



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 2021

ARLINGTON, VA (July 1, 2021) — During May nine-liter control states spirits case sales grew 7.9% over same period sales last year, aided by a weak comp and an octogenarius percent Pennsylvania growth rate. Montgomery County Maryland(-1.2%), Pennsylvania(79.8%), and Utah(5.9%) reported monthly growth rates for May exceeding their twelve-month trends. The growth rates for Alabama(0.8%), Iowa(-2.3%), Idaho(-2.1%), Maine(-0.2%), Michigan(0.9%), Mississippi(-11.6%), Montana(8.2%), North Carolina(4.1%), New Hampshire(-10.5%), Ohio(0.7%), Oregon(-1.7%), Virginia(3.1%), Vermont(-5.2%), West Virginia(-1.5%), and Wyoming(1,5%) fell short of their twelve-month trends. Control state rolling-twelve-month-volume growth, 8.7%, improved upon April's reported 7.9%. Spirits' volumes are growing 7.5% year-to-date compared to 4.8% a year ago.

May's rolling-twelve-month-volume growth rate, 8.7%, is the highest twelve-month growth ever reported by the control states.

Control state spirits shelf dollars were up 13.8% during May while trending at 16.1% during the past twelve months. Montgomery County Maryland(6.1%), Pennsylvania(88.1%), and Utah(9.9%) reported growth rates exceeding their twelve-month trends. Alabama(3.3%), Iowa(4.7%), Idaho(3.6%), Maine(6.4%), Michigan(6.9%), Mississippi(-4.3%), Montana(11.5%), North Carolina(10.0%), New Hampshire(-2.7%), Ohio(7.9%), Oregon(2.9%), Virginia(9.7%), Vermont(0.2%), West Virginia(0.3%), and Wyoming(5.4%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 15.4% year-to-date compared to 8.0% last year.

May's rolling-twelve-month-shelf-dollar growth rate, 16.1%, is the highest twelve-month growth ever reported by the control states.

Premiumization continues to drive Price/Mix in the control states. During May 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 \$17.63. During last year's May, these prices were \$23.99 and \$16.80, respectively.

Price/Mix for May is 5.9%, down from April's reported 10.4%.

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May's control states growth rate was affected by calendar anomalies and pandemic related phenomena.

