



News Release

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FOR IMMEDIATE RELEASE

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

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

ARLINGTON, VA (November 27, 2019) — During October, nine-liter control states spirits case sales grew 3.0% over same period sales last year opposite a modestly strong comp. Alabama(4.5%), Idaho(6.1%), Montgomery County Maryland(5.8%), Maine(7.0%), Michigan(3.6%), Montana(13.0%), North Carolina(5.6%), Ohio(5.4%), Oregon(5.3%), Pennsylvania(3.2%), Utah(38.0%), Vermont(3.2%), and Virginia(7.1%) reported monthly growth rates for October that exceeded their twelve-month trends, while Iowa(0.1%), Mississippi(3.5%), New Hampshire(-20.9%), West Virginia(-46.0%), and Wyoming(5.2%) grew at rates that fell short of their twelve-month trends. Control state rolling-twelve-month volume growth, 3.8%, slipped from September's reported 4.0%. Spirits volumes are growing 3.7% year-to-date compared to 2.5% a year ago.

Control state spirits shelf dollars grew at 5.5% during October while trending at 6.5% during the past twelve months. Alabama(7.4%), Idaho(8.8%), Montgomery County Maryland(10.3%), Maine(8.1%), Montana(16.8%), Ohio(9.1%), Oregon(8.1%), Utah(36.2%), Vermont(6.6%), and Virginia(11.3%) grew shelf dollars during October at rates exceeding their twelve-month trends. Iowa(-0.4%), Michigan(3.8%), Mississippi(4.8%), New Hampshire(-18.5%), North Carolina(9.1%), Pennsylvania(4.4%), West Virginia(-47.7%), and Wyoming(8.8%) 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 5.3% a year ago.

Price/Mix for October is 2.5%, improving upon September's reported 1.2%.

October's growth rate was affected by calendar related and administrative reporting anomalies in the control states.

- **Michigan, with 15% of control state nine-liter case volume, reported five weeks of sales this October compared to four last October, artificially inflating sales and skewing control state results. Michigan had six additional selling days during this year's October.**

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- During H2 2019, a major Authorized Distribution Agent in Michigan moved some of its warehouse facilities, modified its technological infrastructure and redesigned its delivery routes. That these enhancements were made effected the nine-liter case and retail dollar growth rates reported by Michigan for October.
It is possible that Michigan may restate results after an audit has been completed.
- New Hampshire, with 5% of control state nine-liter case volume, reported four weeks of sales this October compared to five last October, artificially deflating sales and skewing control state results. New Hampshire had seven fewer selling days during this year's October.
- Utah, with 3% of the control state nine-liter case volume, reported five weeks of sales this October compared to four last October, artificially inflating sales and skewing control state results. Utah had six additional selling days during this year's October.
- On net, there were nine additional selling days during October in the control states, 1.7% more, compared to last year's October.
- 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 October compared to last year's.
- During September, the West Virginia Alcohol Beverage Control Administration hosts a distilled spirits industry trade show for the state's liquor retailers. Last year the show was held late in September and trade show sales were booked in October 2018. This year, however, sales from the trade show were booked during September, inflating September's growth rate. October this year has a comp with trade show sales and its growth rate is artificially deflated.
- During October, several North Carolina boards were hacked and the transmission to NABCA of daily on-premise and off-premise data was interrupted. The transmission of the sales data from which this report is created was not affected.
- After equalizing selling day variations between this year's October and last year's, October's nine-liter case spirits growth rate is 0.2% with a rolling-twelve-month trend of 3.6%. October's shelf-dollar growth rate is 2.4% with a rolling-twelve-month trend of 6.3%.
- Equalized price mix for October is 2.2%.

Cocktails, with 2% share of the nine-liter case control states spirits market, was October's fastest growing category with 17.2% growth reported and a twelve-month trend of 10.1%. Tequila, with 7% share, reported 11.2% growth and a 11.0% twelve-month trend. Vodka, with 34% share, grew during the same periods at 2.6% and 3.2%, respectively. Cocktails(17.2%, 10.1%), Domestic Whiskey(6.9%, 6.5%), and Tequila(11.2%, 8.1%) grew

