



News Release

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FOR IMMEDIATE RELEASE

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

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

ARLINGTON, VA (May 26, 2020) — During April nine-liter control states spirits case sales grew 0.2% over same period sales last year. Alabama(7.9%), Iowa(12.7%), Idaho(13.4%), Maine(12.9%), Michigan(42.7%), Mississippi(21.8%), North Carolina(8.8%), Ohio(10.7%), Oregon(6.8%), Utah(43.7%), Virginia(7.6%), Vermont(15.6%), West Virginia(18.8%), and Wyoming(7.2%) reported monthly growth rates for April exceeding their twelve-month trends. The growth rates for Montgomery County Maryland(-0.2%), Montana(1.1%), New Hampshire(-26.0%), and Pennsylvania(-90.5%) fell short of their twelve-month trends. Control state rolling-twelve-month volume growth, 4.4%, was down from March's reported 4.9%. Spirits volumes have grown 6.5% year-to-date compared to 4.3% a year ago.

Control state spirits shelf dollars were up 3.0% during April while trending at 6.9% during the past twelve months. Alabama(12.8%), Iowa(14.9%), Idaho(13.9%), Maine(14.5%), Michigan(43.9%), Mississippi(25.2%), North Carolina(11.8%), Ohio(14.6%), Oregon(8.2%), Utah(39.3%), Virginia(11.2%), Vermont(16.7%), and West Virginia(23.2%) reported growth rates exceeding their twelve-month trends. Montgomery County Maryland(1.5%), Montana(1.0%), New Hampshire(-26.8%), Pennsylvania(-89.3%), and Wyoming(7.4%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 8.8% year-to-date compared to 6.9% last year.

Price/Mix for April is 2.8%, improving upon March's reported 0.3%.

During March and April, the industry's on- and off-premise markets behaved capriciously. The changes in the monthly off-premise share of the control state spirits market during the past two months confirms that belief. For the twelve-month period ending February 2020 the off-premise monthly share averaged 82%. Then, during March it jumped to 90%, and during April to 99%. Trends suggest the Control State off-premise share for May will moderate somewhat but still be in the mid 90's.

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

- The volume of product sales during April in the control states was affected by the Pantry Loading behavior of consumers responding to the COVID-19 pandemic, store closings, and reporting period anomalies.

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- Michigan, with 16% of control state nine-liter case volume, reported five weeks of sales this April compared to four last April, artificially inflating sales and skewing control state results.

Michigan had seven additional selling days during this year's April.

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

- Utah, with 3% of the control state nine-liter case volume, reported five weeks of sales this April compared to four last April, artificially inflating sales and skewing control state results. Utah had six additional selling days during this year's April.

- Easter was celebrated on April 12, 2020. Spirits retail outlets are closed on Easter in three States: Montgomery County Maryland, New Hampshire, and Pennsylvania. Spirits retail outlets are routinely closed on Sundays in five states: Alabama, Mississippi, Montana, North Carolina, and Utah.

- Pennsylvania, with 13% of control state nine-liter case volume, reported April sales for a four-week period that began on March 30 and ended on April 26. The State's stores were closed during the first three weeks as a part of the State's Social Distancing initiative, and partially (mostly) closed during the last week.

- On net, there were eighteen fewer selling days during April in the control states, 3.5% fewer, compared to last year's April.

- After equalizing selling day variations between this year's April and last year's, April's nine-liter case spirits growth rate is 6.6% with a rolling-twelve-month trend of 5.3%. April's shelf-dollar growth rate is 10.1% with a rolling-twelve-month trend of 7.8%.

- Equalized price/mix for April is 3.5%.