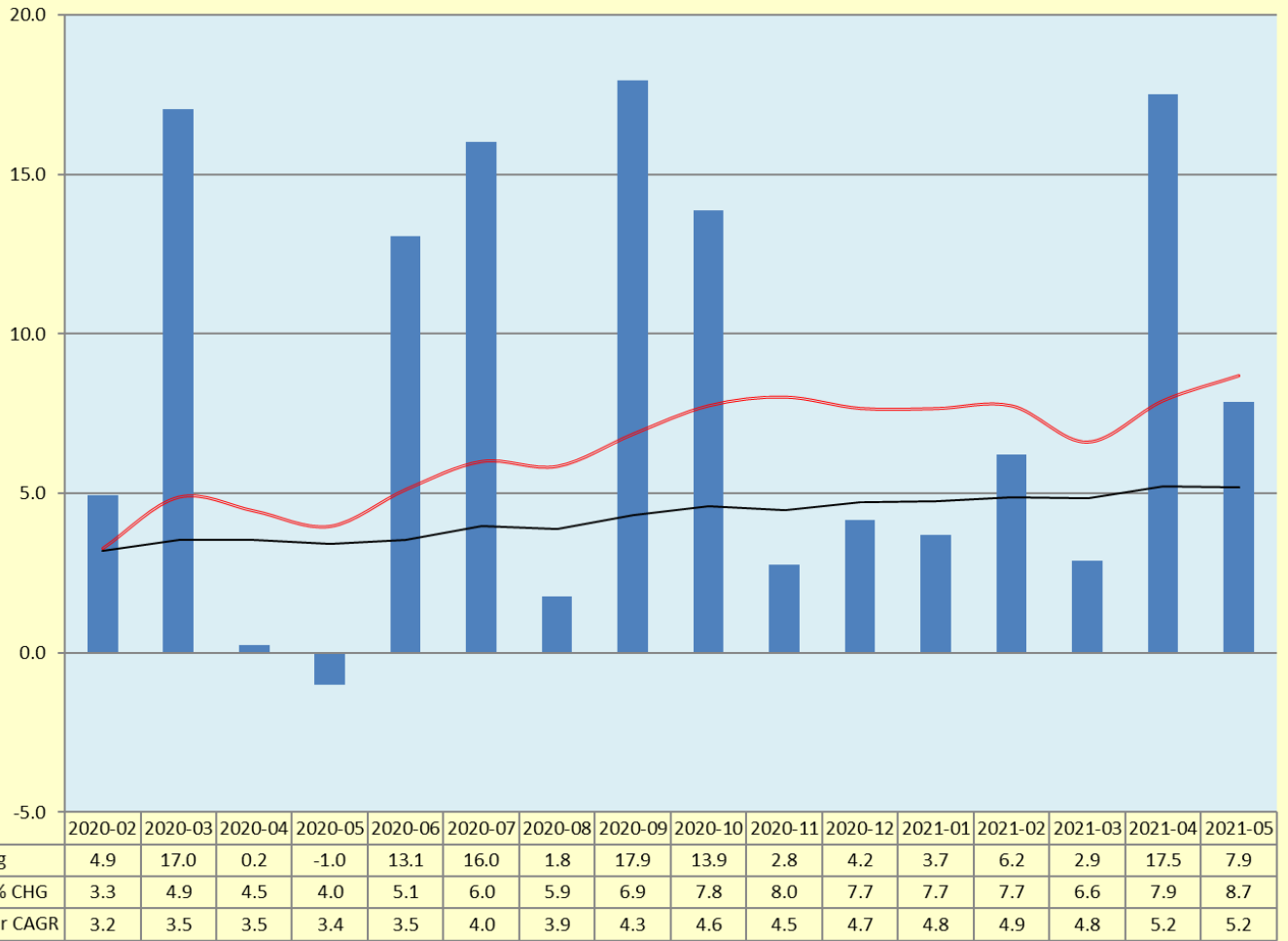
- New Hampshire, with 4% of control state nine-liter-case spirits volume, reported sales for 28 days this May compared to 35 days last year, artificially deflating sales growth and skewing control state results. New Hampshire had seven fewer selling days during this year's May.
- On net, there were 7 fewer selling days during May in the control states, 1% fewer, compared to last year.
- After equalizing selling-day variations between this and last year's May, the nine-liter-case-spirits growth rate is 7.7% with a rolling-twelve-month trend of 7.4%. May's shelf-dollar growth rate is 13.5% with a rolling-twelve-month trend of 14.5%.
- Equalized price/mix for May is 5.9%.

Irish Whiskey, with 2% share of the nine-liter case control states spirits market, was May's fastest growing category with 31.0% reported and a twelve-month trend of 12.1%. Cocktails, with 3% share, grew during May at 28.9% and 42.5% during the past twelve months. Tequila, with 8% share, grew at 23.3% during May and 29.7% during the past twelve months. Vodka, with 32% share, grew during the same periods at 4.7% and 2.5%, respectively. Cordials(19.6% during May, 13.0% during past twelve months), Gin(2.8%, 2.1%), Irish Whiskey(31.0%, 12.1%), Rum(5.5%, 4.0%), Scotch(7.8%, 3.6%), and Vodka(4.7%, 2.5%) grew at rates above their twelve-month trends, while Brandy/Cognac(-1.7%, 14.8%), Canadian Whiskey(0.8%, 6.6%), Cocktails(28.9%, 42.5%), Domestic Whiskey(6.8%, 10.4%), and Tequila(23.3%, 29.7%) grew at rates below their twelve-month trends.

May's nine-liter wine case sales growth rate was -8.4%. Pennsylvania (reporting -6.3% nine-liter-case growth for wines), New Hampshire (-23.1%), Mississippi (-7.6%), Utah (4.9%), Montgomery County Maryland (-6.9%), and Wyoming (-0.9%) 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 1.3%, slipping from April's reported 2.8%.

