



News Release

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FOR IMMEDIATE RELEASE

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

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

ARLINGTON, VA (January 1, 2020) — During November, nine-liter control states spirits case sales grew -0.3% over same period sales last year opposite a strong comp. Idaho(5.0%), Montgomery County Maryland(3.0%), New Hampshire(37.5%), North Carolina(7.2%), Ohio(5.0%), Pennsylvania(4.2%), Vermont(2.4%), and Virginia(7.3%) reported monthly growth rates for November that exceeded their twelve-month trends, while Alabama(2.7%), Iowa(2.9%), Maine(-4.2%), Michigan(-24.8%), Mississippi(-5.0%), Montana(-5.4%), Oregon(4.0%), Utah(-18.4%), West Virginia(-2.5%), and Wyoming(-2.2%) grew at rates that fell short of their twelve-month trends. Control state rolling-twelve-month volume growth, 3.3%, slipped from October's reported 3.8%. Spirits volumes are growing 3.3% year-to-date compared to 2.8% a year ago.

Control state spirits shelf dollars grew at 2.3% during November while trending at 5.9% during the past twelve months. Idaho(7.2%), Montgomery County Maryland(7.0%), New Hampshire(47.9%), North Carolina(11.2%), Ohio(8.5%), Pennsylvania(6.7%), Vermont(5.7%), and Virginia(11.2%) grew shelf dollars during November at rates exceeding their twelve-month trends. Alabama(5.3%), Iowa(5.2%), Maine(-2.7%), Michigan(-23.5%), Mississippi(-3.0%), Montana(-6.9%), Oregon(5.5%), Utah(-15.2%), West Virginia(-3.6%), and Wyoming(-3.4%) grew shelf dollars at rates lagging their twelve-month trends. Shelf dollars in the control states are up 5.9% year-to-date compared to 5.7% a year ago.

Price/Mix for November is 2.6%, nearly flat with October's reported 2.5%.

November's growth rate was affected by calendar related anomalies in the control states.

- **Michigan, with 15% of control state nine-liter case volume, reported four weeks of sales this November compared to five last November, artificially deflating sales and skewing control state results. Michigan had seven fewer selling days during this year's November.**
- **New Hampshire, with 5% of control state nine-liter case volume, reported five weeks of sales this November compared to four last November, artificially inflating sales and skewing control state results. New Hampshire had seven more selling days during this year's November.**

