



# News Release

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FOR IMMEDIATE RELEASE

## NABCA Releases Control States Nine-Liter Spirits Sales Results for March

*Control State results for nine-liter beverage sales for March 2020*

ARLINGTON, VA (April 17, 2020) — During March nine-liter control states spirits case sales grew 17.0% over same period sales last year. This growth rate was abetted by a soft comp as well as motivated consumers engaging in Pantry Loading. Alabama(10.4%), Iowa(25.0%), Idaho(26.7%), Montgomery County Maryland(18.2%), Maine(14.7%), Michigan(14.4%), Mississippi(21.3%), Montana(15.7%), North Carolina(22.5%), New Hampshire(29.6%), Ohio(17.2%), Oregon(21.1%), Utah(24.5%), Virginia(20.0%), Vermont(14.9%), West Virginia(36.6%), and Wyoming(21.8%) reported monthly growth rates for March exceeding their twelve-month trends. The growth rate for Pennsylvania(-0.3%) fell short of its twelve-month trend. Control state rolling-twelve-month volume growth, 4.9%, was up smartly from February's reported 3.3%. Spirits volumes have grown 8.7% year-to-date compared to 3.8% a year ago.

Control state spirits shelf dollars were up 17.3% during March while trending at 7.3% during the past twelve months. Alabama(11.3%), Iowa(24.7%), Idaho(25.1%), Montgomery County Maryland(21.3%), Maine(16.7%), Michigan(13.8%), Mississippi(24.1%), Montana(10.0%), North Carolina(22.3%), New Hampshire(39.3%), Ohio(17.7%), Oregon(21.0%), Utah(21.5%), Virginia(20.9%), Vermont(13.4%), West Virginia(35.3%), and Wyoming(20.8%) reported growth rates exceeding their twelve-month trends. Pennsylvania(0.7%) grew shelf dollars at a rate below its twelve-month trend. Shelf dollars in the control states are up 10.8% year-to-date compared to 6.4% last year.

The 17.0% control state spirits growth and 17.3% shelf dollar growth reported for March, 2020 are remarkable. They are the highest volume and value monthly growth rates reported in decades and are likely the highest of all time.

Price/Mix for March is 0.3%, dwarfed by February's reported 3.1%.

**March's growth rate was affected by calendar and societal anomalies in the control states.**

- The volume of product sales during March in the control states was affected by the Pantry Loading behavior of consumers responding to the COVID-19 pandemic. Note March's Price/Mix, 0.3%, and its change from last month's 3.1%, which may suggest consumers were buying down while stocking up.
- The State of Pennsylvania closed its stores on March 17, and the stores remained closed for the balance of the month.

