



News Release

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FOR IMMEDIATE RELEASE

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

Control State results for nine-liter beverage sales for February 2020

ARLINGTON, VA (March 24, 2020) — During February nine-liter control states spirits case sales grew 5.0% over same period sales last year, reflecting modest improvement over its comp (4.7%) despite eighteen additional selling days during this leap year's February. Alabama(6.4%), Idaho(9.5%), Montgomery County Maryland(6.8%), Maine(5.4%), Mississippi(12.0%), North Carolina(10.5%), Ohio(6.4%), Oregon(7.6%), Pennsylvania(3.1%), Virginia(9.7%), Vermont(4.3%), West Virginia(9.4%), and Wyoming(6.8%) reported monthly growth rates for February exceeding their twelve-month trends. The growth rates for Iowa(-0.3%), Michigan(-2.3%), Montana(0.2%), New Hampshire(0.5%), and Utah(2.3%) fell short of their twelve-month trends. Control state rolling-twelve-month volume growth, 3.3%, was flat compared to January's reported 3.2%. Spirits volumes have grown 4.3% year-to-date compared to 7.7% a year ago.

Control state spirits shelf dollars were up 8.1% during February while trending at 5.8% during the past twelve months. Alabama(9.5%), Idaho(11.0%), Montgomery County Maryland(12.0%), Maine(8.8%), Mississippi(13.3%), North Carolina(13.0%), Ohio(10.0%), Oregon(8.9%), Pennsylvania(7.7%), Utah(5.4%), Virginia(13.2%), Vermont(7.2%), West Virginia(10.6%), and Wyoming(10.4%) reported growth rates exceeding their twelve-month trends. Iowa(4.1%), Michigan(0.7%), Montana(5.0%), and New Hampshire(-0.1%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 7.2% year-to-date compared to 10.6% last year.

Price/Mix for February is 3.1%, improving upon January's reported 2.6%.

February's growth rate was affected by calendar and operational-related anomalies in the control states.

- As of March 2019, retail outlets selling spirits in West Virginia, which previously were not open for business on Sunday, are now open. Spirit retailers in West Virginia had five additional selling days during this year's February compared to last years.
- On net, and because of leap year, there were eighteen more selling days, 4% more, during February in the control states compared to last year's February.
- States with fiscal (namely, 4-4-5-week quarters or 4-5-4-week quarters), rather than calendar, reporting periods—Michigan, New Hampshire, Pennsylvania, Utah—generally do not report sales for an additional selling day during February during leap years.

