



# News Release

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FOR IMMEDIATE RELEASE

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

ARLINGTON, VA (October 1, 2019) — During August, nine-liter control states spirits case sales grew 3.3% over same period sales last year opposite a 4.3% comp. Alabama(3.7%), Idaho(6.8%), Montgomery County Maryland(3.7%), New Hampshire(23.4%), North Carolina(8.2%), Ohio(4.8%), Oregon(5.2%), Pennsylvania(3.2%), Utah(6.0%), Vermont(2.6%), and Virginia(6.0%) reported monthly growth rates for August that exceeded their twelve-month trends, while Iowa(-8.3%), Maine(-0.6%), Michigan(-4.1%) Mississippi(0.5%), Montana(-0.8%), West Virginia(2.7%), and Wyoming(1.8%) grew at rates that fell short of their twelve-month trends. Control state rolling-twelve-month volume growth, 3.4%, slipped slightly from July's reported 3.5%. Spirits volumes grew 3.7% year-to-date compared to 2.7% a year ago.

Control state spirits shelf dollars grew at 5.7% during August while trending at 6.3% during the past twelve months. Alabama(6.6%), Idaho(8.4%), Montgomery County Maryland(6.1%), New Hampshire(22.2%), North Carolina(12.9%), Ohio(7.9%), Oregon(8.3%), Pennsylvania(5.1%), Utah(7.6%), Vermont(6.7%), and Virginia(8.5%) grew shelf dollars during August at rates exceeding their twelve-month trends. Iowa(-6.8%), Maine(1.8%), Michigan(-2.1%) Mississippi(4.9%), Montana(1.5%), West Virginia(3.1%), and Wyoming(-3.4%) 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 5.5% a year ago.

Price/Mix for August is 2.4%, nearly flat with July's 2.3%.

August's growth rate was effected by calendar related reporting anomalies in the control states.

- 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 August compared to last year's.
- New Hampshire reported five weeks of sales this August compared to four weeks last year, artificially inflating sales and skewing state results. New Hampshire's stores had seven more selling days during August this year compared to last year.
- On net, there were eleven additional selling days during August in the control states, 2.0% more, compared to last year's August.
- Seven control states are wholesale only, i.e., they have no state stores or agencies and the stores in their jurisdictions are independently owned. These wholesale states ship to stores Monday through Friday, although some states ship fewer than five times per week. NABCA reports shipments from the warehouses for these states. This August's calendar had twenty-two weekdays compared to twenty-three last year, 4.3%

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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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fewer. As a result, every wholesale only state’s August growth rates for nine-liter cases and dollars lagged their twelve-month trends, while, possibly coincidentally, every wholesales and retail state’s August growth rates exceeded their twelve-month trends. The wholesale only control states are: Iowa, Maine, Michigan, Mississippi, Montana, West Virginia, and Wyoming.

- After equalizing selling day variations between this year’s August and last year’s, August’s nine-liter case spirits growth rate is 2.2% with a rolling-twelve-month trend of 3.4%. August’s shelf-dollar growth rate is 4.9% with a rolling-twelve-month trend of 6.4%.

- Equalized price mix for August is 2.7%.

Cocktails, with 2% share of the nine-liter case control states spirits market, was August’s fastest growing category with 18.0% reported and a twelve-month trend of 7.9%. Tequila, with 6% share, reported 11.1% growth and a 10.0% twelve-month trend. Vodka, with 34% share, grew during the same periods at 2.1% and 2.8%, respectively. Cocktails(18.0%, 7.9%), Cordials(2.7%, 2.2%), Gin(0.0%, -0.3%), Scotch(0.4%, 0.2%), and Tequila(11.1%, 10.0%) grew at rates exceeding their twelve-month trends, while Brandy/Cognac(3.4%, 3.6%), Canadian Whiskey(2.6%, 3.1%), Domestic Whiskey(5.5%, 5.9%), Irish Whiskey(7.8%, 10.6%), Rum(-0.8%, -0.2%), and Vodka(2.1%, 2.8%) grew at monthly rates lagging their twelve-month trends.