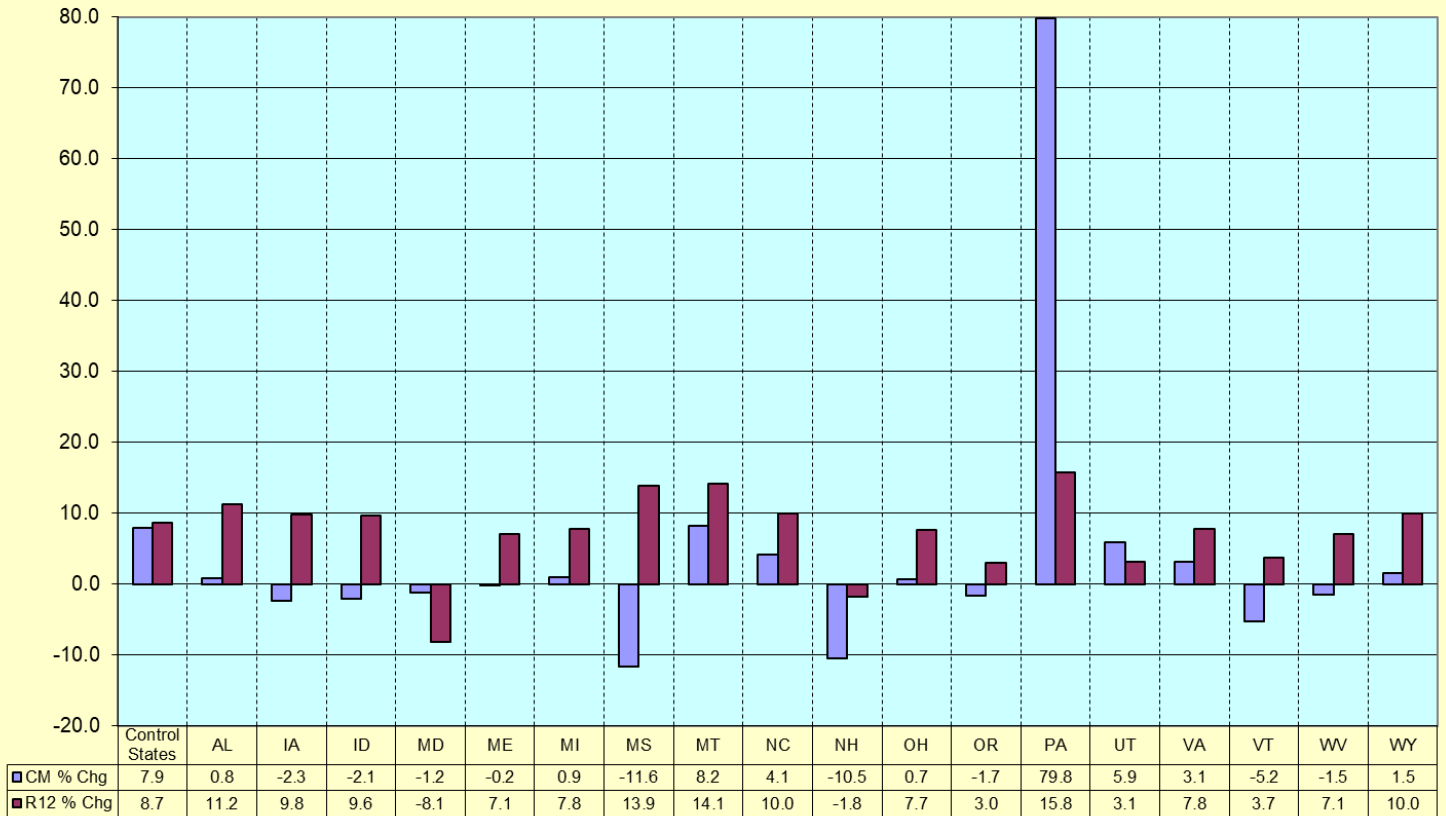
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	7.9	13.8	5.9%	
Central Region	17.5	23.0	5.5%	IA, MD, MI, OH, PA, WV
NE Region	-6.7	0.5	7.2%	ME, NH, VT
NW Region	0.9	5.2	4.3%	ID, MT, OR, UT, WY
Southern Region	1.1	7.3	6.2%	AL, MS, NC, VA