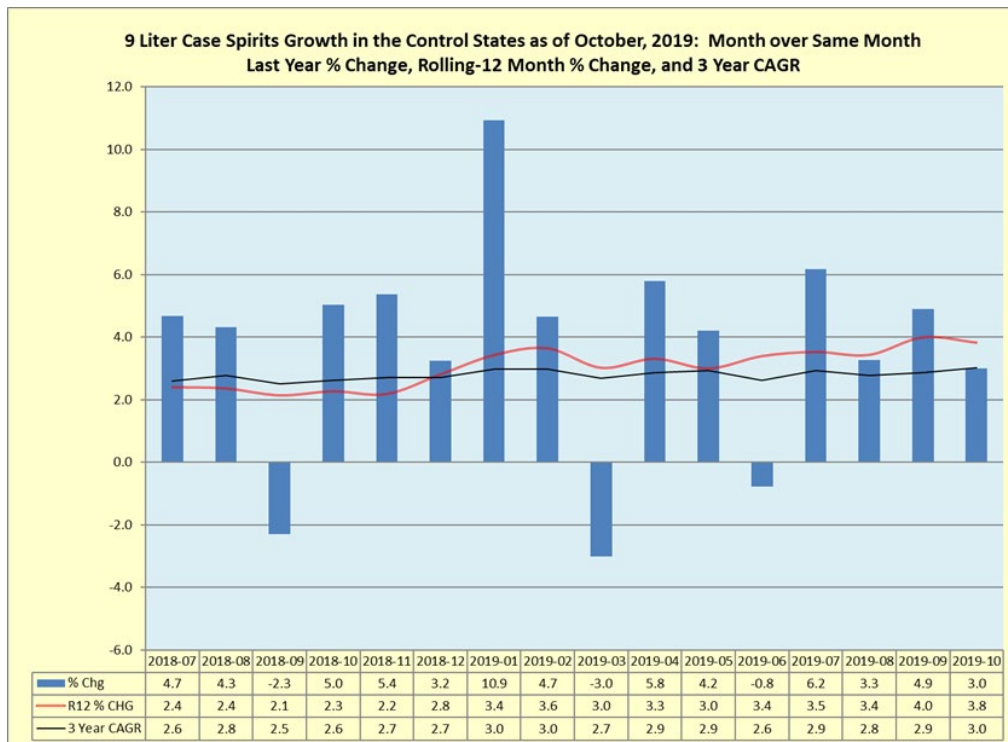
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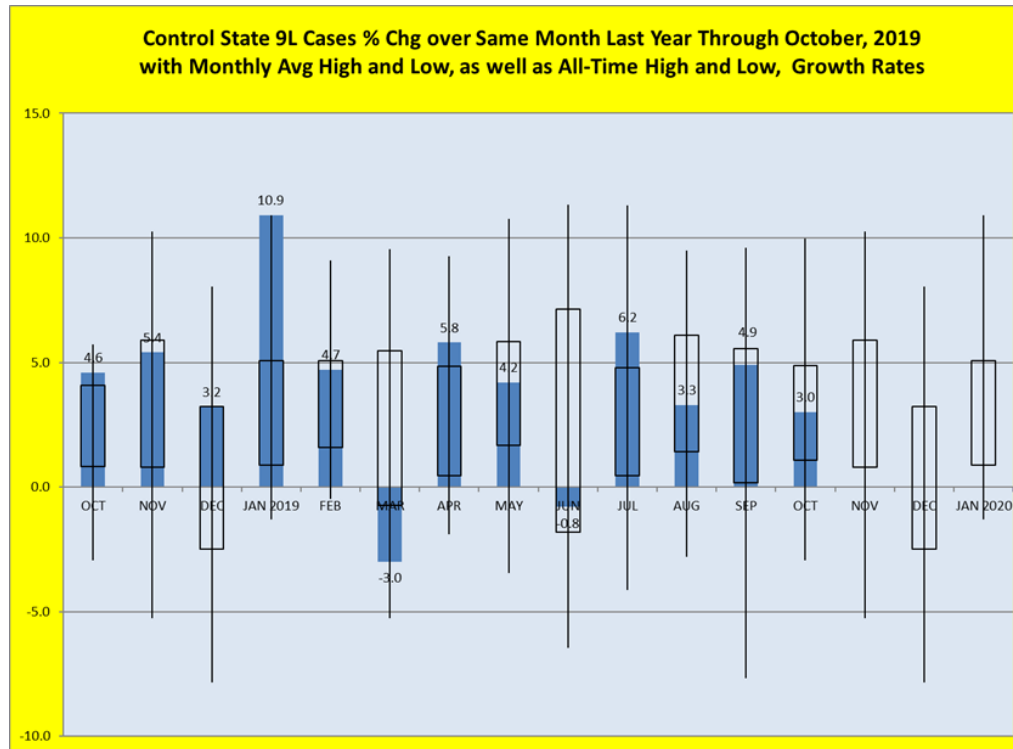
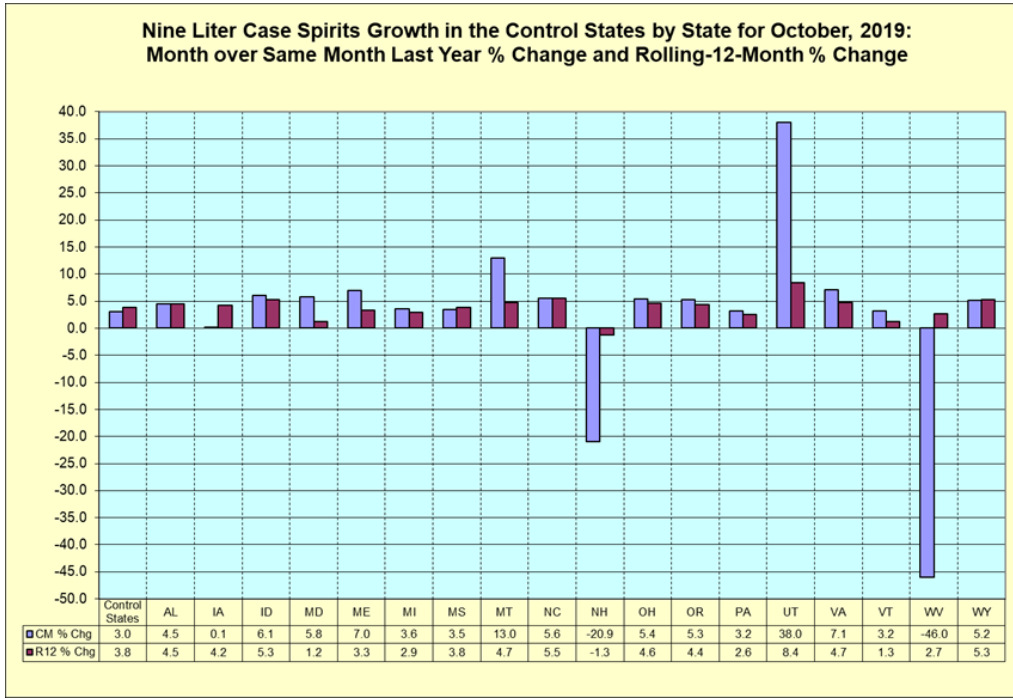
at rates exceeding their twelve-month trends, while Brandy/Cognac(0.8%, 2.7%), Canadian Whiskey(0.9%, 3.5%), Cordials(1.2%, 2.7%), Gin(-0.8%, 0.0%), Irish Whiskey(0.9%, 9.2%), Rum(-0.7%, 0.1%), Scotch(-3.8%, 0.1%), and Vodka(2.6%, 3.2%) grew at monthly rates lagging their twelve-month trends.