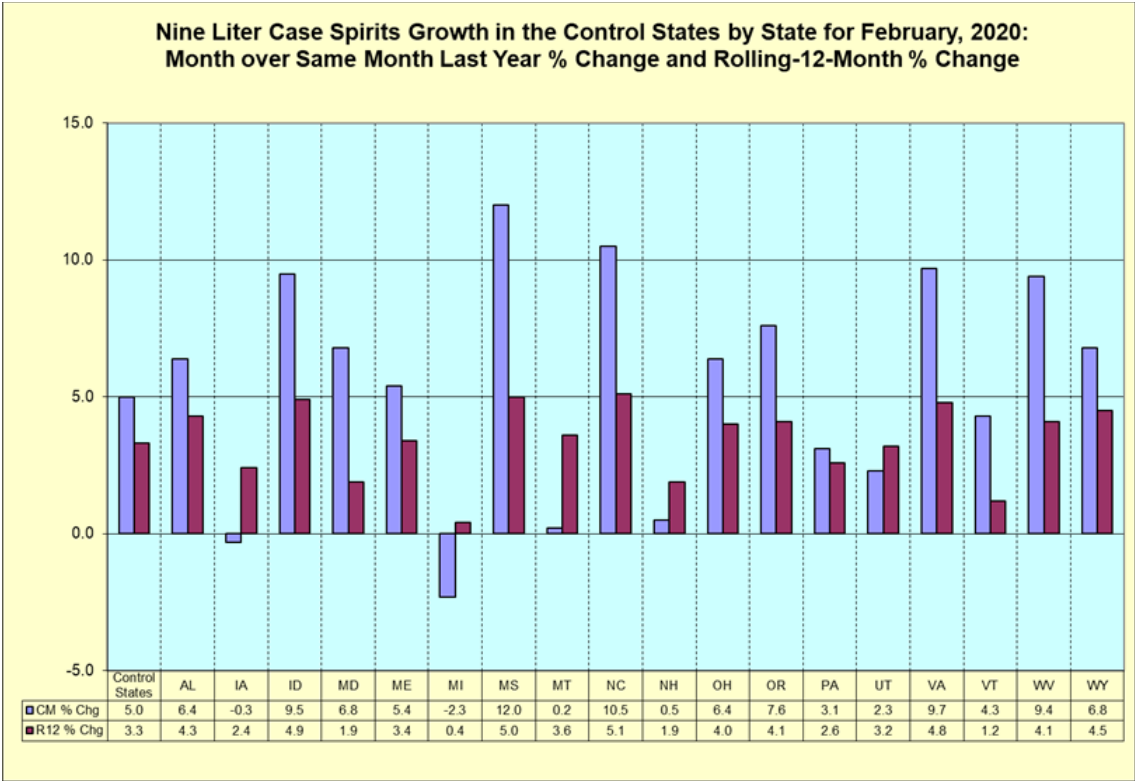
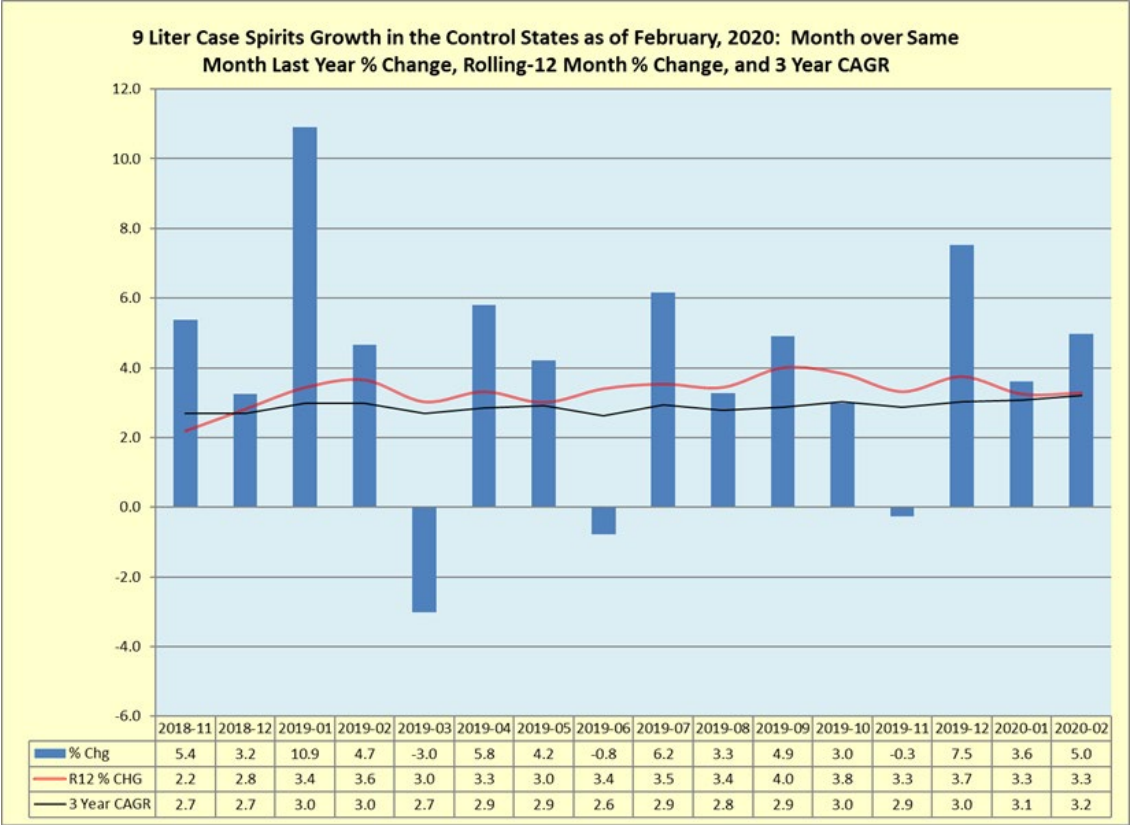
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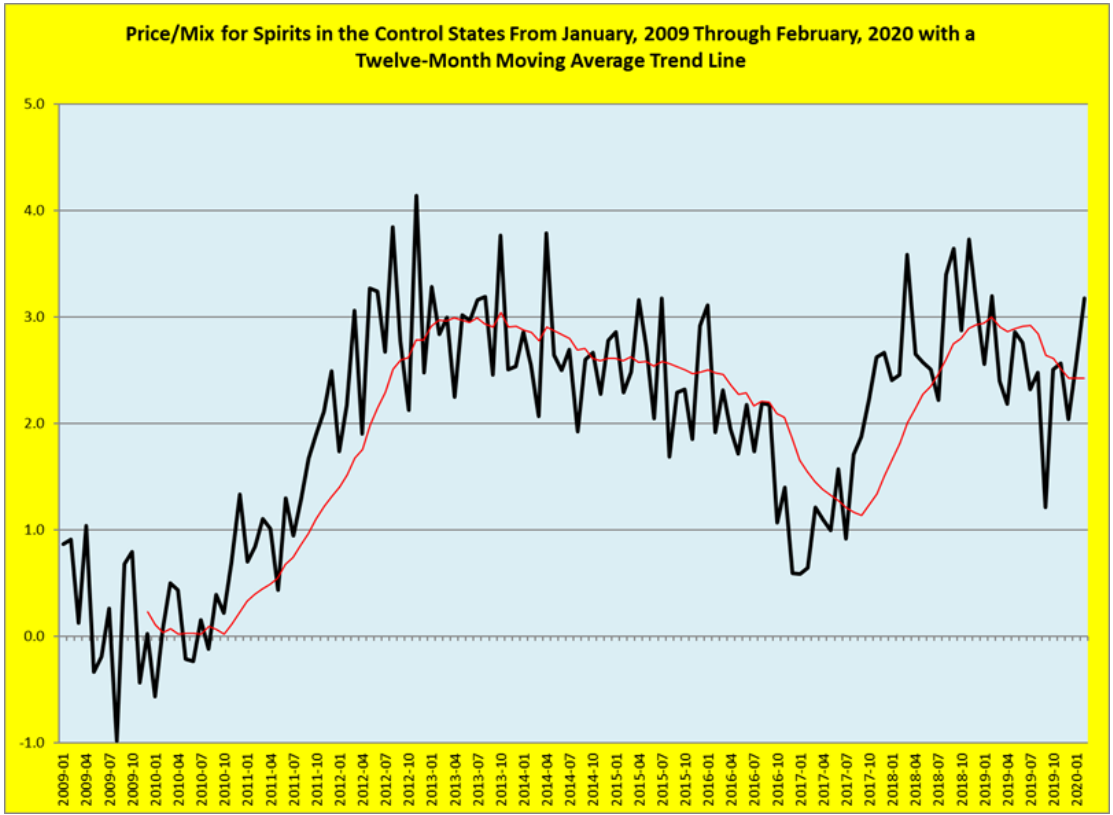
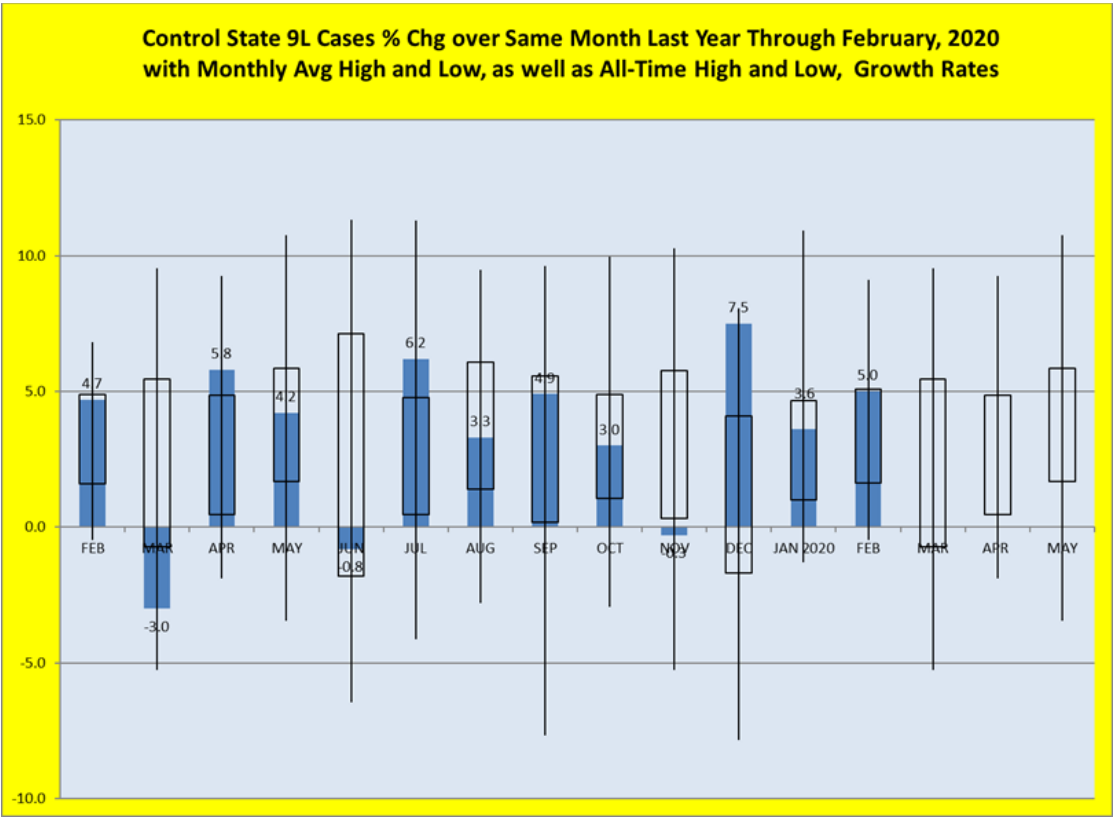
- Saturday is the second-biggest sales day in the control states. February 2020 had five Saturdays compared to February 2019's having had four.
- After equalizing selling day variations between this year's February and last year's, February's nine-liter case spirits growth rate is 2.4% with a rolling-twelve-month trend of 3.5%. February's shelf-dollar growth rate is 5.4% with a rolling-twelve-month trend of 6.1%.
- Equalized price/mix for February is 3.0%.