9 Liter Case Spirits Growth in the Control States as of May, 2021: Month over Same Month Last Year % Change, Rolling-12 Month % Change, and 3 Year CAGR

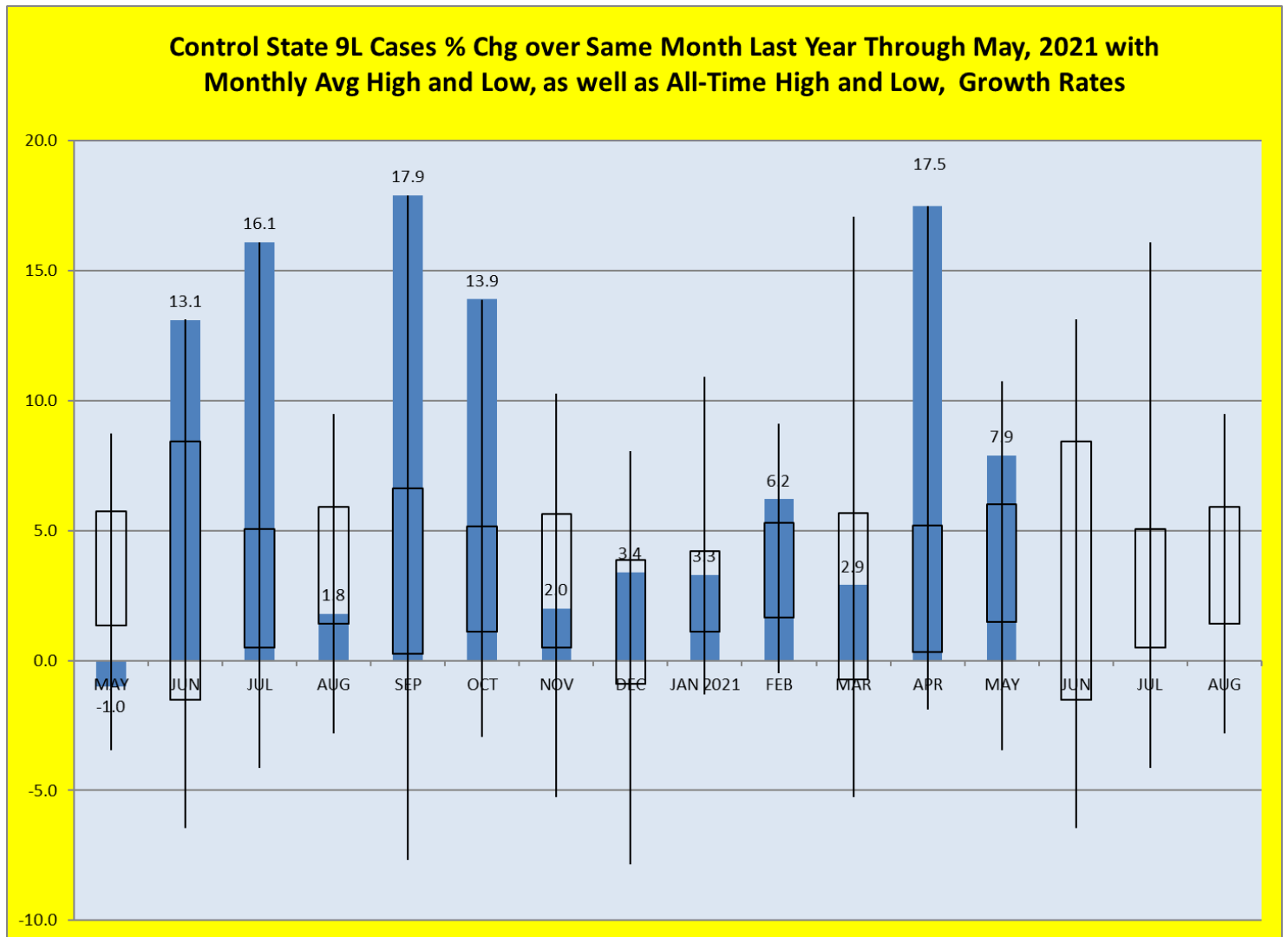


