

DLC Wholesale Price Comparison – Special Order Beer and Wine

June 2015



Special Order Wholesale Price Comparison Overview

OLO REPORT

Table 31. Difference between DLC and Private Distributor
Average Wholesale Prices for DLC Top 30 Sellers

Product Type	# of Products in Calculation	Average Wholesale Price		
		DLC	Private Distributor	% Difference, DLC vs. Private
Stock				
Beer	5	\$24.01	\$24.66	-3%
Wine	27	\$73.88	\$75.44	-2%
Spirits	26	\$170.31	\$178.61	-5%
Special Order				
Beer	3	\$33.60	\$28.74	+14%
Wine	12	\$87.84	\$93.46	-6%
Spirits	26	\$251.59	\$277.67	-10%

Source: DLC, MD/DC Beverage Journal

In March 2015 CountyStat provided additional analysis to supplement the study completed by OLO in 2015 regarding average wholesale price differences between private wholesalers and DLC.

Special orders were excluded from this initial supplemental analysis.

Since March, DLC has provided CountyStat with the wholesale prices for DLC and private distributors for special order wine and special order beer.

This analysis includes the following DLC to private wholesale price comparisons:
DLC vs. MD: Special Order Wine
DLC vs. MD: Special Order Beer

This reports also contains summaries of stock items. Detail on stock items can be found in the March 2015 price comparison analysis.

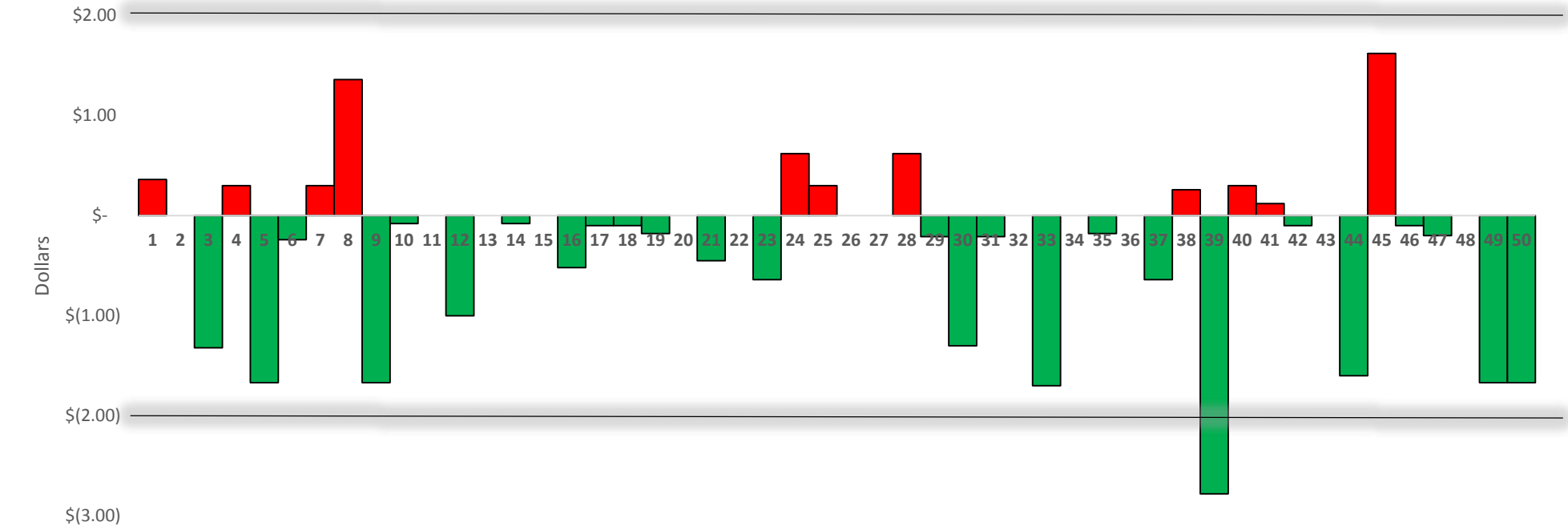
LEGEND
Special orders (Blue)
Stock items (Orange)

