



News Release

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FOR IMMEDIATE RELEASE

NABCA Releases Control States Nine-Liter Spirits Sales Results for May *Control State results for nine-liter beverage sales for May 2020*

ARLINGTON, VA (June 23, 2020) — During May nine-liter control states spirits case sales grew -1.0% over same period sales last year. Alabama(8.2%), Idaho(14.8%), Mississippi(14.6%), North Carolina(12.3%), New Hampshire(25.0%), Ohio(9.3%), Oregon(7.3%), Virginia(9.1%), Vermont(13.1%), West Virginia(11.3%), and Wyoming(6.9%) reported monthly growth rates for May exceeding their twelve-month trends. The growth rates for Iowa(-2.1%), Montgomery County Maryland(-2.7%), Maine(2.2%), Michigan(-7.2%), Montana(4.0%), Pennsylvania(-37.0%), and Utah(-12.8%) fell short of their twelve-month trends. Control state rolling-twelve-month-volume growth, 4.0%, was down from April's reported 4.4%. Spirits volumes grew 4.8% year-to-date compared to 4.2% a year ago.

Control state spirits shelf dollars were up 4.9% during May while trending at 6.7% during the past twelve months. Alabama(16.1%), Idaho(21.1%), Mississippi(19.9%), North Carolina(19.2%), New Hampshire(24.1%), Ohio(17.9%), Oregon(13.6%), Virginia(14.2%), Vermont(14.3%), and West Virginia(16.3%) reported growth rates exceeding their twelve-month trends. Iowa(-2.2%), Montgomery County Maryland(0.8%), Maine(2.0%), Michigan(2.1%), Montana(4.8%), Pennsylvania(-34.4%), Utah(-9.2%), and Wyoming(6.9%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 8.0% year-to-date compared to 6.9% last year.

Price/Mix for May is 5.9%, lapping April's reported 2.8%.

Price/Mix has been tracked by NABCA since January 2002, and May's 5.9% is the largest Price/Mix value published, ever. The previous highest value, 4.7%, was recorded during November 2006.

During March, April, and May the control states' on- and off-premise markets behaved capriciously. During the twelve-month period ending February 2020, the off-premise monthly share averaged 82%. During March the off-premise share jumped to 90% and during April to 99%. During May it moderated, somewhat, to 96%. Trends suggest the Control State off-premise share for June may continue to be elevated above historical levels.

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

- Michigan, with 16% of control state nine-liter-case volume, reported four weeks of sales this May compared to five last May, artificially deflating sales and skewing control state results. Michigan had seven fewer selling days during this year's May.