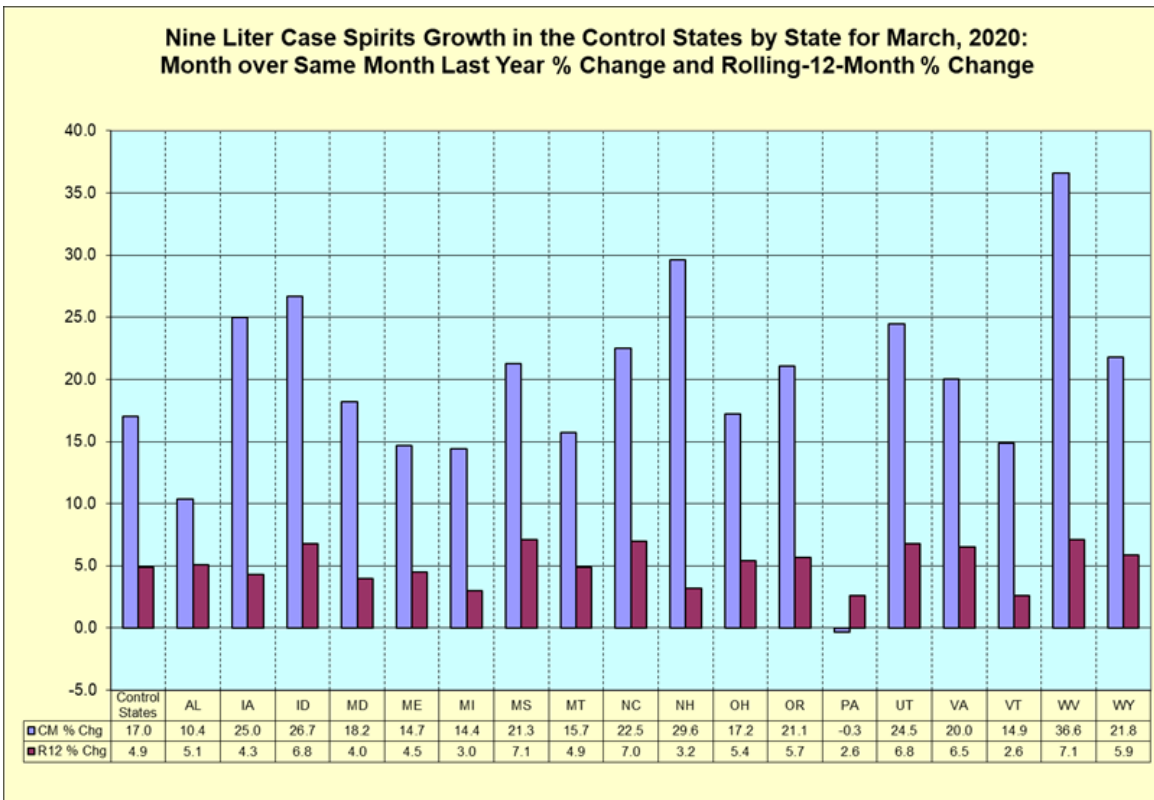
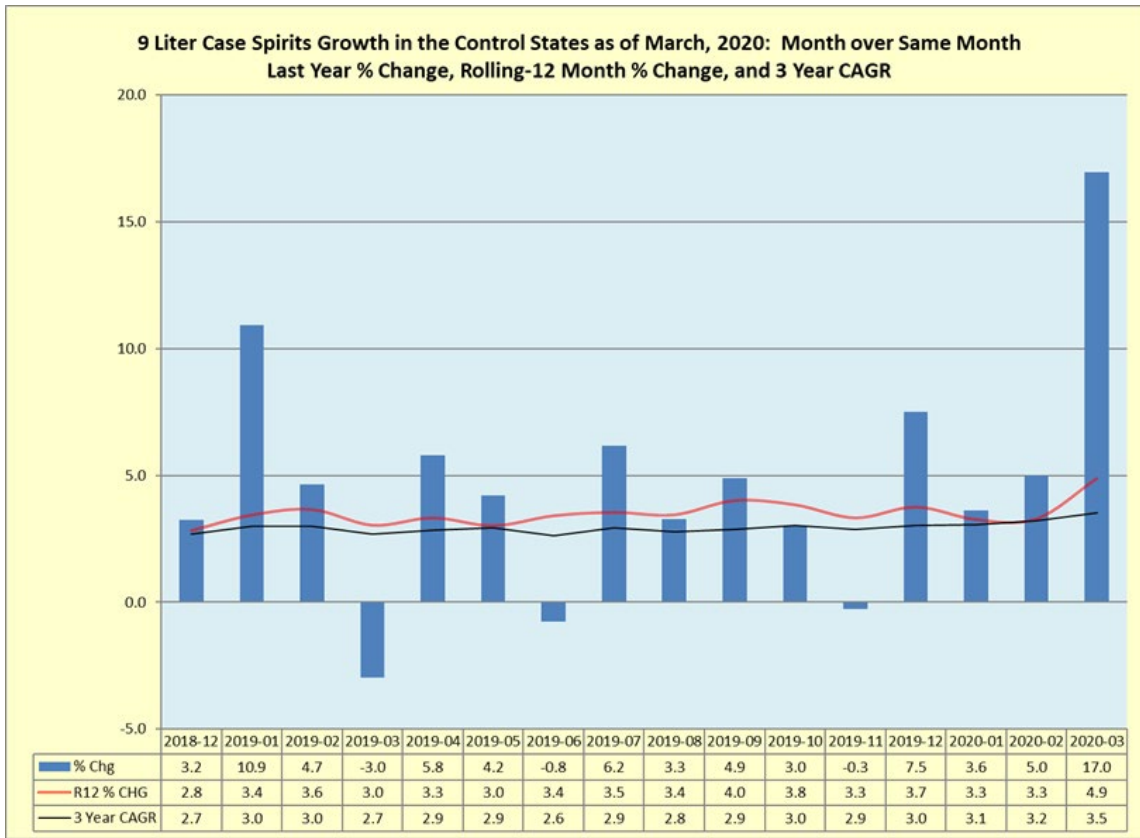
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- Friday and Saturday are the days during which the most spirits are sold in the control states. March 2020 had four Fridays and four Saturdays compared to March 2019's having had five of each.
- Seven control states are wholesale-only, i.e., they have no state stores or agencies: the stores in their jurisdictions are privately owned. These control states ship to stores Monday through Friday, and NABCA reports warehouse shipments as sales for these states. This March's calendar had twenty-two weekdays compared to twenty-one last year, 4.8% more. 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 on a 4-4-5-week fiscal calendar.