CountyStat Analysis

Category	% of Top 50 items					
	Special Order Wine (State)	Special Order Beer (State)	Stock Wine (State)	Stock Beer (State)	Stock Beer (DC)	Stock Spirits (State)
Montgomery County wholesale price is <u>higher</u> than the private distributor	22%	74%	36%	24%	18%	20%
Montgomery County wholesale price is <u>lower</u> than the private distributor	52%	12%	64%	36%	76%	74%
Montgomery County wholesale price is the <u>same</u> as the private distributor	0%	0%	0%	38%	0%	2%
Private distributor wholesale price not available	26%	14%	0%	2%	6%	4%
Total	100%	100%	100%	100%	100%	100%
Montgomery County wholesale price is <u>higher</u> than the private distributor by \$2.00 or more	0%	58%	6%	0%	2%	4%
Private distributor wholesale price is <u>higher</u> than Montgomery County by \$2.00 or more	2%	4%	0%	2%	26%	34%
Difference in price is equal to or greater than \$2.00	2%	62%	6%	2%	28%	38%

Montgomery County vs. State Private Distributor: Special Order Wine

Difference in wholesale price (in dollars)



Of the top 50 special order wines, Montgomery County’s wholesale price was greater for 11 wines (22%) and lower for 26 wines (52%). Pricing information was not available for 13 wines (26%).

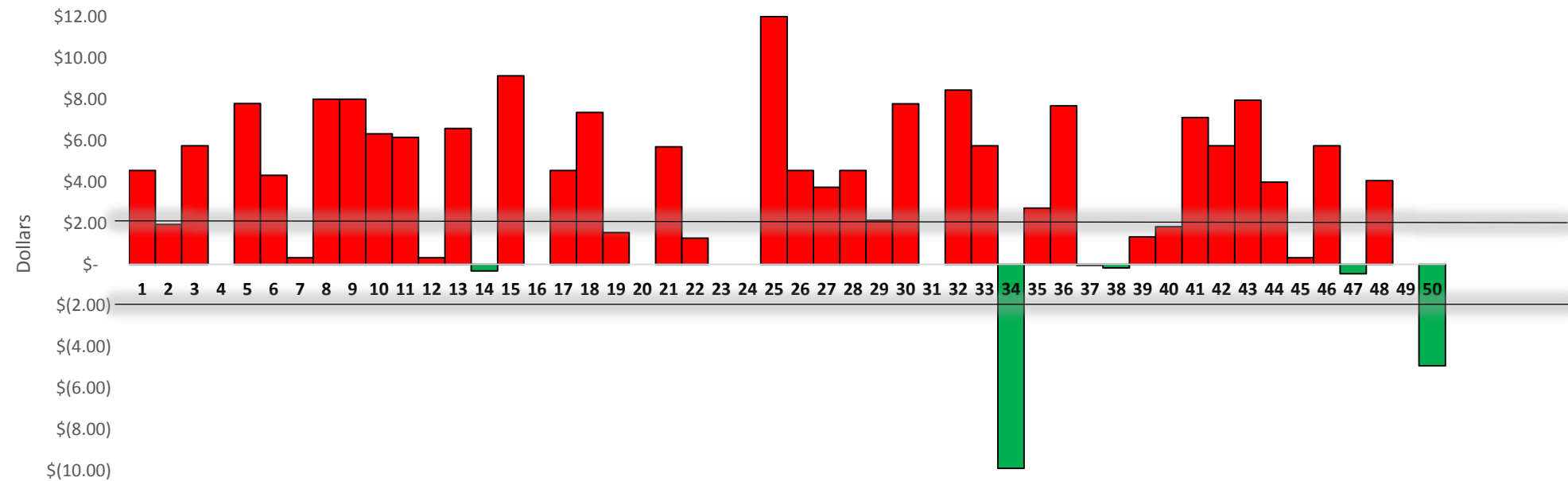
Price differentials were predominately within this study’s \$2.00 range. One product of the Top 50 exceeded this range with the wholesale price being \$2.78 more than Montgomery County’s wholesale price.

