



News Release

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FOR IMMEDIATE RELEASE

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

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

ARLINGTON, VA (July 23, 2021) — During June nine-liter control states spirits case sales grew 8.6% over same period sales last year in spite of an imposing (13.1%) comp. The monthly growth rate was elevated by over-the-top month-over-same-month-last-year sales increases reported by the control state Titans Michigan (25.2%) and Pennsylvania (18.2%).

Montgomery County Maryland(10.2%), Maine(7.7%), Michigan(25.2%), New Hampshire(14.1%), Oregon(5.8%), Pennsylvania(18.0%), and Utah(6.4%) reported monthly growth rates for June exceeding their twelve-month trends. The growth rates for Alabama(5.4%), Iowa(3.6%), Idaho(2.3%), Mississippi(-15.6%), Montana(9.7%), North Carolina(5.6%), Ohio(1.3%), Virginia(3.7%), Vermont(2.9%), West Virginia(-2.2%), and Wyoming(8.1%) fell short of their twelve-month trends. Control state rolling-twelve-month-volume growth, 8.3%, slipped from May's reported 8.7%. Spirits' volumes are growing 7.7% year-to-date compared to 6.2% a year ago.

June's 3-year CAGR of rolling-twelve-month 9-liter case volumes, 5.6%, is the highest recorded 3-year growth period in the control states during the 21st century. 3-year CAGRs calculated for the past six rolling-twelve-month periods (4.8%, 4.9%, 4.8%, 5.2%, 5.2%, 5.6%) are strikingly higher than those calculated for their year ago counterparts (3.1%, 3.2%, 3.5%, 3.5%, 3.4%, 3.5%). The 21-year control state CAGR of 3.1% demonstrates that the last six 3-year growth periods are significantly above the average.

Control state spirits shelf dollars were up 13.7% during June while trending at 15.6% during the past twelve months. Montgomery County Maryland(18.8%), Maine(14.5%), Michigan(26.3%), New Hampshire(29.7%), Oregon(9.8%), Utah(9.7%), and Vermont(8.7%) reported growth rates exceeding their twelve-month trends. Alabama(7.2%), Iowa(7.5%), Idaho(7.1%), Mississippi(-13.8%), Montana(18.1%), North Carolina(11.8%), Ohio(7.5%), Pennsylvania(20.7%), Virginia(10.6%), West Virginia(-0.5%), and Wyoming(10.3%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 15.1% year-to-date compared to 10.0% last year.

Premiumization continues to drive Price/Mix in the control states. During June 2021, the median and weighted average prices of 750 ML spirits volumes sold in those control states that set the retail price point continued to be reported at historically high levels. During June the median price was \$24.95, and the weighted average price was \$17.66. During last year's June, these prices were \$23.99 and \$16.82, respectively.

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Price/Mix for June is 5.1%, down from May's reported 5.9%.