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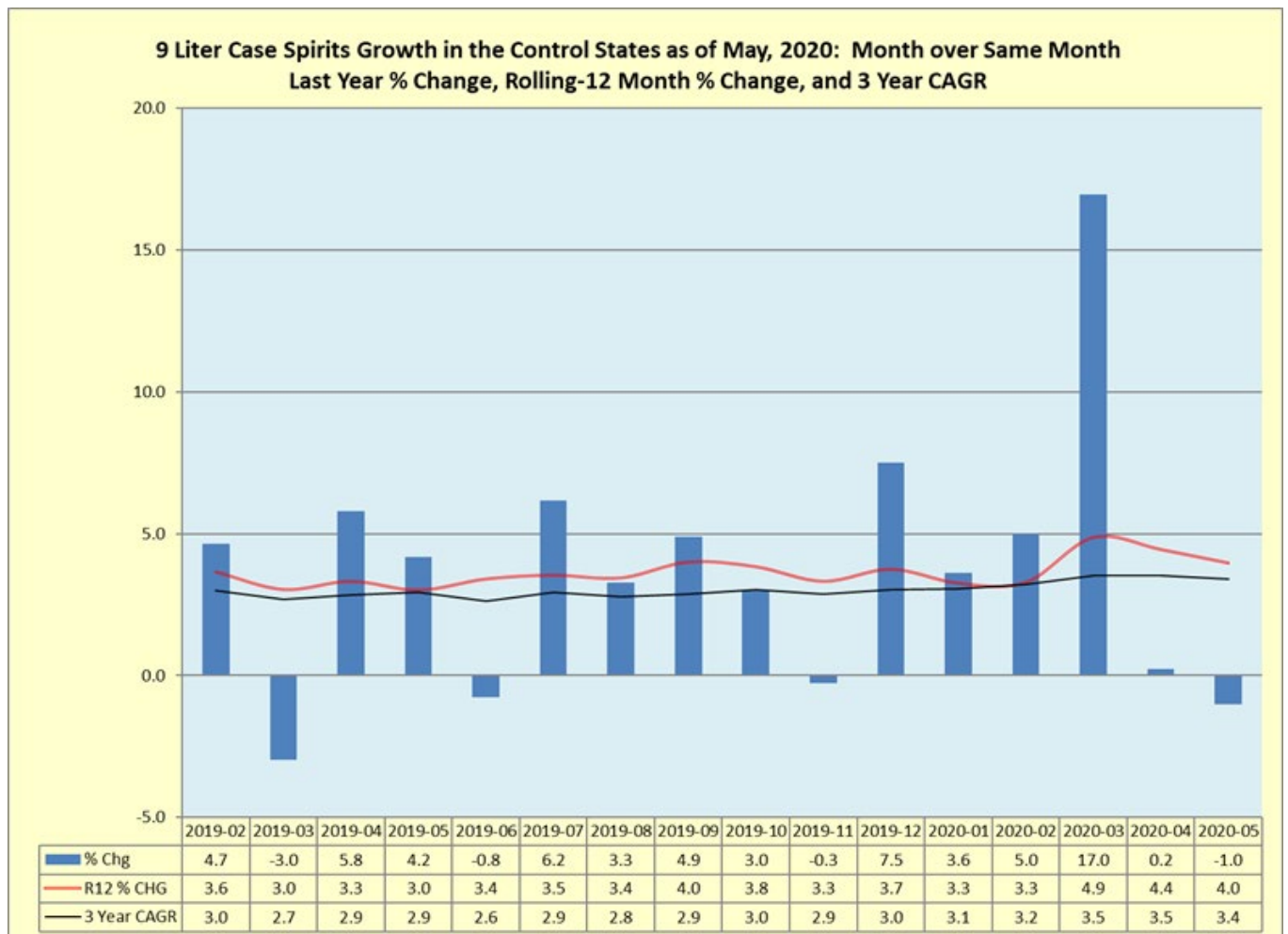
- New Hampshire, with 5% of control state nine-liter-case volume, reported five weeks of sales this May compared to four last May, artificially inflating sales and skewing control state results. New Hampshire had seven more selling days during this year's May.
- Utah, with 3% of the control state nine-liter-case volume, reported four weeks of sales this May compared to five last May, artificially deflating sales and skewing control state results. Utah had five fewer selling days during this year's May.
- Pennsylvania, with 13% of control state nine-liter-case volume, reported nine-liter-case growth of -37.0% for the month of May. Off-premise (consumer takeaways) sales were down -20.4% compared to same period last year. Sales to on-premise licensees were down 95.2%.
- On net, there were eight fewer selling days during May in the control states, 1.5% fewer, compared to last year.
- After equalizing selling-day variations between this year's May and last year's, May's nine-liter-case-spirits growth rate is 4.2% with a rolling-twelve-month trend of 5.3%. May's shelf-dollar growth rate is 10.7% with a rolling-twelve-month trend of 8.1%.
- Equalized price/mix for May is 6.6%.

Cocktails, with 2% share of the nine-liter case control states spirits market, was May's fastest growing category with 43.2% reported and a twelve-month trend of 20.1%. Brandy / Cognac, with 6% share, grew during May at 12.1% and 4.7% during the past twelve months while Tequila, with 7% share, grew at 11.2% and 10.7%. Vodka, with 34% share, grew during the same periods at -6.6% and 2.7%, respectively. Brandy/Cognac(12.1% during May, 4.7% twelve-month trend), Cocktails(43.2%, 20.1%), and Tequila(11.2%, 10.7%) grew at rates above their twelve-month trends, while Canadian Whiskey(-0.7%, 3.2%), Cordials(-7.4%, 0.0%), Domestic Whiskey(4.4%, 8.3%), Gin(-6.7%, -0.1%), Irish Whiskey(-10.6%, 4.7%), Rum(-7.2%, -0.5%), Scotch(-5.5%, 0.2%), and Vodka(-6.6%, 2.7%) fell short.