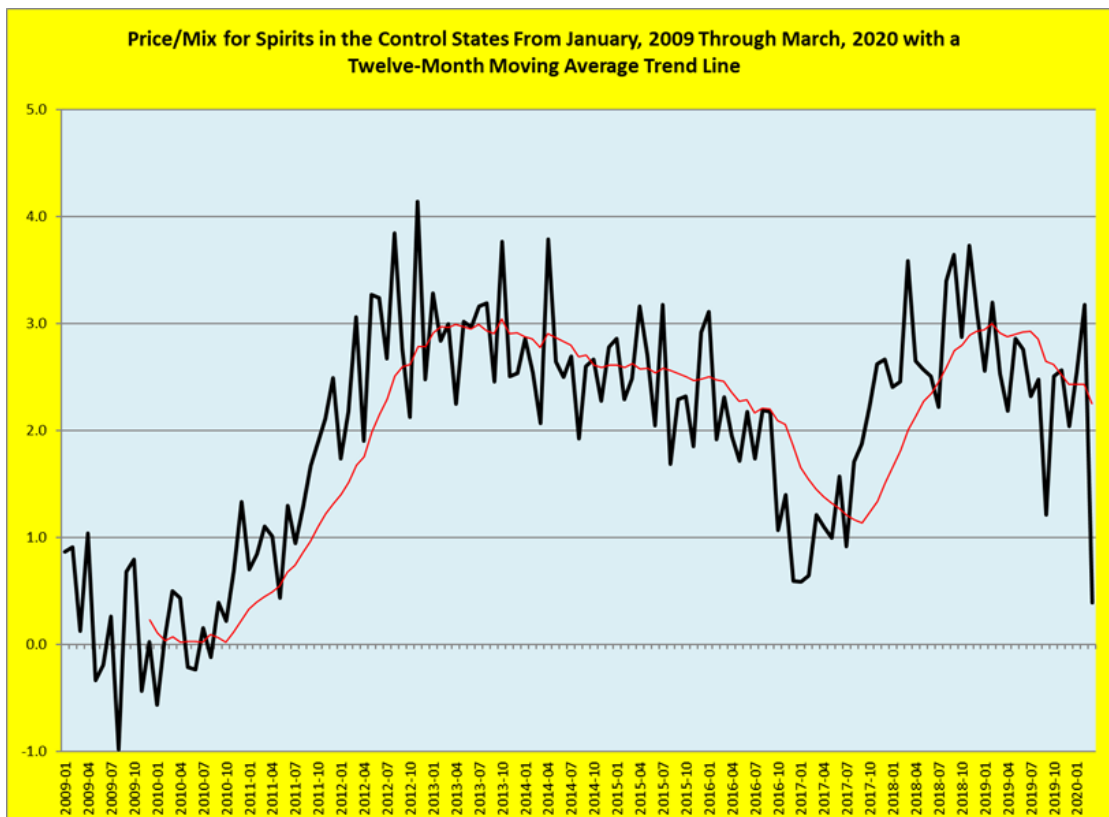
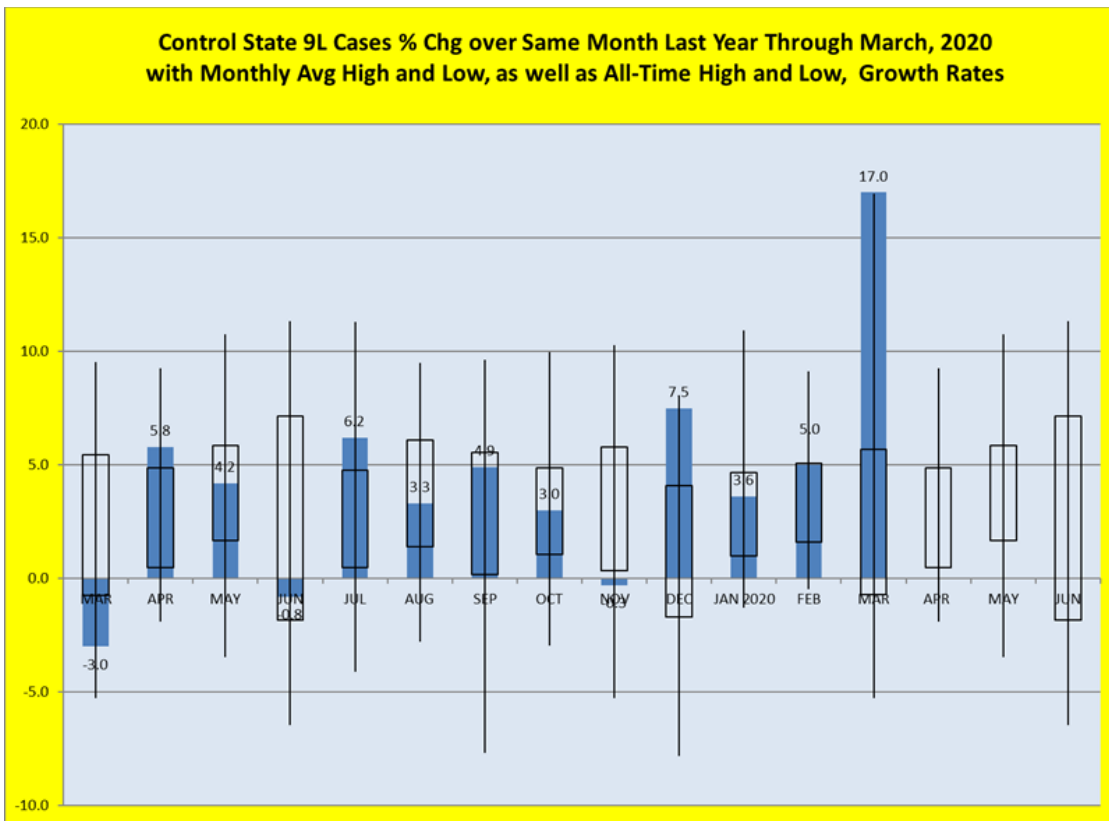
Cocktails, with 2% share of the nine-liter case control states spirits market, was March's fastest growing category with 41.3% reported and a twelve-month trend of 13.6%. Domestic Whiskey, with 15% share, grew at 25.3% with a twelve-month trend of 8.7%. Vodka, with 34% share, grew during the same periods at 19.2% and 4.4%, respectively. Brandy/Cognac(15.8% during March, 3.4%twelve-month trend), Canadian Whiskey(15.0%, 3.4%), Cocktails(41.3%, 13.6%), Domestic Whiskey(25.3%, 8.7%), Gin(13.6%, 1.2%), Rum(14.6%, 0.8%), Scotch(14.3%, 1.1%), and Vodka(19.2%, 4.4%) grew at rates above their twelve-month trends, while Cordials(0.3%, 2.5%), Irish Whiskey(1.9%, 7.9%), and Tequila(10.0%, 11.4%) fell short.

March's nine-liter wine case sales growth rate was 22.9%. Pennsylvania (reporting 24.8% nine-liter case growth for wines), New Hampshire (19.3%), Utah (20.8%), Mississippi (24.1%), Montgomery County Maryland (13.0%), and Wyoming (33.2%) 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 0.4%, improving upon February's reported -2.0%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	17.0	17.3	0.3%	
Central Region	12.6	12.7	0.1%	IA, MD, MI, OH, PA, WV
NE Region	23.8	30.2	6.4%	ME, NH, VT
NW Region	22.1	20.5	-1.6%	ID, MT, OR, UT, WY
Southern Region	19.3	19.9	0.6%	AL, MS, NC, VA



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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.