



# News Release

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FOR IMMEDIATE RELEASE

## NABCA Releases Control States Nine-Liter Spirits Sales Results for March

*Control State results for nine-liter beverage sales for March 2021*

ARLINGTON, VA (April 27, 2021) — During March nine-liter control states spirits case sales grew 2.9% over same period sales last year despite a (monster) 17% comp. Michigan(25.5%), Montana(16.8%), and Pennsylvania(11.2%) reported monthly growth rates for March exceeding their twelve-month trends. The growth rates for Alabama(6.2%), Iowa(9.8%), Idaho(-5.9%), Montgomery County Maryland(-21.4%), Maine(7.9%), Mississippi(16.9%), North Carolina(-3.0%), New Hampshire(-31.7%), Ohio(0.2%), Oregon(-8.8%), Utah(-8.2%), Virginia(-5.3%), Vermont(-6.0%), West Virginia(-7.9%), and Wyoming(4.5%) fell short of their twelve-month trends. Control state rolling-twelve-month-volume growth, 6.6%, slipped from February's reported 7.7%. Spirits volumes are growing 4.2% year-to-date compared to 8.7% a year ago.

Control state spirits shelf dollars were up 12.0% during March while trending at 13.5% during the past twelve months. Iowa(17.1%), Maine(16.3%), Michigan(36.2%), Mississippi(28.7%), Montana(25.6%), Pennsylvania(19.5%), and Wyoming(12.8%) reported growth rates exceeding their twelve-month trends. Alabama(13.3%), Idaho(3.0%), Montgomery County Maryland(-15.0%), North Carolina(7.2%), New Hampshire(-31.2%), Ohio(12.9%), Oregon(-1.2%), Utah(0.1%), Virginia(5.0%), Vermont(1.3%), and West Virginia(-1.3%) 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 10.8% last year.

Price/Mix for March is 9.1%, up from February's reported 6.8%.

Premiumization continues to drive Price/Mix in the control states. Note YTD nine-liter case growth and YTD shelf dollar growth rates compared against last year's. March's 9.1% reported Price/Mix is the second highest value ever reported. During March 2021, the median price of 750 ML spirits volumes sold in those control states that set the retail price point was \$24.98 (the second highest value recorded in the control states) and the weighted average price of 750 ML volumes was \$17.85 (also the second highest value recorded). During last year's March, these prices were \$23.99 and \$16.34, respectively.

During the period March 2020 through February of 2021, the control states' on- and off-premise markets behaved capriciously. However, during March the on-premise share of the control state market climbed to a value that is less than 4% below its historical March share, suggesting the on-premise marketplace recovery in the control states is strengthening, as would be expected, as COVID restrictions are lifted.

