

Message from NBWA President and CEO Craig Purser and  
Chairman of the Board Michael Schilleci

## Welcome to Las Vegas

**W**elcome to Las Vegas—the entertainment capital of the world and an undeniable beer lover’s paradise! We are very excited to be here with all of you for NBWA’s 82nd Annual Convention and Trade Show.

Get ready for a jam-packed agenda. We’ll spend the next few days learning from each other and business experts about how new practices, technologies and politics are shaping the industry, as well as how we can adapt moving forward. We’ll hear from an exciting lineup of speakers, attend informational seminars and exhibits and foster relationships through many fun and engaging networking opportunities.



This year’s conference features an impressive group of speakers. Two trailblazing women – **Kristen Soltis Anderson**, the co-founder of Echelon Insights and author of *‘The Selfie Vote: Where Millennials are Leading America (And How Republicans Can Keep Up)’*, and **Col. Nicole Malachowski**, the first woman pilot of the Thunderbirds Air Demonstration Squadron – will take center stage at our General Session for conversations about leadership and the current political landscape. **Jim Koch**, founder of Boston Beer Co., and **Sam Calagione**, founder of Dogfish Head Brewery, will also give an update on the state of the beer industry and their recent merger. And **Anthony Von Mandl**, founder of Mark Anthony Group, will share his story as a pioneer of the flavored malt beverage category and his insights into the success of the brands he started, Mike’s Hard Lemonade and White Claw.

We are also excited to offer **21 education seminars** on a wide variety of topics, including sales, warehousing, leadership and technology, among others. And don’t forget about the **Distributor Member Meeting** on Sunday, where NBWA elected leaders and staff will discuss the greatest challenges and opportunities that face the industry today.

This year’s **Trade Show floor will feature more than 240 exhibiting companies** showing innovative products and services to help your company grow. New to the show floor are face-to-face talks that you and your team won’t want to miss!

Be sure to stay connected on social media throughout the conference using **#FollowYourBeer** and by following NBWA on Twitter, Facebook and Instagram. We’re grateful for the work you do to make America’s beer industry the best in the world, and we hope you enjoy our 82nd Convention and Trade Show!

Cheers!

Michael Schilleci  
NBWA Chairman of the Board

Craig A. Purser  
NBWA President & CEO

# Meet NBWA's Incoming Chair: Brian Gelner, Executive Vice President and CFO of Heart of America Beverage Co. in Springfield, Mo.

**T**he Gelner family is no stranger to the beer industry.

Spanning three generations, the Gelners' experience in beer began with Brian Gelner's grandfathers, both of whom spent much of their careers working at or with Anheuser-Busch (AB) in St. Louis.

When it came time for Brian's father Richard to go to work, he decided to take a different route, working for Hamm's Brewing Company. It was a bold move in an area fiercely loyal to AB, and after a few years, Richard sought to acquire the Springfield, Mo., Hamms/Miller distributor. At the age of 27, he partnered with an existing distributor in the area, and in 1973, they launched Premium Beverage Sales.

While his family has a rich beer history, Brian's career started outside of the

beer industry at a regional accounting firm. His father believed Brian and his brother Mark needed to gain professional experience before working full-time for the family business. After a few years at the accounting firm, Brian joined Premium Beverage Sales, eventually becoming president.

In 2016, after merging with the Coors distributor in the market, Premium Beverage Sales became Heart of America Beverage, and now proudly distributes 30 suppliers in 26 counties in Southwest Missouri, employing 200 men and women.

Brian's roots in the beer business are deep, a fact that is apparent through his active membership with NBWA. During his time on the NBWA Board, Brian has led the Innovation and Technology, Industry Affairs,



Membership, Finance and State Association Committees and has served in every elected officer position on the NBWA Board.

Brian is also an active member of the Missouri Beer Wholesalers Association.

