

Control State Results for April 2021

Control State Results

Source: NABCA

May 25, 2021

During April nine-liter control states spirits case sales grew 17.5% over same period sales last year, effected by a flat comp and an anomalous kilo-percent Pennsylvania growth rate. Alabama(19.0%), Montgomery County Maryland(7.2%), Montana(16.0%), North Carolina(16.6%), New Hampshire(46.9%), Ohio(9.0%), Oregon(5.3%), Pennsylvania(1,052.9%), Virginia(11.3%), and Wyoming(14.0%) reported monthly growth rates for April exceeding their twelve-month trends. The growth rates for Iowa(1.2%), Idaho(9.1%), Maine(4.2%), Michigan(-20.4%), Mississippi(-5.4%), Utah(-0.5%), Vermont(-0.4%), and West Virginia(-5.0%) fell short of their twelve-month trends. Control state rolling-twelve-month-volume growth, 7.9%, improved upon March's reported 6.6%. Spirits' volumes are growing 7.4% year-to-date compared to 6.5% a year ago.

April's 17.5% nine-liter spirits growth rate is the second highest growth rate reported for the control states, surpassed only by September 2020's reported 17.9%.

Control state spirits shelf dollars were up 27.9% during April while trending at 15.4% during the past twelve months. Alabama(25.4%), Idaho(18.8%), Montgomery County Maryland(18.6%), Montana(28.0%), North Carolina(28.4%), New Hampshire(58.9%), Ohio(20.8%), Oregon(13.8%), Pennsylvania(1,024.0%), Utah(8.2%), Virginia(20.3%), and Wyoming(22.3%) reported growth rates exceeding their twelve-month trends. Iowa(8.0%), Maine(11.2%), Michigan(-9.6%), Mississippi(5.8%), Vermont(7.1%), and West Virginia(0.7%) grew shelf dollars at rates below their twelve-month trends. Shelf dollars in the control states are up 15.8% year-to-date compared to 8.9% last year.

April's 27.9% shelf dollar growth rate is the highest growth rate reported for the control states.

Price/Mix for April is 10.4%, up from March's reported 9.1%.

Premiumization continues to drive Price/Mix in the control states. April's 10.4% reported Price/Mix is the highest value ever reported. During April 2021, the median price of 750 ML spirits volumes sold in those control states that set the retail price point was \$24.99 (the highest value recorded in the control states) and the weighted average price of 750 ML volumes was \$17.80. During last year's April, these prices were \$23.95 and \$16.55, respectively.

April's control states growth rate was effected by calendar anomalies and pandemic related phenomena.

- Michigan, with 17% of control state nine-liter-case spirits volume, reported sales for 28 days this April compared to 35 days last year, artificially deflating sales growth and skewing control state results. Michigan had seven fewer selling days during this year's April.
- Pennsylvania, with 12% of control state nine-liter-case spirits volume, reported sales for 27 days this April compared to 3 days last year, artificially inflating sales growth and skewing control state results. Pennsylvania had 24 more selling days during this year's April.
- New Hampshire, with 4% of control state nine-liter-case spirits volume, reported sales for 34 days this April compared to 27 days last year, artificially inflating sales growth and skewing control state results. New Hampshire had seven more selling days during this year's April.