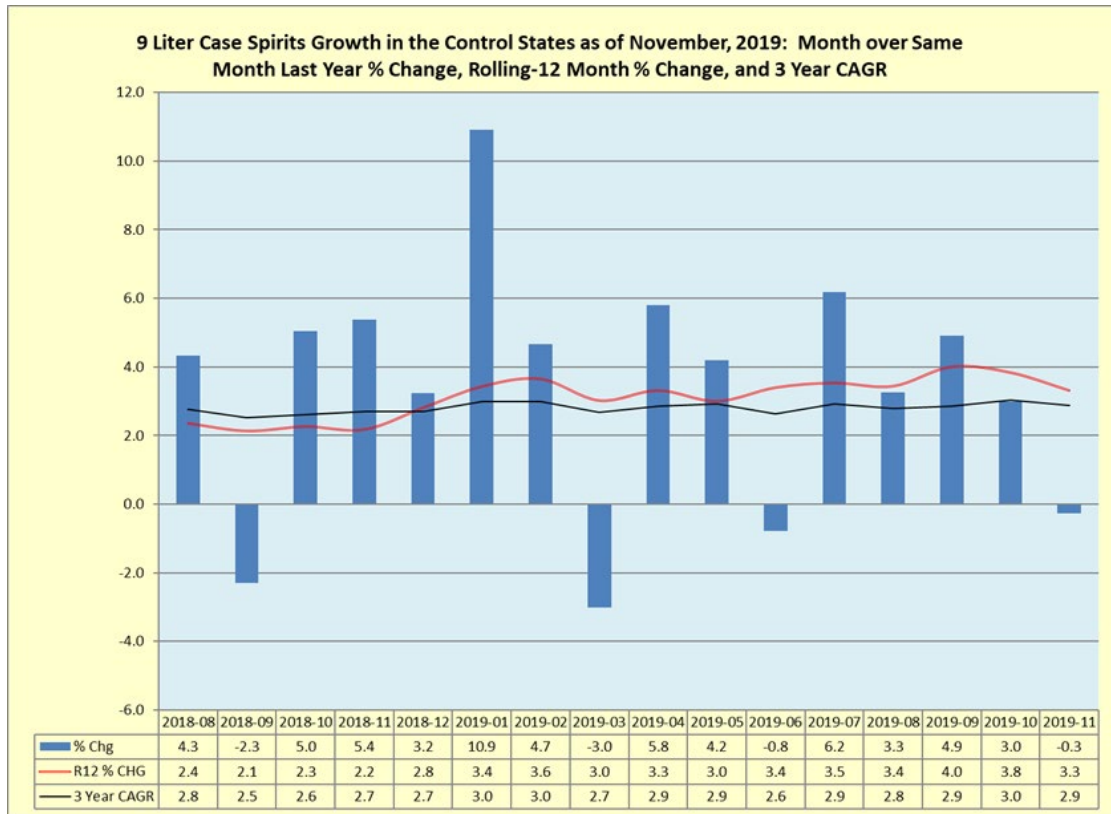
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- Utah, with 3% of the control state nine-liter case volume, reported four weeks of sales this November compared to five last November, artificially deflating sales and skewing control state results. Utah had six fewer selling days during this year's November.
- 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 November compared to last year's.
- 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 seven states ship to stores Monday through Friday. NABCA reports shipments from the warehouses for these states. This November's calendar had twenty-one weekdays compared to twenty-two last year, 4.5% fewer. As a result, every wholesale only state's November growth rate for nine-liter cases and dollars lagged their twelve-month trends. The wholesale only control states are Iowa, Maine, Michigan, Mississippi, Montana, West Virginia, and Wyoming.
- On net, there were three fewer selling days and seven fewer shipping days during November in the control states, 2% fewer, compared to last year's November.
- After equalizing selling day variations between this year's November and last year's, November's nine-liter case spirits growth rate is 2.5% with a rolling-twelve-month trend of 3.3%. November's shelf-dollar growth rate is 5.5% with a rolling-twelve-month trend of 6.0%.
- Equalized price mix for November is 3.0%.

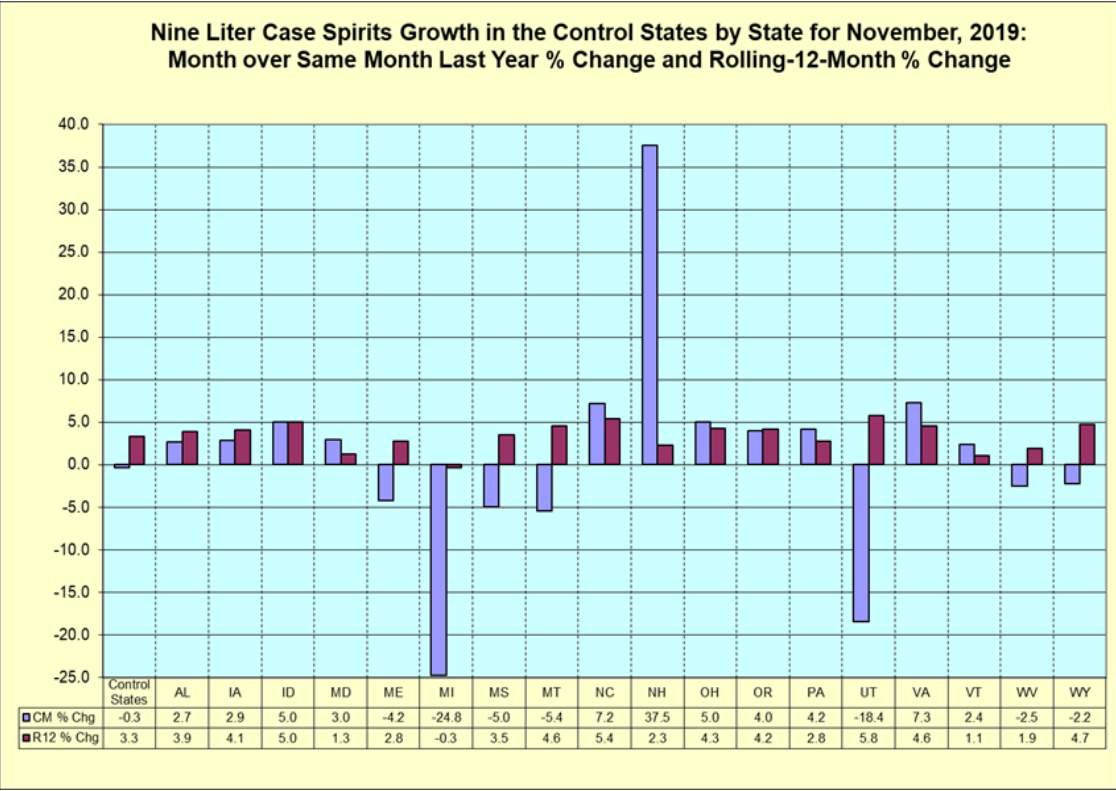
Cocktails, with 2% share of the nine-liter case control states spirits market, was November's fastest growing category with 10.2% growth reported and a twelve-month trend of 10.0%. Tequila, with 7% share, reported 9.1% growth and a 10.7% twelve-month trend. Vodka, with 34% share, grew during the same periods at -1.2% and 2.7%, respectively. Brandy/Cognac(2.7%, 2.5%) and Cocktails(10.1%, 10.0%) grew at rates exceeding their twelve-month trends, while Canadian Whiskey(-5.2%, 2.5%), Cordials(-3.8%, 1.7%), Domestic Whiskey(3.3%, 6.0%), Gin(-2.5%, -0.2%), Irish Whiskey(4.9%, 8.2%), Rum(-3.6%, -0.4%), Scotch(0.0%, 0.1%), Tequila(9.1%, 10.7%), and Vodka(-1.2%, 2.7%) grew at monthly rates lagging their twelve-month trends.