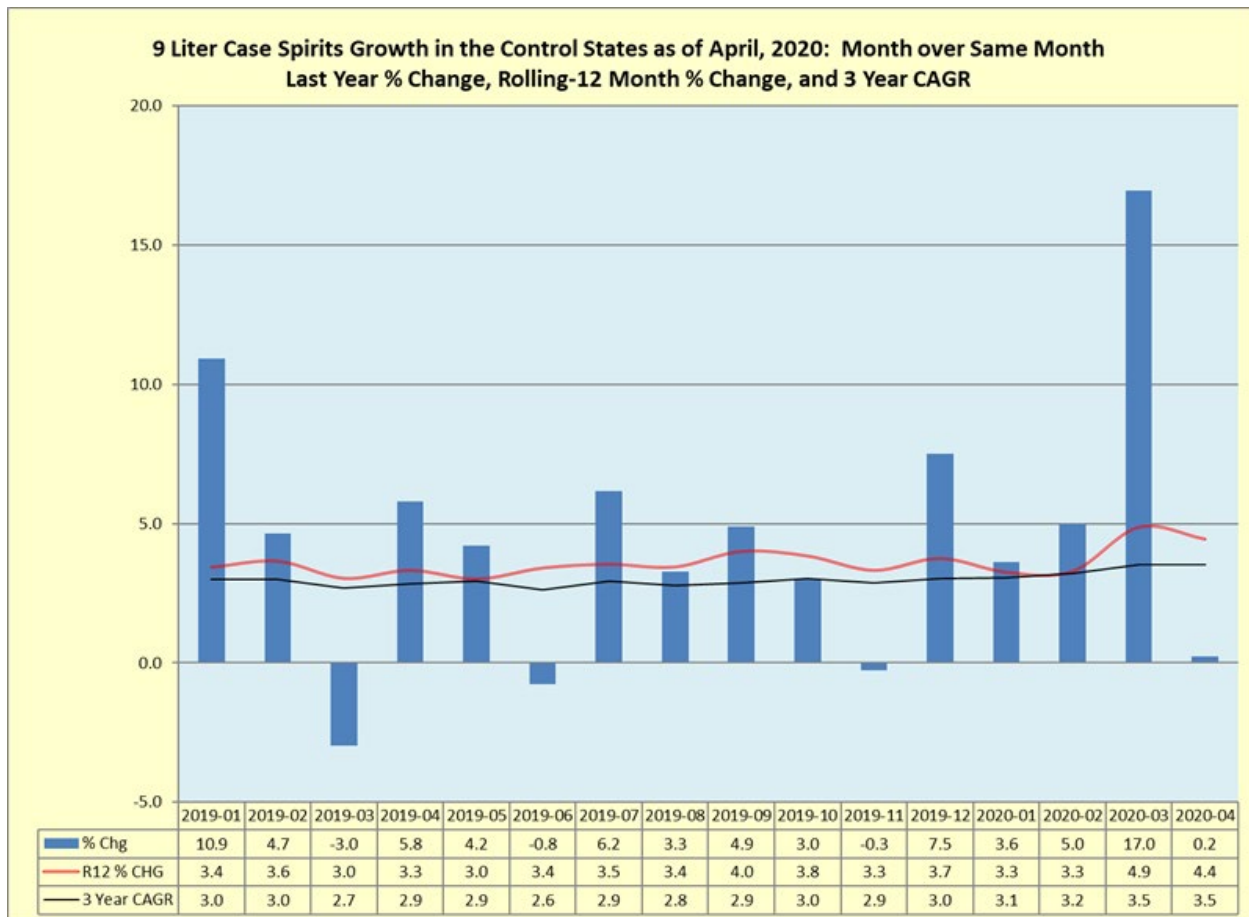
Cocktails, with 2% share of the nine-liter case control states spirits market, was April's fastest growing category with 40.4% reported and a twelve-month trend of 15.6%. Vodka, with 34% share, grew during the same periods at -2.5% and 3.8%, respectively. Brandy/Cognac(8.5% during April, 4.0% twelve-month trend), Canadian Whiskey(8.5%, 3.6%), and Cocktails(40.4%, 15.6%) grew at rates above their twelve-month trends, while Cordials(-16.1%, 1.0%), Domestic Whiskey(6.3%, 8.6%), Gin(-5.0%, 0.6%), Irish Whiskey(-11.4%, 6.4%), Rum(-5.4%, 0.2%), Scotch(-8.2%, 0.7%), Tequila(-0.7%, 10.3%), and Vodka(-2.5%, 3.8%) fell short.