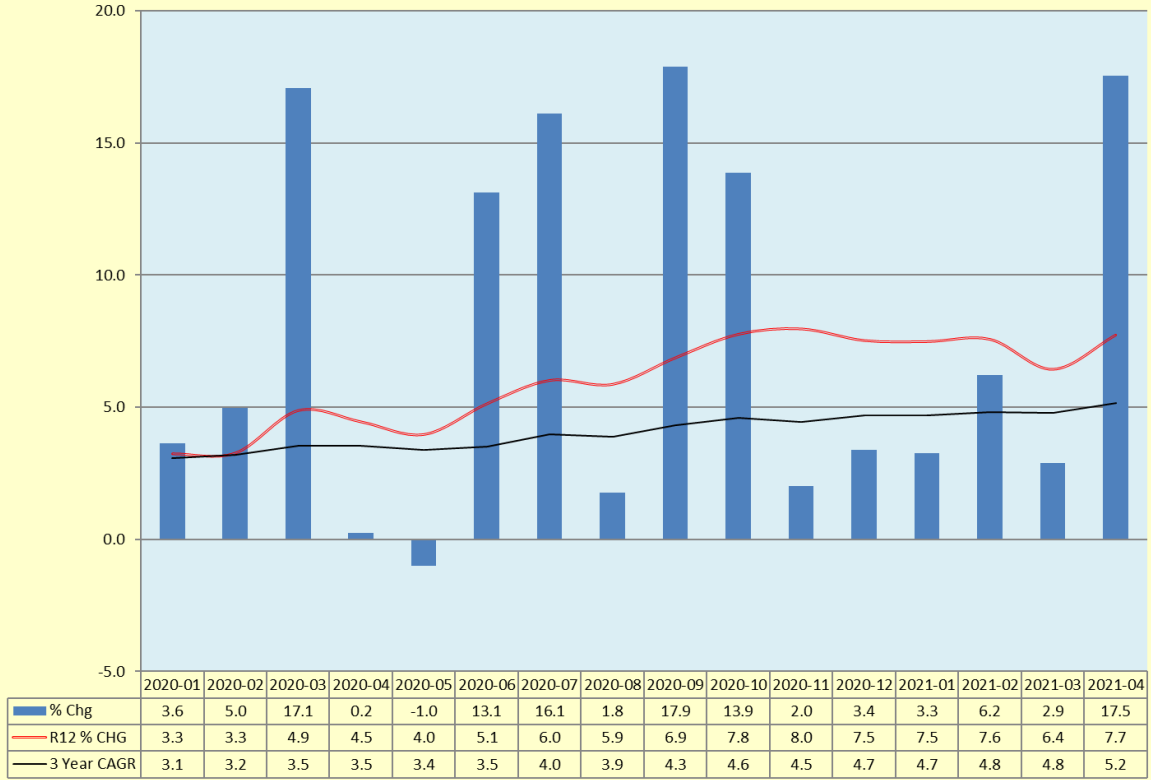
- On net, there were 24 more selling days during April in the control states, 5% more, compared to last year.
- After equalizing selling-day variations between this and last year's April, the nine-liter-
- case-spirits growth rate is 9.9% with a rolling-twelve-month trend of 7.1%. April's shelf-dollar growth rate is 19.2% with a rolling-twelve-month trend of 14.3%.
- Equivalized price/mix for April is 9.3%.

Tequila, with 9% share of the nine-liter case control states spirits market, was April's fastest growing category with 57.2% reported and a twelve-month trend of 28.5%. Cordials, with 7% share, grew during April at 49.1% and 10.7% during the past twelve months. Irish Whiskey, with 2% share, grew at 47.0% during April and 9.1% during the past twelve months. Vodka, with 32% share, grew during the same periods at 9.8% and 1.5%, respectively. Cordials(49.1% during April, 10.7% during past twelve months), Domestic Whiskey(14.3%, 10.2%), Gin(11.4%, 1.2%), Irish Whiskey(47.0%, 9.1%), Rum(13.7%, 2.9%), Scotch(21.9%, 2.6%), Tequila(57.2%, 28.5%) and Vodka(9.8%, 1.5%) and grew at rates above their twelve-month trends, while Brandy/Cognac(13.1%, 16.2%), Canadian Whiskey(4.4%, 6.5%), Cocktails(43.1%, 44.3%) grew at rates below their twelve-month trends.

April's nine-liter wine case sales growth rate was 23.1%. Pennsylvania (reporting 47.0% nine-liter-case growth for wines), New Hampshire (24.4%), Mississippi (-13.4%), Utah (-0.9%), Montgomery County Maryland (-8.3%), and Wyoming (-18.5%) 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 2.8%, improving upon March's reported 0.1%.

	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	17.5	27.9	10.4%	
Central Region	24.4	35.4	11.0%	IA, MD, MI, OH, PA, WV
NE Region	24.9	33.5	8.6%	ME, NH, VT
NW Region	6.4	15.2	8.8%	ID, MT, OR, UT, WY
Southern Region	12.3	22.8	10.5%	AL, MS, NC, VA

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



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

