



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 2020

ARLINGTON, VA (December 28, 2020) — During November nine-liter control states spirits case sales grew 2.0%, against a weak comp, over same period sales last year. Montana(11.0%), Pennsylvania(5.4%), and Wyoming(14.7%) reported monthly growth rates for November exceeding their twelve-month trends. The growth rates for Alabama(3.0%), Iowa(4.8%), Idaho(7.3%), Montgomery County Maryland(-16.6%), Maine(6.4%), Michigan(17.0%), Mississippi(10.1%), North Carolina(1.8%), New Hampshire(-33.8%), Ohio(-0.6%), Oregon(-0.7%), Utah(5.9%), Virginia(-5.6%), Vermont(2.0%), and West Virginia(9.3%) fell short of their twelve-month trends. Control state rolling-twelve-month-volume growth, 8.0%, improved upon October's reported 7.8%. Spirits volumes are growing 8.0% year-to-date compared to 3.3% a year ago.

Short- and long-term growth trends are calculated to compare and analyze control state sales data. Twelve-month moving averages are used to calculate the short-term trend (rolling-twelve-month growth), and the three-year CAGR is used to calculate the long-term trend. November's short-term trend, 8.0%, is the highest value reported, and November's long-term trend, 4.5%, is the second highest value reported, by the control states.

Control state spirits shelf dollars were up 6.4% during November while trending at 13.2% during the past twelve months. Maine(11.5%), Michigan(27.9%), Montana(15.6%), Pennsylvania(5.7%), Utah(11.0%), and Wyoming(13.7%) reported growth rates exceeding their twelve-month trends. Alabama(7.6%), Iowa(4.9%), Idaho(12.6%), Montgomery County Maryland(-12.7%), Mississippi(17.2%), North Carolina(6.6%), New Hampshire(-37.9%), Ohio(6.4%), Oregon(5.1%), Virginia(-1.5%), Vermont(4.3%), and West Virginia(13.1%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 13.6% year-to-date compared to 5.9% last year.

Price/Mix for November is 4.4%, down from October's reported 8.3%.

During March, April, May, June, July, August, September, and October the control states' on- and off-premise markets behaved capriciously. November is no exception. During the twelve-month period ending February 2020, the off-premise monthly spirits share averaged 82%. The off-premise monthly shares of the control state market during March-November were 91%, 99%, 97%, 90%, 90%, 89%, 88%, 88%, and 91%, respectively. This sequence suggests that the on-premise marketplace's recovery is irregular and saw-toothed-like after being devastated by the Corona Virus. Trends suggest the control state off-premise share for December will be above historical levels as the recovery continues.

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November's control states growth rate was effected by calendar anomalies and pandemic related phenomena.