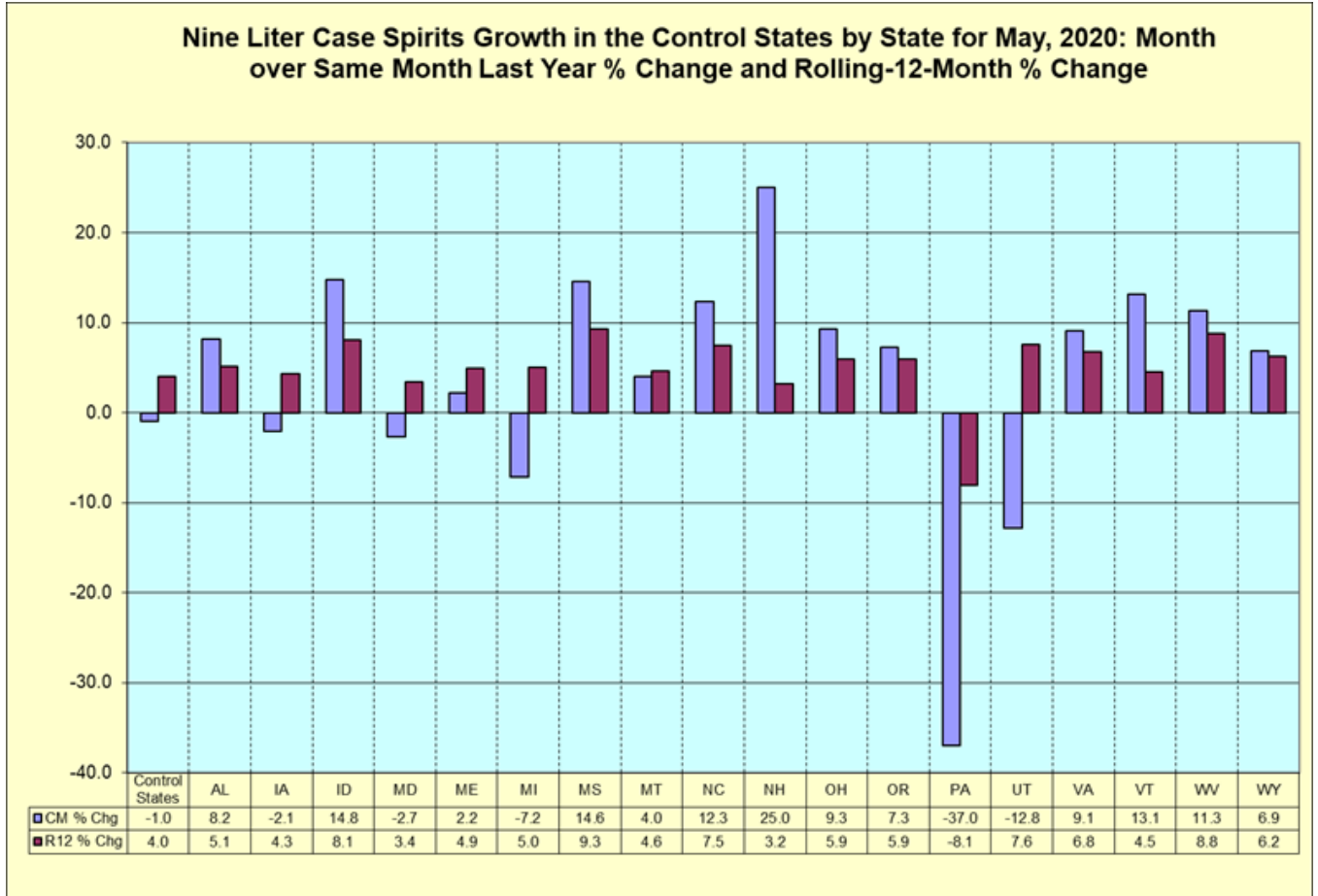
May's nine-liter wine case sales growth rate was 7.4%. Pennsylvania (reporting 7.6% nine-liter-case growth for wines), New Hampshire (30.2%), Utah (-20.4%), Mississippi (10.0%), Montgomery County Maryland (-8.4%), and Wyoming (-2.2%) are the control states that are the sole wholesalers of wines and spirits within their geographical boundaries. Rolling-twelve-month wine volume growth in these six control states is -0.1%, up from April's reported -1.0%.

