

NABCA CONTROL STATE RESULTS

Control State Results for November 2017

Control State Results

January 10, 2017

During November, nine-liter control states spirits case sales, influenced by reporting anomalies in Michigan and Utah and in spite of a rather strong comp, grew 6.6% over same period sales last year. Alabama (4.3%), Michigan (25.9%), Mississippi (1.6%), Montana (5.3%), North Carolina (3.8%), New Hampshire (4.5%), Utah (28.2%), Virginia (4.8%), Vermont (3.4%), West Virginia (3.8%), and Wyoming (4.5%) reported monthly growth rates for November that exceeded their twelve month trends. The growth rates for Iowa (-0.9%), Idaho (3.4%), Montgomery County Maryland (-4.1%), Maine (3.3%), Ohio (2.7%), Oregon (2.7%), and Pennsylvania (0.2%) fell short of matching their twelve month trends. Control state rolling-twelve month volume growth, 3.1%, was a slight improvement over October's reported 3.0%. Spirits volumes have grown 3.1% year-to-date compared to 2.8% a year ago.

Control state spirits shelf dollars were up 9.2% during November while trending at 5.3% during the past twelve months. Alabama (9.1%), Montgomery County Maryland (3.6%), Maine (6.8%), Michigan (28.6%), Mississippi (4.1%), Montana (8.2%), New Hampshire (5.1%), Ohio (6.5%), Utah (31.1%), Virginia (6.5%), West Virginia (9.1%), and Wyoming (5.5%) reported growth rates exceeding their twelve month trends. Iowa (1.5%), Idaho (5.3%), North Carolina (5.7%), Oregon (4.5%), Pennsylvania (0.7%), and Vermont (4.6%) grew shelf dollars at rates below their twelve month trends. Shelf dollars in the control states are up 5.4% year-to-date compared to 5.0% last year.

Price/Mix for November is 2.6%, up from October's 2.1%.

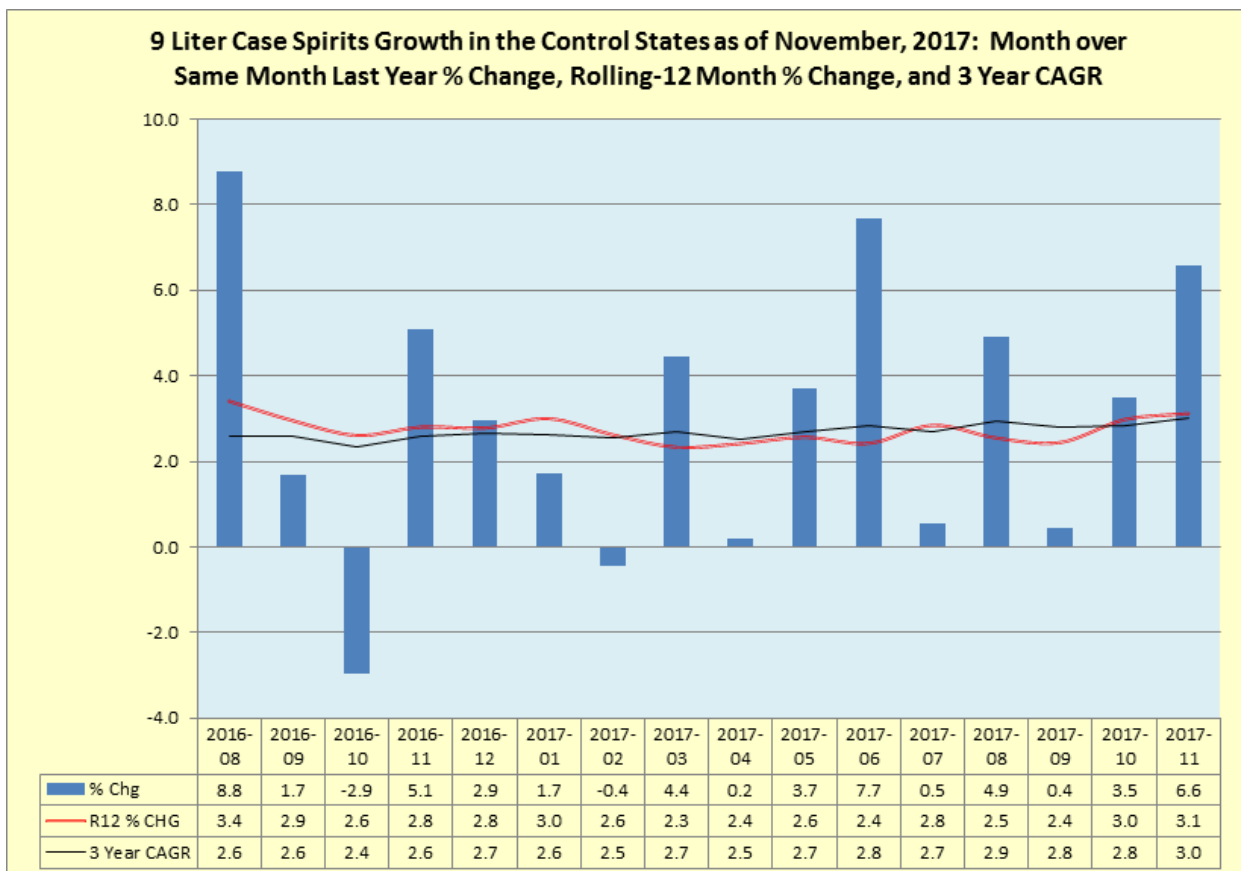
November's Control State spirits nine-liter case and shelf dollar growth rates were effected by the Control States' reporting calendars:

- Utah, with 2.6% of Control States' spirits nine-liter case volumes and dollars, reported five weeks of sales this year versus four weeks of sales during November 2016, artificially inflating sales and skewing Control States results. Utah had six more selling days during this year's November than during last year's,
- Michigan, with 17.4% of Control States' spirits nine-liter case volumes and 15.6% of Control States' dollars, reported five weeks of sales this year versus four weeks of sales during November 2016, artificially inflating sales and skewing Control States results. Michigan had seven more selling days during this year's November than during last year's.
- Overall, November 2017 had thirteen more selling days, 2.5% more, than last year's November.
- After equalizing nine-liter spirits case sales with respect to selling-day variations, November's volumetric growth is 2.3%, and rolling-twelve-month volume is up 2.5%. Likewise, after equalizing shelf dollars, November's control states shelf dollar growth rate is 4.6% with a twelve-month trend of 4.4%.
- September's equalized Price/Mix is 2.3%.

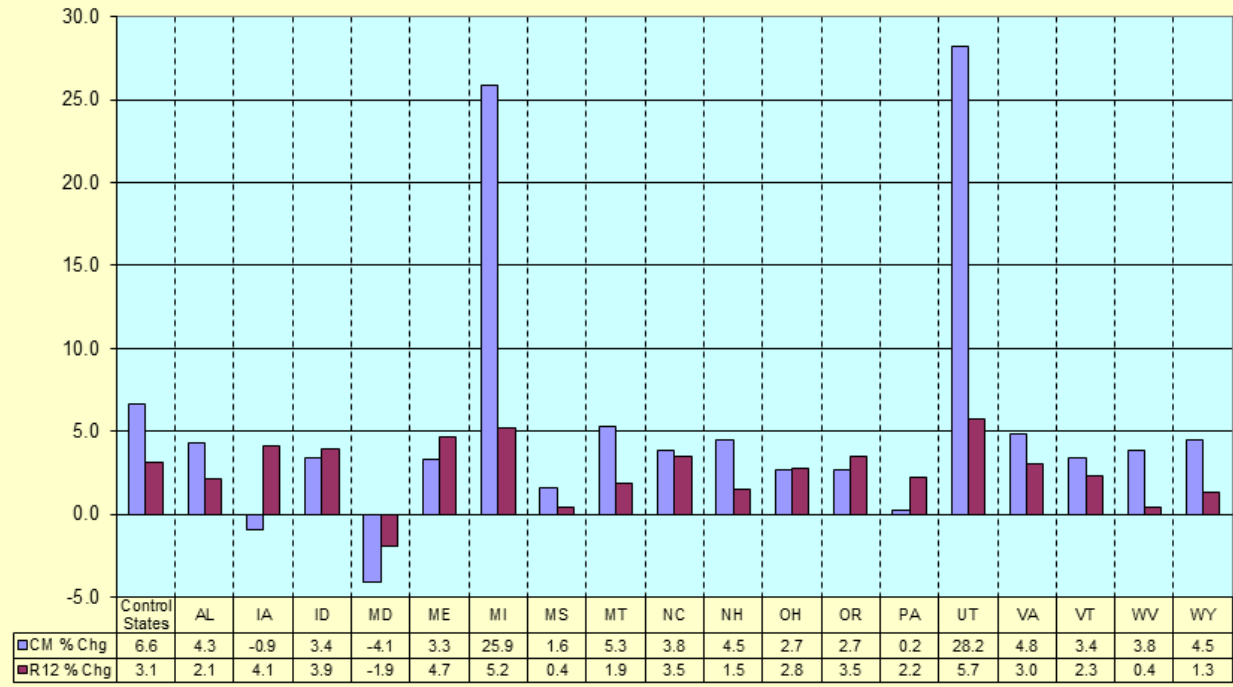
Irish Whiskey, with 1% share of the nine-liter case control states spirits market, was November’s fastest growing category with 20.4% reported and a twelve month trend of 15.4%. Vodka, with 35% share, grew during the same periods at 5.7% and 2.3%, respectively. Tequila (11.1%), Domestic Whiskey (9.2%), Scotch (8.7%), Cocktails (8.2%), Vodka (5.7%), Cordials (5.6%), Canadian Whiskey (5.5%), Rum (5.4%), and Gin (3.1%) grew at rates at or above their twelve month trends, whereas Brandy/Cognac (4.8%) grew at a rate below its.