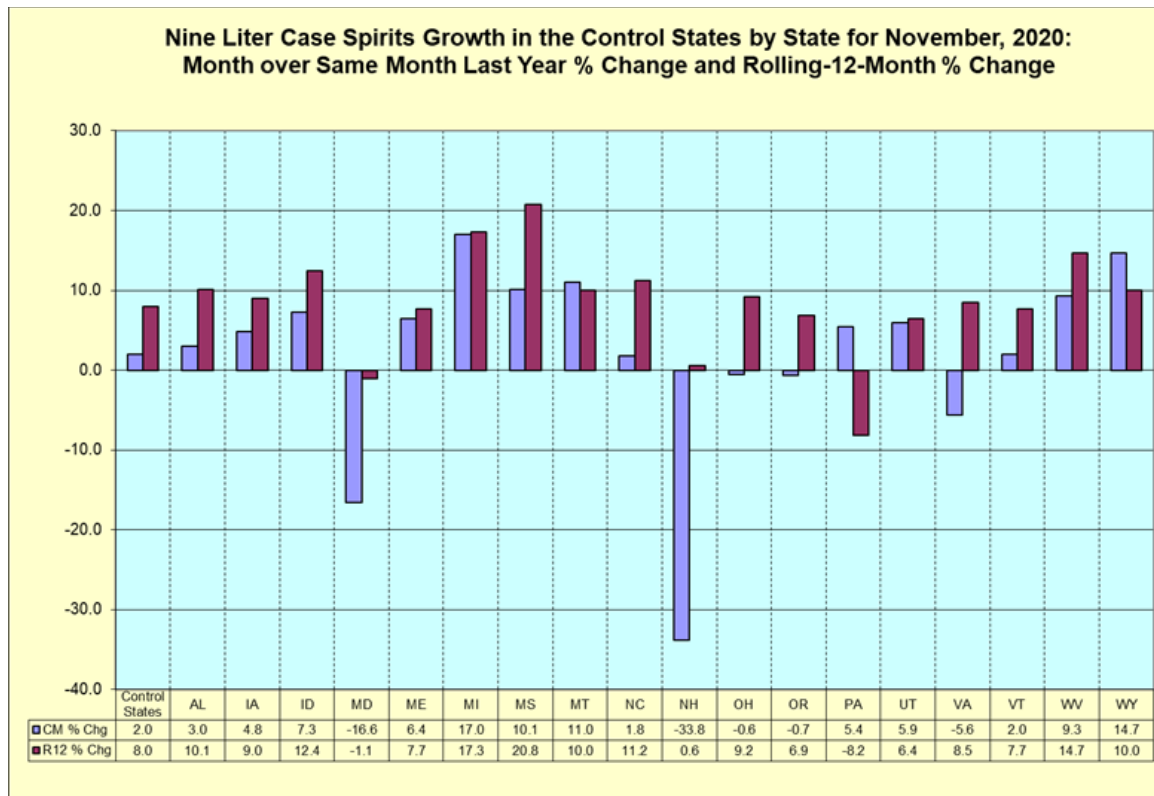
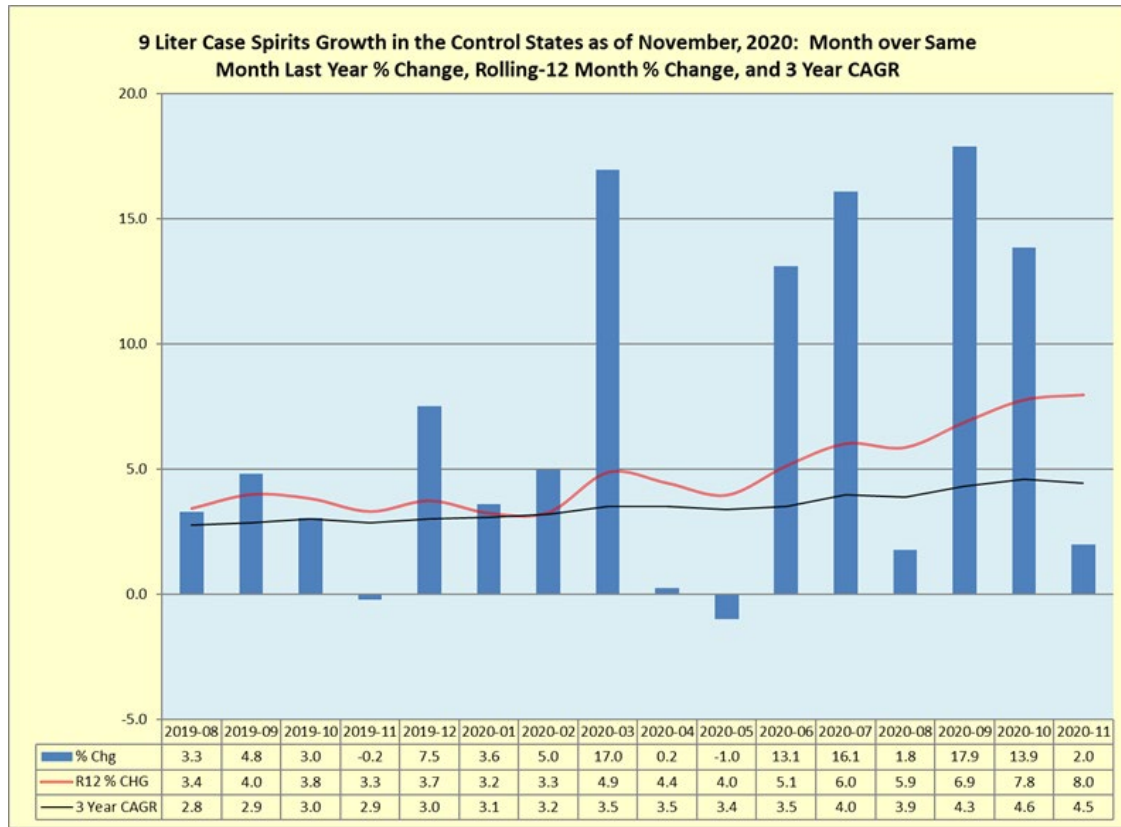
- New Hampshire, with 4% of control state nine-liter-case spirits volume, reported sales for 27 days this November compared to 34 days last November, artificially deflating sales and skewing control state results. New Hampshire had seven fewer selling days during this year's November.
- Last year's November had five Fridays and five Saturdays compared to four Fridays and four Saturdays this year.
- Retail outlets selling spirits in five states—Alabama, Mississippi, Montana, North Carolina, Utah—are closed Sundays. This year's November had five Sundays compared to four last year.
- On net, there were eleven fewer selling days during November in the control states, 2.2% fewer, compared to last year.
- After equalizing selling-day variations between this and last year's November, the nine-liter-case-spirits growth rate is 4.4% with a rolling-twelve-month trend of 9.2%. November's shelf-dollar growth rate is 9.0% with a rolling-twelve-month trend of 14.5%.
- Equalized price/mix for November is 4.6%.