April's nine-liter wine case sales growth rate was -15.4%. Pennsylvania (reporting -31.5% nine-liter case growth for wines), New Hampshire (-16.7%), Utah (31.0%), Mississippi (26.6%), Montgomery County Maryland (8.4%), and Wyoming (11.7%) 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 -1.0%, down from March's reported 0.4%.

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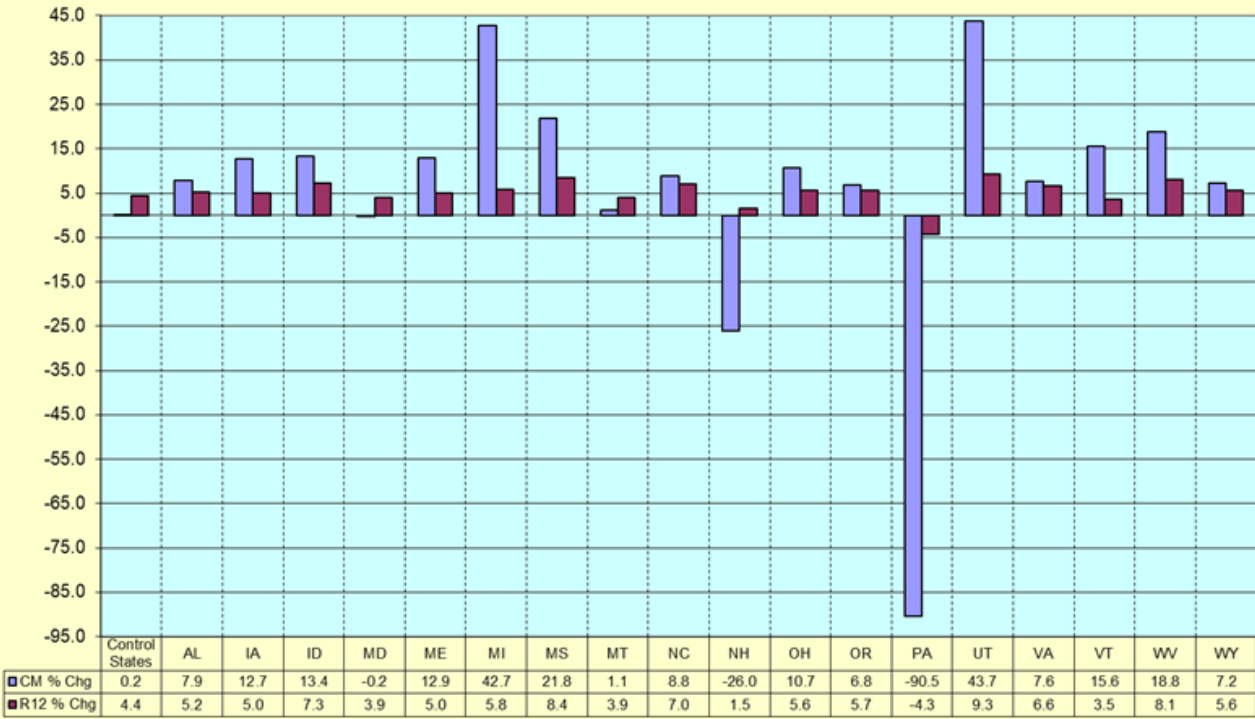
November's nine-liter wine case sales growth was -1.2%. Pennsylvania (reporting -2.2% nine-liter case growth for wines), New Hampshire(18.5%), Utah (-17.8%), Mississippi (-8.8%), Montgomery County Maryland (-6.7%), and Wyoming (-7.3%) are the control states that are the sole wholesalers of wines and 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	0.2	3.0	2.8%	
Central Region	-8.4	-4.7	-3.7%	IA, MD, MI, OH, PA, WV
NE Region	-10.4	-9.7	0.7%	ME, NH, VT
NW Region	13.7	13.7	0.0%	ID, MT, OR, UT, WY
Southern Region	9.9	13.0	3.1%	AL, MS, NC, VA

