



News Release

Contact: Margaret Barchine, APR
703-578-4200-Office; 703-907-9636-Cell
maggie.barchine@nabca.org

FOR IMMEDIATE RELEASE

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

Control State results for nine-liter beverage sales for February 2021

ARLINGTON, VA (March 31, 2021) — During February nine-liter control states spirits case sales grew 6.2% over same period sales last year. Maine(11.8%), Michigan(14.3%), Montana(12.9%), New Hampshire(8.5%), Pennsylvania(2.3%), Utah(7.5%), and West Virginia(17.8%) reported monthly growth rates for February exceeding their twelve-month trends. The growth rates for Alabama(7.8%), Iowa(9.2%), Idaho(8.9%), Montgomery County Maryland(-17.2%), Mississippi(9.4%), North Carolina(3.9%), Ohio(7.4%), Oregon(-0.4%), Virginia(0.9%), Vermont(1.4%), and Wyoming(6.2%) fell short of their twelve-month trends. Control state rolling-twelve-month-volume growth, 7.7%, mirrored January's reported 7.7%. Spirits volumes are growing 5.0% year-to-date compared to 4.3% a year ago.

Control state spirits shelf dollars were up 13.0% during February while trending at 13.9% during the past twelve months. Maine(17.1%), Michigan(23.4%), Montana(16.2%), New Hampshire(18.3%), Pennsylvania(7.7%), Utah(10.6%), and West Virginia(24.9%) reported growth rates exceeding their twelve-month trends. Alabama(14.0%), Iowa(14.7%), Idaho(15.4%), Montgomery County Maryland(-14.7%), Mississippi(16.7%), North Carolina(10.5%), Ohio(17.8%), Oregon(5.4%), Virginia(7.1%), Vermont(3.6%), and Wyoming(5.6%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 11.9% year-to-date compared to 7.2% last year.

Price/Mix for February is 6.8%, down from January's reported 7.1%.

Nine-liter case growth rates in the control states during Februarys with comps that are leap year Februarys are, on average, about 0.5%. February 2021's 6.2% nine-liter case growth rate is anomalous. It is more than an order of magnitude bigger than expected and can be considered a pandemic related phenomenon.

Price/Mix continues to be driven in the control states by premiumization. During January 2020 through February 2021, the median price of 750 ML spirits volumes rose more than 4%, and the average price rose more than 6%. These growth rates are remarkable. The monthly median prices for 750 ML spirits volumes during January 2020 through February 2021 inclusive were: 23.99, 23.99, 23.99, 23.95, 23.99, 23.99, 24.05, 24.71, 24.87, 24.95, 24.96, 24.99, 24.99, and 24.97 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, 38.54, 41.12, 39.10, and 39.59.

-more-

During the period March through January of 2020, the control states' on- and off-premise markets behaved capriciously. February 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-February 2021 were 91%, 99%, 96%, 90%, 89%, 89%, 88%, 88%, 91%, 94%, 90%, and 88% respectively. This sequence suggests an irregular on-premise marketplace's recovery. Short term trends suggest the control state off-premise share for March will be above historical levels as the on-premise marketplace recovery continues.