October’s nine-liter wine case sales growth was -1.6%. Pennsylvania (reporting -0.5% nine-liter case growth for wines), New Hampshire (-18.5%), Utah (26.4%), Mississippi (5.4%), Montgomery County Maryland (1.1%), and Wyoming (-8.0%) 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%, flat with September’s reported -1.6%.

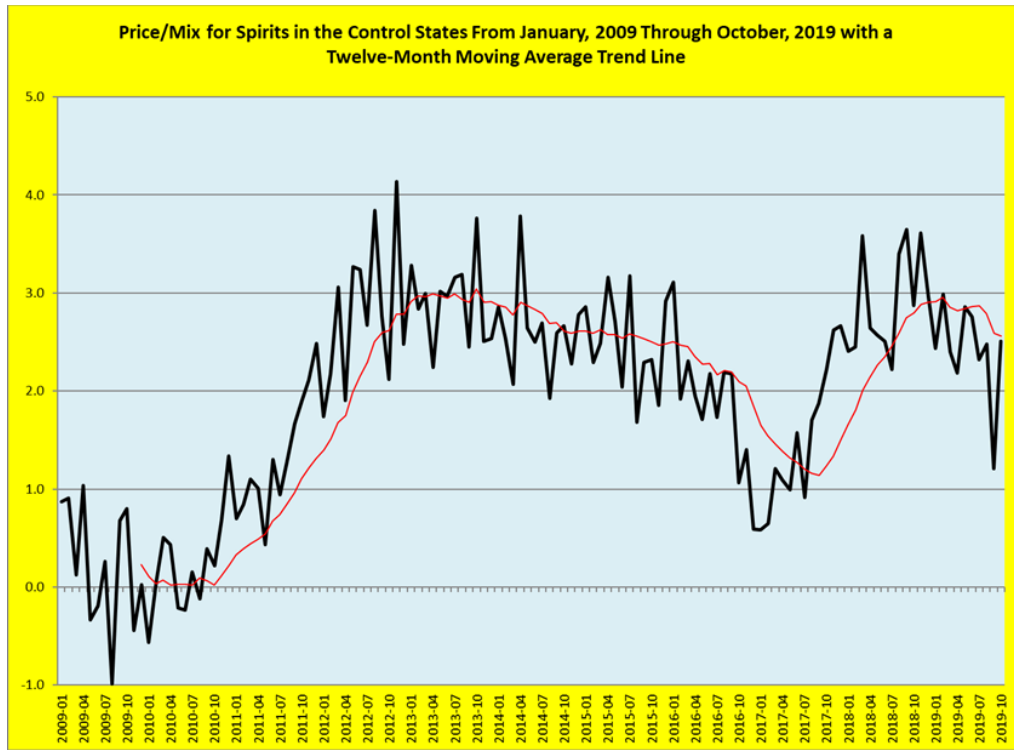
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	3.0	5.5	2.5%	
Central Region	1.0	3.0	2.0%	IA, MD, MI, OH, PA, WV
NE Region	-10.5	-8.0	2.5%	ME, NH, VT
NW Region	11.9	14.0	2.1%	ID, MT, OR, UT, WY
Southern Region	5.6	9.1	3.5%	AL, MS, NC, VA



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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.