November's nine-liter wine case sales growth was -1.2%. Pennsylvania (reporting -2.2% nine-liter case growth for wines), New Hampshire (18.5%), Utah (-17.8%), Mississippi (-8.8%), Montgomery County Maryland (-6.7%), and Wyoming (-7.3%) 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%, down from October's reported -1.6%.

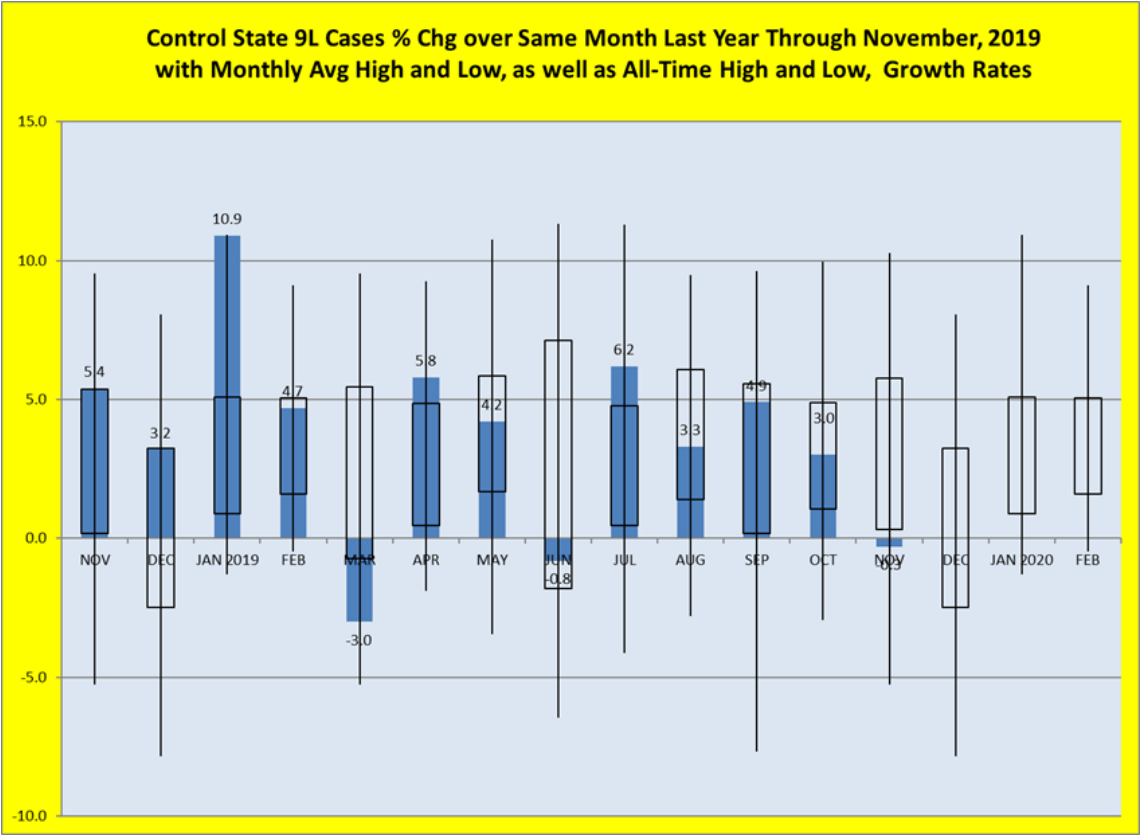
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	-0.3	2.3	2.6%	
Central Region	-6.0	-4.4	1.6%	IA, MD, MI, OH, PA, WV
NE Region	21.8	28.9	7.1%	ME, NH, VT
NW Region	-2.1	-0.3	1.8%	ID, MT, OR, UT, WY
Southern Region	4.9	8.8	3.9%	AL, MS, NC, VA