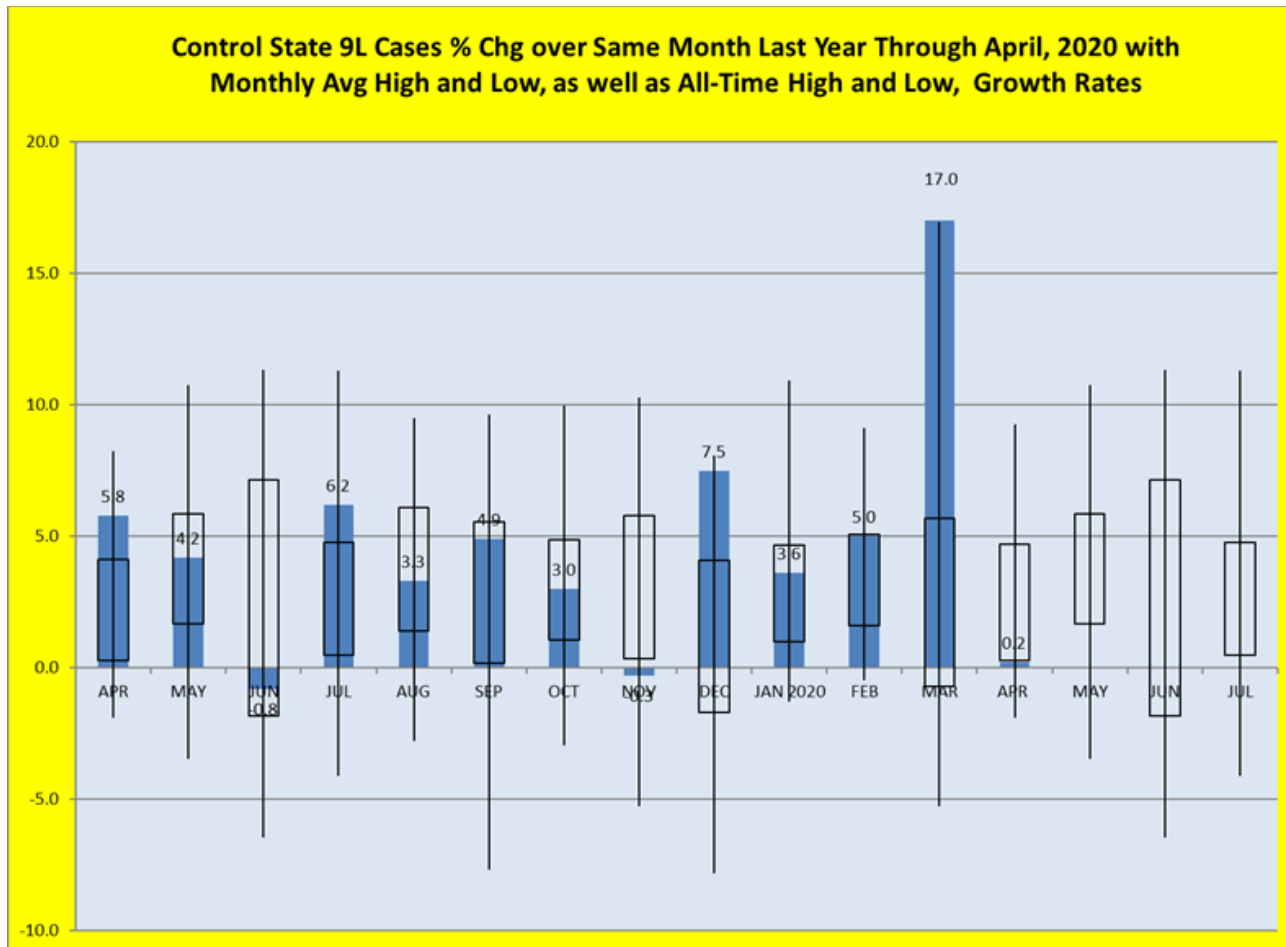


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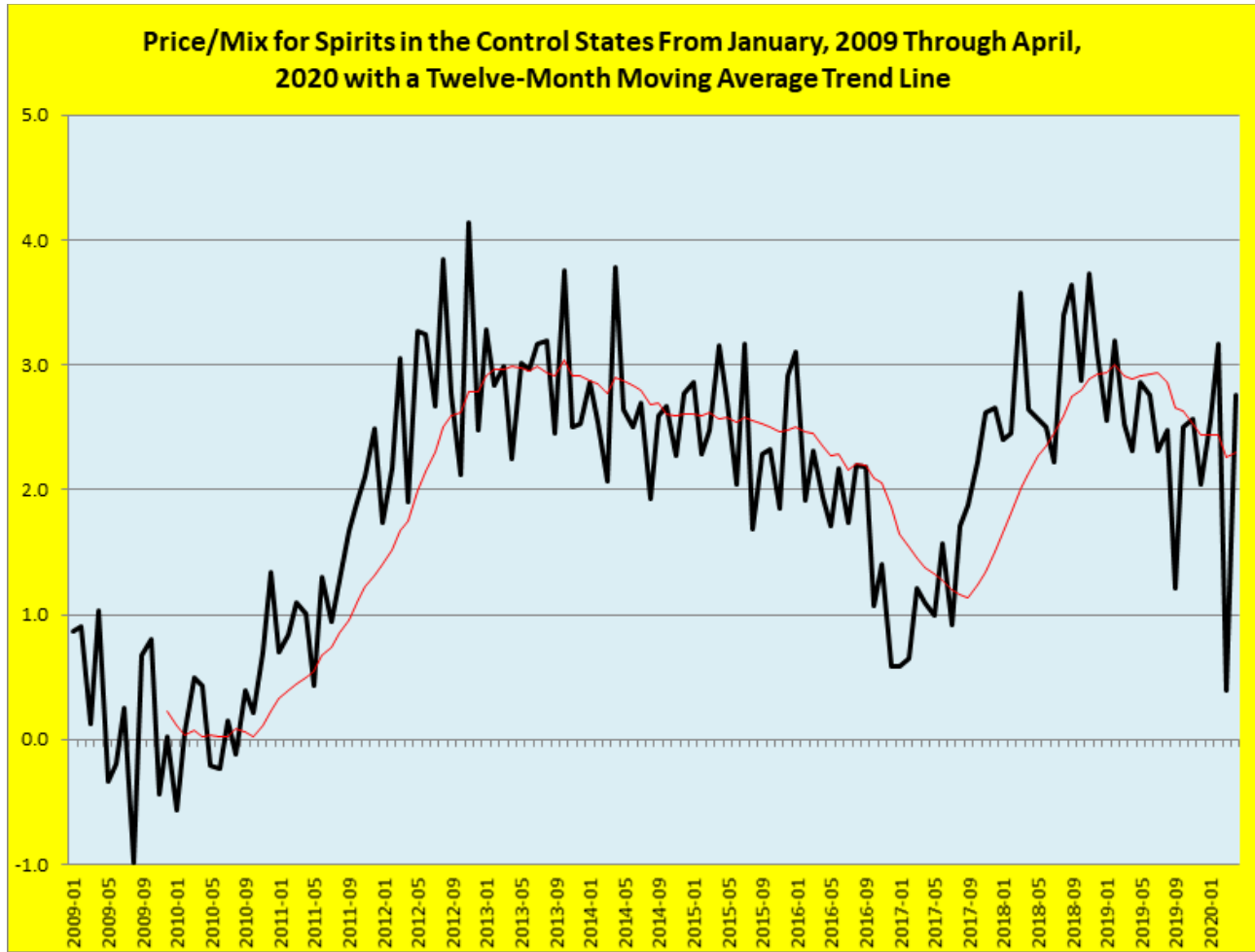
**Nine Liter Case Spirits Growth in the Control States by State for April, 2020:
Month over Same Month Last Year % Change and Rolling-12-Month % Change**



