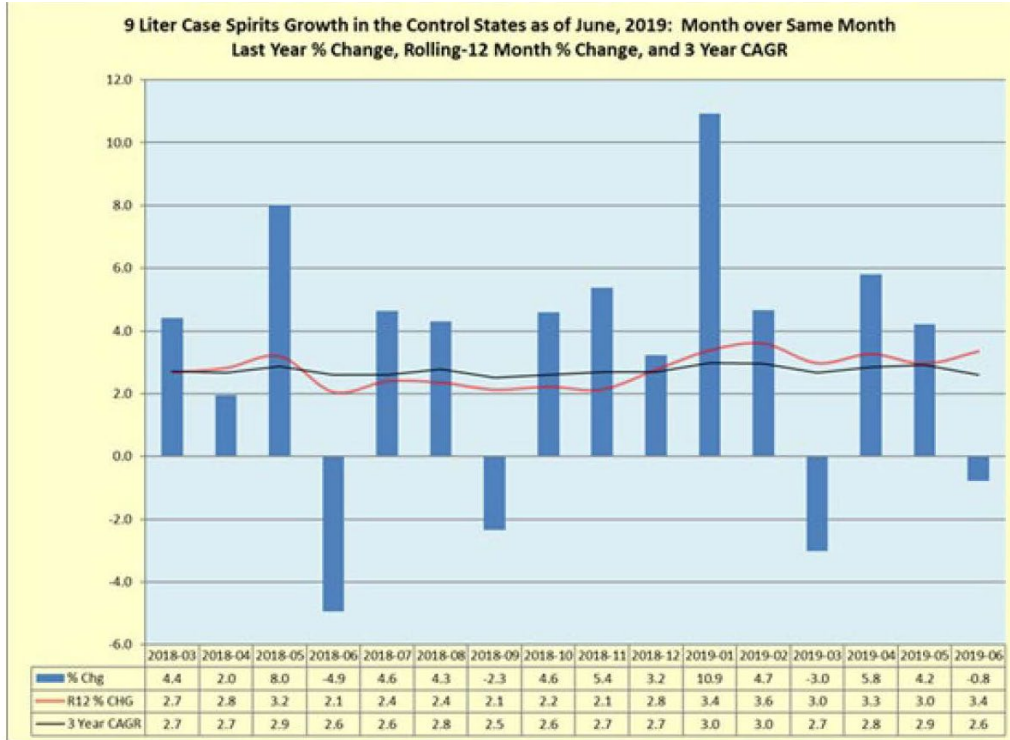
June's nine-liter wine case sales growth rate was -7.1%. Pennsylvania (reporting -3.2% nine-liter case growth for wines), New Hampshire (-20.2%), Utah (1.0%), Mississippi (-6.9%), Montgomery County Maryland (-6.7%), and Wyoming (-5.2%) are the control states that are the sole wholesalers of wines and spirits within their geographical boundaries. Rolling-twelve-month wine volume growth in these six control states was -1.1%, up from May's reported -1.7%.

| | 9L Cases CM % Chg | Shelf \$ CM % Chg | Price/Mix | Control States |
|----------------------|----------------------|----------------------|-----------|------------------------|
| Total Control States | -0.8 | 2.0 | .28% | |
| Central Region | 0.2 | 2.9 | 2.7% | IA, MD, MI, OH, PA, WV |
| NE Region | -8.7 | -4.5 | 4.2% | ME, NH, VT |
| NW Region | 0.8 | 2.1 | 1.3% | ID, MT, OR, UT, WY |
| Southern Region | -0.8 | 2.3 | 3.1% | AL, MS, NC, VA |

