



News Release

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FOR IMMEDIATE RELEASE

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

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

ARLINGTON, VA (October 23, 2019) — During September, nine-liter control states spirits case sales grew 4.9% over same period sales last year opposite a weak comp. Iowa(13.7%), Montgomery County Maryland(0.8%), Maine(4.5%), Michigan(5.0%), Mississippi(10.3%), Montana(12.8%), Pennsylvania(3.7%), Utah(13.9%), West Virginia(87.9%), and Wyoming(16.5%) reported monthly growth rates for September that exceeded their twelve-month trends, while Alabama(3.8%), Idaho(2.9%), New Hampshire(-5.4%), North Carolina(0.3%), Ohio(2.8%), Oregon(2.0%), Vermont(1.8%), and Virginia(0.2%) grew at rates that fell short of their twelve-month trends. Control state rolling-twelve-month volume growth, 4.0%, improved upon August's reported 3.4%. Spirits volumes are growing 3.8% year-to-date compared to 2.2% a year ago.

Control state spirits shelf dollars grew at 6.1% during September while trending at 6.7% during the past twelve months. Iowa(17.9%), Montgomery County Maryland(3.4%), Maine(7.2%), Michigan(6.5%) Mississippi(17.2%), Montana(16.2%), Utah(11.6%), and West Virginia(100.5%) grew shelf dollars during September at rates exceeding their twelve-month trends. Alabama(6.3%), Idaho(4.5%), New Hampshire(-12.8%), North Carolina(3.8%), Ohio(5.5%), Oregon(3.4%), Pennsylvania(4.3%), Vermont(4.3%), Virginia(4.5%), and Wyoming(5.4%) grew shelf dollars at rates lagging their twelve-month trends. Shelf dollars in the control states are up 6.3% year-to-date compared to 5.0% a year ago.

Price/Mix for September is 1.2%, down from August's reported 2.4%.

September'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 five additional selling days during this year's September compared to last year's.
- On net, there were six additional selling days during September in the control states, 1.2% more, compared to last year's September.

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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

- During September, the West Virginia Alcohol Beverage Control Administration hosts a distilled spirits industry trade show for the state's liquor retailers. Last September the show was held late in September and trade show sales were booked in October. This year, however, sales from the trade show were booked during September, and the state's sales are artificially inflated, and its growth rate is skewed. Note that October's growth rate will have a comp with trade show sales and its growth rate will be artificially deflated.
- 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 control states ship to stores Monday through Friday. When reporting sales, NABCA reports warehouse shipments for these states. This September's calendar had twenty weekdays, excluding Labor Day, compared to nineteen last year, 5.3% more. Every wholesale-only state's September nine liter case growth rate exceeded its twelve-month trend. The wholesale-only control states that report calendar month sales are: Iowa, Maine, Mississippi, Montana, West Virginia, and Wyoming. Michigan is also wholesale-only but reports warehouse depletions based upon a 4-5-4 week fiscal calendar.
- After equalizing selling day variations between this year's September and last year's, September's nine-liter case spirits growth rate is 4.1% with a rolling-twelve-month trend of 4.0%. September's shelf-dollar growth rate is 5.4% with a rolling-twelve-month trend of 6.8%.
- Equalized price mix for September is 1.3%.

Cocktails, with 2% share of the nine-liter case control states spirits market, was September's fastest growing category with 25.8% reported and a twelve-month trend of 9.4%. Tequila, with 7% share, reported 12.5% growth and a 10.7% twelve-month trend. Vodka, with 35% share, grew during the same periods at 4.2% and 3.3%, respectively. Canadian Whiskey(6.6%, 4.0%), Cocktails(25.8%, 9.4%), Cordials(6.0%, 2.9%), Domestic Whiskey(7.6%, 6.6%), Gin(0.4%, 0.1%), Rum(0.8%, 0.3%), Tequila(12.5%, 10.7%), and Vodka(4.2%, 3.3%) grew at rates exceeding their twelve-month trends, while Brandy/Cognac(-4.3%, 2.9%), Irish Whiskey(6.9%, 10.9%), and Scotch(0.4%, 0.8%) grew at monthly rates lagging their twelve-month trends.

