



News Release

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FOR IMMEDIATE RELEASE

NABCA Releases Control States Nine-Liter Spirits Sales for October

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

ALEXANDRIA, VA (November 23, 2016) – During October, nine-liter spirits case sales in the control states grew at -2.9%, a rate effected by reporting calendar anomalies. Rolling-twelve month volume growth of 2.6% was down from September’s 2.9%. Mississippi, Pennsylvania, and West Virginia reported monthly nine-liter case growth rates that exceeded their 12-month trends. Spirits volumes in the control states have grown 2.5% year-to-date compared to 2.6% a year ago.

Control state spirits shelf dollars growth was down 1.0% during October while trending at 4.7% during the past twelve months. Iowa, Mississippi, Pennsylvania, and West Virginia reported monthly growth rates exceeding their 12-month trends. Spirits shelf dollars have grown 4.5% year-to-date, down from the 5.2% reported during 2015’s October.

Price/Mix for October is 1.9%, short of September’s 2.2%.

October’s control state spirits growth rate was effected by the control states’ reporting calendars:

- Utah, with more than 2% of control states’ spirits nine-liter case volumes and dollars, reported four weeks of sales this year versus five weeks of sales during October, 2015, artificially deflating growth and skewing control states results. Utah had six fewer selling days during this year’s October than during last year’s.
- October, 2016, had five Sundays compared with four during October, 2015. Stores in six control states—Alabama, Mississippi, Montana, North Carolina, Utah, and West Virginia—are not open on Sundays.
- Overall, October, 2016, had thirteen fewer selling days, 2.5% fewer, than last year’s October.
- After equalizing nine-liter spirits case sales with respect to selling-day variations, October’s volumetric growth is -0.4%, and rolling-twelve-month volume growth is 2.5%. Likewise, after equalizing shelf dollars, October’s control states shelf dollar growth rate is 1.5% with a twelve-month trend of 4.7%.

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Alabama | Idaho | Iowa | Maine | MD - Montgomery County | MD - Worcester County | Michigan | Mississippi | Montana
New Hampshire | North Carolina | Ohio | Oregon | Pennsylvania | Utah | Vermont | Virginia | West Virginia | Wyoming

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- April's equivalized Price/Mix is 1.9%.

Irish Whiskey, with 1% share of the control states spirits market, was October's fastest growing category with 9.8% reported and a twelve month trend of 16.6%. Vodka, with 35% share, grew during the same periods at -2.2% and 3.5%. No category—Brandy/Cognac (6.4%), Canadian Whiskey (-1.4%), Cocktails (-1.1%), Cordials (-7.0%), Domestic Whiskey (1.8%), Gin (-4.6%), Irish Whiskey (9.8%), Rum (-4.7%), Scotch (-2.7%), Tequila (2.1), and Vodka (-2.2%)—grew at a rate that exceeded its twelve month trend.

