



News Release

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FOR IMMEDIATE RELEASE

NABCA Releases Control States Nine-Liter Spirits Sales for July

Control State results for nine-liter beverage sales for July 2016

ALEXANDRIA, VA (August 29, 2016) – During July, nine-liter spirits case sales in the control states fell at a -4.2% rate, being influenced by reporting calendar anomalies and a modestly robust comp. Rolling-twelve month volume growth of 2.6% was down from June's 3.3%. No control state reported a monthly nine-liter case growth rate that exceeded its 12-month trend. Spirits volumes in the control states have grown 2.5% year-to-date compared to 2.7% a year ago.

Control state spirits shelf dollars growth was down -2.4% during July while trending at 4.9% during the past twelve months. No control state reported a monthly growth rate that exceeded its 12-month trend. Spirits shelf dollars have grown 4.8% year-to-date compared to 5.5% during 2015's July.

Price/Mix for July is 1.8%, slipping from June's 2.4%.

July's Control State spirits growth rate was effected by the Control States' reporting calendars:

- Michigan, with more than 15% of Control States' spirits nine-liter case volumes and dollars, reported four weeks of sales this year versus five weeks of sales during July, 2015, artificially deflating growth and skewing Control States results. Michigan had seven fewer selling days during this year's July than during last year's.
- July this year had five Sundays versus four Sundays last year. Retail outlets in six states (Alabama, Mississippi, Montana, North Carolina, Utah, and West Virginia) are not open on Sundays.
- Overall, July, 2016, had sixteen fewer selling days, 3.1% fewer, than last year's July.
- After equalizing nine-liter spirits case sales with respect to selling-day variations, July's volumetric growth is 0.8%, and rolling-twelve-month volume is up 2.5%. Likewise, after equalizing shelf dollars, July's control states shelf dollar growth rate is 2.7% with a twelve-month trend of 4.8%.
- April's equalized Price/Mix is 1.9%.

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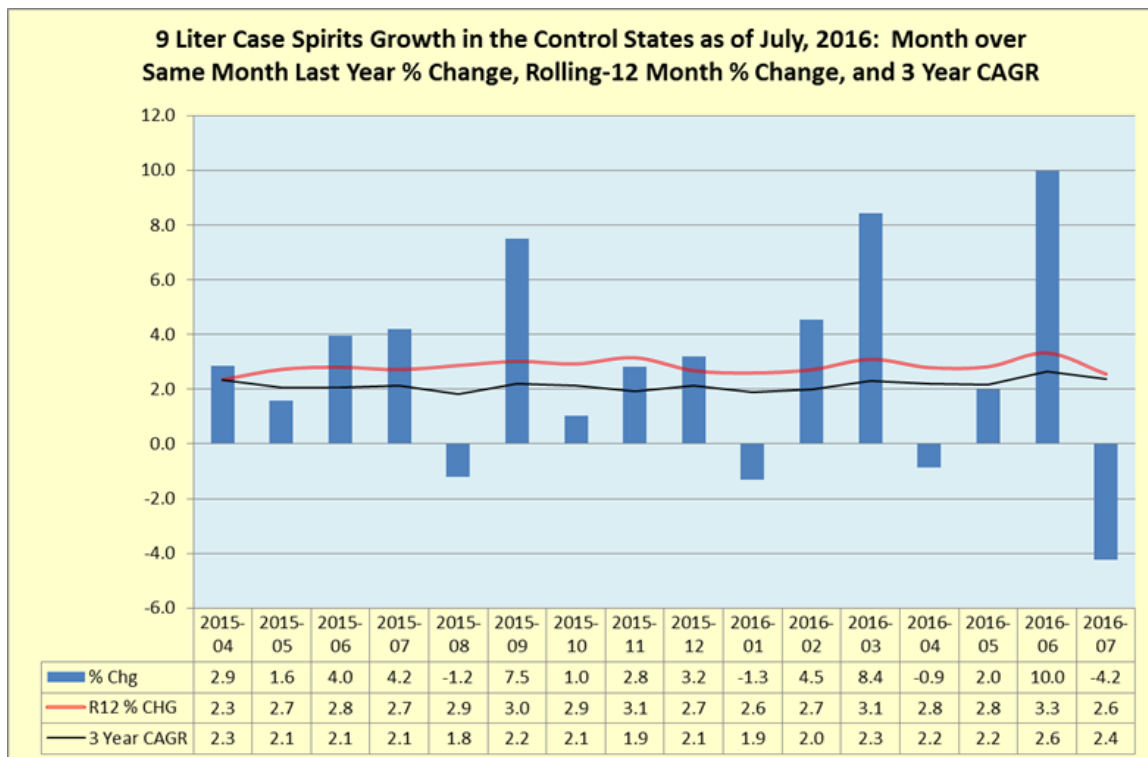
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New Hampshire | North Carolina | Ohio | Oregon | Pennsylvania | Utah | Vermont | Virginia | West Virginia | Wyoming

JulyCS Results Add 1

Irish Whiskey, with 1% share of the control states spirits market, was July's fastest growing category with 7.3% reported and a twelve month trend of 15.5%. Vodka, with 36% share, grew during the same periods at -3.6% and 2.4%. No Category, namely Brandy/Cognac (-0.3%), Canadian Whiskey (-5.7%), Cocktails (-4.0%), Cordials (-8.9%), Domestic Whiskey (-3.8%), Gin (-5.2%), Irish Whiskey (7.3%), Rum (-6.2%), Scotch (-6.3%), Tequila (0.0%), and Vodka (-3.6%), grew at a July rate that exceeded its twelve-month trend.