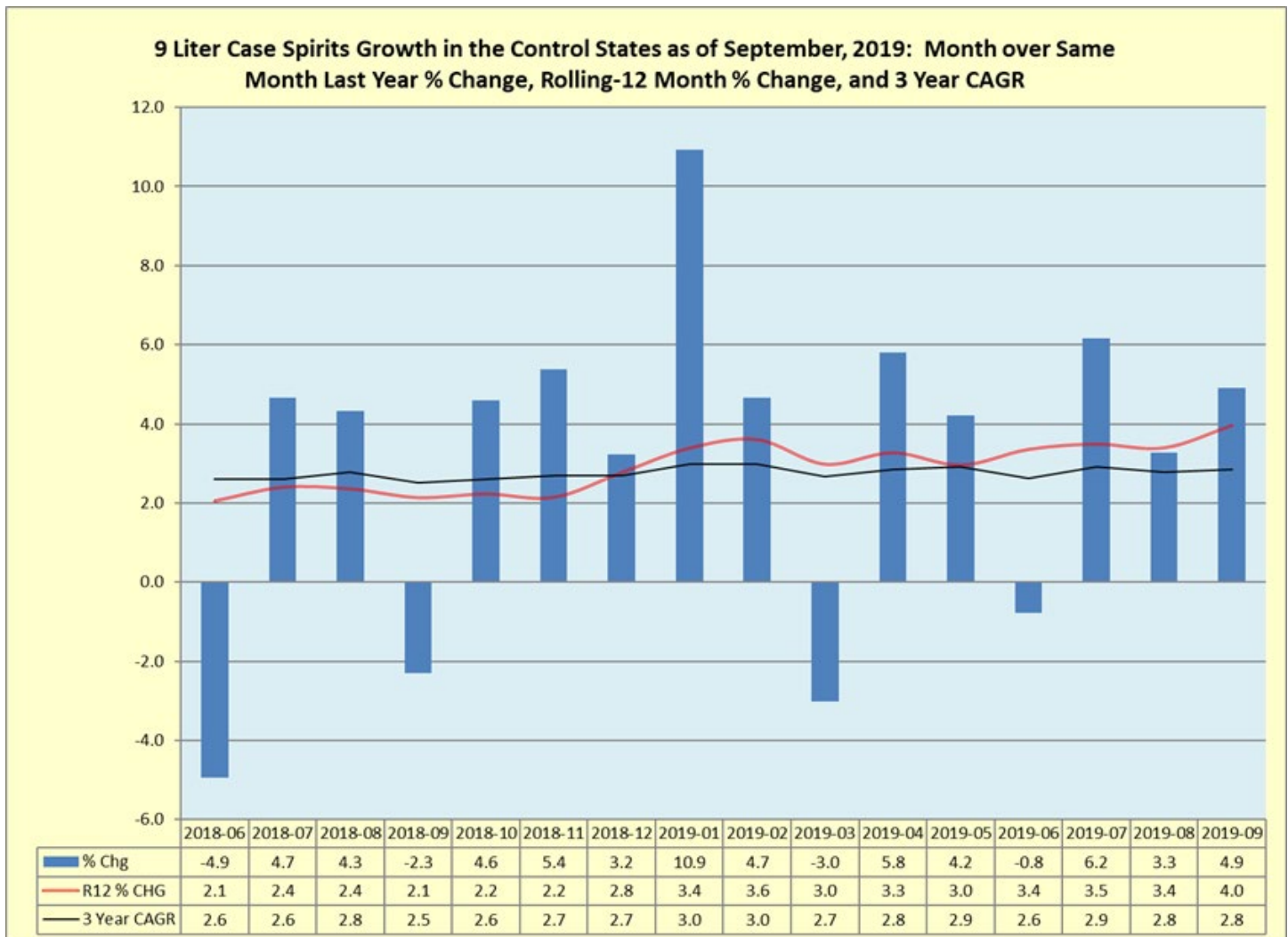
September's nine-liter wine case sales growth was -0.7%. Pennsylvania (reporting -1.9% nine-liter case growth for wines), New Hampshire (-1.1%), Utah (1.2%), Mississippi (5.4%), Montgomery County Maryland (-2.0%), and Wyoming (8.1%) are the control states that are the sole wholesalers of wines and spirits within their geographical boundaries. Rolling-twelve-month wine volume growth in these six control states is -1.6%, slightly improved over August's reported -1.8%.