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

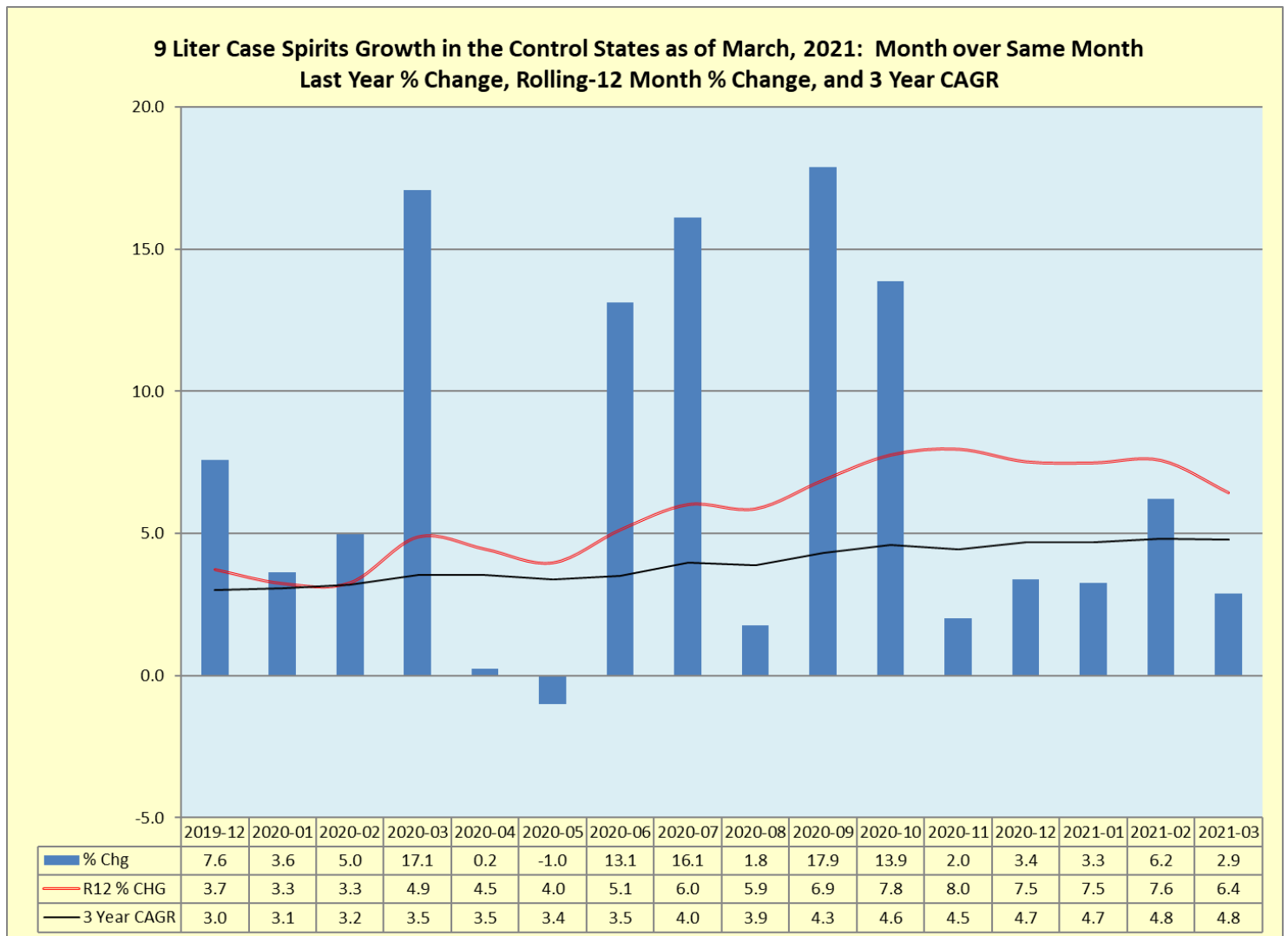
- Michigan, with 16% of control state nine-liter-case spirits volume, reported sales for 35 days this March compared to 28 days last year, artificially inflating sales and skewing control state results. Michigan had seven more selling days during this year's March.
- Retail outlets selling spirits in five states—Alabama, Mississippi, Montana, North Carolina, Utah—are closed Sundays. This year's March had four Sundays compared to five last year.
- Six control states are wholesale only, i.e., they have no state stores or agencies and the stores in their jurisdictions are independently owned, and report calendar month sales. Michigan is wholesale only but reports four- or five-week fiscal period sales. These six states ship to licensees Monday through Friday. NABCA reports shipments from the warehouses as sales for all wholesale only control states. This March's calendar had twenty-three weekdays compared to twenty-two last year, 4.5% more. The six wholesale only control states reporting calendar month sales are Iowa, Maine, Mississippi, Montana, West Virginia, and Wyoming.
- On net, there were eleven more selling days during March in the control states, 2% more, compared to last year.
- After equalizing selling-day variations between this and last year's March, the nine-liter-case-spirits growth rate is -5.8% with a rolling-twelve-month trend of 6.8%. March's shelf-dollar growth rate is 2.4% with a rolling-twelve-month trend of 13.6%.
- Equalized price/mix for March is 8.2%.

Cocktails, with 3% share of the nine-liter case control states spirits market, was March's fastest growing category with 41.9% reported and a twelve-month trend of 44.0%. Tequila, with 8% share, grew during March at 40.5% and 23.9% during the past twelve months. Cordials, with 7% share, grew at 24.7% during March and 6.5% during the past twelve months. Vodka, with 32% share, grew during the same periods at -5.5% and 0.6%, respectively. Cordials(24.7% during March, 6.5% during past twelve months), Irish Whiskey(10.9%, 5.5%), and Tequila(40.5%, 23.9%) grew at rates above their twelve-month trends, while Brandy/Cognac(7.6%, 15.9%), Canadian Whiskey(1.8%, 6.8%), Cocktails(41.9%, 44.0%), Domestic Whiskey(-0.4%, 9.6%), Gin(-5.8%, -0.1%), Rum(-2.2%, 1.5%), Scotch(-8.6%, 0.5%), and Vodka(-5.5%, 0.6%) grew at rates below their twelve-month trends.