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

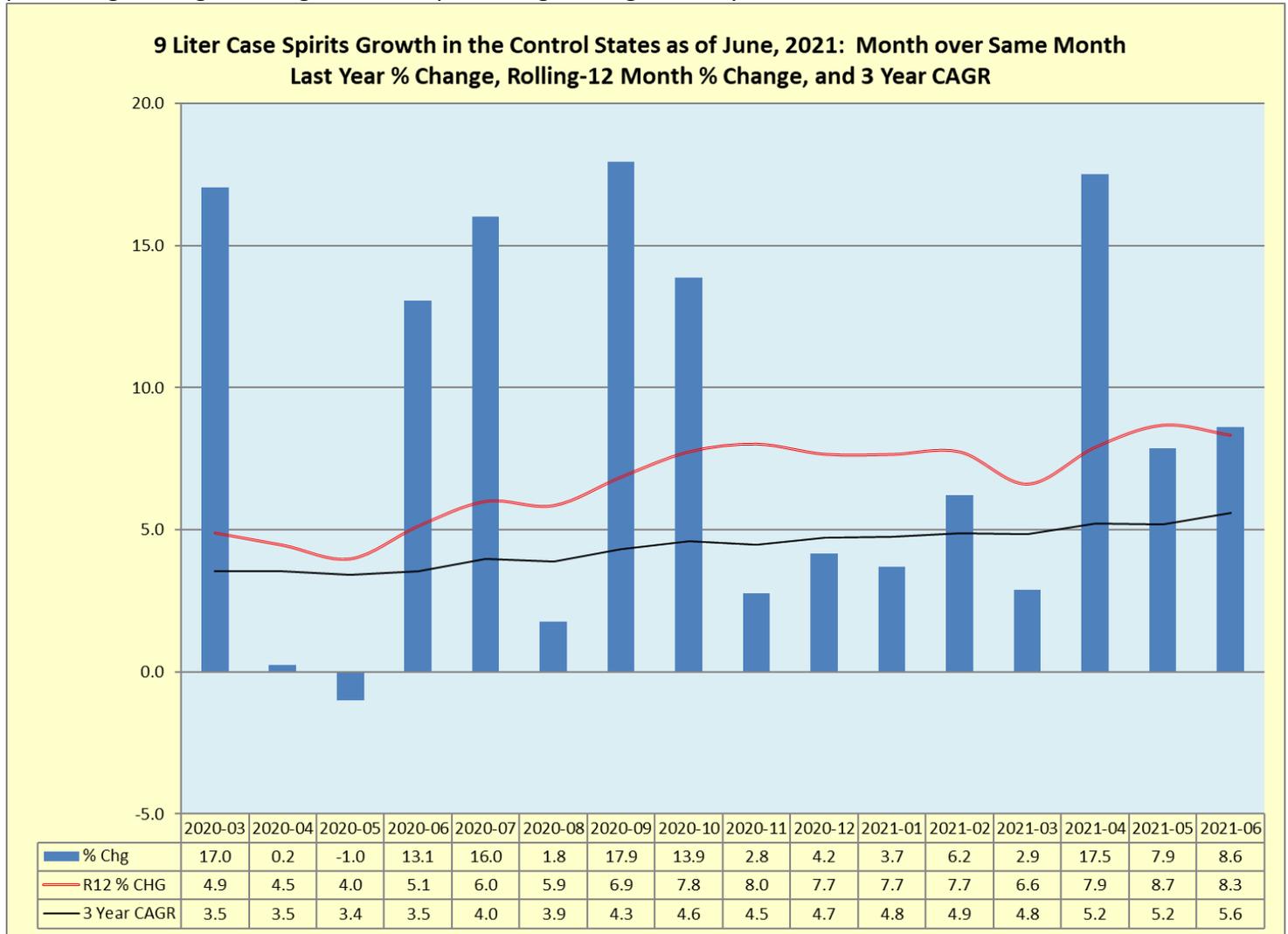
- Michigan, with 16% of control state nine-liter-case spirits volume, reported sales for 35 days this June compared to 28 days last year, artificially inflating sales growth and skewing control state results. Michigan had seven more selling days during this year's June.
- On net, there were 8 more selling days during June in the control states, 2% more, compared to last year.
- After equalizing selling-day variations between this and last year's June, the nine-liter-case-spirits growth rate is 4.5% with a rolling-twelve-month trend of 6.8%. June's shelf-dollar growth rate is 9.0% with a rolling-twelve-month trend of 13.8%.
- Equalized price/mix for June is 4.5%.

Cocktails, with 3% share of the nine-liter case control states spirits market, was June's fastest growing category with 33.4% reported and a twelve-month trend of 39.8%. Irish Whiskey, with 2% share, grew during June at 26.8% and 13.7% during the past twelve months. Tequila, with 9% share, grew at 23.8% during June and 28.9% during the past twelve months. Vodka, with 32% share, grew during the same periods at 5.9% and 2.5%, respectively. Cordials(15.7% during June, 13.2% during past twelve months), Gin(4.8%, 2.0%), Irish Whiskey(26.8%, 13.7%), Rum(5.1%, 3.8%), Scotch(9.3%, 4.0%), and Vodka(5.9%, 2.5%) grew at rates above their twelve-month trends, while Brandy/Cognac(-6.1%, 12.2%), Canadian Whiskey(3.1%, 5.9%), Cocktails(33.4%, 39.8%), Domestic Whiskey(9.5%, 9.9%), and Tequila(23.8%, 28.9%) grew at rates below their twelve-month trends.