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	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	4.9	6.1	1.2%	
Central Region	7.0	8.1	1.1%	IA, MD, MI, OH, PA, WV
NE Region	-1.9	-5.4	-3.5%	ME, NH, VT
NW Region	6.6	6.4	-0.2%	ID, MT, OR, UT, WY
Southern Region	2.6	5.6	3.0%	AL, MS, NC, VA

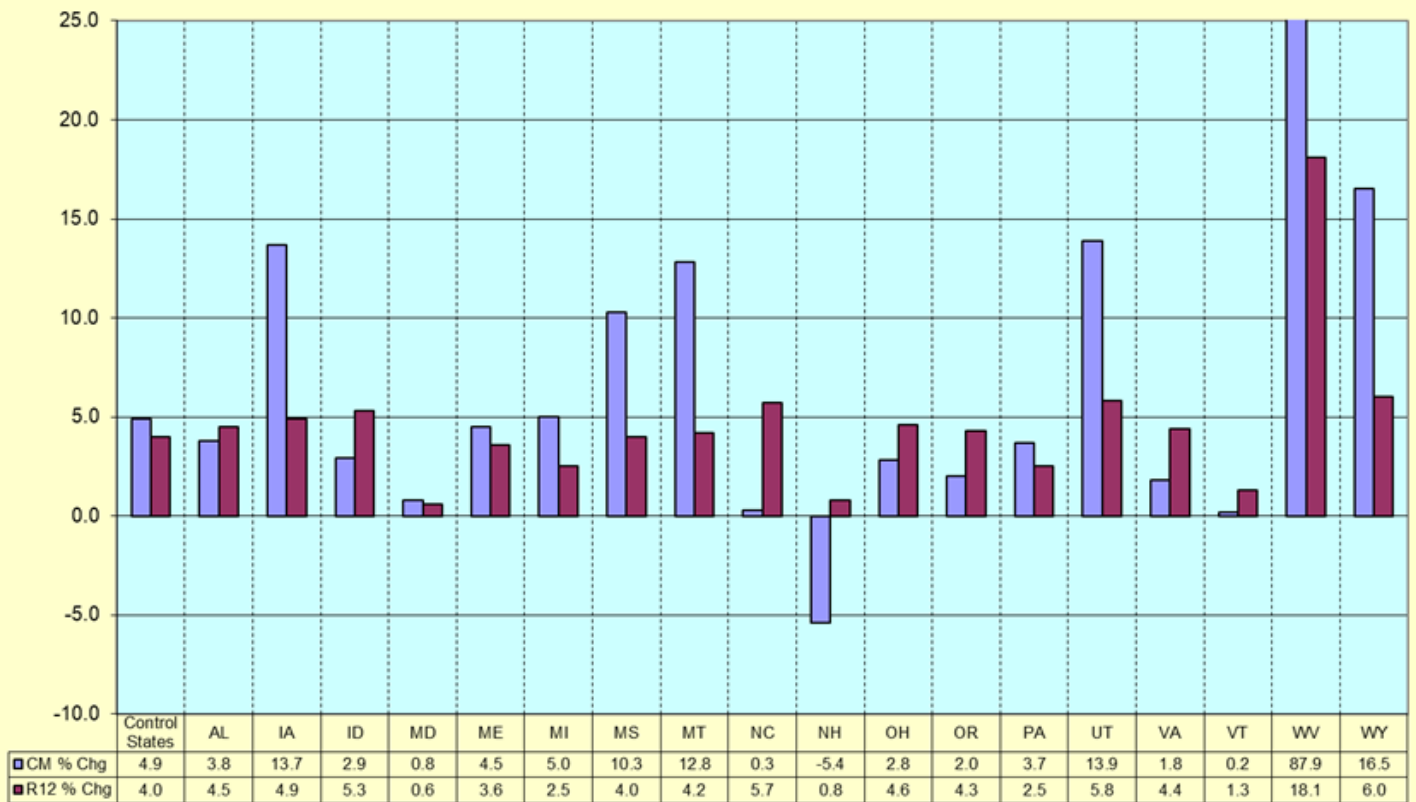


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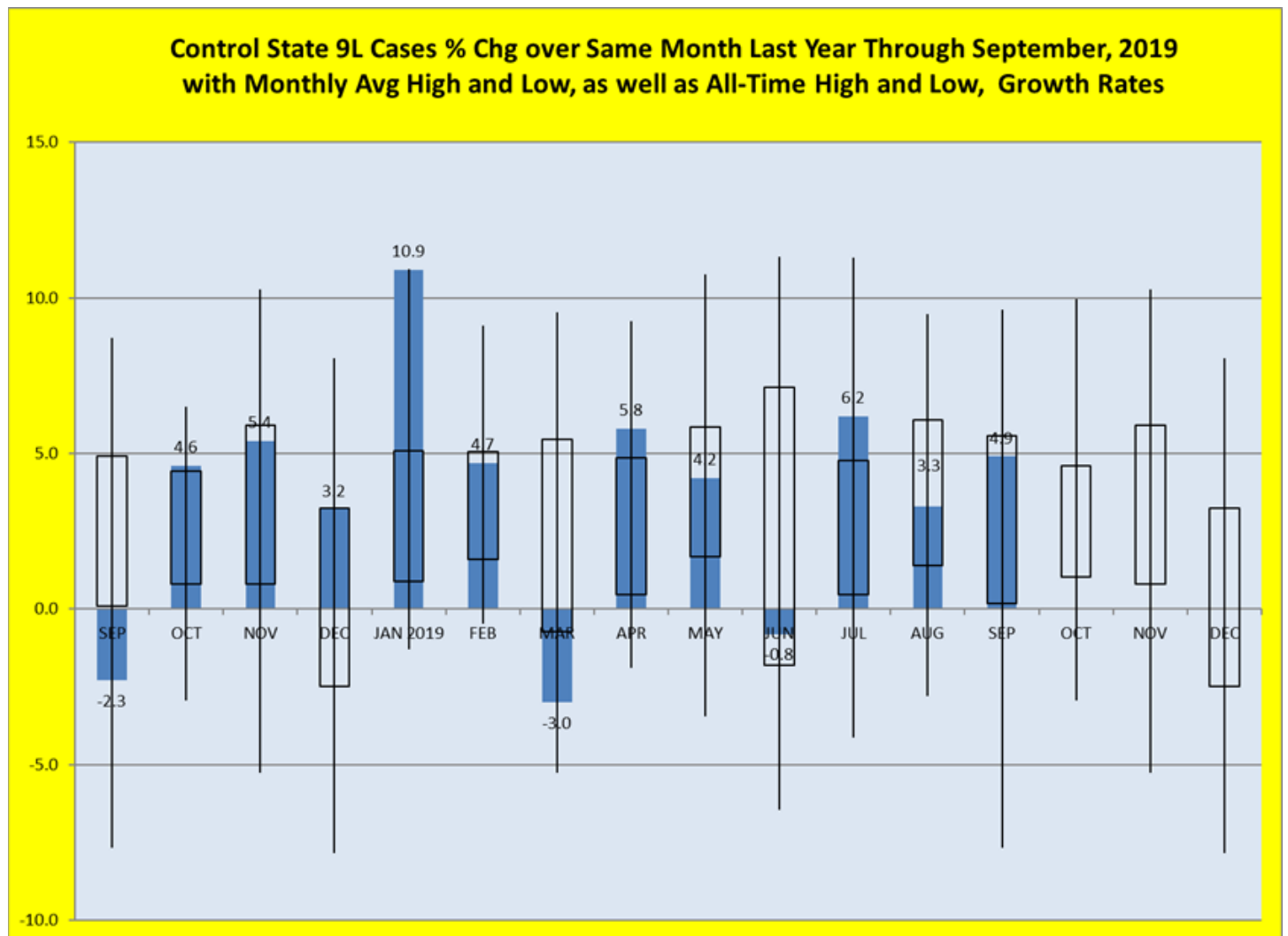
Nine Liter Case Spirits Growth in the Control States by State for September, 2019: Month over Same Month Last Year % Change and Rolling-12-Month % Change



