

# NABCA CONTROL STATE RESULTS

## Control State Results for October 2017

### Control State Results

November 28, 2017

During October, nine-liter control states spirits case sales, stimulated by pyknic sales of Tequila and Cocktails as well as an asthenic comp, grew 3.5% over same period sales last year. Alabama (5.5%), Iowa (9.8%), Michigan (7.1%), Mississippi (11.7%), Montana (4.8%), Utah (4.4%), West Virginia (8.8%), and Wyoming (4.0%) reported monthly growth rates for October that exceeded their twelve month trends. The growth rates for Idaho (2.4%), Montgomery County Maryland (-2.6%), Maine (5.1%), North Carolina (0.7%), New Hampshire (-0.7%), Ohio (2.5%), Oregon (3.4%), Pennsylvania (0.5%), Virginia (1.2%), and Vermont (-0.5%) fell short of matching their twelve month trends. Control state rolling-twelve month volume growth, 3.0%, improved upon September's reported 2.4%. Spirits volumes have grown 2.8% year-to-date compared to 2.5% a year ago.

Control state spirits shelf dollars were up 5.6% during October while trending at 5.2% during the past twelve months. Alabama (6.4%), Iowa (12.7%), Montgomery County Maryland (2.8%), Maine (9.0%), Michigan (7.5%), Mississippi (13.1%), Montana (6.4%), Ohio (5.8%), Pennsylvania (6.5%), Utah (7.2%), West Virginia (12.0%), and Wyoming (5.3%) reported growth rates exceeding their twelve month trends. Idaho (4.0%), North Carolina (2.1%), New Hampshire (1.9%), Oregon (4.0%), Virginia (1.8%), and Vermont (3.3%) grew shelf dollars at rates below their twelve month trends. Shelf dollars in the control states are up 5.0% year-to-date compared to 4.7% last year.

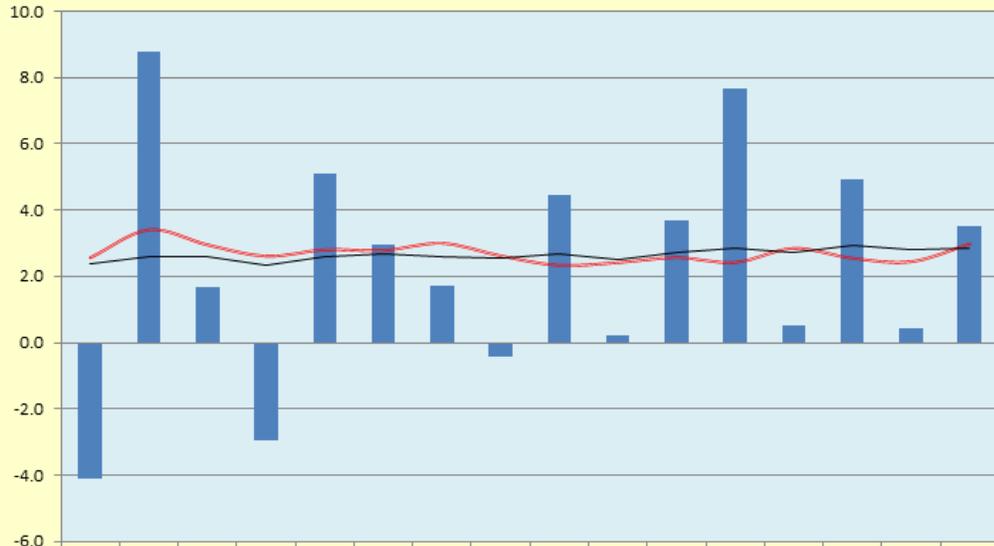
Price/Mix for October is 2.1%, up slightly over September's 1.9%.

Tequila, with 6% share of the control states spirits market, was October's fastest growing category with 15.9% reported and a twelve month trend of 10.1%. Vodka, with 35% share, grew during the same periods at 3.1% and 2.2%, respectively. Cocktails (15.1%), Cordials (1.4%), Gin (1.2%), Rum (1.3%), Tequila (15.9%), and Vodka (3.1%) grew at rates at or above their twelve month trends, whereas Brandy/Cognac (0.3%), Canadian Whiskey (2.6%), Domestic Whiskey (4.0%), Irish Whiskey (13.0%), and Scotch (-0.5%) grew at rates below theirs.

October's nine-liter wine case sales growth rate was 0.4%. Pennsylvania (reporting 0.5% nine-liter case growth for wines), New Hampshire (-3.4%), Utah (2.0%), Mississippi (11.9%), Montgomery County Maryland (-3.4%), and Wyoming (1.3%) 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 2.7%, flat with September's reported 2.7%.