Cocktails, with 3% share of the nine-liter case control states spirits market, was November's fastest growing category with 30.0% reported and a twelve-month trend of 38.2%. Tequila, with 7% share, grew during November at 14.5% and 21.1% during the past twelve months. Vodka, with 33% share, grew during the same periods at -2.1% and 4.0%, respectively. Brandy/Cognac(2.1% during November, 14.5% twelve-month trend), Canadian Whiskey(3.6%, 7.3%), Cocktails(30.0%, 38.2%), Cordials(1.8%, 4.6%), Domestic Whiskey(5.8%, 12.0%), Gin(-4.1%, 2.3%), Irish Whiskey(-2.3%, 6.3%), Rum(-1.3%, 3.0%), Scotch(-7.4%, 2.2%), Tequila(14.5%, 21.1%), and Vodka(-2.1%, 4.0%) grew at rates below their twelve-month trends.

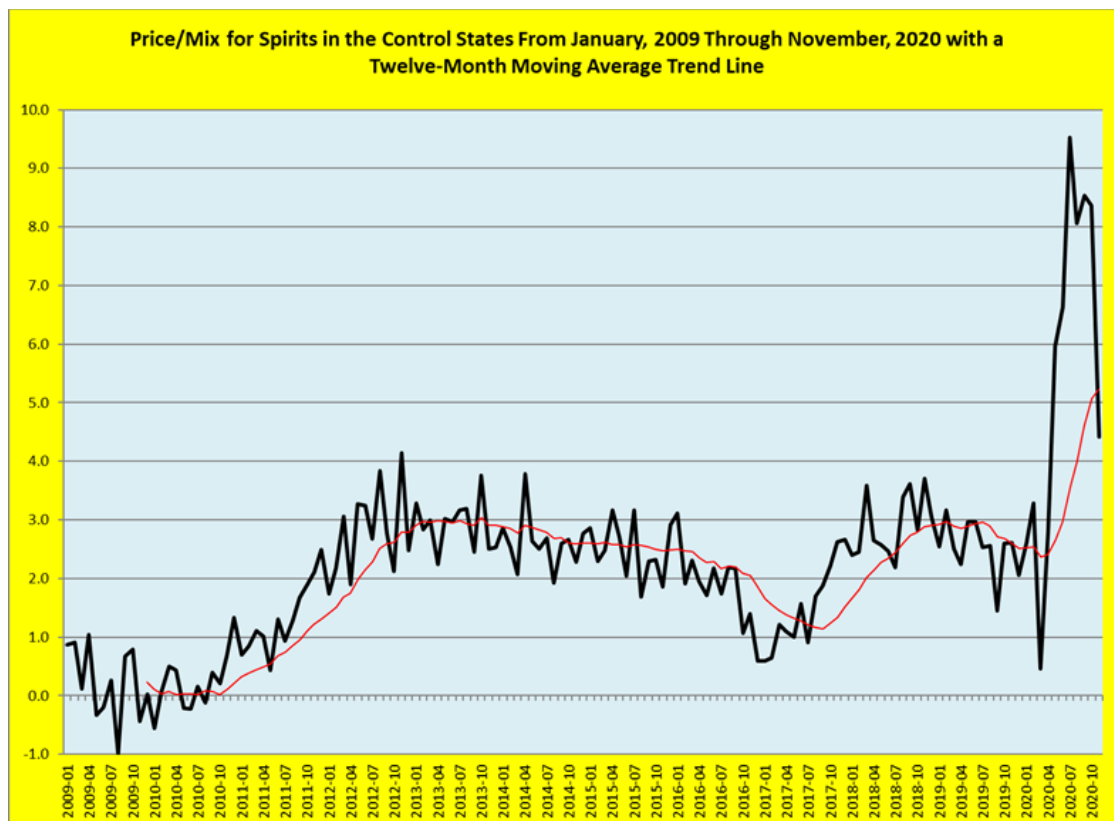