Category	# of items	% of items
Montgomery County wholesale price is higher than the State Distributor (RED)	11	22%
Montgomery County wholesale price is lower than the State Distributor (Green)	26	52%
Montgomery County wholesale price is the same as the State Distributor	0	0%
State Distributor price not available	13	26%
Total	50	100%
Montgomery County wholesale price is <u>higher</u> than the private distributor by \$2.00 or more	0	0%
Private distributor wholesale price is <u>higher</u> than Montgomery County by \$2.00 or more	1	2%
Difference in price is equal to or greater than \$2.00	1	2%

Note: See appendix for Top 50 list

Montgomery County vs. State Private Distributor: Special Order Beer

Difference in wholesale price (in dollars)



Of the top 50 special order beers, Montgomery County’s wholesale price is higher for 37 beers (74%). Montgomery County’s wholesale price is lower for 6 beers (12%) and pricing information was not available for 7 beers (14%).

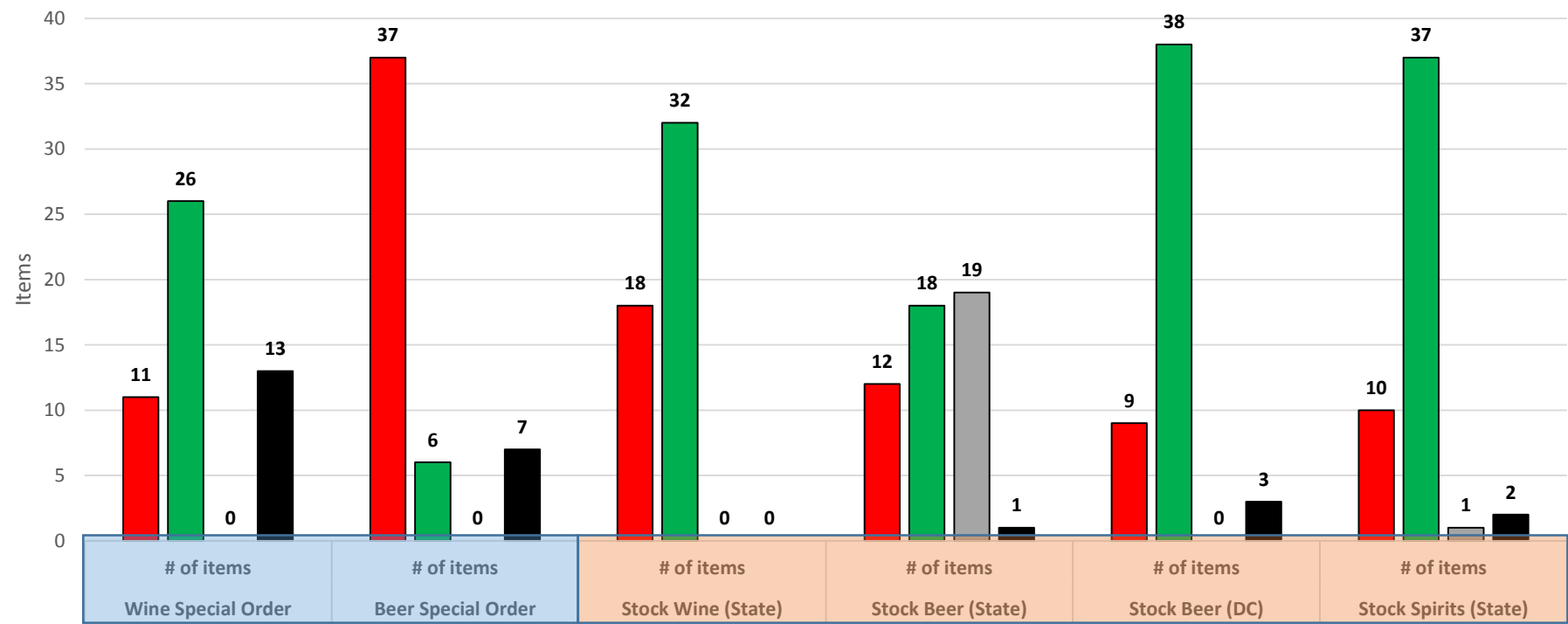
62% of special orders beers had a price differential of \$2.00 or greater. The Montgomery County wholesale price was higher than the private distributor by \$2.00 or more for 29 beers (58%). The private distributor wholesale price was higher than Montgomery County by \$2.00 or more for 2 beers (4%).