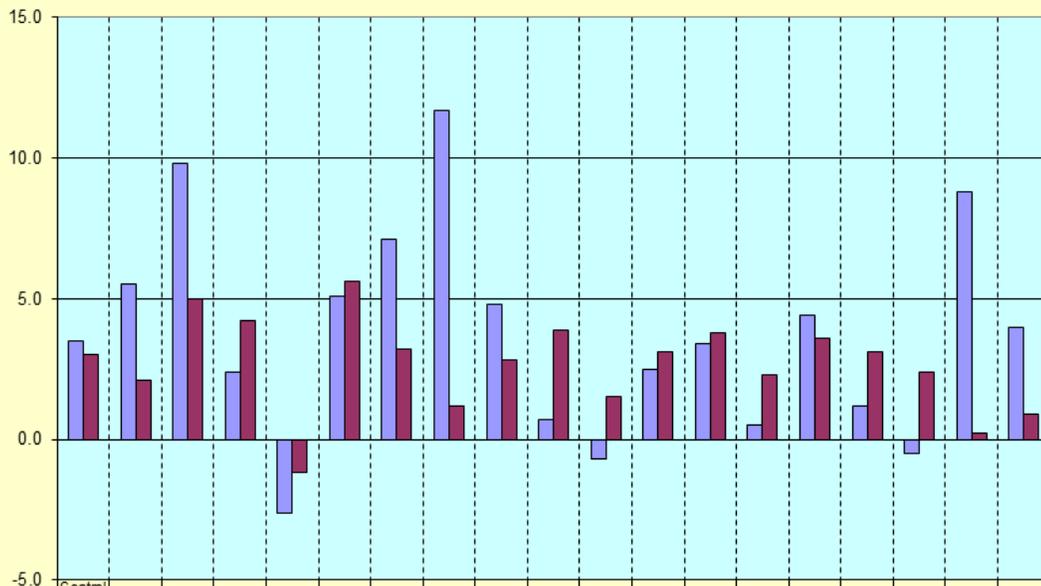
	9L Cases CM % Chg	Shelf \$ CM % Chg	Price/Mix	Control States
Total Control States	3.5	5.6	2.1%	
Central Region	4.2	7.2	3.0%	IA, MD, MI, OH, PA, WV
NE Region	0.9	3.9	3.0%	ME, NH, VT
NW Region	3.6	4.9	1.3%	ID, MT, OR, UT, WY
Southern Region	3.1	3.8	0.7%	AL, MS, NC, VA

**9 Liter Case Spirits Growth in the Control States as of October, 2017: Month over Same Month Last Year % Change, Rolling-12 Month % Change, and 3 Year CAGR**



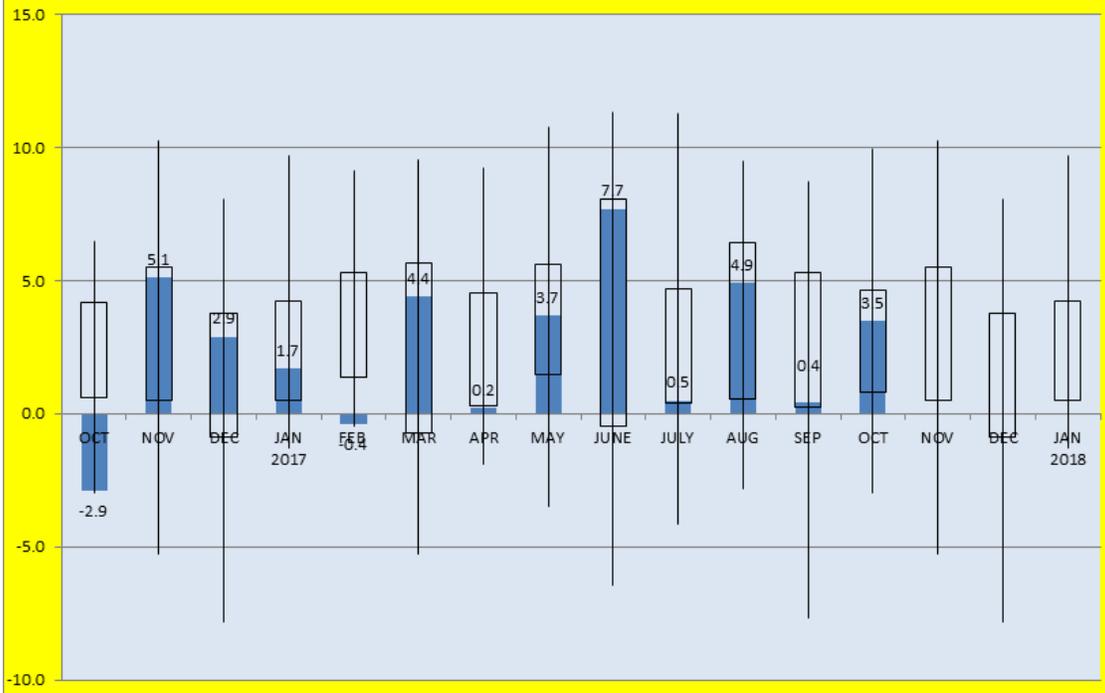
	2016-07	2016-08	2016-09	2016-10	2016-11	2016-12	2017-01	2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	2017-08	2017-09	2017-10
<b>% Chg</b>	-4.1	8.8	1.7	-2.9	5.1	2.9	1.7	-0.4	4.4	0.2	3.7	7.7	0.5	4.9	0.4	3.5
<b>R12 % CHG</b>	2.6	3.4	2.9	2.6	2.8	2.8	3.0	2.6	2.3	2.4	2.6	2.4	2.8	2.5	2.4	3.0
<b>3 Year CAGR</b>	2.4	2.6	2.6	2.4	2.6	2.7	2.6	2.5	2.7	2.5	2.7	2.8	2.7	2.9	2.8	2.8

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



	Control States	AL	IA	ID	MD	ME	MI	MS	MT	NC	NH	OH	OR	PA	UT	VA	VT	WV	WY
<b>CM % Chg</b>	3.5	5.5	9.8	2.4	-2.6	5.1	7.1	11.7	4.8	0.7	-0.7	2.5	3.4	0.5	4.4	1.2	-0.5	8.8	4.0
<b>R12 % Chg</b>	3.0	2.1	5.0	4.2	-1.2	5.6	3.2	1.2	2.8	3.9	1.5	3.1	3.8	2.3	3.6	3.1	2.4	0.2	0.9

**Control State 9L Cases % Chg over Same Month Last Year Through October, 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 October, 2017 with a Six Month Moving Average Trend Line**

