



News Release

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FOR IMMEDIATE RELEASE

NABCA Releases Control States Nine-Liter Spirits Sales Results for January *Control State results for nine-liter beverage sales for January 2021*

ARLINGTON, VA (March 5, 2021) — During January nine-liter control states spirits case sales grew 3.3% over same period sales last year. Idaho(15.1%), New Hampshire(12.3%), Pennsylvania(1.8%), and Wyoming(11.6%) reported monthly growth rates for January exceeding their twelve-month trends. The growth rates for Alabama(8.1%), Iowa(10.5%), Montgomery County Maryland(-12.8%), Maine(3.4%), Michigan(-12.4%), Mississippi(13.6%), Montana(-5.6%), North Carolina(11.3%), Ohio(9.8%), Oregon(3.6%), Utah(-17.8%), Virginia(4.8%), Vermont(4.9%), and West Virginia(11.9%) fell short of their twelve-month trends. Control state rolling-twelve-month-volume growth, 7.5%, mirrored December's reported 7.5%. Spirits volumes are growing 3.3% year-to-date compared to 3.6% a year ago.

Control state spirits shelf dollars were up 10.4% during January while trending at 13.4% during the past twelve months. Iowa(15.2%), Idaho(23.0%), North Carolina(18.7%), New Hampshire(25.5%), Ohio(20.7%), Pennsylvania(4.9%), Virginia(15.4%), West Virginia(19.9%), and Wyoming(15.1%) reported growth rates exceeding their twelve-month trends. Alabama(14.4%), Montgomery County Maryland(-11.2%), Maine(9.1%), Michigan(-5.0%), Mississippi(25.0%), Montana(-0.7%), Oregon(11.6%), Utah(-16.1%), and Vermont(7.5%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 10.4% year-to-date compared to 6.2% last year.

Price/Mix for January is 7.1%, up from December's reported 5.0%.

Price/Mix continues to be driven in the control states by premiumization. During January 2020 through January 2021, the median price of 750 ML spirits volumes rose more than 4%, and the average price rose more than 5%. These growth rates are remarkable. The monthly median prices for 750 ML spirits volumes during January 2020 through January 2021 inclusive were: 23.99, 23.99, 23.99, 23.95, 23.99, 23.99, 24.05, 24.72, 24.87, 24.95, 24.96, 24.99, and 24.99, respectively. The monthly average prices for 750 ML spirits volumes during the same period were: 37.25, 37.19, 35.13, 34.25, 35.38, 37.35, 37.05, 37.83, 37.88, 38.02, 38.53, 41.14, and 39.17.

During the period March through December of 2020, the control states' on- and off-premise markets behaved capriciously. January is no exception. During the twelve-month period ending February 2020, the off-premise monthly spirits share averaged 81%. The off-premise monthly shares of the control states market during March 2020-January 2021 were 91%, 99%, 96%, 90%, 89%, 89%, 88%, 88%, 91%, 94%, and 90%, respectively. This sequence suggests an irregular on-premise marketplace's recovery. Short term trends suggest the control state off-premise share for February will be above historical levels as the on-premise marketplace recovery continues.

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January's control states growth rate was affected by calendar anomalies and continues to be influenced by pandemic related phenomena.

- Utah, with 3% of control state nine-liter-case spirits volume, reported sales for 23 days this January compared to 28 days last January, artificially deflating sales and skewing control state results. Utah had five fewer selling days during this year's January.
- Michigan, with 16% of control state nine-liter-case spirits volume, reported sales for 28 days this January compared to 35 days last January, artificially deflating sales and skewing control state results. Michigan had seven fewer selling days during this year's January.
- Last year's January had five Fridays and four Saturdays compared to five Fridays and five Saturdays this year.
- Retail outlets selling spirits in five states—Alabama, Mississippi, Montana, North Carolina, Utah—are closed Sundays. This year's January had five Sundays compared to four last year.
- Six states—Iowa, Maine, Mississippi, Montana, West Virginia, Wyoming—report monthly warehouse depletions as calendar month sales. This year's January had 20 shipping days compared to 22 last year.
- On net, there were sixteen fewer selling days during January in the control states, 3% fewer, compared to last year.
- After equalizing selling-day variations between this and last year's January, the nine-liter-case-spirits growth rate is 8.5% with a rolling-twelve-month trend of 8.5%. January's shelf-dollar growth rate is 16.0% with a rolling-twelve-month trend of 14.4%.
- Equalized price/mix for January is 7.5%.