Category	# of items	% of items
Montgomery County wholesale price is higher than the State Distributor (RED)	37	74%
Montgomery County wholesale price is lower than the State Distributor (Green)	6	12%
Montgomery County wholesale price is the same as the State Distributor	0	0%
State Distributor price not available	7	14%
Total	50	100%
Montgomery County wholesale price is <u>higher</u> than the private distributor by \$2.00 or more	29	58%
Private distributor wholesale price is <u>higher</u> than Montgomery County by \$2.00 or more	2	4%
Difference in price is equal to or greater than \$2.00	31	62%

Note: See appendix for Top 50 list

DLC Wholesale Price Comparison Summary (1 of 2)

Price comparison by distributor and product type (# of items)



- Montgomery County wholesale Price is higher than the private distributor
- Montgomery County wholesale Price is lower than the private distributor
- Montgomery County wholesale price is the same as the private distributor
- Private distributor wholesale price not available

The majority of Montgomery County wholesale prices were lower than private distributor prices in the following categories:

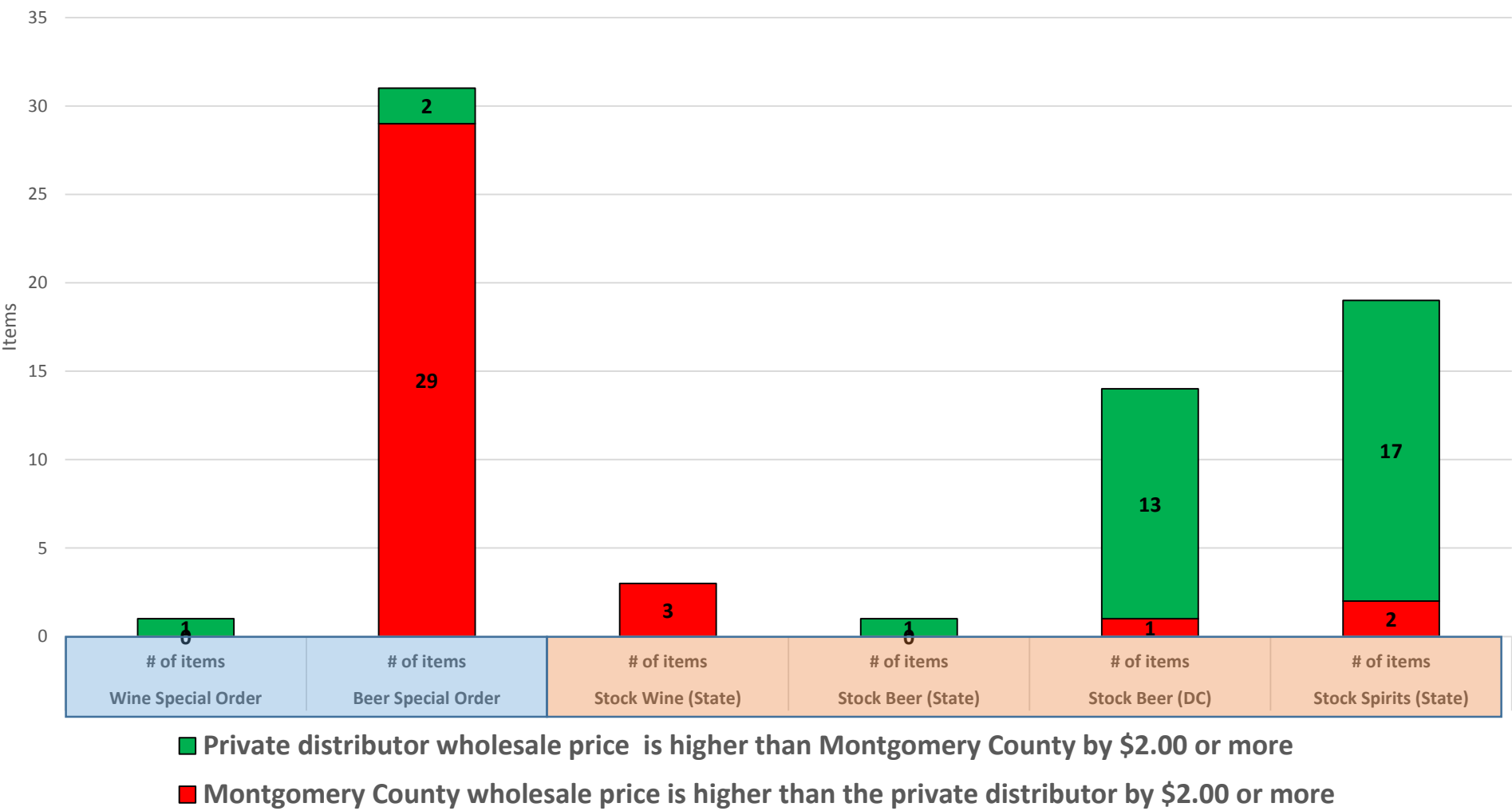
Special order wine (State): 26 items(52%)
Stock Wine (State) = 32 items (64%)
Stock Beer (DC) = 38 items (76%)
Stock Spirits (State) =37 items (74%)