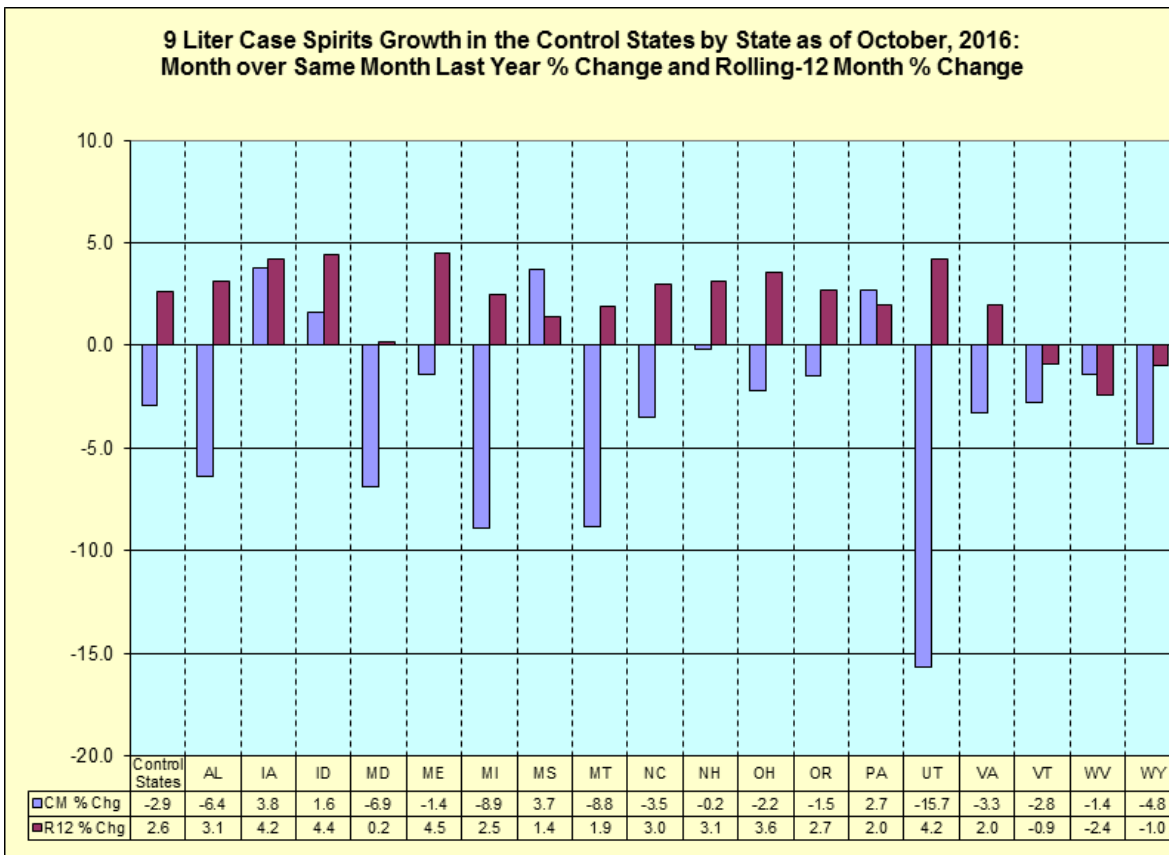
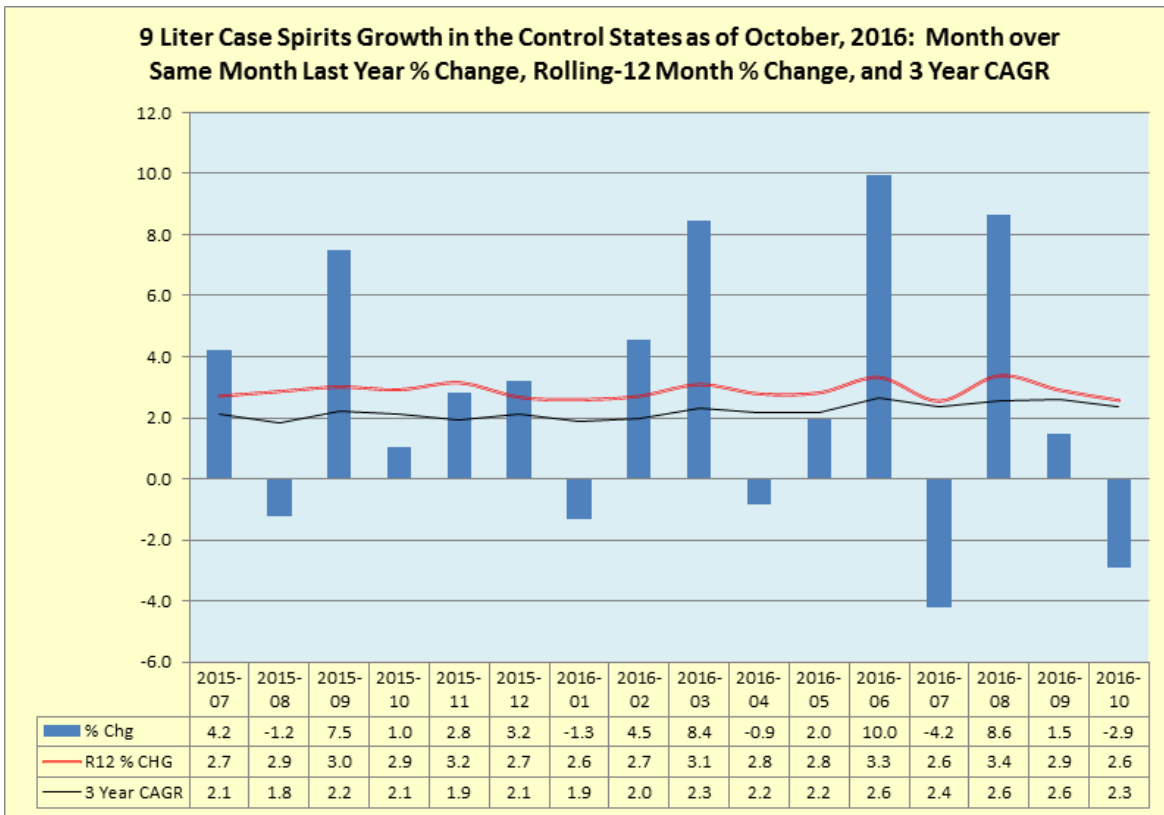
October's nine-liter wine case sales growth rate was 1.1%. Pennsylvania (reporting 2.5% nine-liter case growth for wines), New Hampshire (3.1%), Utah (-14.5%), Mississippi (12.6%), Montgomery County Maryland (-7.4%), and Wyoming (2.6%) are the control states that are the sole wholesalers of wines and spirits within their geographical boundaries. Rolling-twelve month wine volume growth in these six control states was 1.9%, mirroring September's reported growth.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	-2.9	-1.0	1.9	
Central Region	-2.5	-1.1	1.4	IA, MD, MI, OH, PA, WV
NE Region	-0.8	0.7	1.5	ME, NH, VT
NW Region	-4.9	-3.2	1.7	ID, MT, OR, UT, WY
Southern Region	-3.1	-0.3	2.8	AL, MS, NC, VA