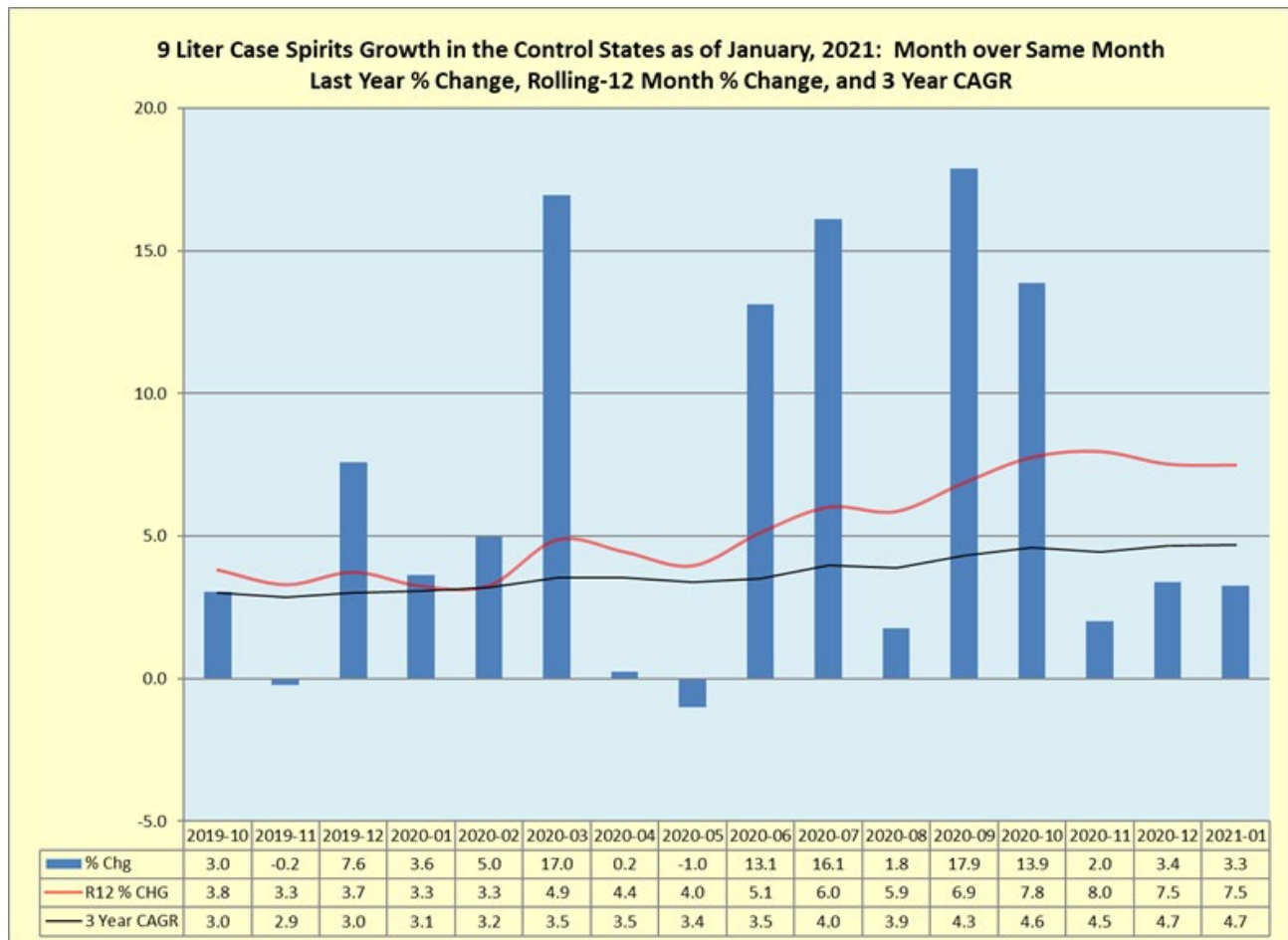
Cocktails, with 3% share of the nine-liter case control states spirits market, was January's fastest growing category with 50.1% reported and a twelve-month trend of 42.1%. Tequila, with 7% share, grew during January at 17.8% and 21.0% during the past twelve months. Vodka, with 33% share, grew during the same periods at -3.1% and 2.9%, respectively. Cocktails(50.1% during January, 42.1% twelve-month trend), Irish Whiskey(7.2%, 4.5%), and Scotch(2.6%, 1.9%) grew at rates above their twelve-month trends, while Brandy/Cognac(10.2%, 15.2%), Canadian Whiskey(4.7%, 7.1%), Cordials(3.3%, 4.0%), Domestic Whiskey(7.5%, 11.6%), Gin(-4.1%, 1.4%), Rum(-3.0%, 2.5%), Tequila(17.8%, 21.0%), and Vodka(-3.1%, 2.9%) grew at rates below their twelve-month trends.