November’s nine-liter wine case sales growth rate was 0.8%. Pennsylvania (reporting -1.3% nine-liter case growth for wines), New Hampshire (-0.9%), Utah (24.6%), Mississippi (1.2%), Montgomery County Maryland (-0.5%), and Wyoming (1.2%) 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 2.4%, down slightly from October’s reported 2.7%.

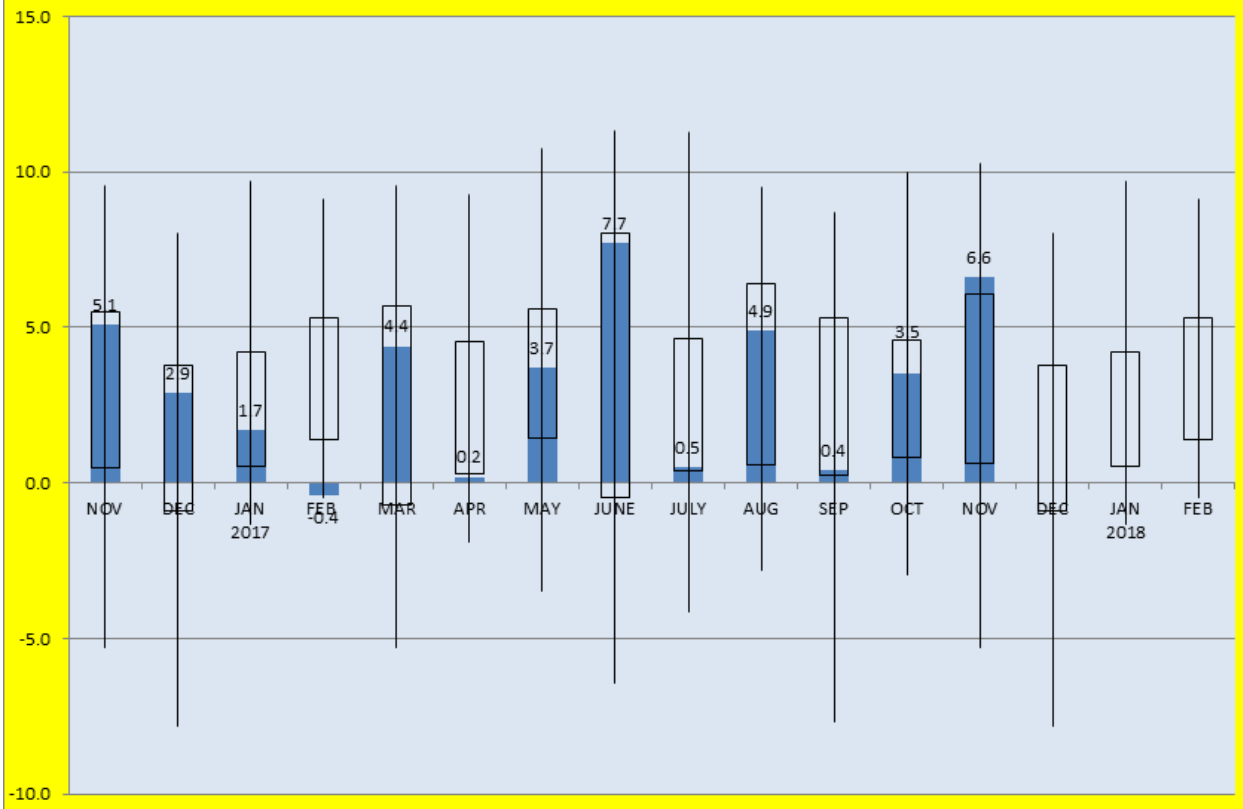
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	6.6	9.2	2.6%	
Central Region	8.3	11.3	3.0%	IA, MD, MI, OH, PA, WV
NE Region	4.0	5.5	1.5%	ME, NH, VT
NW Region	7.7	9.6	1.9%	ID, MT, OR, UT, WY
Southern Region	3.9	6.4	2.5%	AL, MS, NC, VA



**9 Liter Case Spirits Growth in the Control States by State as of November, 2017:
Month over Same Month Last Year % Change and Rolling-12 Month % Change**



**Control State 9L Cases % Chg over Same Month Last Year Through November, 2017,
with Monthly Avg High and Low, as well as All-Time High and Low, Growth Rates**



Price/Mix for Spirits in the Control States From January, 2008 Through November, 2017 with a Six Month Moving Average Trend Line