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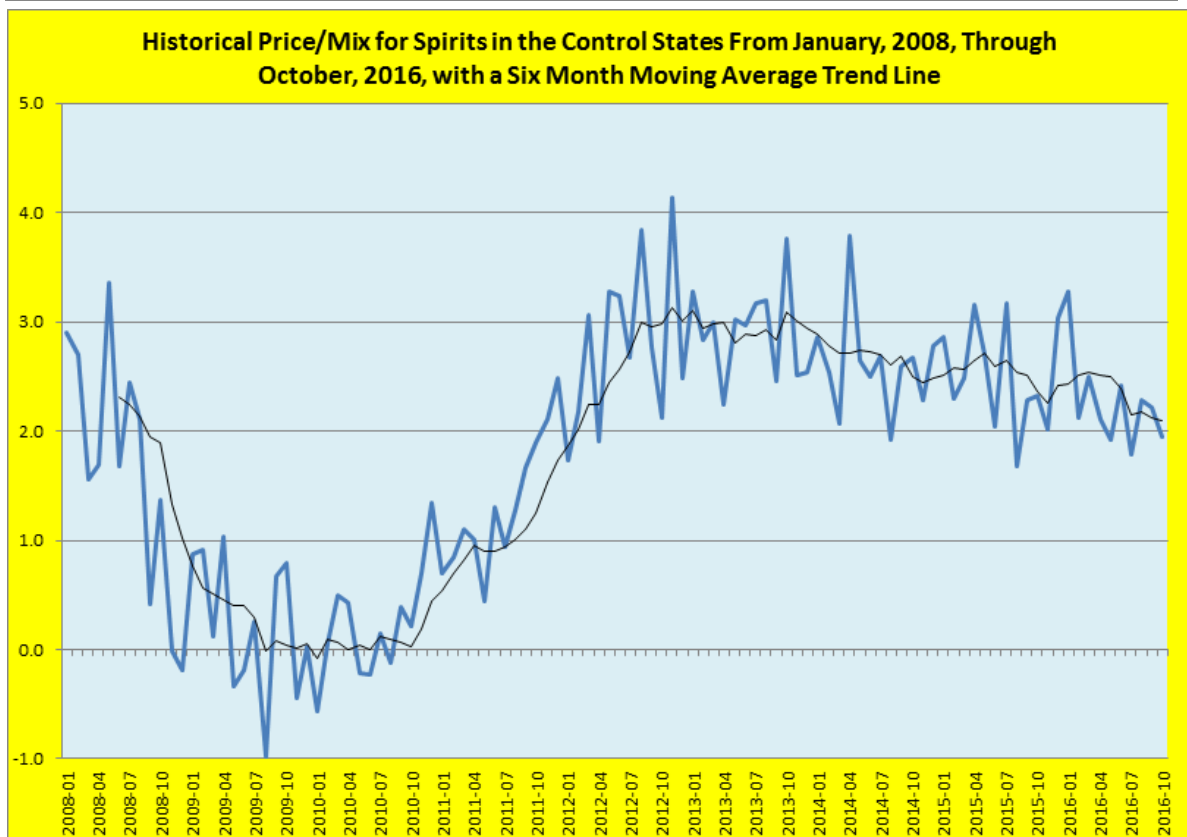
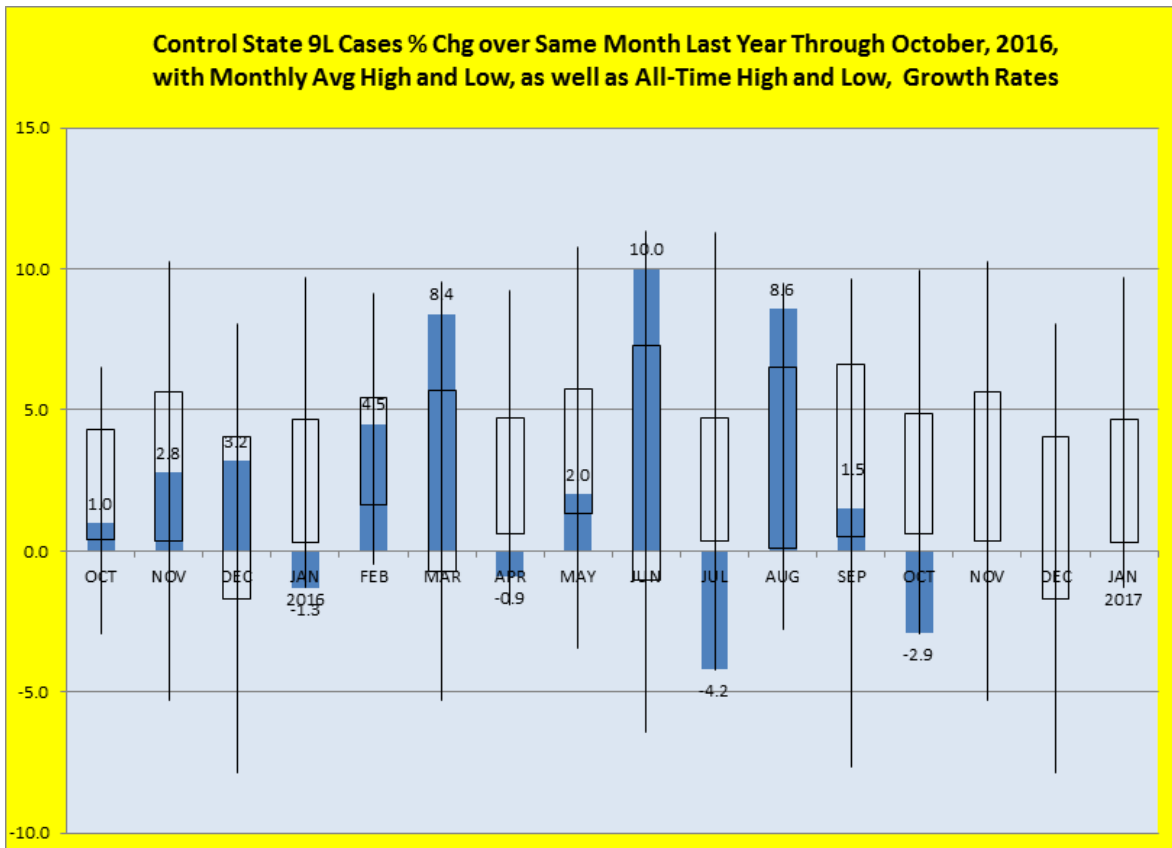
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For more information about the NABCA, visit www.nabca.org.

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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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