January's nine-liter wine case sales growth rate was 2.8%. Pennsylvania (reporting 4.2% nine-liter-case growth for wines), New Hampshire (12.2%), Mississippi (10.8%), Utah (-22.5%), Montgomery County Maryland (-10.7%), and Wyoming (10.8%) 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 3.3%, up from December's reported 3.1%.

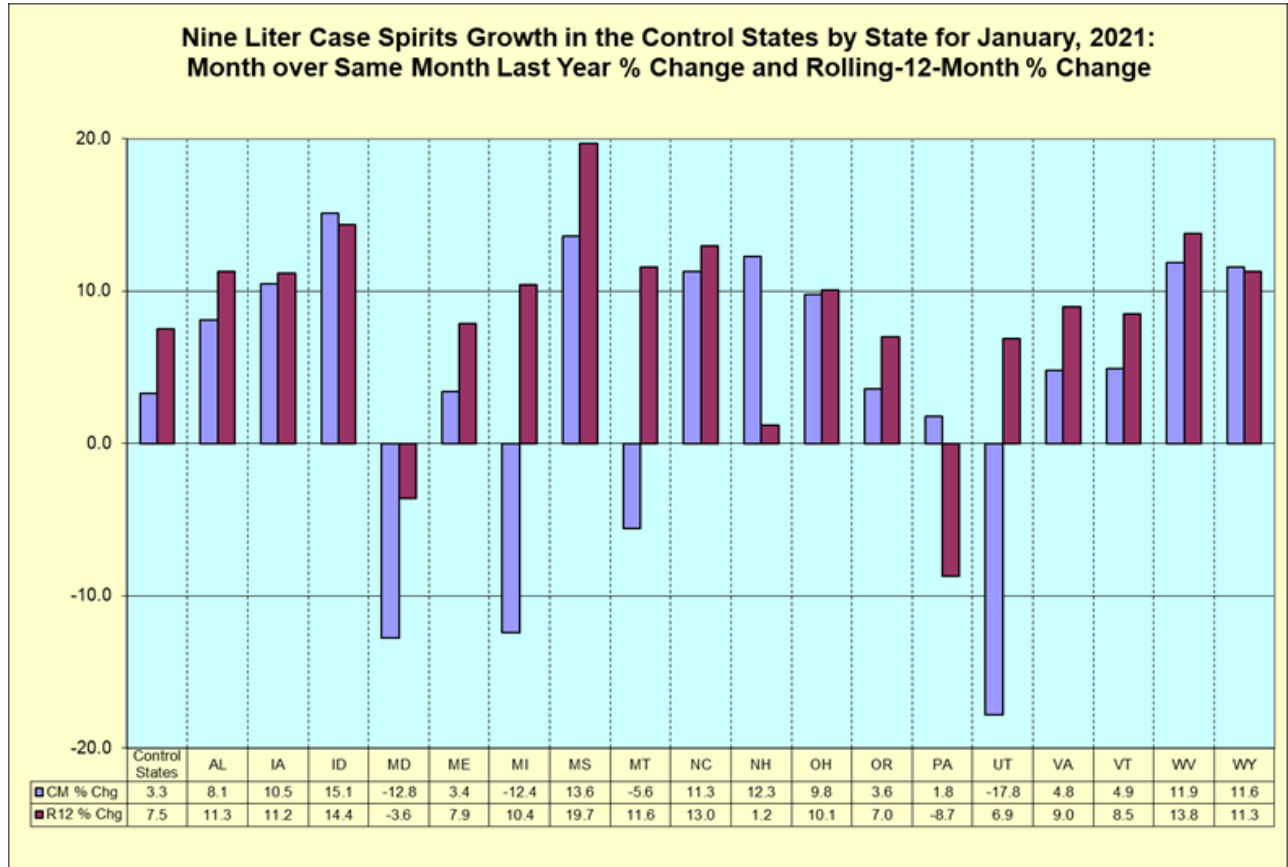
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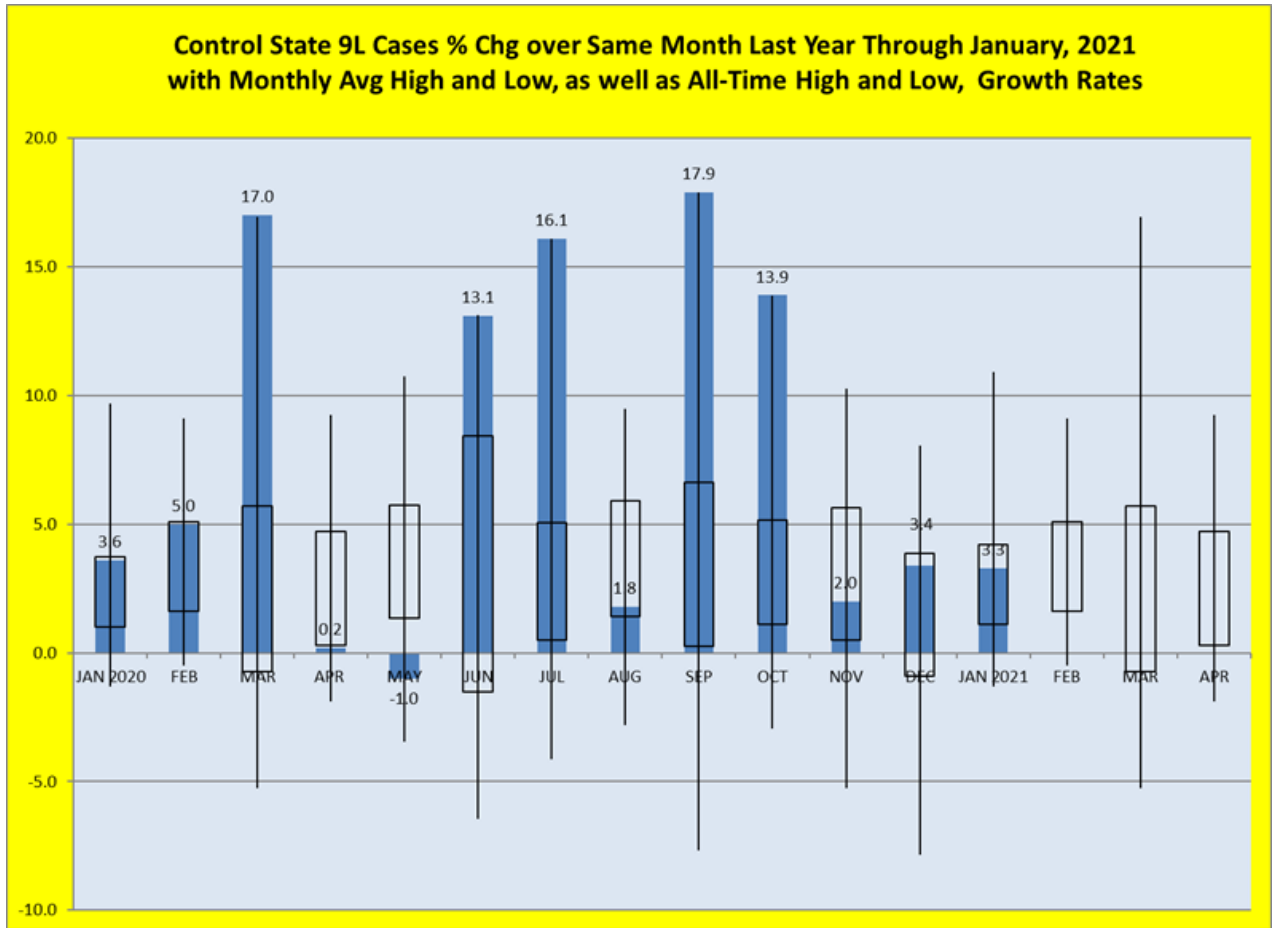
January’s nine-liter wine case sales growth rate was 2.8%. Pennsylvania (reporting 4.2% nine-liter-case growth for wines), New Hampshire (12.2%), Mississippi (10.8%), Utah (-22.5%), Montgomery County Maryland (-10.7%), and Wyoming (10.8%) are the control states that are the sole wholesalers of wines and spirits within their geographical boundaries. Rolling-twelve-month wine volume growth in these six control states is 3.3%, up from December’s reported 3.1%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	3.3	10.4	7.1%	
Central Region	-0.3	6.1	6.4%	IA, MD, MI, OH, PA, WV
NE Region	8.9	18.4	9.5%	ME, NH, VT
NW Region	0.2	6.0	5.8%	ID, MT, OR, UT, WY
Southern Region	9.0	17.5	8.5%	AL, MS, NC, VA