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

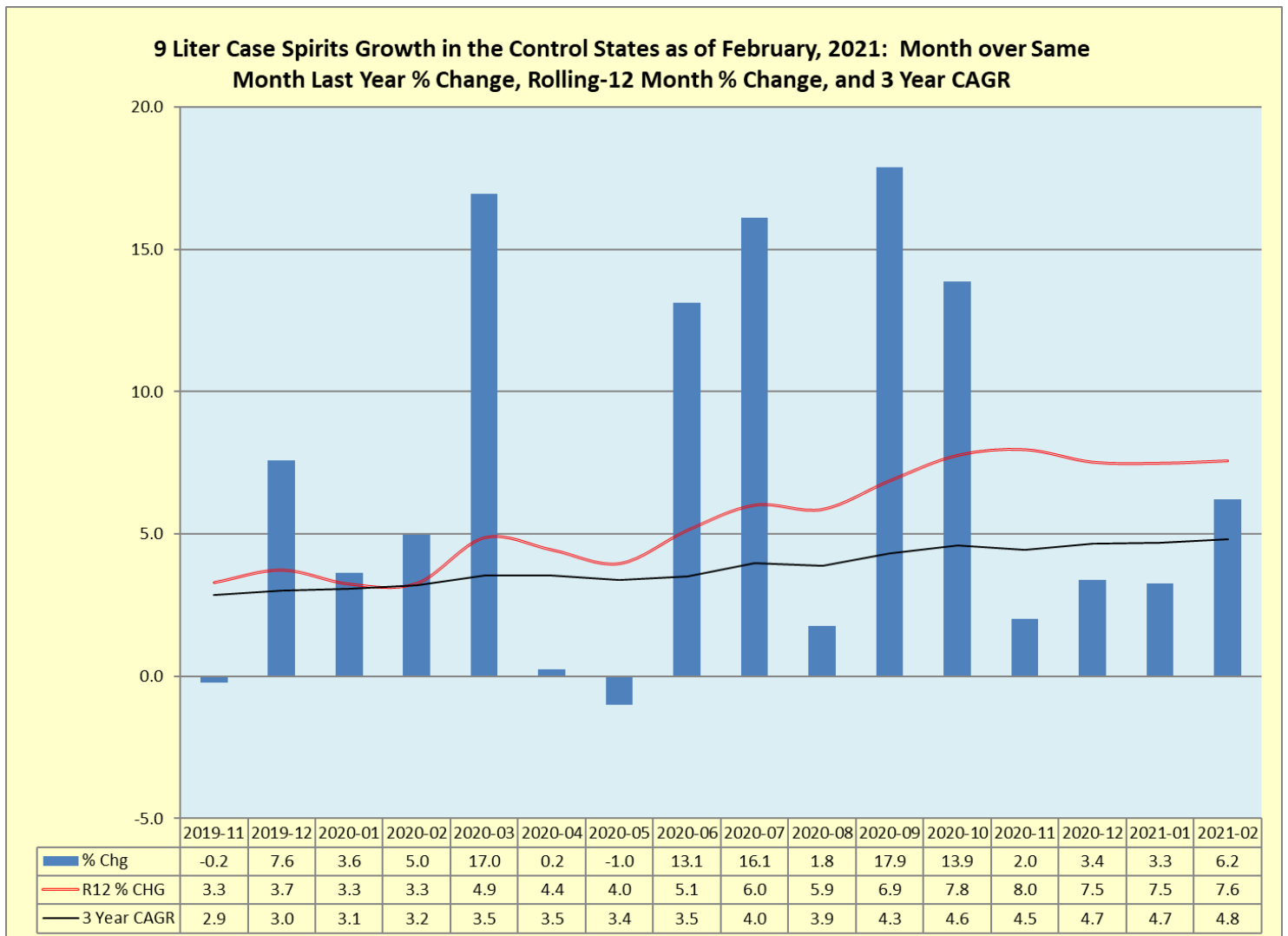
- Last year's February was a leap year. The fourteen control states that report calendar month sales had an additional selling day last year, leap year. Four states—Michigan, New Hampshire, Pennsylvania, Utah—report fiscal period sales—4, 4, 5-week quarters or 4,5,4-week quarters—and are reporting the same number of selling days this February compared to last year's.
- On net, there were fourteen fewer selling days during February in the control states, 3% fewer, compared to last year.
- After equalizing selling-day variations between this and last year's February, the nine-liter-case-spirits growth rate is 9.1% with a rolling-twelve-month trend of 9.2%. February's shelf-dollar growth rate is 16.0% with a rolling-twelve-month trend of 15.4%.
- Equalized price/mix for February is 6.9%.

Cocktails, with 3% share of the nine-liter case control states spirits market, was February's fastest growing category with 44.6% reported and a twelve-month trend of 44.0%. Tequila, with 8% share, grew during February at 19.2% and 21.5% during the past twelve months. Vodka, with 33% share, grew during the same periods at -0.6% and 2.6%, respectively. Canadian Whiskey(9.8% during February, 8.0% twelve-month trend), Cocktails(44.6%, 44.0%), Cordials(8.9%, 4.7%), Irish Whiskey(5.4%, 4.4%), and Scotch(3.7%, 2.5%) grew at rates above their twelve-month trends, while Brandy/Cognac(16.2%, 16.6%), Domestic Whiskey(8.6%, 11.8%), Gin(-0.1%, 1.5%), Rum(1.3%, 2.8%), Tequila(19.2%, 21.5%), and Vodka(-0.6%, 2.6%) grew at rates below their twelve-month trends.