June's nine-liter wine case sales growth rate was -3.5%. Pennsylvania (reporting -5.8% nine-liter-case growth for wines), New Hampshire (2.5%), Mississippi (-8.3%), Utah (-1.6%), Montgomery County Maryland (-1.4%), and Wyoming (2.8%) 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 0.6%, slipping from May's reported 1.3%.

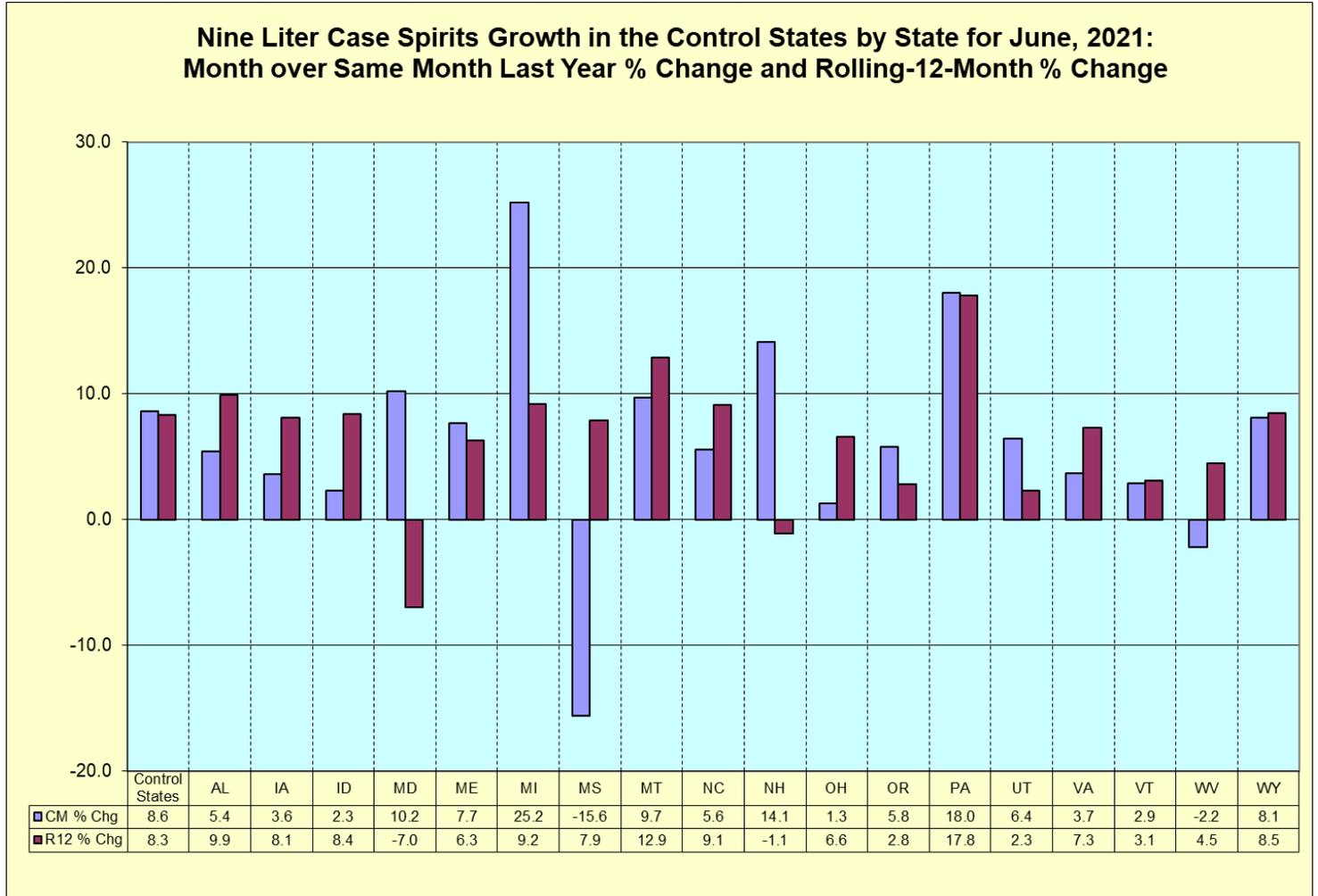
	9L Cases CM % Chg.	Shelf \$ CM % Chg.	Price/Mix	Control States
Total Control States	8.6	13.7	5.1%	
Central Region	13.7	17.5	1.8%	IA, MD, MI, OH, PA, WV
NE Region	10.8	22.3	11.5%	ME, NH, VT
NW Region	6.1	10.4	4.3%	ID, MT, OR, UT, WY
Southern Region	1.8	7.6	5.8%	AL, MS, NC, VA