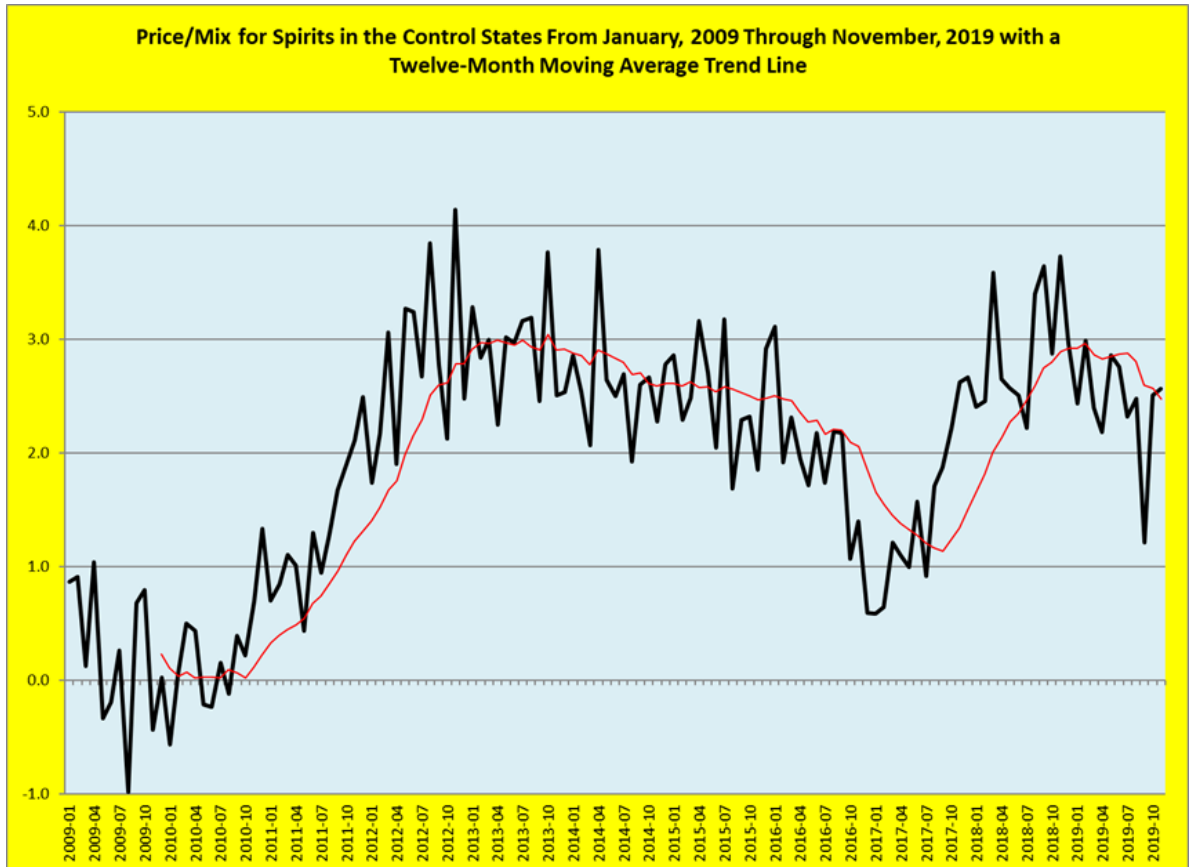
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For more information about the NABCA, visit www.nabca.org.

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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.