February's nine-liter wine case sales growth rate was 0.3%. Pennsylvania (reporting -2.3% nine-liter-case growth for wines), New Hampshire (11.3%), Mississippi (-1.0%), Utah (4.8%), Montgomery County Maryland (-7.5%), and Wyoming (15.8%) 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 3.1%, nearly flat with January's reported 3.3%.

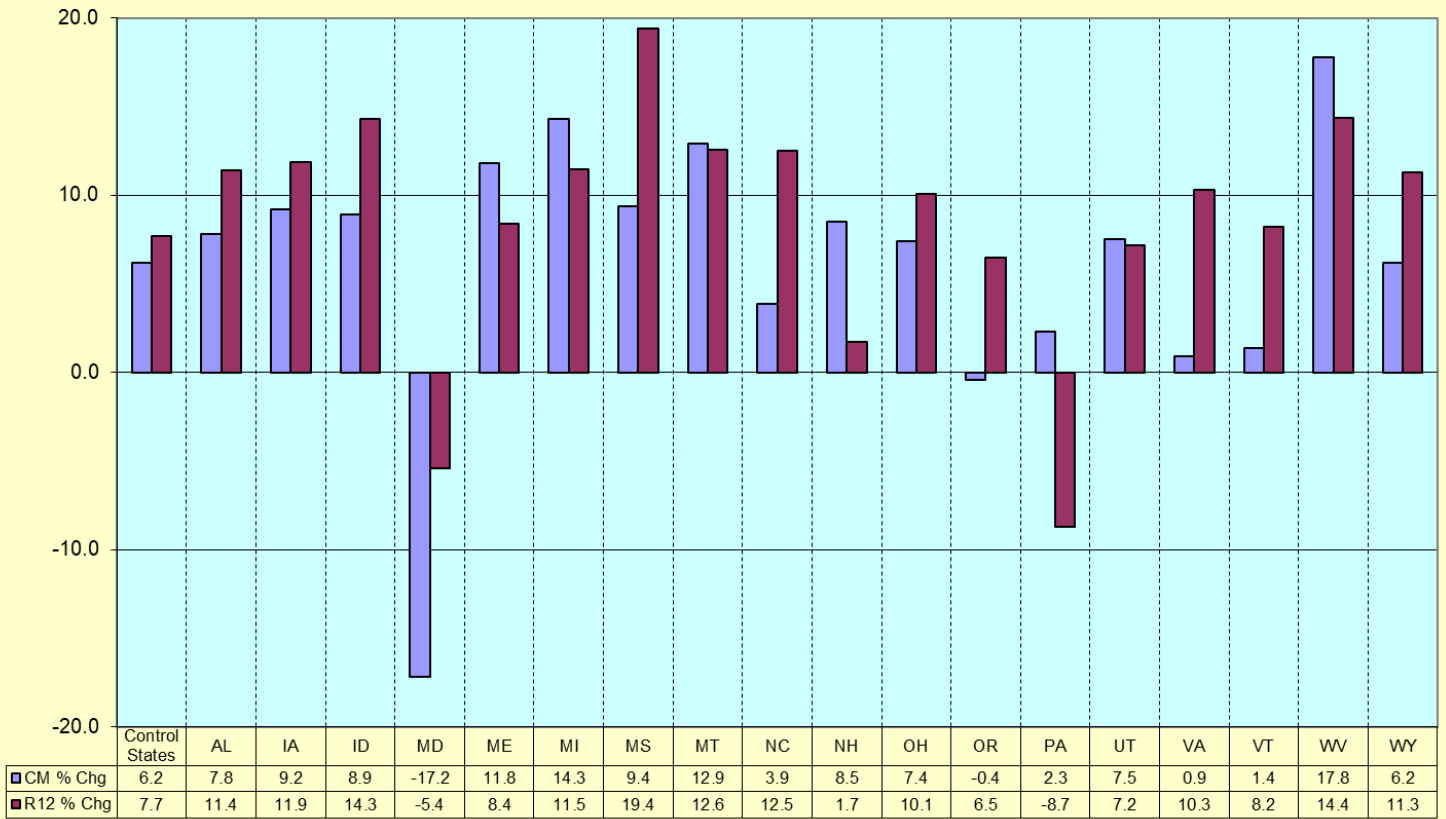
-more-

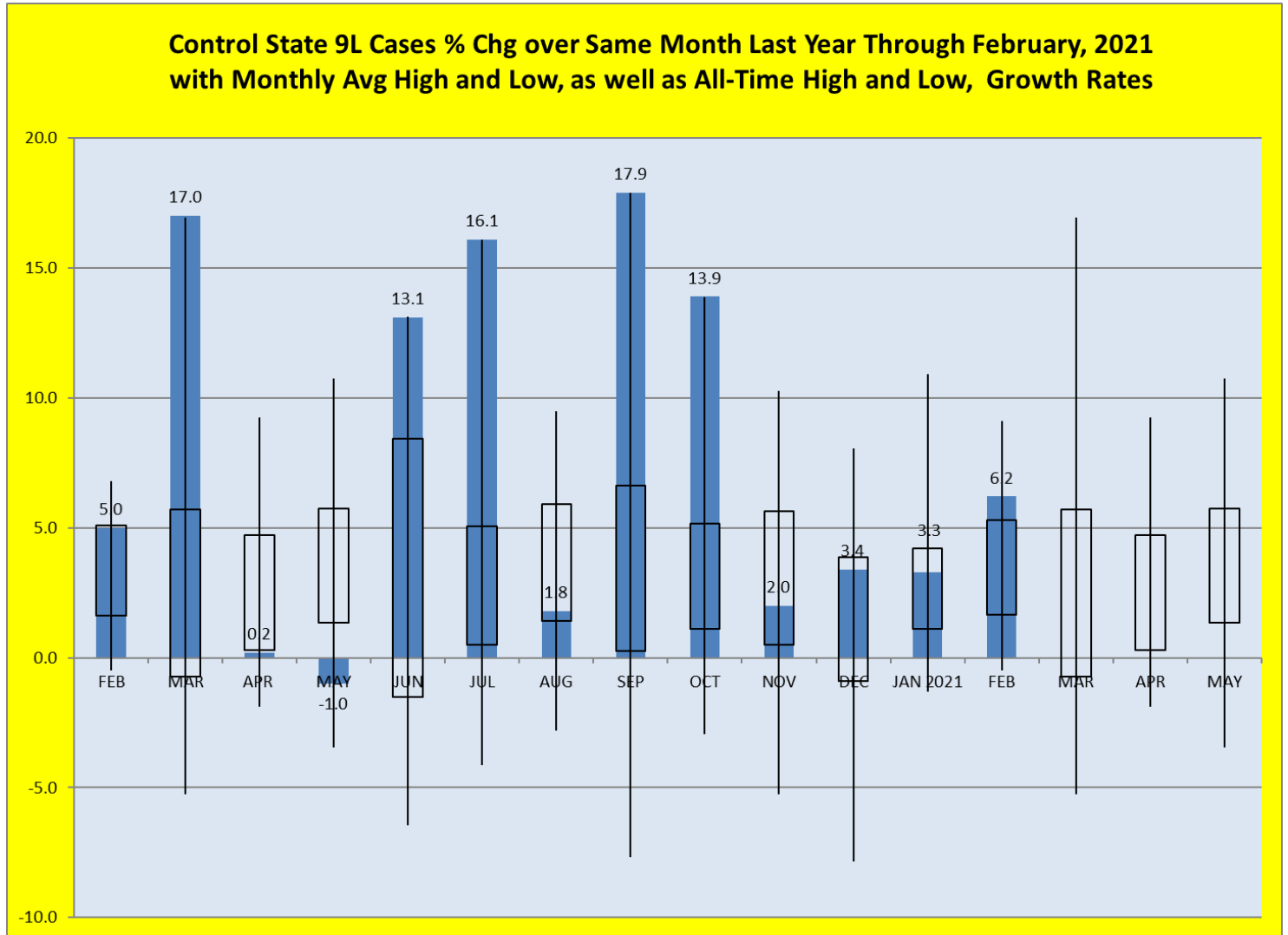
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	6.2	13.0	6.8%	
Central Region	7.5	15.2	7.7%	IA, MD, MI, OH, PA, WV
NE Region	8.8	15.9	7.1%	ME, NH, VT
NW Region	4.7	9.1	4.4%	ID, MT, OR, UT, WY
Southern Region	4.4	10.5	5.1%	AL, MS, NC, VA