Chart: 9 Liter Case Spirits Growth in the Control States as of June 2021: Month over same month last year percentage change, Rolling 12-month percentage change and 3-year CAGR



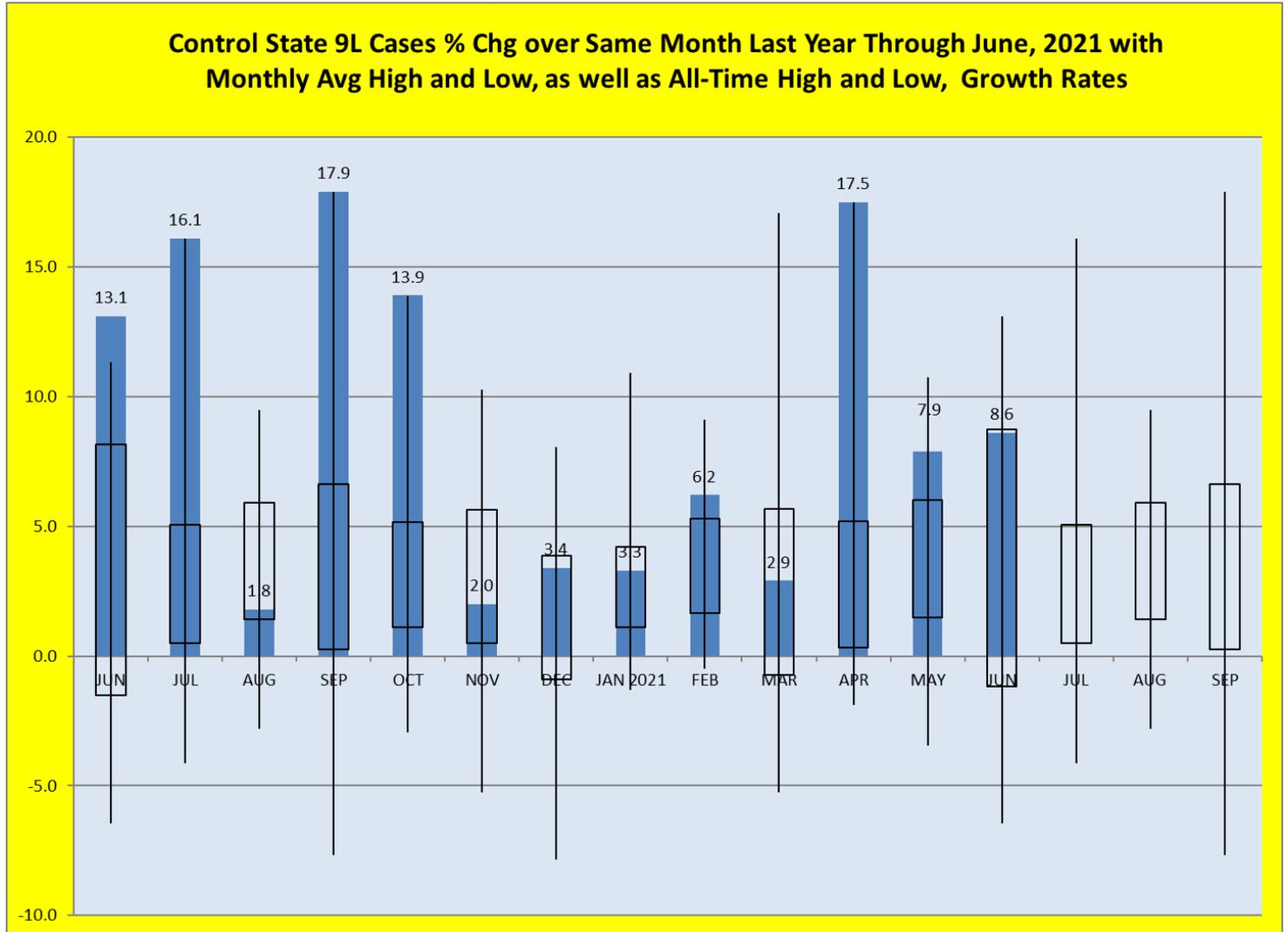
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Chart: 9 Liter Case Spirits Growth in the Control States by State for June 2021: Month over same month last year percentage change and rolling 12-month percentage change