Montgomery County wholesale prices were predominately higher than private distributor prices in the following category:
Special order beer (State): 37 items(74%)

LEGEND
Special orders (Blue)
Stock items (Orange)

DLC Wholesale Price Comparison Summary (2 of 2)

Price differences of \$2.00 or greater by distributor and product type (# of items)



For special order items, the majority of large price differentials were the result of the Montgomery County charging \$2.00 or higher than private distributors (primarily for beer special order items).

State = 3
Montgomery County = 29

Stock items show the opposite with the majority of large price differentials being the result of the private distributor charging \$2.00 or higher than Montgomery County:

State or DC = 31 items
Montgomery County = 3 items

1. Summary of Top 50 price comparison
2. Top 50 special order wines price comparison by item (State)
3. Top 50 special order beers price comparison by item (State)

Appendix 1: Summary of Top 50 Price Comparison

Category	Wine Special Order	Beer Special Order	Stock Wine (State)	Stock Beer (State)	Stock Beer (DC)	Stock Spirits (State)
	# of items	# of items	# of items	# of items	# of items	# of items
Montgomery County wholesale Price is <u>higher</u> than the private distributor	11	37	18	12	9	10
Montgomery County wholesale Price is <u>lower</u> than the private distributor	26	6	32	18	38	37
Montgomery County wholesale price is the <u>same</u> as the private distributor	0	0	0	19	0	1
Private distributor wholesale price not available	13	7	0	1	3	2
Total	50	50	50	50	50	50
Montgomery County wholesale price is <u>higher</u> than the private distributor by \$2.00 or more	0	29	3	0	1	2
Private distributor wholesale price is <u>higher</u> than Montgomery County by \$2.00 or more	1	2	0	1	13	17
Difference in price is equal to or greater than \$2.00	1	31	3	1	14	19

LEGEND
Special orders (Blue)
Stock items (Orange)

Source: Beverage Journal and DLC provided by DLC

Appendix 2: Top 50 Special Order Wine Price Comparison By Item

Top 50 Special Order Wine (State)