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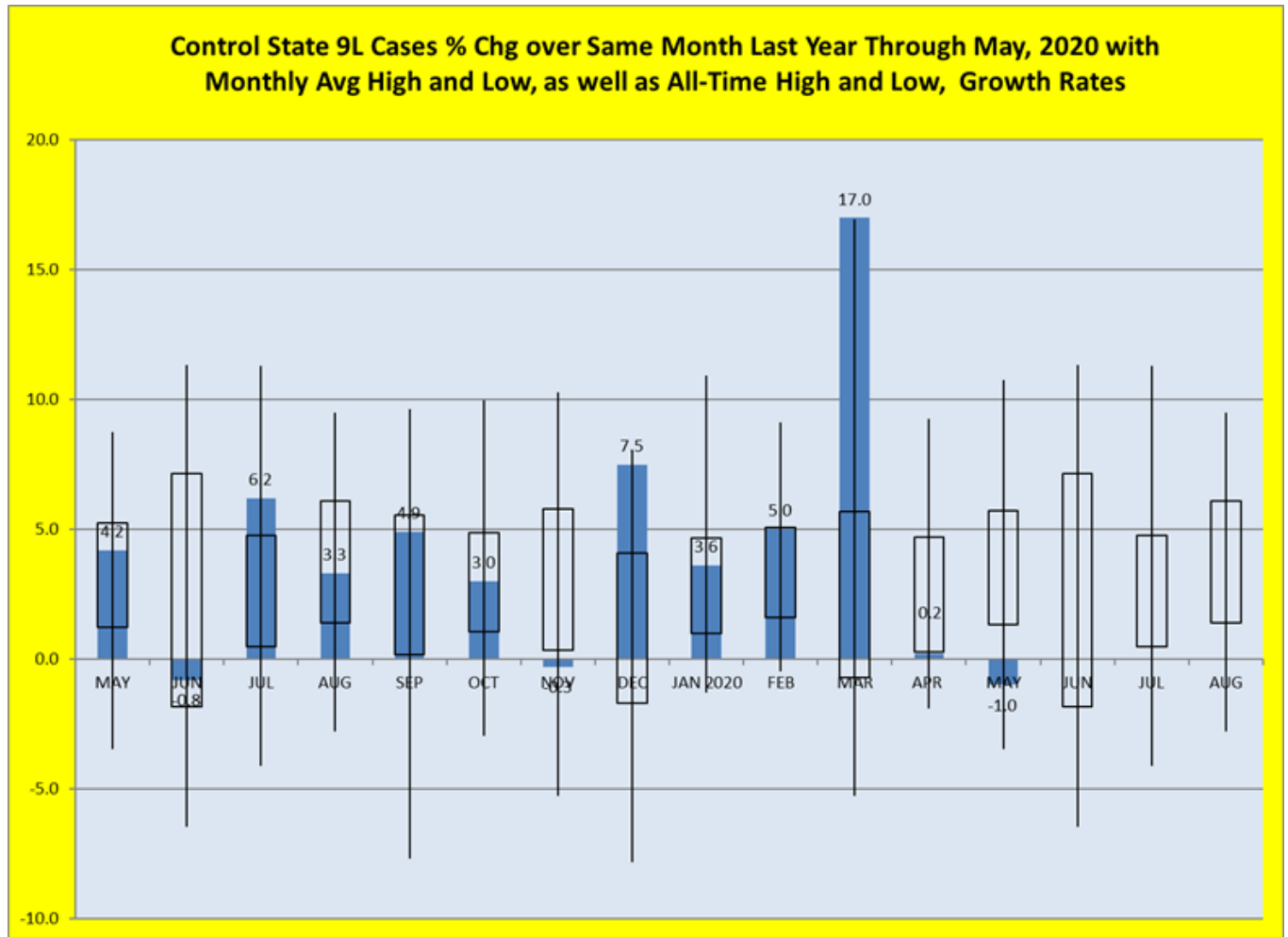
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	-1.0	4.9	5.9%	
Central Region	-11.5	-4.5	7.0%	IA, MD, MI, OH, PA, WV
NE Region	15.7	15.1	-0.6%	ME, NH, VT
NW Region	4.0	8.9	4.9%	ID, MT, OR, UT, WY
Southern Region	10.8	17.0	6.2%	AL, MS, NC, VA