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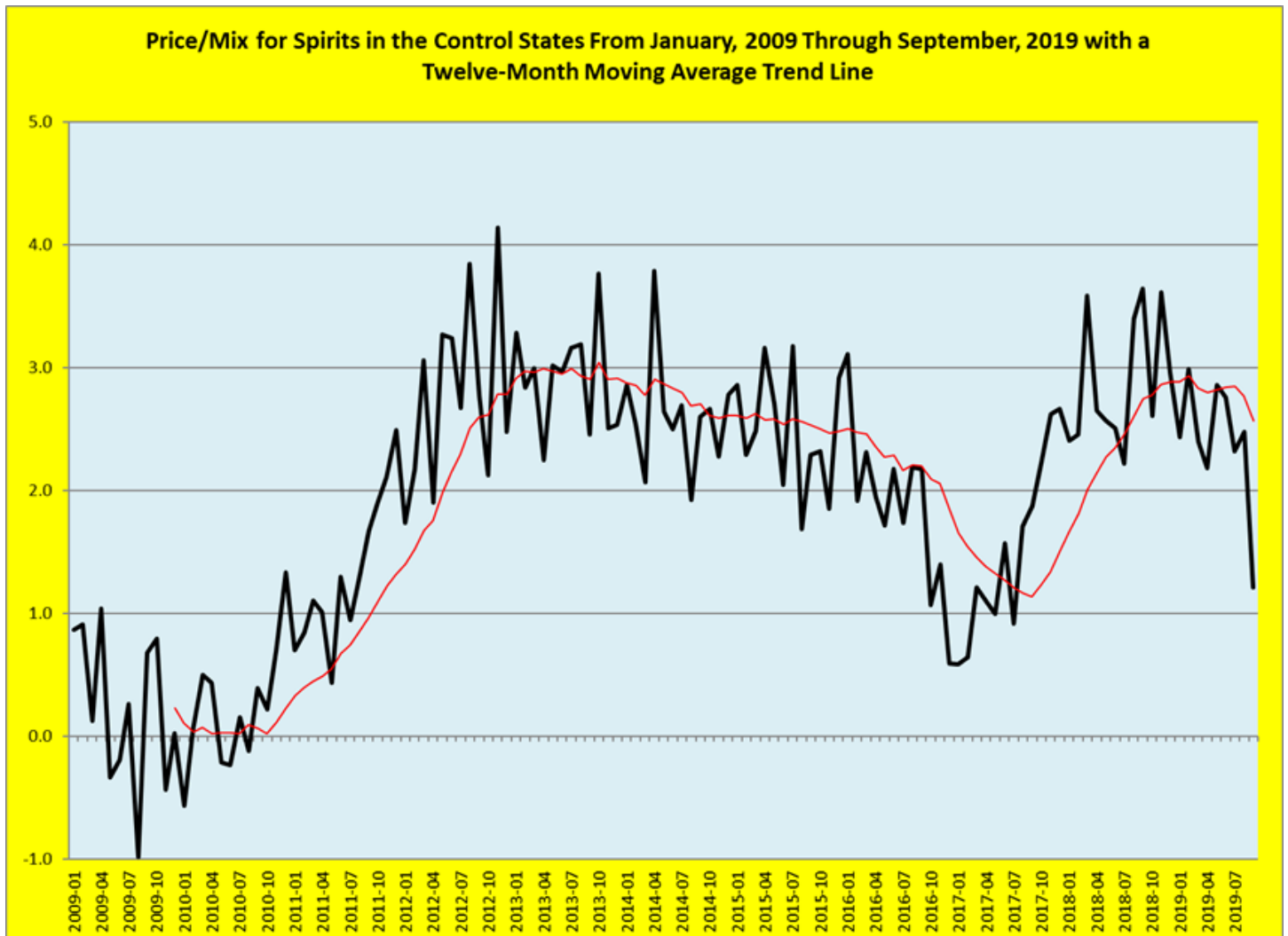
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For more information about the NABCA, visit www.nabca.org.

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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 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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