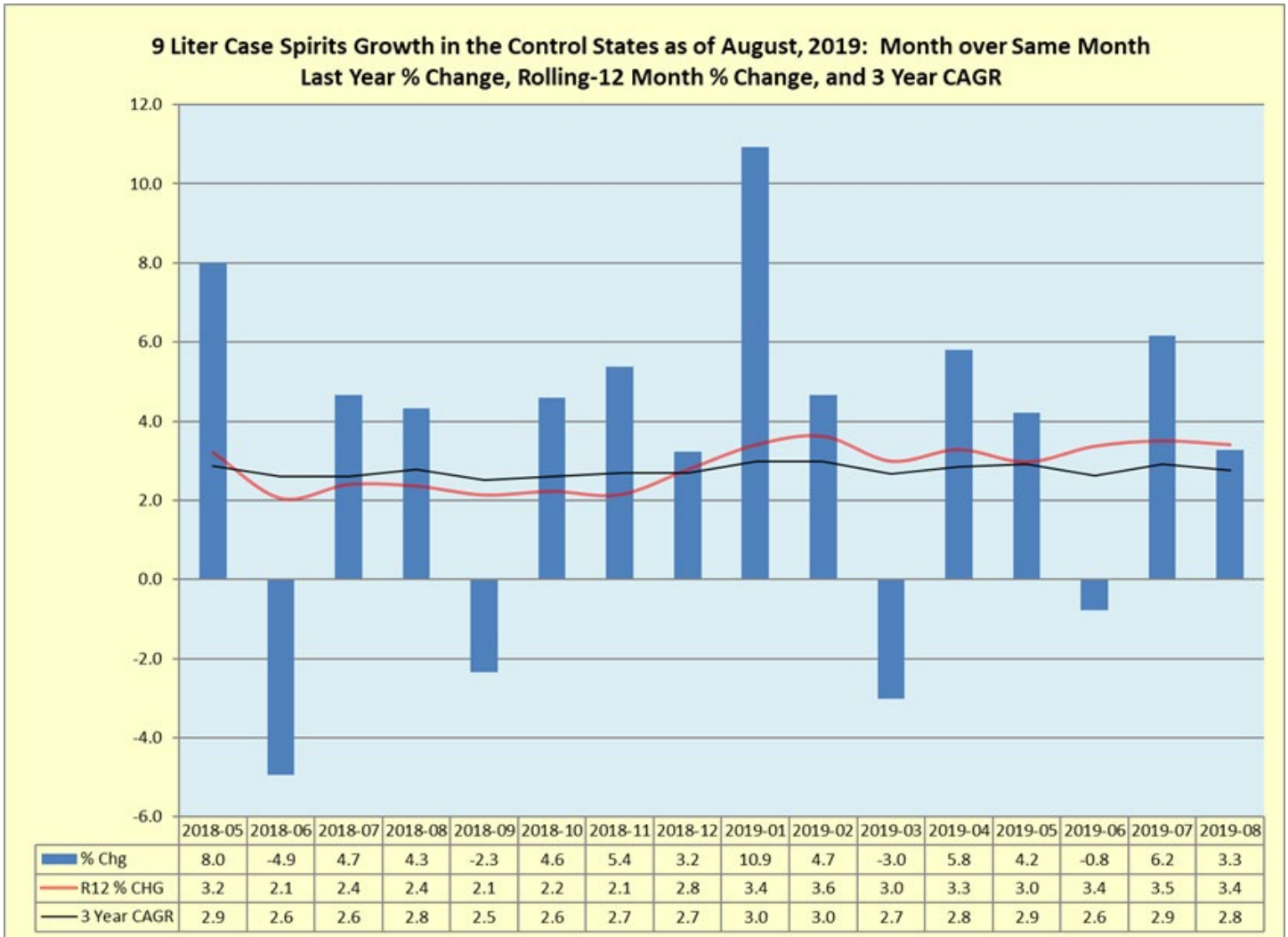
August’s nine-liter wine case sales growth rate was flat. Pennsylvania (reporting -3.2% nine-liter case growth for wines), New Hampshire (17.2%), Utah (-0.6%), Mississippi (-5.4.4%), Montgomery County Maryland (-5.3%), and Wyoming (-6.9%) are the control states that are the sole wholesalers of wines and spirits within their geographical boundaries. Rolling-twelve-month wine volume growth in these six control states is -1.8%, slightly improved over July’s reported -1.9%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	3.3	5.7	2.4%	
Central Region	0.0	2.3	2.3%	IA, MD, MI, OH, PA, WV
NE Region	12.7	13.2	0.5%	ME, NH, VT
NW Region	4.6	6.6	2.0%	ID, MT, OR, UT, WY
Southern Region	5.8	9.5	3.7%	AL, MS, NC, VA