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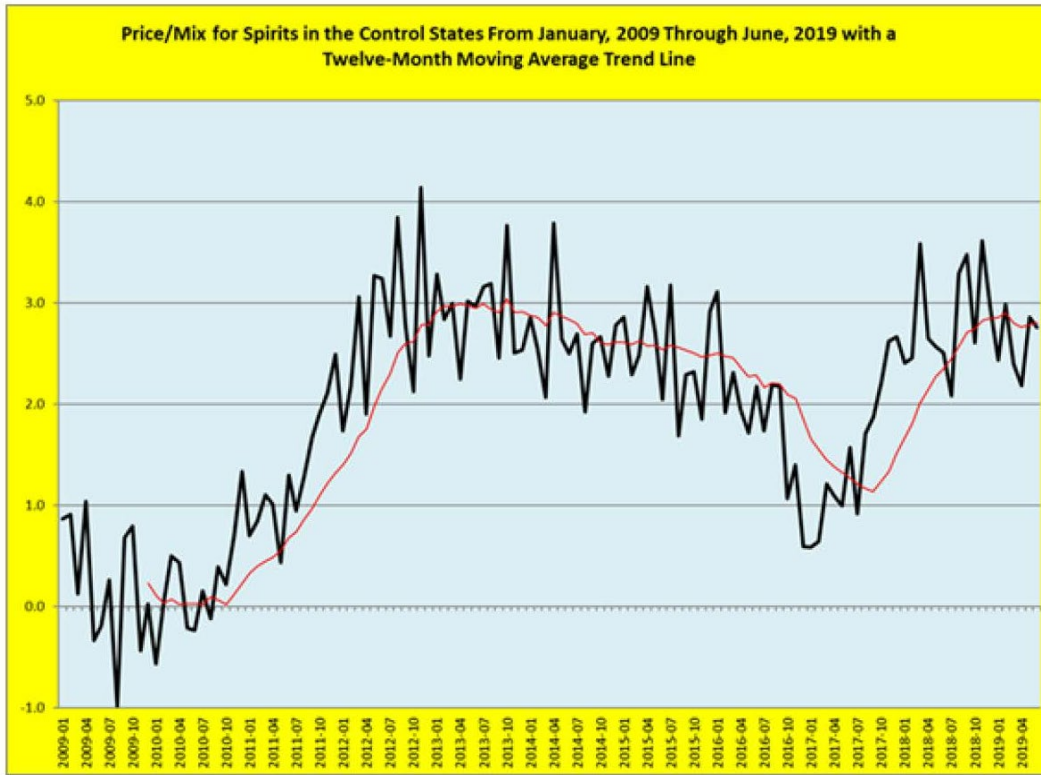
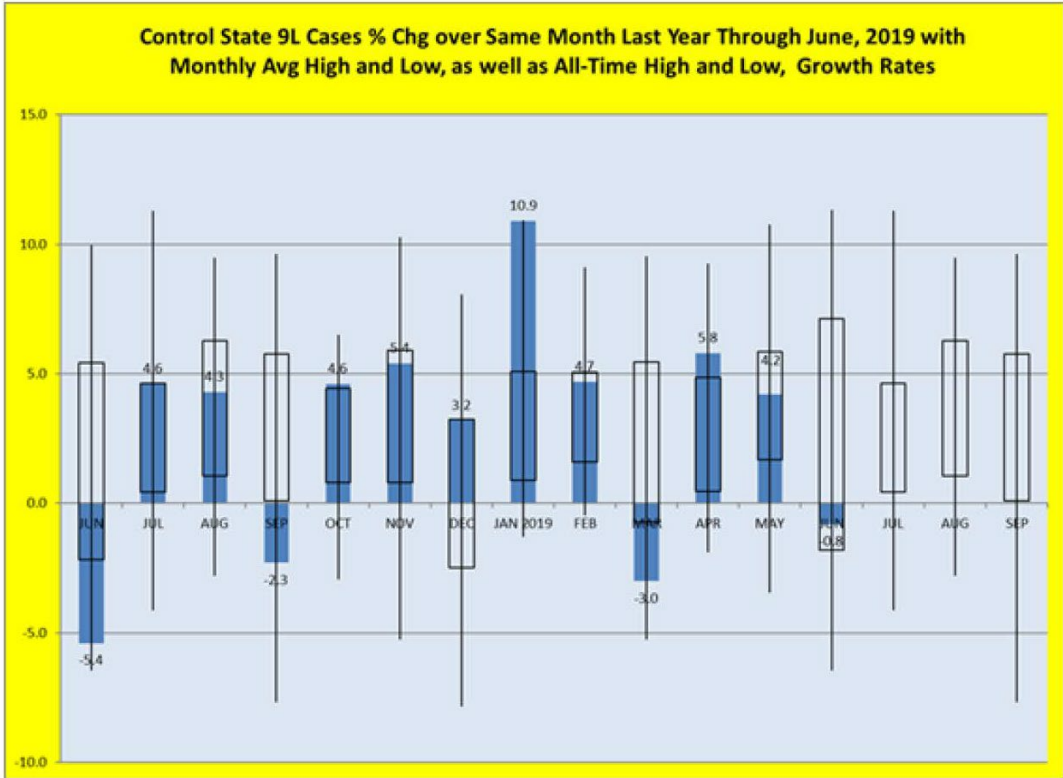
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JuneCS Add 4

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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