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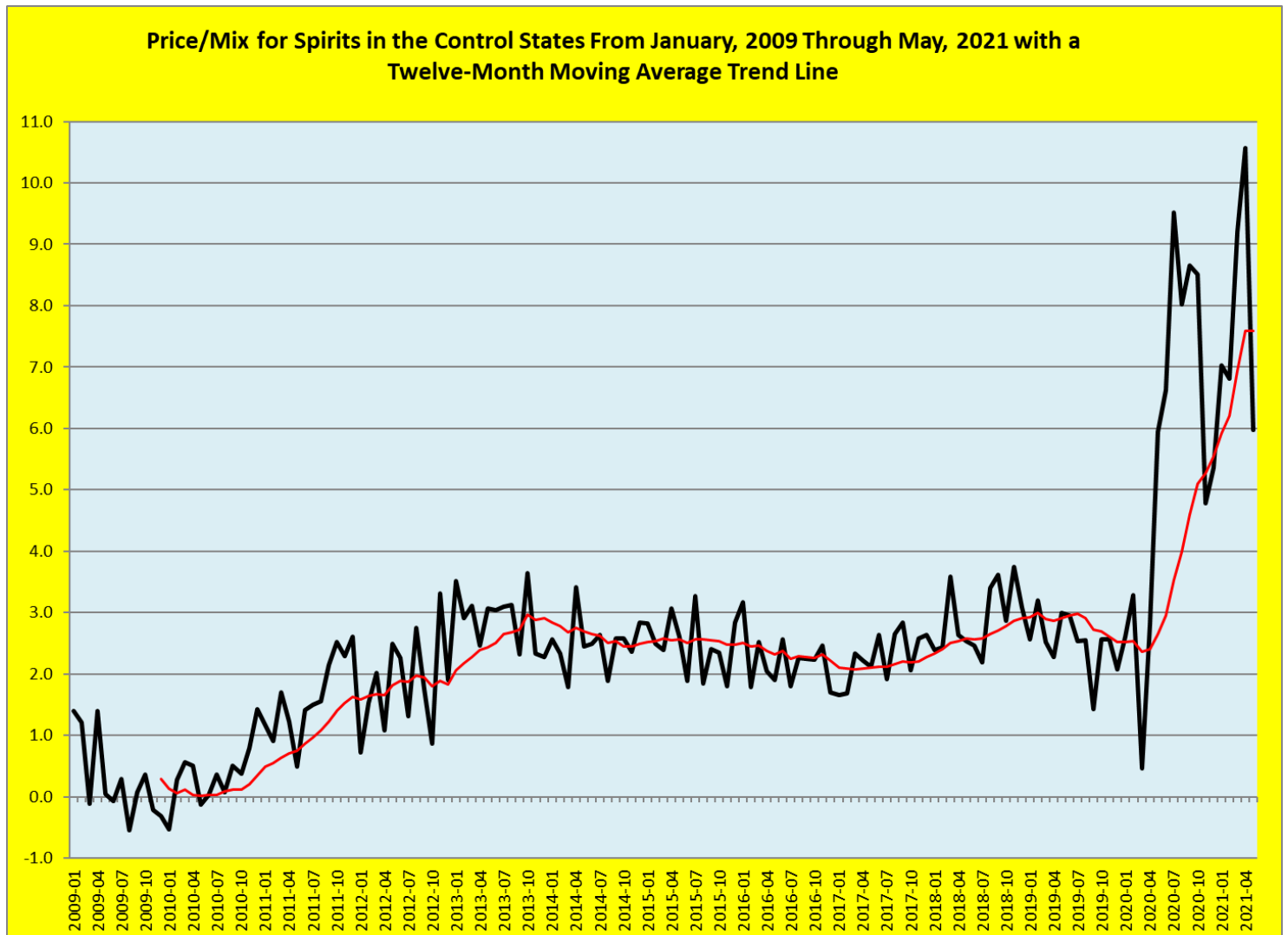
Nine Liter Case Spirits Growth in the Control States by State for May, 2021: Month over Same Month Last Year % Change and Rolling-12-Month % Change