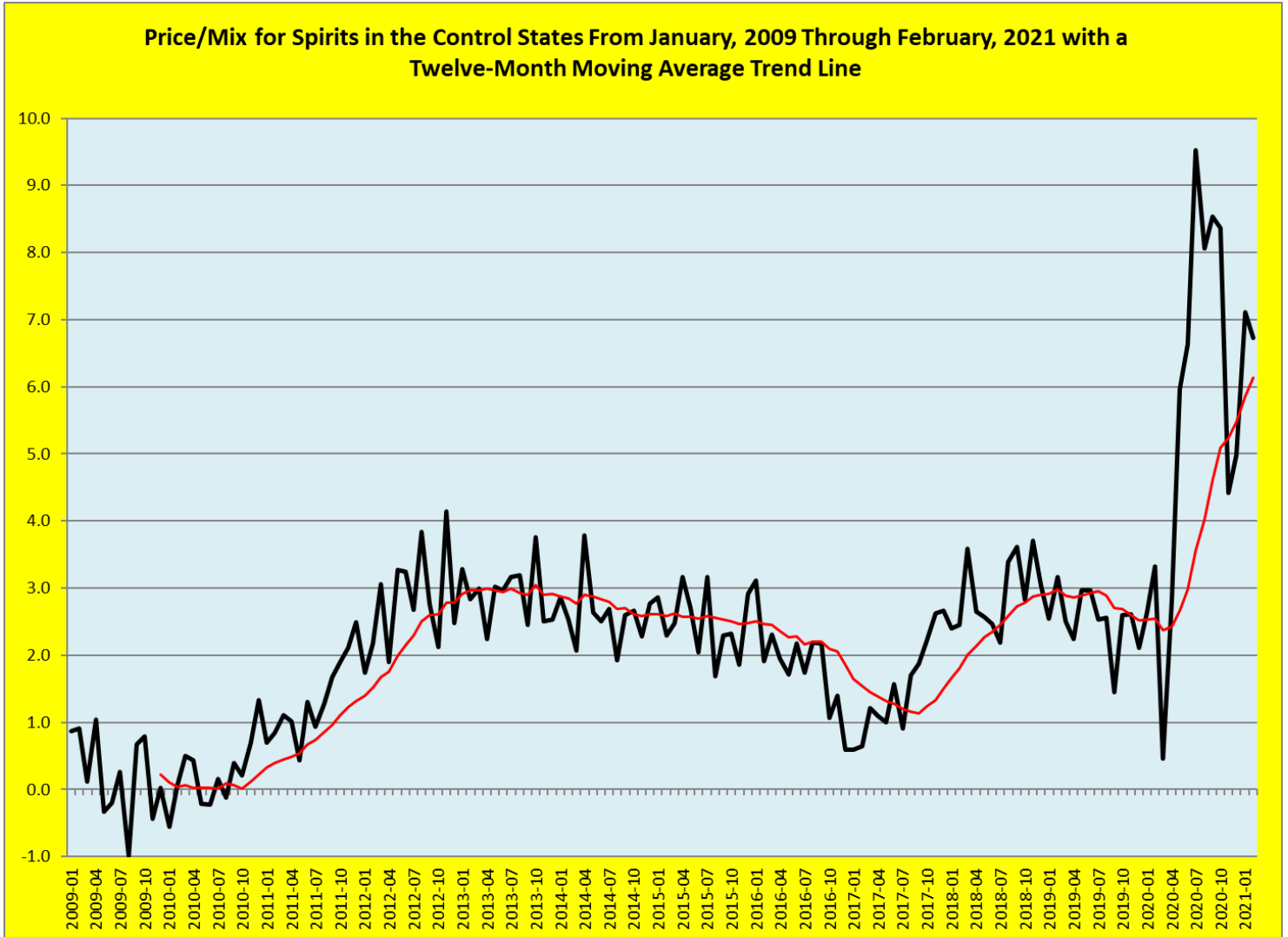
-more-

**Nine Liter Case Spirits Growth in the Control States by State for February, 2021:
Month over Same Month Last Year % Change and Rolling-12-Month % Change**