Cocktails, with 2% share of the nine-liter case control states spirits market, was February's fastest growing category with 18.6% reported and a twelve-month trend of 10.9%. Tequila, with 7% share, grew at 13.3% with a twelve-month trend of 11.0%. Vodka, with 34% share, grew during the same periods at 5.3% and 2.6%, respectively. Cocktails(18.6% during February, 10.9% twelve-month trend), Cordials(2.9%, 1.9%), Domestic Whiskey(10.2%, 6.6%), Gin(1.1%, -0.2%), Rum(-0.3%, -0.9%), Scotch(0.3%, -0.3%), Tequila(13.3%, 11.0%), and Vodka(5.3%, 2.6%) grew at rates above their twelve-month trends, while Brandy/Cognac(0.4%, 1.5%), Canadian Whiskey(0.3%, 2.1%), and Irish Whiskey(8.2%, 8.3%) fell short.

February's nine-liter wine case sales growth rate was 2.6%. Pennsylvania (reporting 2.9% nine-liter case growth for wines), New Hampshire (-0.7%), Utah (-0.8%), Mississippi (13.2%), Montgomery County Maryland (-0.6%), and Wyoming (-2.1%) 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 was -2.0%, slightly improving upon January's reported -2.2%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	5.0	8.1	3.1%	
Central Region	2.3	6.1	3.8%	IA, MD, MI, OH, PA, WV
NE Region	2.5	3.6	1.1%	ME, NH, VT
NW Region	5.9	8.2	2.3%	ID, MT, OR, UT, WY
Southern Region	9.7	12.5	2.8%	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.