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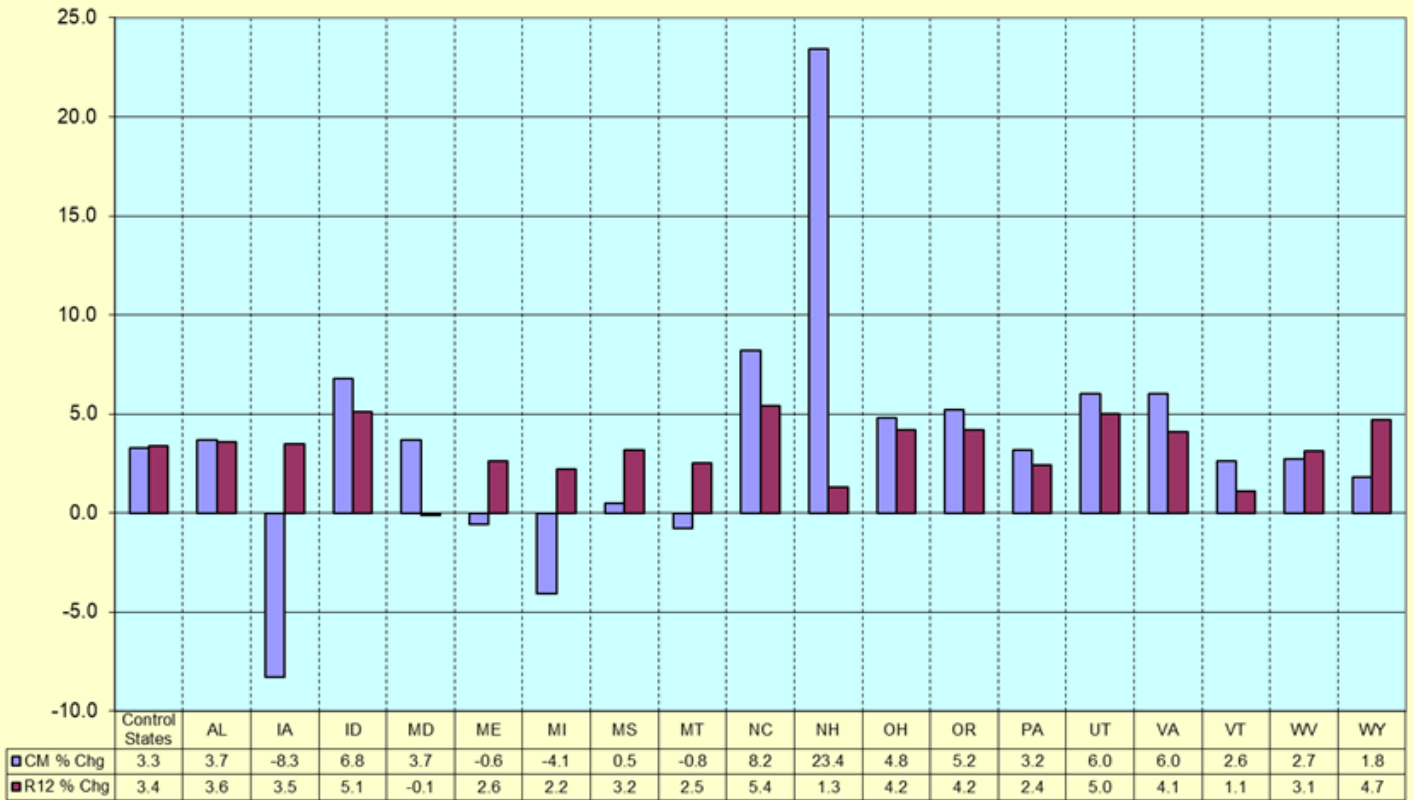