Wine	Size	Montgomery County Wholesale Price	Private Distributor	Private Distributor	\$ Difference	% Difference
1 Sonoma Cutrea RR Chard	1849	\$ 15.35	Reliable Churchill	\$ 14.99	\$ 0.36	2%
2 Balduccis Pinot Grigio	1019	\$ 6.75	Mont.County Only	NA	NA	NA
3 Fire Road S/Blanc	1001	\$ 9.35	Country Vintner	\$ 10.67	\$ (1.32)	-14%
4 Canyon Road Chard	965	\$ 4.55	Reliable Churchill	\$ 4.25	\$ 0.30	7%
5 Oyster Bay S/Blanc (Stores)	786	\$ 8.99	RNDC	\$ 10.66	\$ (1.67)	-19%
6 Domino De Eguren Protocolo Red	785	\$ 5.75	Country Vintner	\$ 5.99	\$ (0.24)	-4%
7 Canyon Road Cab	708	\$ 4.55	Reliable Churchill	\$ 4.25	\$ 0.30	7%
8 Bogle Chard	672	\$ 9.35	Constantine	\$ 7.99	\$ 1.36	15%
9 Oyster Bay S/Blanc (Restaurants)	667	\$ 8.99	RNDC	\$ 10.66	\$ (1.67)	-19%
10 Ponga S/Blanc	639	\$ 8.59	Country Vintner	\$ 8.67	\$ (0.08)	-1%
11 Duboeuf Beaujolais Noveau	616	\$ 8.15	Reliable Churchill	NA	NA	NA
12 A to Z Pinot Noir (Restaurant)	608	\$ 14.29	Country Vintner	\$ 15.29	\$ (1.00)	-7%
13 Nespoli Adesso Cagnini	592	\$ 8.29	NA	NA	NA	NA
14 Montelliana Ex Brut Res NV	576	\$ 8.59	Country Vintner	\$ 8.67	\$ (0.08)	-1%
15 Walmae Makkoli	576	\$ 4.35	NA	NA	NA	NA
16 Annabella Cab	565	\$ 12.15	Country Vintner	\$ 12.67	\$ (0.52)	-4%
17 Santa Julia Organica Malbec	556	\$ 7.89	Country Vintner	\$ 7.99	\$ (0.10)	-1%
18 Dibon Cava Brut res NV	543	\$ 7.89	Country Vintner	\$ 7.99	\$ (0.10)	-1%
19 Cielo Pinot Grigio Del Veneto	540	\$ 6.49	Country Vintner	\$ 6.67	\$ (0.18)	-3%
20 Two Oceans S/Blanc	538	\$ 8.69	Southern W & S	NA	NA	NA
21 Lab Portuguesa Red	538	\$ 5.05	NBB	\$ 5.50	\$ (0.45)	-9%
22 Marine Cuv	537	\$ 6.49	Elite	NA	NA	NA
23 Dr. Loosen "L" Est Ries Trocken	535	\$ 9.35	Country Vintner	\$ 9.99	\$ (0.64)	-7%
24 Septima Malbec	523	\$ 7.95	Southern W & S	\$ 7.33	\$ 0.62	8%
25 Canyon Road Pinot Grigio	517	\$ 4.55	Reliable Churchill	\$ 4.25	\$ 0.30	7%
26 Balduccis Malbec	517	\$ 6.35	Mont.County Only	NA	NA	NA
27 Cristalino Brut	495	\$ 7.49	RNDC	NA	NA	NA
28 Avalon Cab	485	\$ 7.95	Bacchus	\$ 7.33	\$ 0.62	8%
29 Alois Lageder Pinot Grigio Riff	482	\$ 7.89	Country Vintner	\$ 8.10	\$ (0.21)	-3%
30 True Myth Chard	477	\$ 10.69	Country Vintner	\$ 11.99	\$ (1.30)	-12%
31 Evodia	474	\$ 7.89	Country Vintner	\$ 8.10	\$ (0.21)	-3%
32 Valoroso Red	468	\$ 6.35	RNDC	NA	NA	NA
33 A to Z Oregon Pinot Noir (Stores)	439	\$ 14.29	Country Vintner	\$ 15.99	\$ (1.70)	-12%
34 Anciano 10 Gran res.	430	\$ 7.69	NA	NA	NA	NA
35 Borsao	427	\$ 6.49	Country Vintner	\$ 6.67	\$ (0.18)	-3%
36 Duboeuf Beboeuf Beaujolais Noveau	424	\$ 8.79	Reliable Churchill	NA	NA	NA
37 New Age White	422	\$ 8.35	Atlantic	\$ 8.99	\$ (0.64)	-8%
38 Spy Valley Marlborough S/Blanc	417	\$ 13.59	Country Vintner	\$ 13.33	\$ 0.26	2%
39 Angeline Calif Pinot Noir	414	\$ 8.55	Country Vintner	\$ 11.33	\$ (2.78)	-33%
40 Canyon Road Merlot	407	\$ 4.55	Reliable Churchill	\$ 4.25	\$ 0.30	7%
41 Angeline Pinot Noir	406	\$ 11.45	Country Vintner	\$ 11.33	\$ 0.12	1%
42 Gouguenheim Mal 13	405	\$ 7.89	Country Vintner	\$ 7.99	\$ (0.10)	-1%
43 La Playa S/Blanc	404	\$ 5.89	NA	NA	NA	NA
44 Franciscan Oakville Est Cab	378	\$ 20.39	RNDC	\$ 21.99	\$ (1.60)	-8%
45 Clifford Bay S/Blanc	375	\$ 8.28	Southern W & S	\$ 6.66	\$ 1.62	20%
46 Charles Smith Velvet Devil Merlot	358	\$ 9.25	RNDC	\$ 9.35	\$ (0.10)	-1%
47 La Fiera Montpul D'Abru	358	\$ 5.79	Country Vintner	\$ 5.99	\$ (0.20)	-3%
48 Molinos De Dulcinea White Bib	357	\$ 13.75	NA	NA	NA	NA
49 Tavernello Bianco	356	\$ 2.99	Prestige Beverage	\$ 4.66	\$ (1.67)	-56%
50 Tavernello Rosso	347	\$ 2.99	Prestige Beverage	\$ 4.66	\$ (1.67)	-56%