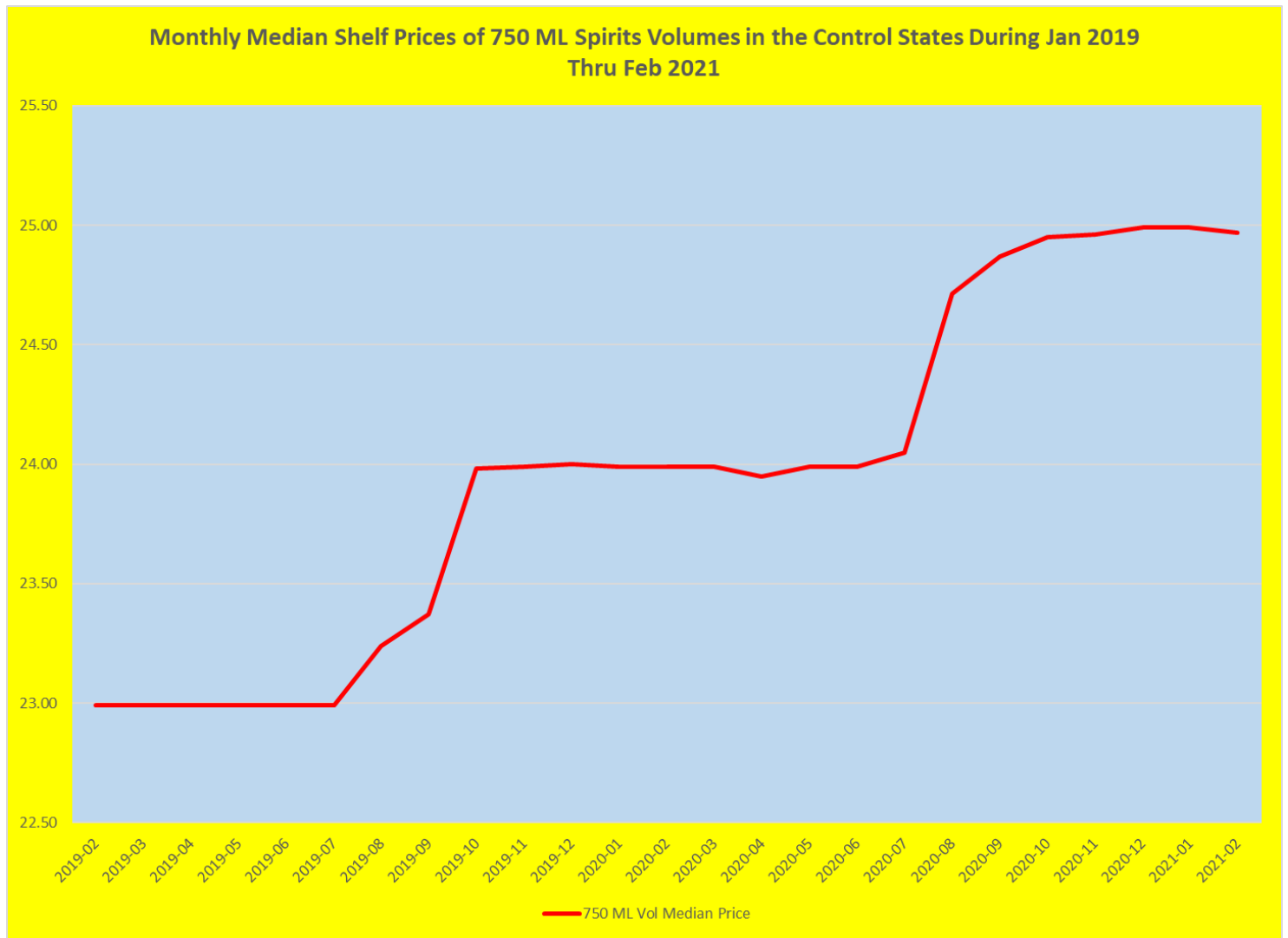


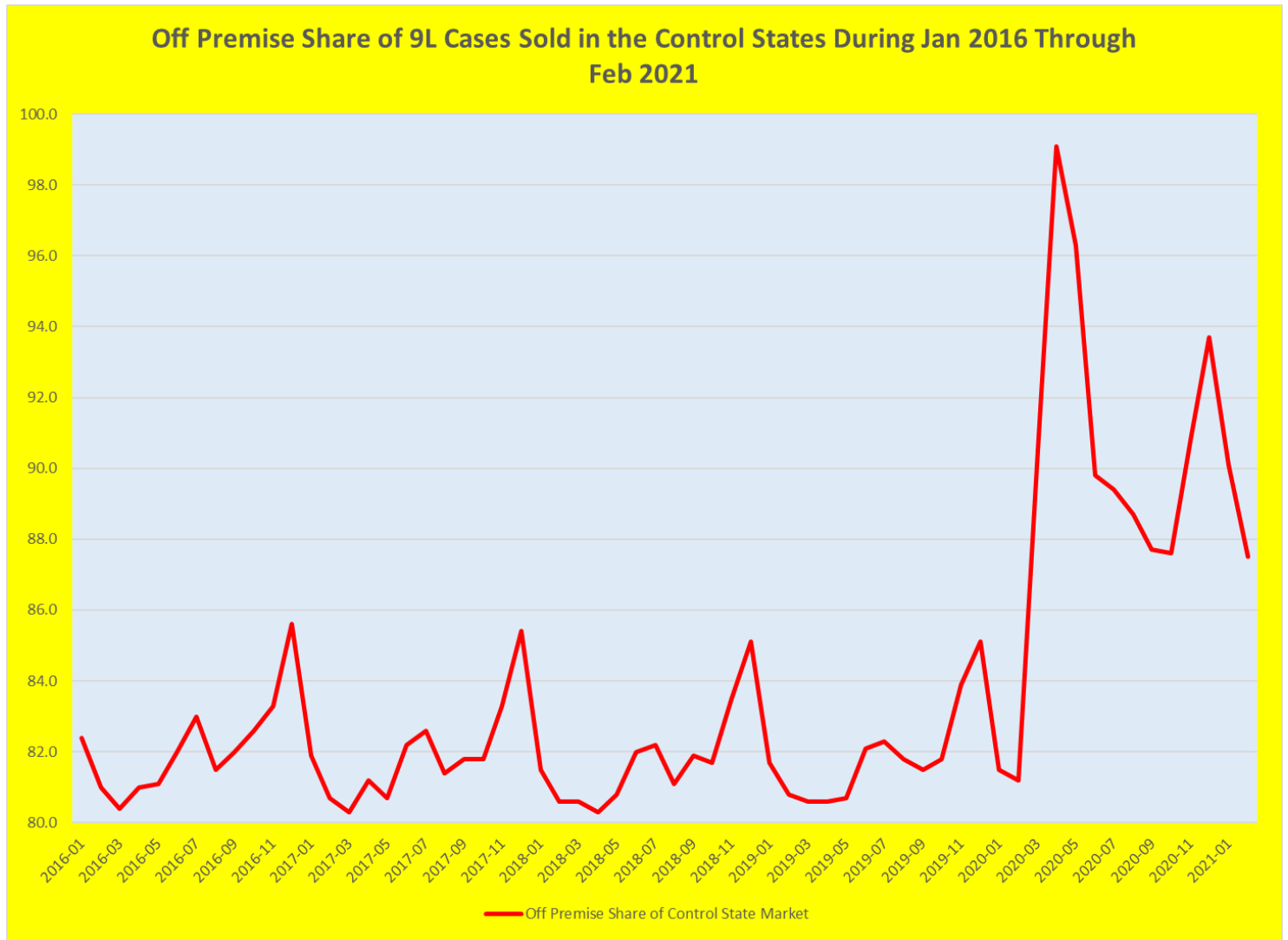


-more-