July's nine-liter wine case sales growth rate was -3.9%. Pennsylvania (reporting 1.1% nine-liter case growth for wines), New Hampshire (-10.0%), Utah (-7.8%), Mississippi (-9.2%), Montgomery County Maryland (-7.7%), and Wyoming (-9.1%) 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 was 1.6%, down from June's reported 1.9%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	-4.2	-2.4	1.8	
Central Region	-7.5	-6.3	1.2	IA, MD, MI, OH, PA, WV
NE Region	-3.0	-1.1	1.9	ME, NH, VT
NW Region	-3.0	-1.0	2.0	ID, MT, OR, UT, WY
Southern Region	0.3	3.2	2.9	AL, MS, NC, VA

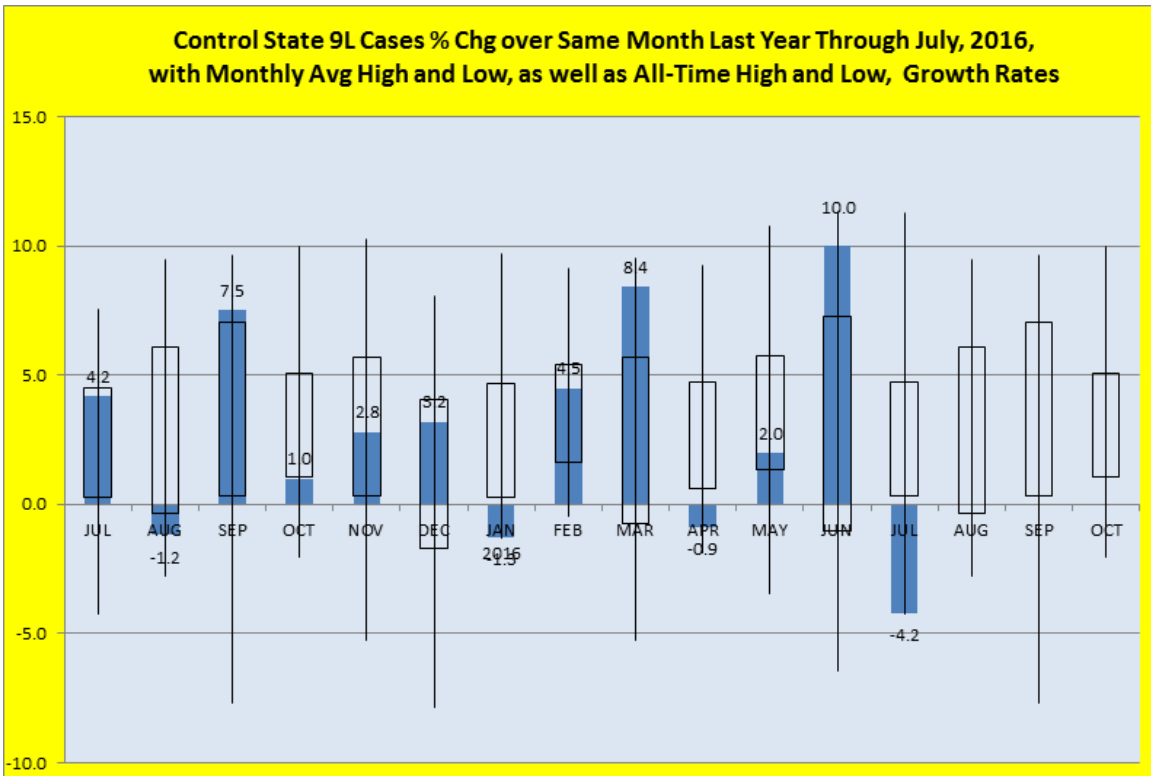
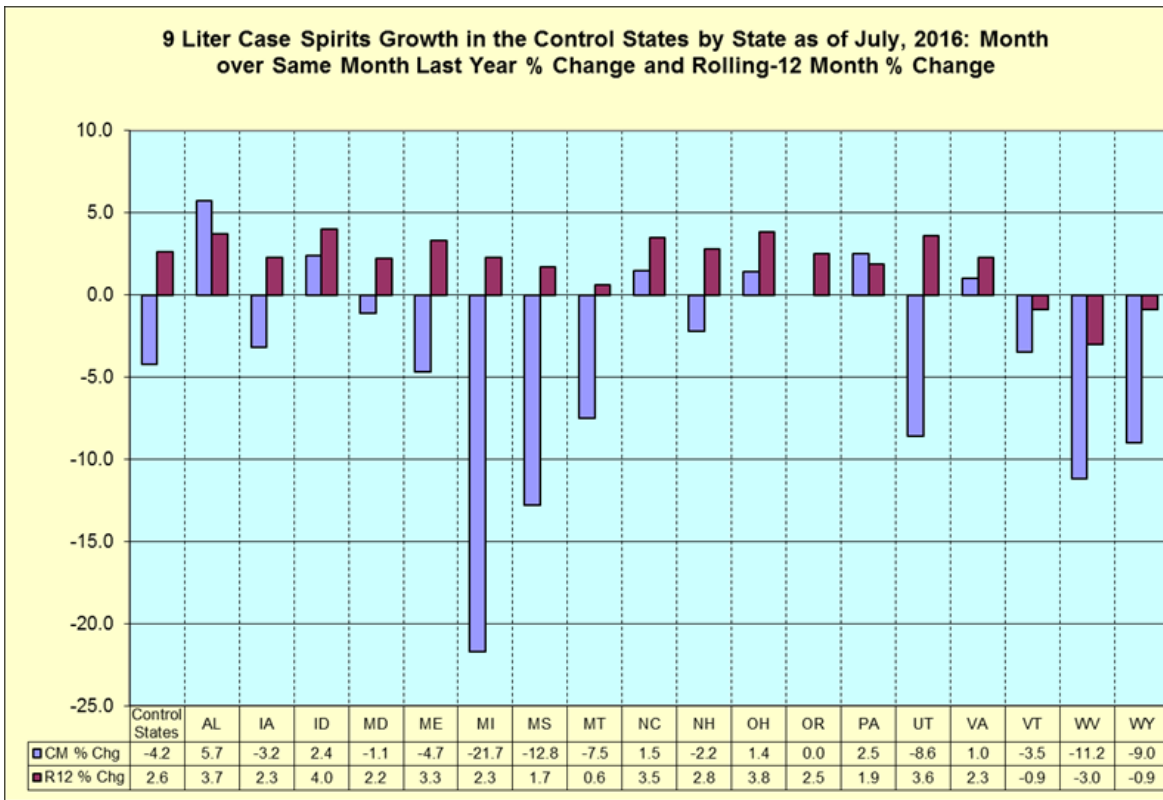