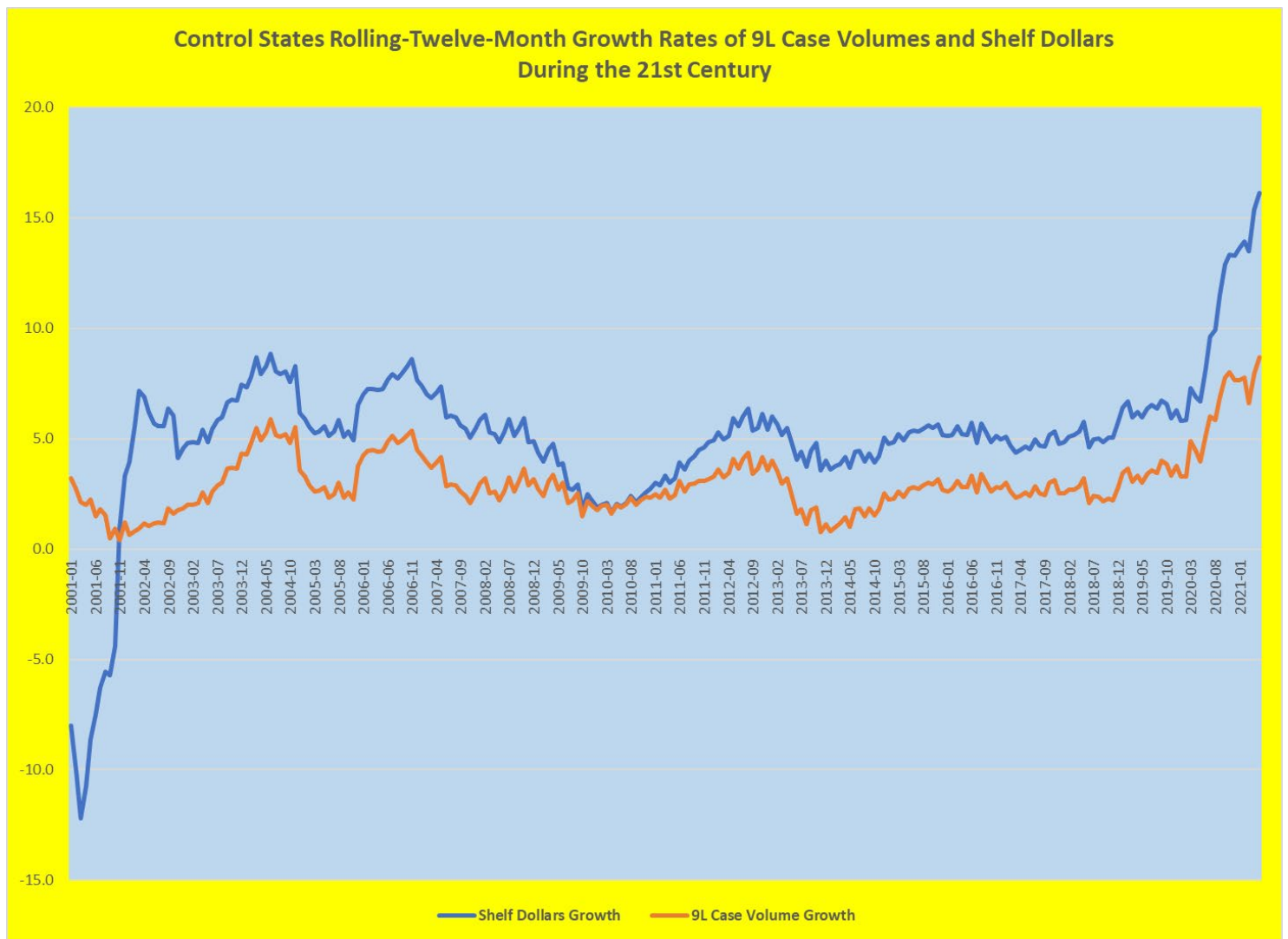
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For more information about the NABCA, visit www.nabca.org.

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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.