LEGEND

Montgomery County wholesale price is higher than the private distributor (RED)

Montgomery County wholesale price is lower than the private distributor (Green)

Difference in price is equal to or greater than \$2.00 (BOLD)

Source: Beverage Journal and DLC provided by DLC

Appendix 2: Top 50 Special Order Beer Price Comparison By Item

Top 50 Special Order Beer (State)

Montgomery County Wholesale Price								
	Wine	Size	Price	Private Distributor	Private Distributor	\$ Difference	% Difference	
1	Oskar Blues Dales Pale Ale 4/6 Can	12oz	\$ 35.30	Legends	\$ 30.75	\$ 4.55	13%	
2	Stone IPA NR	12oz	\$ 33.34	Chesapeake Distributors	\$ 31.40	\$ 1.94	6%	
3	Lagunita's IPA	12oz	\$ 33.95	Legends	\$ 28.20	\$ 5.75	17%	
4	Duclaw Sweet Baby Jesus	12oz	\$ 27.20	Bond	NA	NA	NA	
5	Lagunita's Sumpin Sumpin	12oz	\$ 40.59	Legends	\$ 32.80	\$ 7.79	19%	
6	Crispin Cider Original	12oz	\$ 42.32	Legends	\$ 38.00	\$ 4.32	10%	
7	Pub Dog Imperial Dog IPA	12oz	\$ 29.83	NBB-National Beverage Bro	\$ 29.50	\$ 0.33	1%	
8	21st Amendment Can	12oz	\$ 38.00	D.O.P.S	\$ 30.00	\$ 8.00	21%	
9	21st Amendment Watermelon Can	12oz	\$ 38.00	D.O.P.S	\$ 30.00	\$ 8.00	21%	
10	Brewers Art Reserrection Can	12oz	\$ 37.33	Legends	\$ 31.00	\$ 6.33	17%	
11	Southern Tier Pumpkin	22oz	\$ 74.65	Legends	\$ 68.50	\$ 6.15	8%	
12	Pub Dog Hoppy Dog Ale IPA	12oz	\$ 29.83	NBB-National Beverage Bro	\$ 29.50	\$ 0.33	1%	
13	Breckenridge Vanilla Porter	12oz	\$ 37.33	Legends	\$ 30.75	\$ 6.58	18%	
14	Stone Arrogant Bastard	22oz	\$ 47.18	Chesapeake Distributors	\$ 47.50	\$ (0.32)	-1%	
15	Lagunita's Maximus	12oz	\$ 39.89	Legends	\$ 30.75	\$ 9.14	23%	
16	Mythos Beer	12oz	\$ 35.30	Dionysos	NA	NA	NA	
17	Oskar Blues Mamas Yella	12oz	\$ 35.30	Legends	\$ 30.75	\$ 4.55	13%	
18	Duvel 6/4	12oz	\$ 81.61	Legends	\$ 74.25	\$ 7.36	9%	
19	Stone Go To IPA	12oz	\$ 32.94	Chesapeake Distributors	\$ 31.40	\$ 1.54	5%	
20	St. George Beer Ethiopia	330ml	\$ 39.35	Global Ocean	NA	NA	NA	
21	Crabbies Ginger Beer	11.2oz	\$ 54.20	Legends	\$ 48.50	\$ 5.70	11%	
22	Tona	12oz	\$ 26.26	Chesapeake Distributors	\$ 24.99	\$ 1.27	5%	
23	Duclaw Hellrazer IPA	12oz	\$ 27.20	Bond	NA	NA	NA	
24	Duclaw Serum Double IPA	12oz	\$ 29.90	Bond	NA	NA	NA	