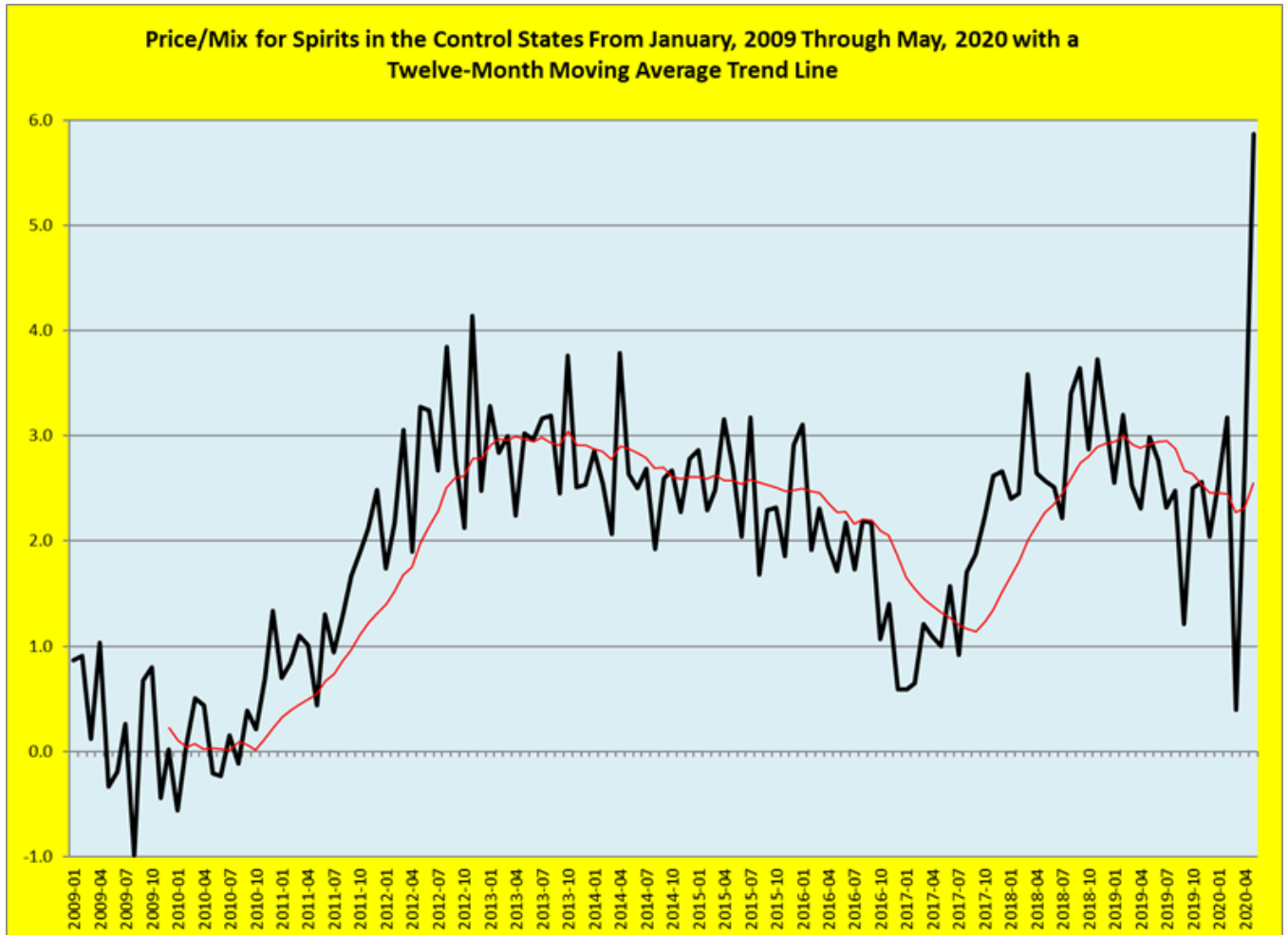
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For more information about the NABCA, visit www.nabca.org.

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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.