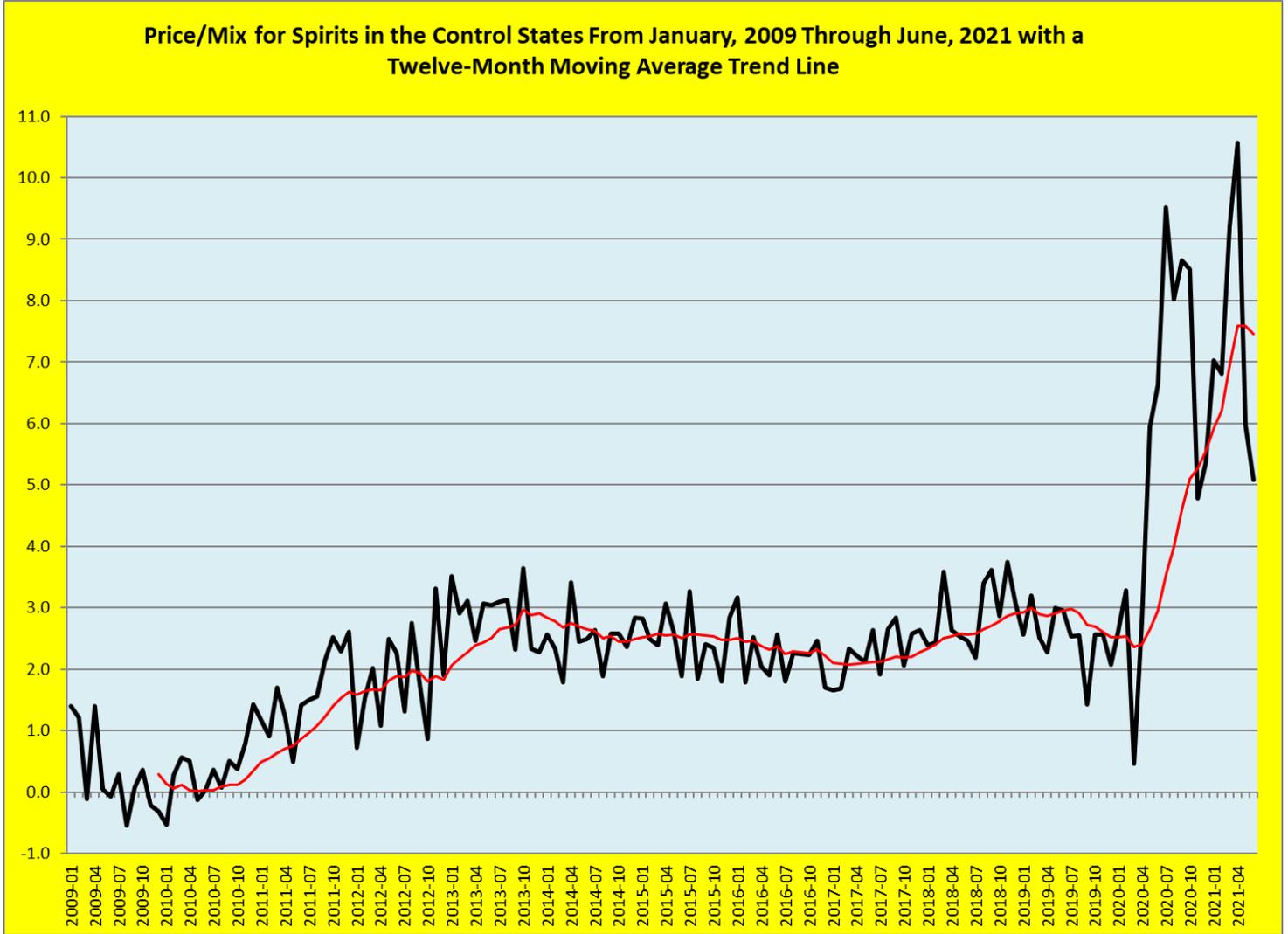
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Chart: Control State 9 Liter cases percentage change over same month last year through June 2021 with monthly average high and low, as well as all-time high and low growth rates