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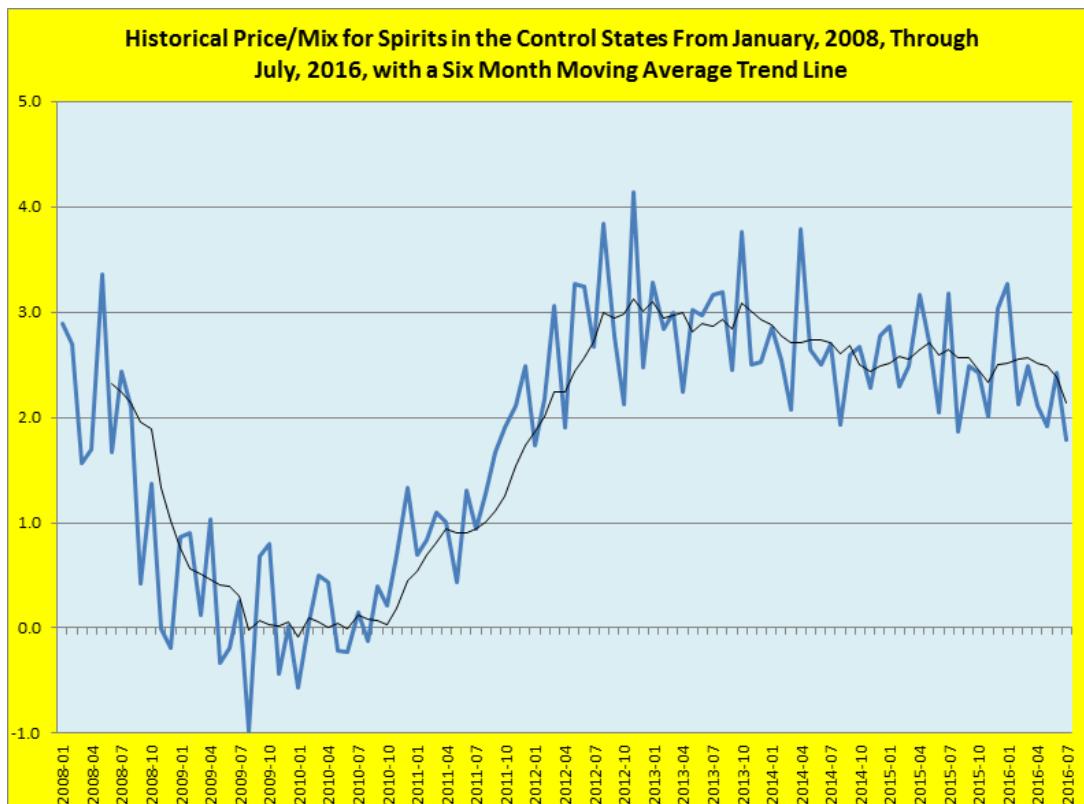
JulyCS Results Add 2



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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 Alexandria, 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.

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