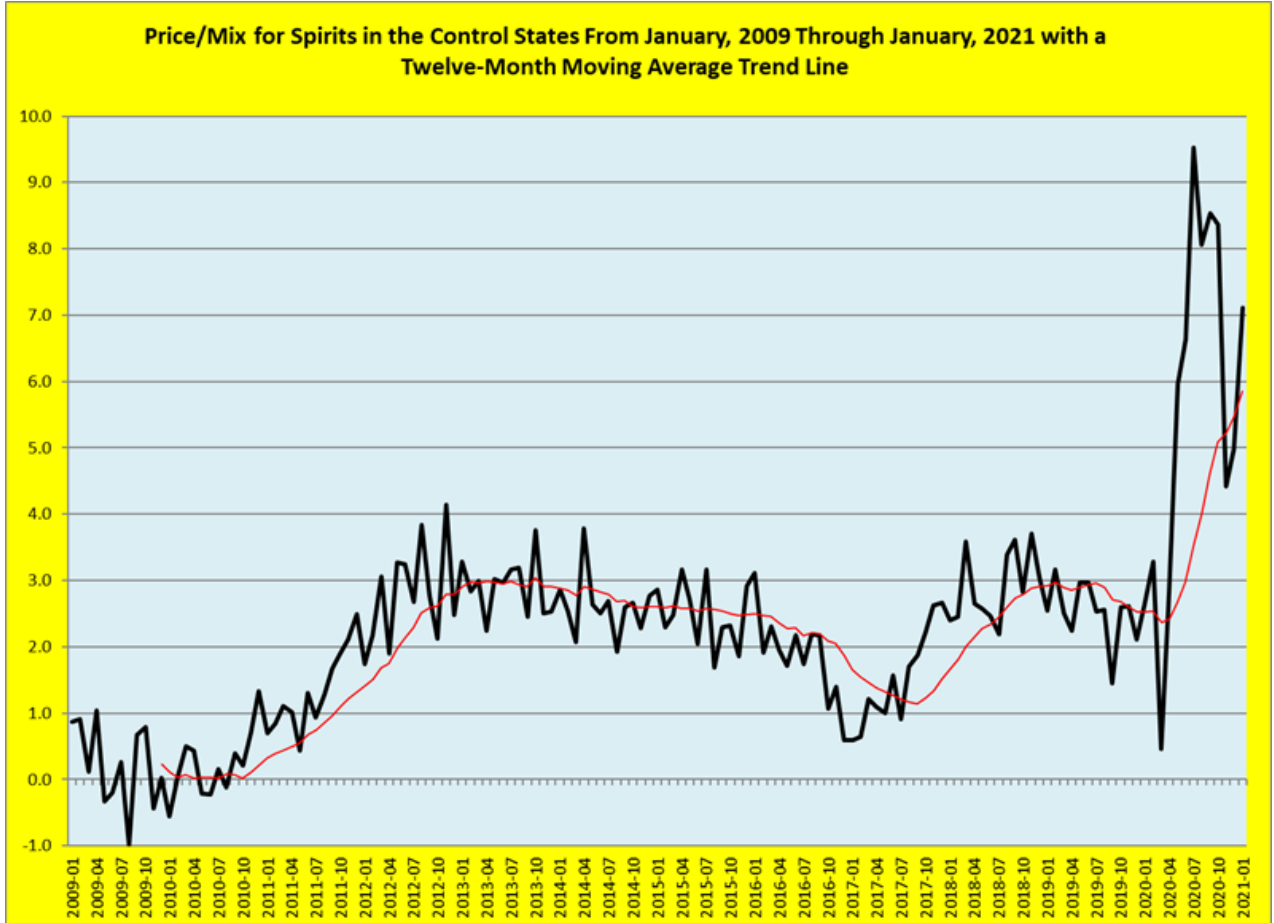


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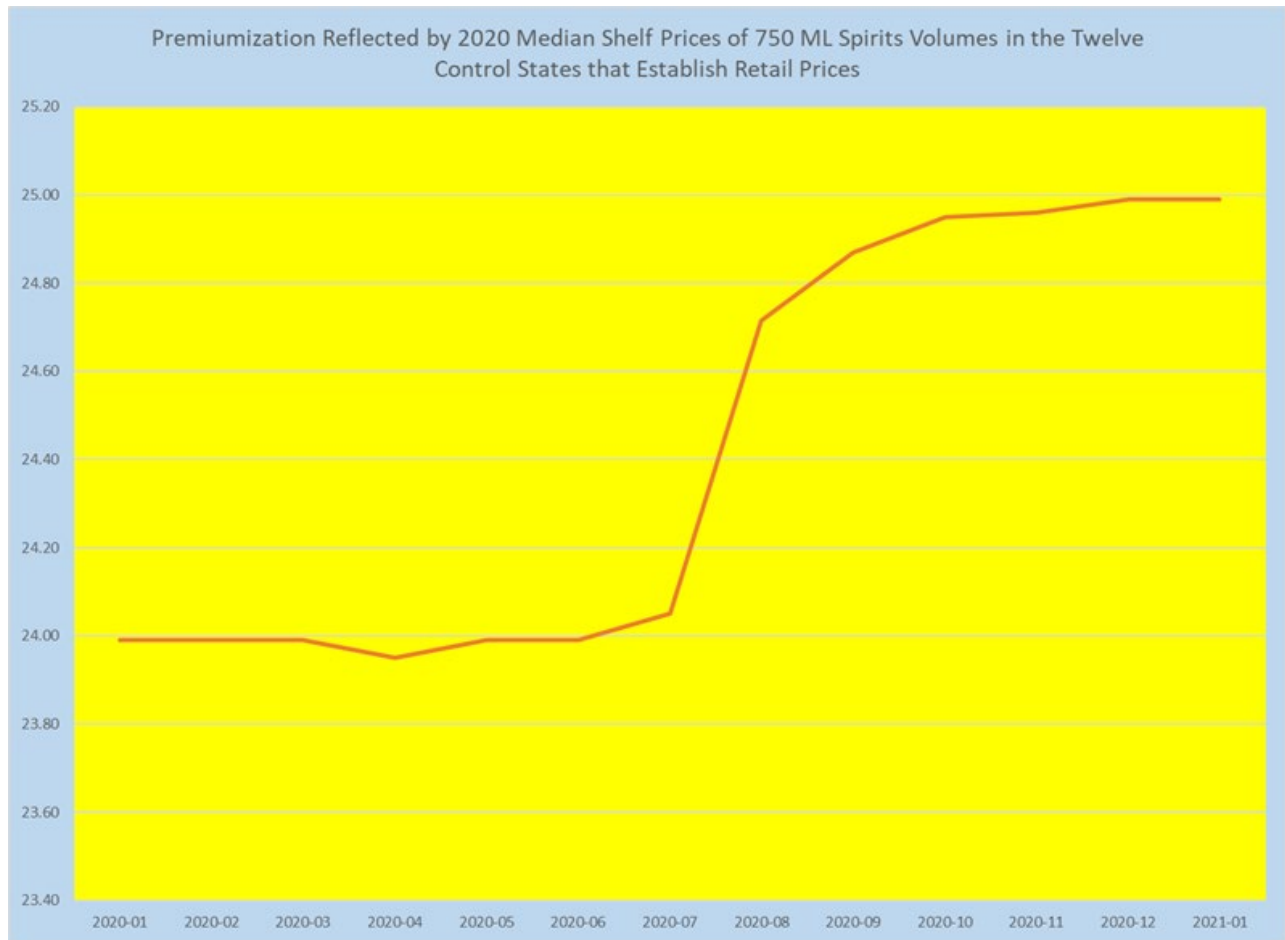




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For more information about the NABCA, visit www.nabca.org.

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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.