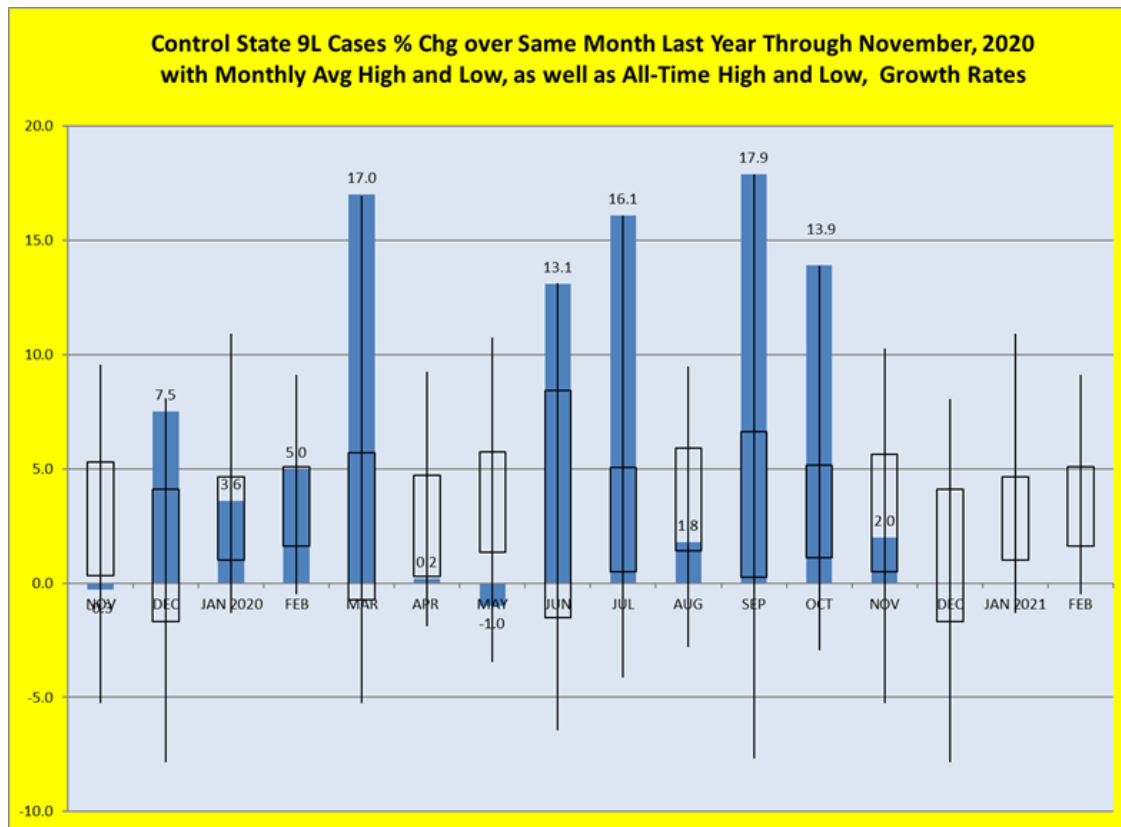
November's nine-liter wine case sales growth rate was 1.4%. Pennsylvania (reporting 6.2% nine-liter-case growth for wines), New Hampshire (-17.5%), Mississippi (9.0%), Utah (4.3%), Montgomery County Maryland (-7.4%), and Wyoming (9.7%) are the control states that are the sole wholesalers of wines and spirits within their geographical boundaries. Rolling-twelve-month wine volume growth in these six control states is 2.7%, up from October's reported 2.5%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	2.0	6.4	4.4%	
Central Region	6.8	12.2	5.4%	IA, MD, MI, OH, PA, WV
NE Region	-21.6	-23.4	-1.8%	ME, NH, VT
NW Region	4.3	9.0	4.7%	ID, MT, OR, UT, WY
Southern Region	0.5	4.8	4.3%	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.