March's nine-liter wine case sales growth rate was -14.5%. Pennsylvania (reporting -17.4% nine-liter-case growth for wines), New Hampshire (-12.9%), Mississippi (-1.7%), Utah (-14.4%), Montgomery County Maryland (-13.3%), and Wyoming (-13.4%) 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%, down from February's reported 3.0%.

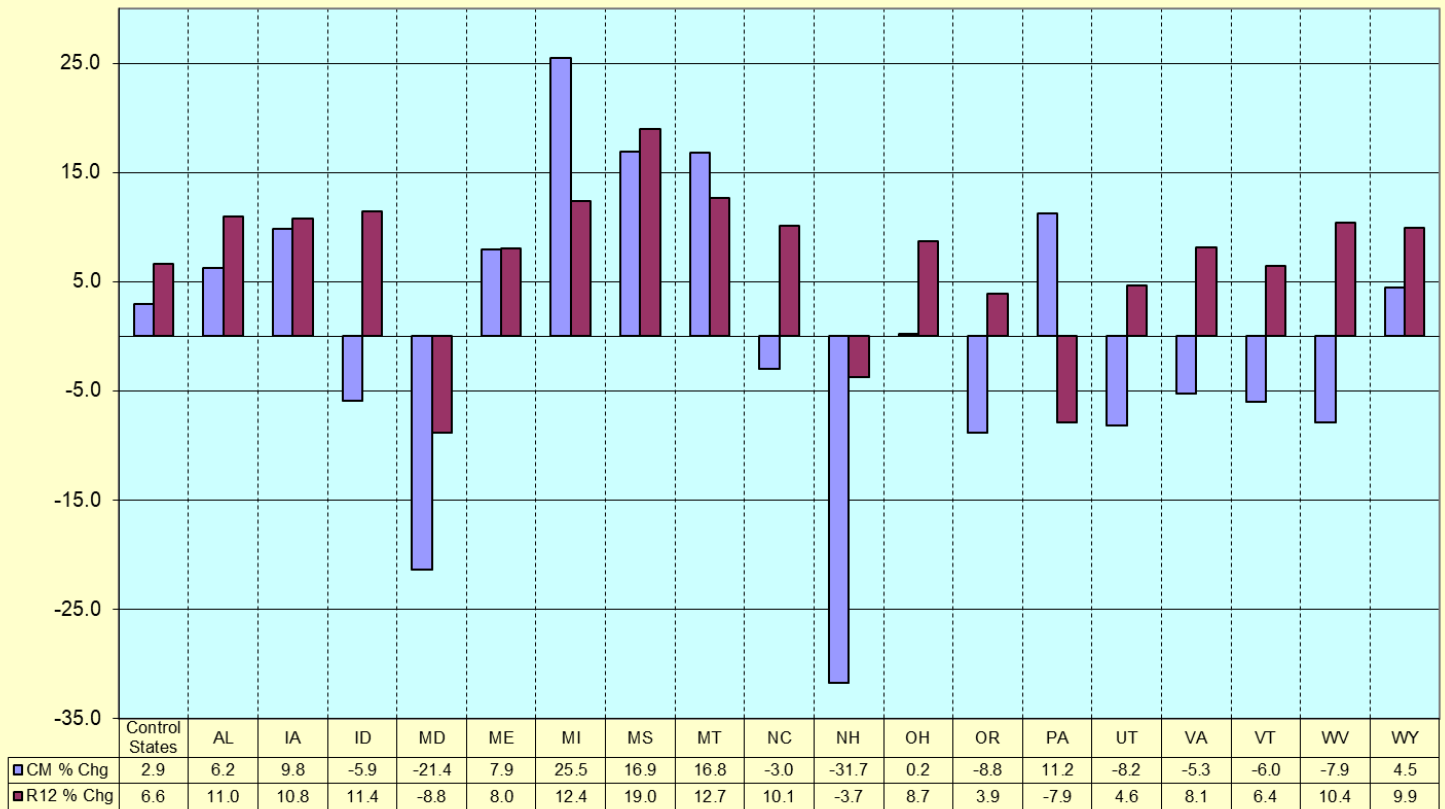
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	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	2.9	12.0	9.1%	
Central Region	11.1	21.4	10.3%	IA, MD, MI, OH, PA, WV
NE Region	-18.7	-16.2	2.5%	ME, NH, VT
NW Region	-4.4	3.3	7.7%	ID, MT, OR, UT, WY
Southern Region	0.4	9.6	9.2%	AL, MS, NC, VA