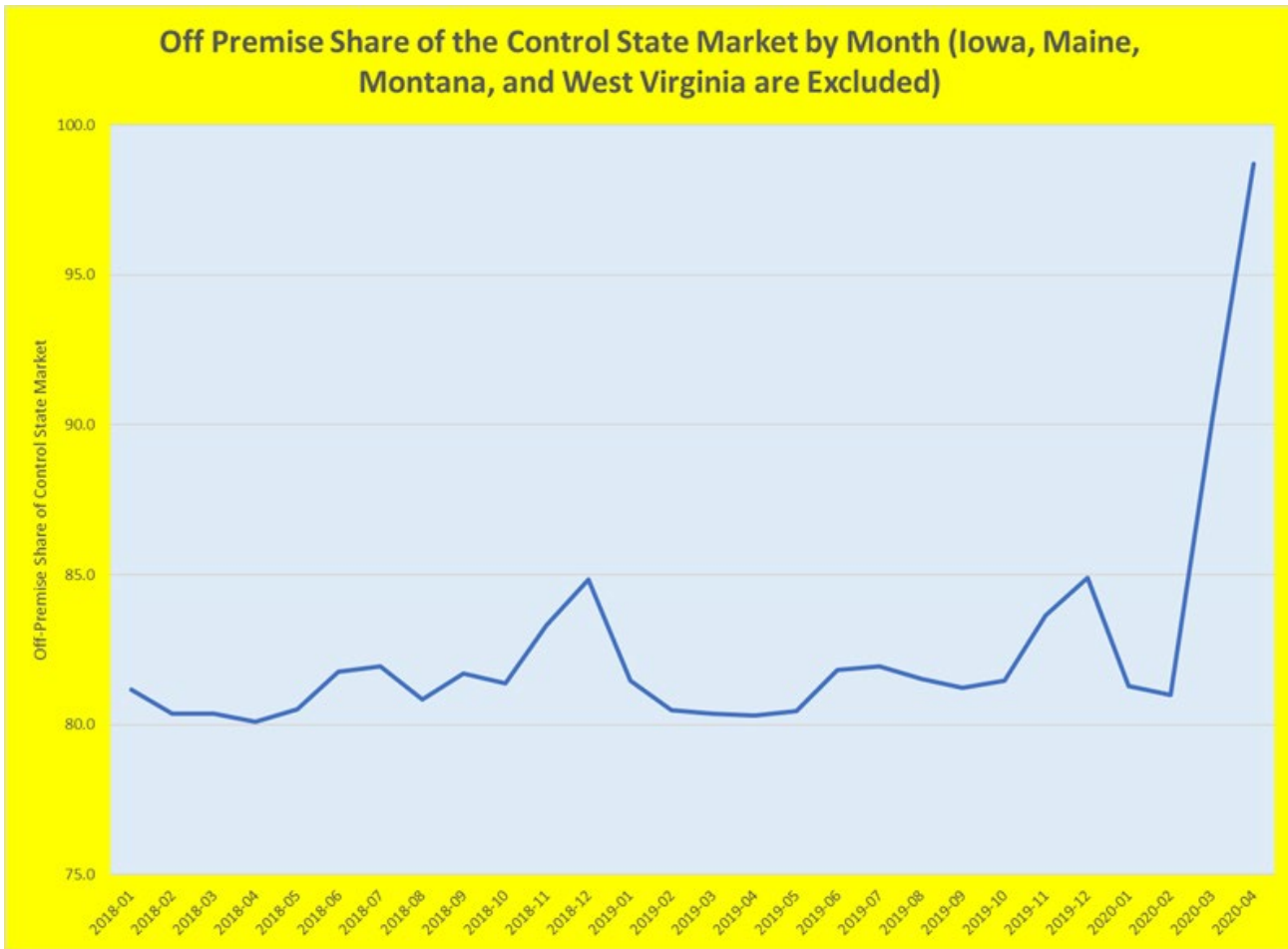
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For more information about the NABCA, visit www.nabca.org.

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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.