25	Schlafly Pumpkin Ale	12oz	\$ 48.00	D.O.P.S	\$ 36.00	\$ 12.00	25%	
26	Oskar Blues Old Chub	12oz	\$ 35.30	Legends	\$ 30.75	\$ 4.55	13%	
27	Abita Purple Haze	12oz	\$ 36.24	D.O.P.S	\$ 32.50	\$ 3.74	10%	
28	Oskar Blue's Dales Pale Ale 2/12 can	12oz	\$ 35.30	Legends	\$ 30.75	\$ 4.55	13%	
29	Butternut PorksIPA Pale Ale	12oz	\$ 28.89	Legends	\$ 26.75	\$ 2.14	7%	
30	Shipyard Pumpkinhead	12oz	\$ 39.78	D.O.P.S	\$ 32.00	\$ 7.78	20%	
31	Dirty Little Freak Coconut Ale	12oz	\$ 27.20	Bond	NA	NA	NA	
32	Union Duckpin Ale	12oz	\$ 39.69	Legends	\$ 31.25	\$ 8.44	21%	
33	Lagunitas Pils	12oz	\$ 33.95	Legends	\$ 28.20	\$ 5.75	17%	
34	Lagunitas Hop Stoopid	22oz	\$ 43.13	Legends	\$ 53.00	\$ (9.87)	-23%	
35	Zywiec	11oz	\$ 31.93	Legends	\$ 29.20	\$ 2.73	9%	
36	Brewers Art Bezley	12oz	\$ 38.68	Legends	\$ 31.00	\$ 7.68	20%	
37	Victory Golden Monkey Ale	12oz	\$ 37.95	Katcef Brothers	\$ 38.00	\$ (0.05)	0%	
38	Full Tilt Baltimore Ale	12oz	\$ 29.83	Chesapeake Distributors	\$ 30.00	\$ (0.17)	-1%	
39	Lancaster Milk Stout	12oz	\$ 31.59	Chesapeake Distributors	\$ 30.25	\$ 1.34	4%	
40	Lagunitas Day Time	12oz	\$ 34.63	Legends	\$ 32.80	\$ 1.83	5%	
41	Estrella Dam Daura	12oz	\$ 34.61	Chesapeake Distributors	\$ 27.50	\$ 7.11	21%	
42	Lagunitas Pale Ale	12oz	\$ 33.95	Legends	\$ 28.20	\$ 5.75	17%	
43	Unibroue La Fin Du Monde	12oz	\$ 66.95	Legends	\$ 59.00	\$ 7.95	12%	
44	Bitburger	12oz	\$ 31.18	Legends	\$ 27.20	\$ 3.98	13%	
45	Pub Dog White Dog Wheat	12oz	\$ 29.83	NBB-National Beverage Bro	\$ 29.50	\$ 0.33	1%	
46	Lagunitas Censored Ale	12oz	\$ 33.95	Legends	\$ 28.20	\$ 5.75	17%	
47	Evolution Primal Pale Ale	12oz	\$ 28.55	Chesapeake Distributors	\$ 29.00	\$ (0.45)	-2%	
48	Weyerbacher Merry Monks	12oz	\$ 43.06	Legends	\$ 39.00	\$ 4.06	9%	
49	DuClaw Bare Ass Blonde Ale	12oz	\$ 25.85	Bond	NA	NA	NA	
50	Stone Ruination	12oz	\$ 53.59	Chesapeake Distributors	\$ 58.50	\$ (4.91)	-9%	

LEGEND

Montgomery County wholesale price is higher than the private distributor (RED)

Montgomery County wholesale price is lower than the private distributor (Green)

Difference in price is equal to or greater than \$2.00 (BOLD)

Source: Beverage Journal and DLC provided by DLC