"Brian is a staunch advocate for beer distributors, and we are thrilled to welcome him as the 2019-2020 NBWA Chairman of the Board," said NBWA President and CEO Craig Purser. "His commitment to his community and passion for the industry is unparalleled, and I am confident he will bring the same enthusiasm to his chairmanship as we continue to move our industry forward toward a prosperous future."

## TTB Responds to NBWA, Offers Voluntary Disclosure Program for Federal Permits



**N**BWA has very important news: the Alcohol and Tobacco Tax and Trade Bureau (TTB) recently granted a special, limited extension for alcohol beverage wholesalers and importers to address unreported changes in control or proprietorship. This is a critical matter that NBWA has been working to address with the TTB for some time.

NBWA welcomes the news of the extension, as well as some additional

resources TTB has made available through its telephone help line and email service.

You may contact the TTB by phone at 877-882-3277 or by email at [CIC2019@ttb.gov](mailto:CIC2019@ttb.gov) with any questions. You may also contact NBWA for further assistance.

In the coming weeks, TTB will post an informational presentation on their website [www.ttb.gov](http://www.ttb.gov). It is critically important for all distributors to make

sure their TTB wholesaler permits are in proper form and order as well as maintain a priority to update these permits for any future changes.

**Distributors now have until the end of the year, December 31, 2019, to bring their permit paperwork under the Federal Alcohol Administration (FAA) Act up-to-date for ownership or control issues.**



# What's the Impact of the U.S. Supreme Court's Latest Ruling on the 21st Amendment?

By: Paul Pisano, NBWA Senior Vice President,  
Industry Affairs and General Counsel



**O**n June 26, the U.S. Supreme Court issued its long-awaited decision in the case of *Tennessee Wine and Spirits Retailers Association v. Russell Thomas*, striking down a Tennessee law that dealt with durational residency requirements for liquor store owners. While it goes without saying that NBWA disagrees with this decision, the association's active engagement in the case helped limit the decision to a narrow ruling on a unique Tennessee law with a problematic procedural history. Most importantly, the Court was deliberate in clarifying that this case was not a broader ruling on the three-tier system.

The Court confirmed at several times in its opinion that the 21st Amendment gives states the ability to create various alcohol laws, but it also found that state alcohol laws cannot “blatantly” discriminate against commerce. It also stated that these laws must support public health and safety – an argument that was not comprehensively made in support of the Tennessee law in this case.

Specifically, the decision says that the 21st Amendment ‘... allows each State leeway to enact the measures that its citizens believe are appropriate to address the public health and safety effects of alcohol use and to serve other legitimate interests...’

The Court also suggested that requiring industry participants to be physically present in the states where they operate – something NBWA believes to be essential to the three-tier system – can also be a legitimate exercise of government control. However, the Court has limited defenses states used to dismiss litigation in the last decade, so more litigation is likely to define the boundaries of this decision.

From the outset of this case, NBWA worked diligently to marshal support for the 21st Amendment and state-based alcohol regulation. The goal was to prevent the Supreme Court from issuing an overly



broad ruling on the 21st Amendment – and by extension the three-tier system.

NBWA helped to facilitate submission of 12 different amicus briefs to reaffirm the importance of the 21st Amendment, in addition to their own brief and a brief from the Center for Alcohol Policy. The briefs emphasized the critical role state-led alcohol regulation plays in advancing public safety, expanding consumer choice and promoting competition. The coalition filing briefs included 36 attorneys general, along with organizations representing small businesses, consumers, law enforcement, state governments and public health advocates.

As is customary with Supreme Court decisions, more litigation is expected to follow and there are many cases already at the circuit court level. A return of an alcohol case to the Supreme Court is likely in the next few years. NBWA will continue to play an active role in legal advocacy to protect beer distributors and defend the 21st Amendment as giving states the primary authority to regulate alcohol within their own borders. To stay abreast of all these litigation issues please follow [www.alcoholawreview.com](http://www.alcoholawreview.com).