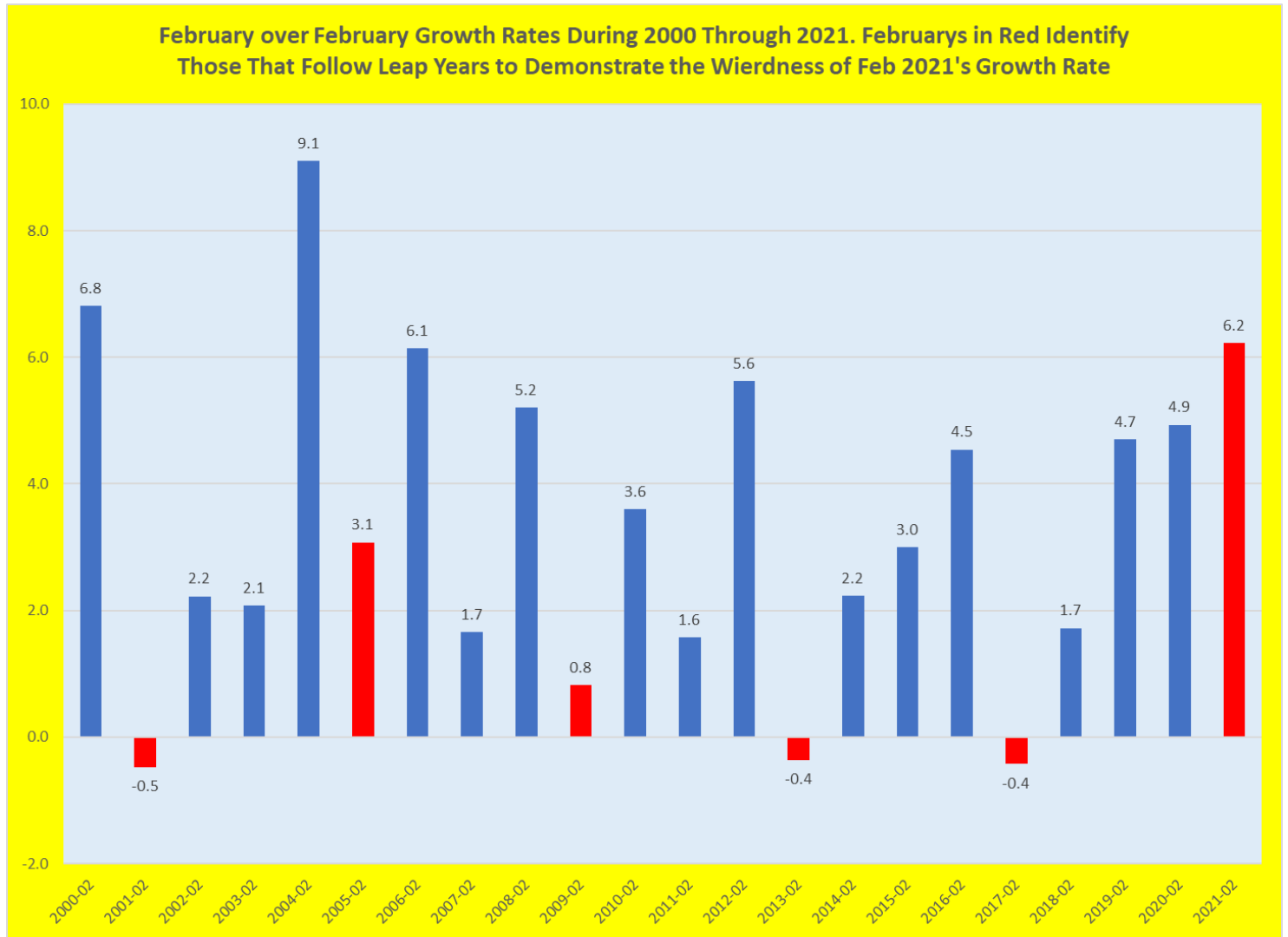


-more-





-more-



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

###

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.