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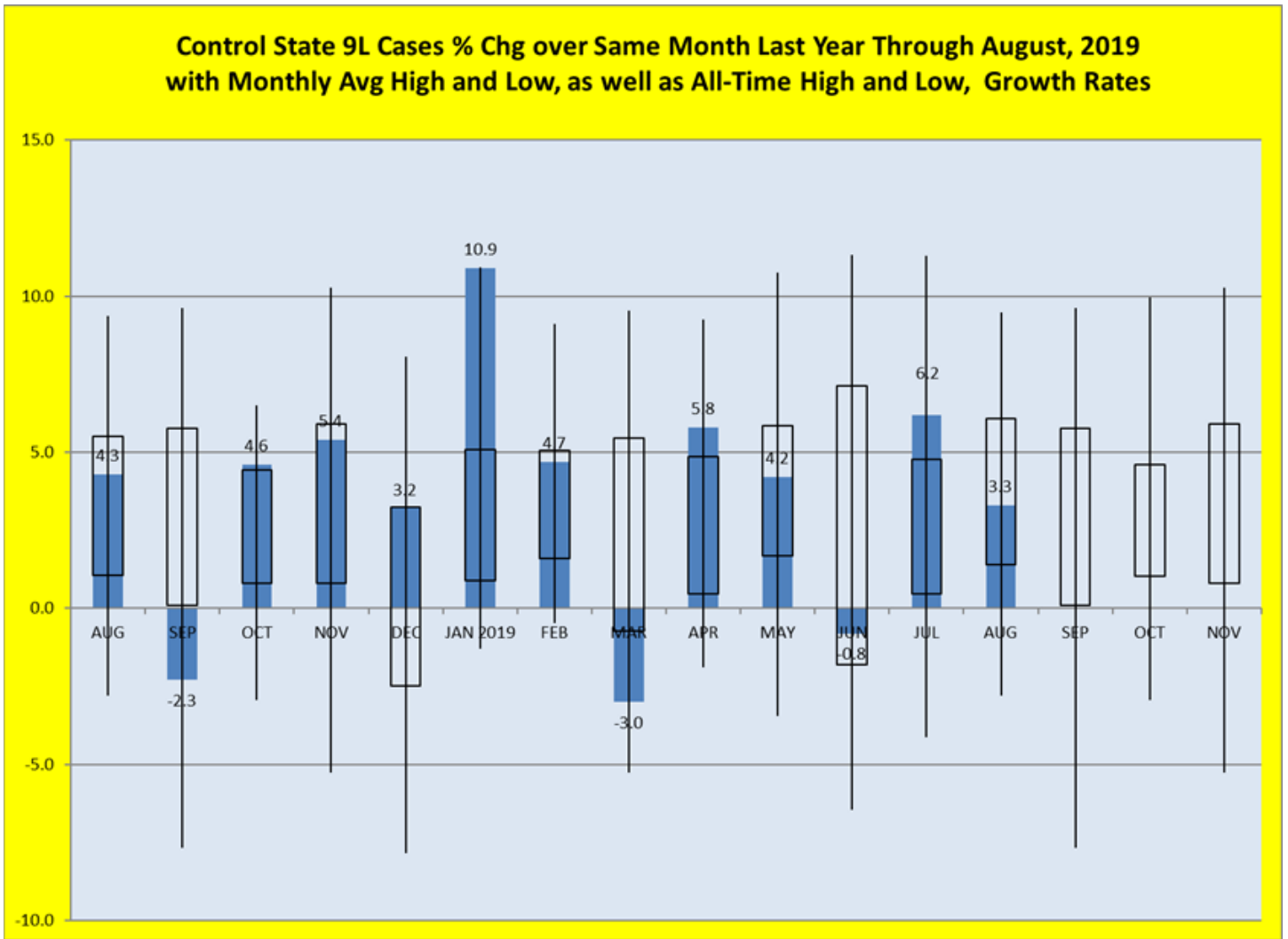
**Nine Liter Case Spirits Growth in the Control States by State for August, 2019:  
Month over Same Month Last Year % Change and Rolling-12-Month % Change**