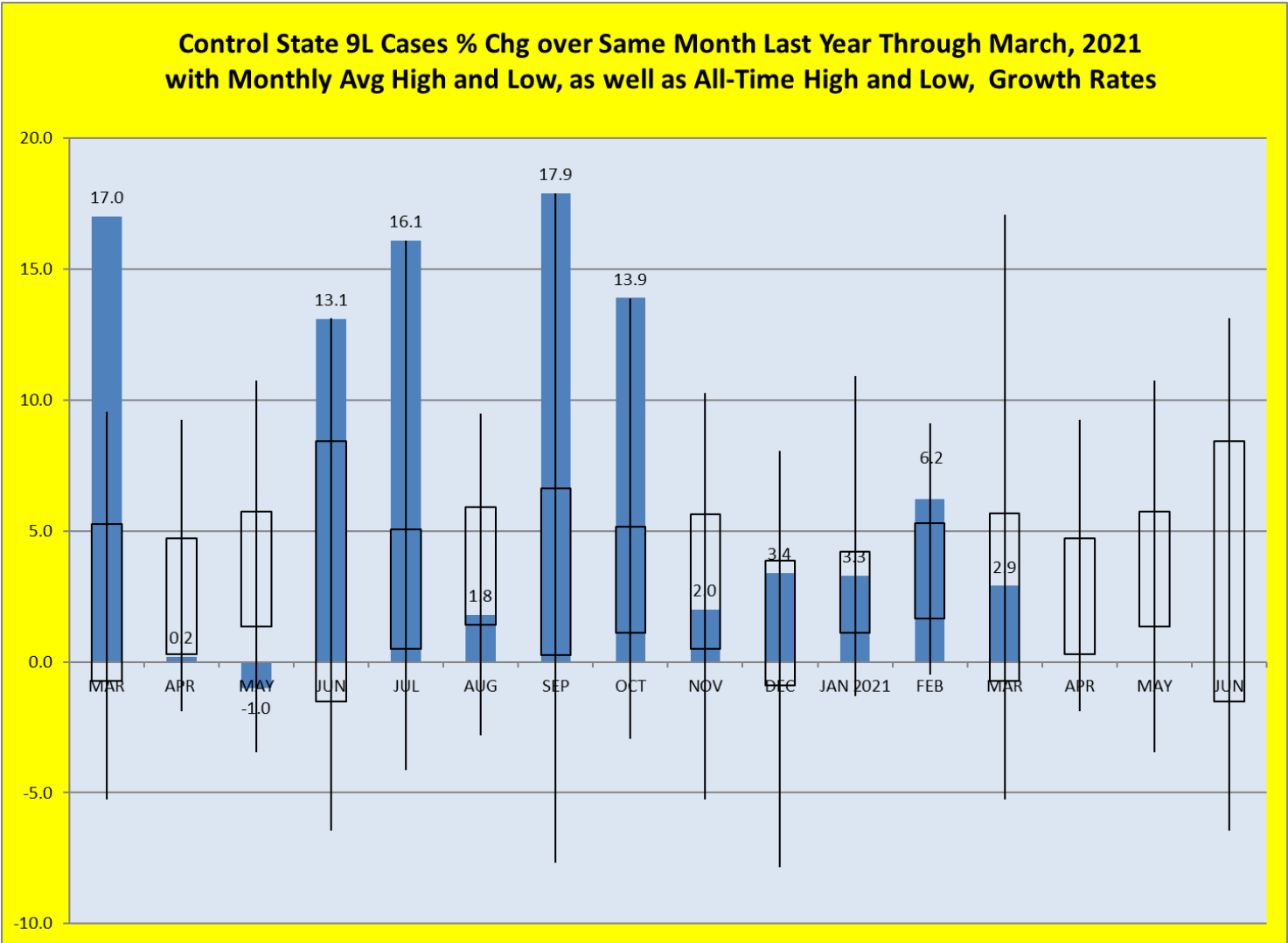


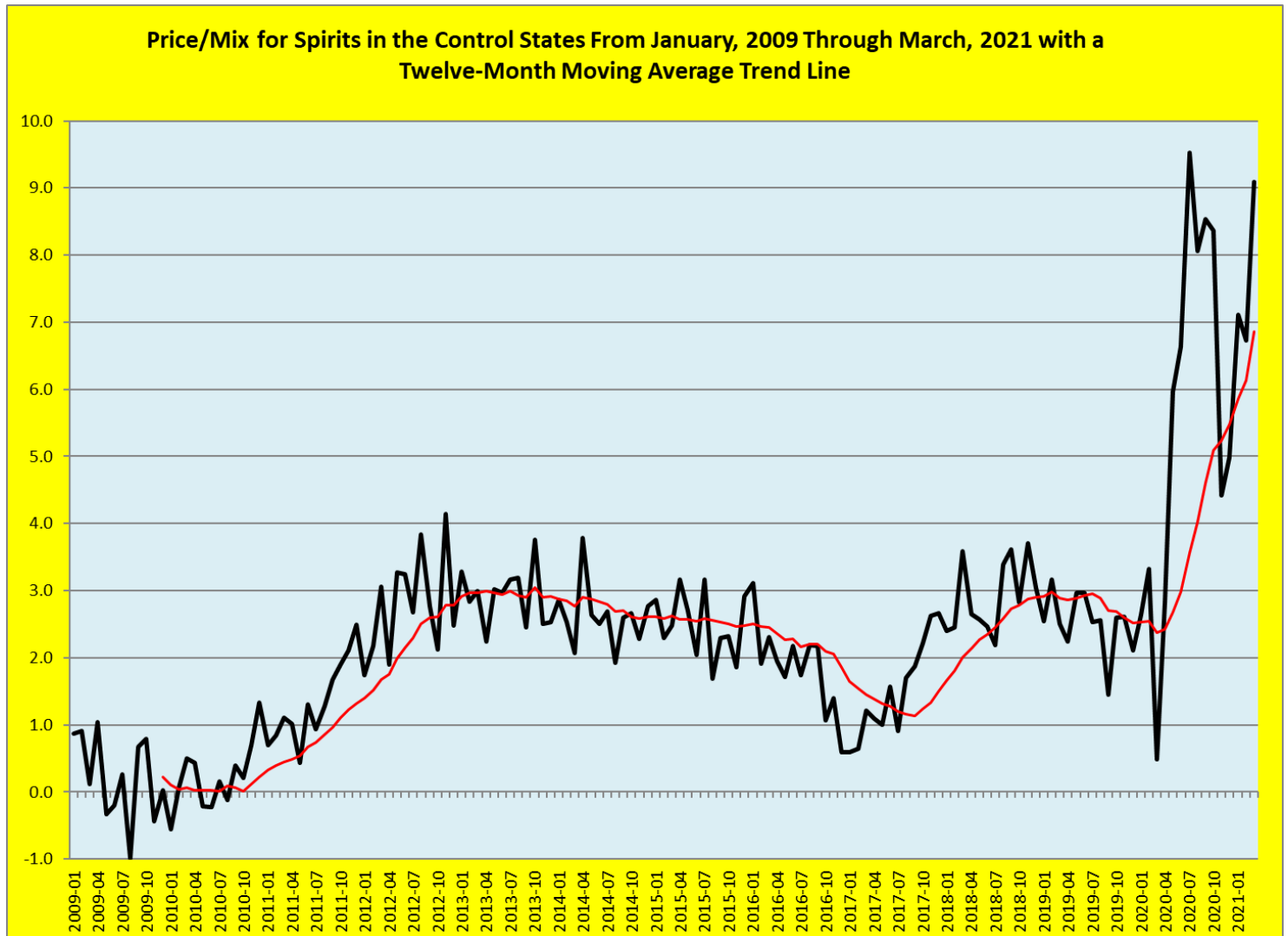
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### Nine Liter Case Spirits Growth in the Control States by State for March, 2021: Month over Same Month Last Year % Change and Rolling-12-Month % Change



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For more information about the NABCA, visit [www.nabca.org](http://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.