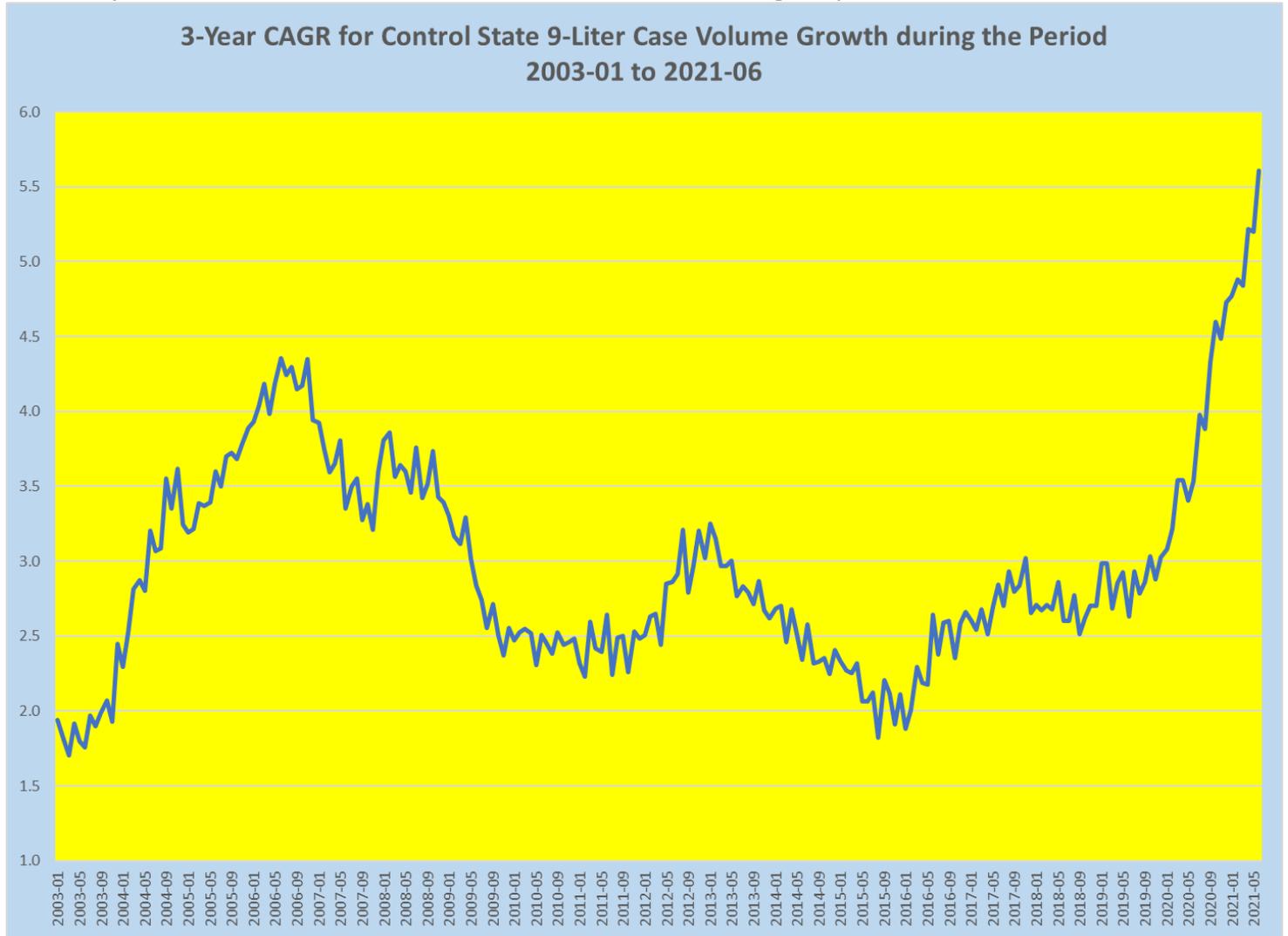
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Chart: Price Mix for Spirits in the Control States from January 2009 through June 2021 with a 12-month moving average trend line.



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Chart: 3-year CAGR Control State 9 Liter Case Volume Growth during the period 2003-01 to 2021-06



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.