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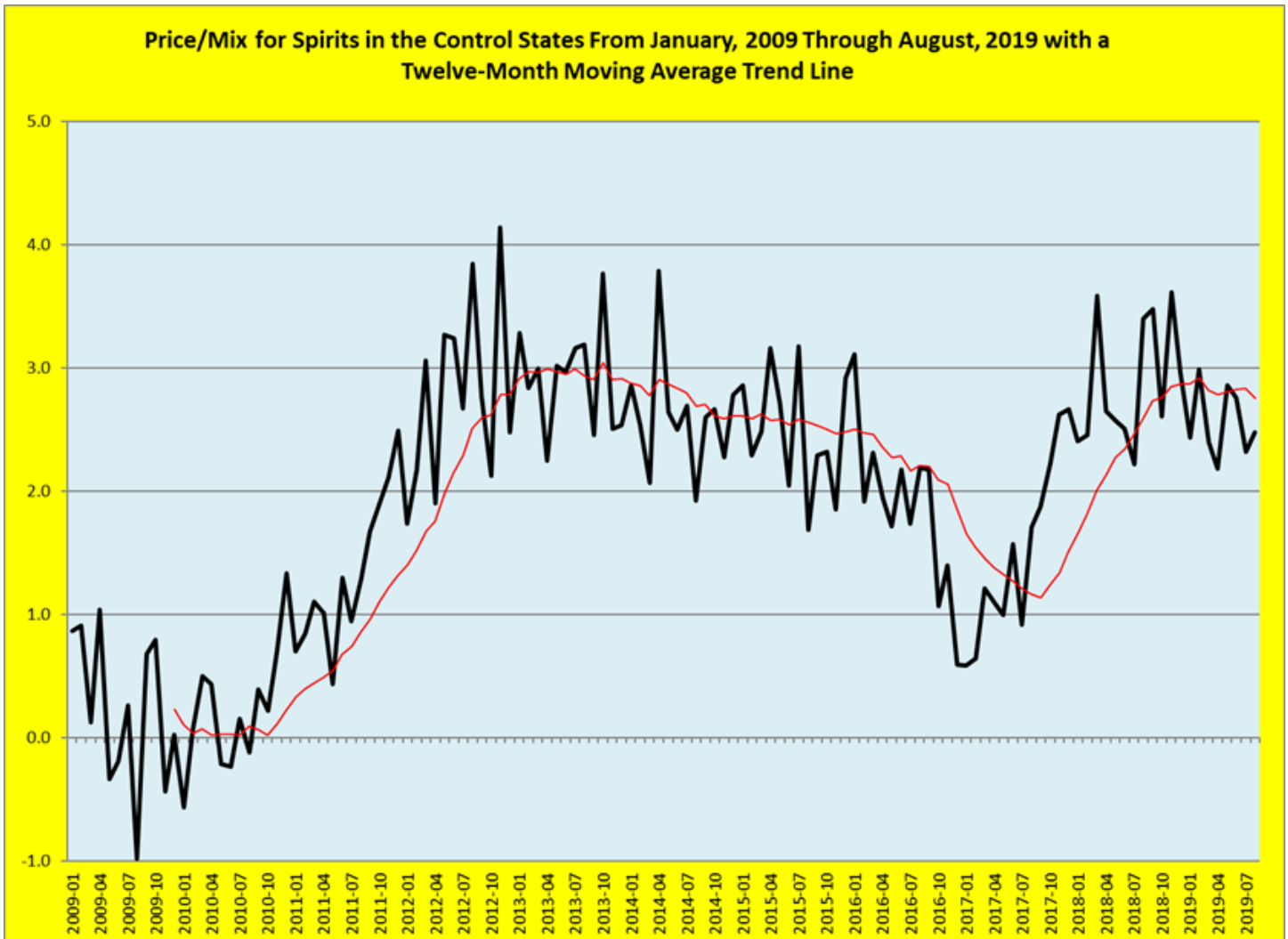
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For more information about the NABCA, visit [www.nabca.org](http://www.nabca.org).

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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 Arlington, 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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