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# Beer Serves America

By: Craig Purser, NBWA President & CEO

Two thousand nineteen has shaped up to be a very busy year in the U.S. beer industry. NBWA has been working tirelessly to advocate on behalf of beer distributors and to educate important stakeholders on the role of beer distributors in communities across the country. We've had a seat at the table during major decisions that could have had long-standing implications for the beer distribution industry, including a U.S. Supreme Court case and guidance on federal policymaking. We've also been involved in policy battles and have taken every opportunity to show America the value of your work to provide consumers with unprecedented choice and variety.

NBWA has also been busy providing leadership in working to return the beer category to growth. The association has led a coalition of distributors and brewers in a sustained effort to advance a "beer first" agenda. This has resulted in real deliverables in the form of sales tools to be shared at retail and in the development of a digital media campaign promoting beer.

Day-in and day-out, NBWA is committed to strengthening the independent beer distribution system and ensuring America's beer industry remains the best in the world.

As an NBWA member, your support and involvement have been paramount to these efforts. Quite frankly, we could not have done it without you. NBWA values every contribution you make because we know that our association is only as strong as our membership's investment.



But as the industry and consumers continue to change, your involvement with NBWA is more important than ever. Beer distributors have a great story to tell, and you are the best people to tell it. Only with your help and engagement will your association be able to maintain our strength in Washington, D.C.,

state capitals and the judiciary nationwide; work to grow the beer category; and remain a leading voice in the beer industry.

Beer distributors embody the true values of the American Dream. You are family-owned businesses providing thousands of jobs in communities nationwide and making the country a better place. This year alone we've seen the number of distributor jobs increase and the industry thrive in our *Beer Serves America* data. We've also seen countless members acting selflessly for their communities in times of need.

Whether through warehouse tours with elected officials or by engaging with the media in your market, NBWA wants to help you tell your story. We look forward to working alongside you to educate America on the best beer industry in the world.

Cheers!



# Navigating a Divided Washington: Here's What You Need to Know



By: Laurie Knight, NBWA Executive Vice President, Government Affairs

**N**BWA's Federal Affairs team has been working to build on our collective advocacy efforts that began during this year's Legislative Conference. Conference attendees will recall that gathering support for a bipartisan House resolution (H. Res. 285) that recognizes over 85 years of successful state-based alcohol regulation and the effective system of distribution was one of several priority issues featured in April and during our time on Capitol Hill.

With over 100 newly elected members serving in the 116th Congress and many more new staffers, H. Res. 285 is proving to be an effective advocacy tool for educating Congress on the value of distributor independence and reaffirming congressional support for state-based alcohol regulations.

With the help of your individual advocacy efforts – whether during your meetings on Capitol Hill, as part of your warehouse tours back home or your leadership in your local communities – we have successfully garnered commitments from more than 190 House members who support the resolution. These members are demonstrating their commitment to your businesses and the role that you play within the beer industry.

The enactment of the 2018 farm bill, which legalized industrial hemp and its derivative byproducts, was an important milestone with respect to federal cannabis policy and the

federal government has been pressed to establish a suitable regulatory framework to bring industrial hemp and cannabidiol (CBD) products to market. However, the practical application of approving CBD as an ingredient in food and beverages continues to be elusive.

NBWA remains engaged in the discussion with members of Congress, the U.S. Food and Drug Administration and the U.S. Department of Agriculture, paying special attention to the regulatory discussions surrounding CBD and helping policymakers better understand regulatory practices in our industry and the benefits of a well-regulated market that promotes safety for all market participants.

Congress has also begun its work on a large transportation and infrastructure package that will shape federal transportation policy for the next five years. In July, a key Senate Committee advanced an initial draft of a new “highway bill,” setting the stage for further negotiations this fall. The transportation reauthorization bill will need to be passed before the end of 2020, giving Congress about one year to complete its work.

Several NBWA priority issues can be affected by this process, including CDL workforce issues, incentives for alternative fuel vehicles, impaired driving initiatives and other important policy proposals.

Additionally, NBWA is supporting the efforts to grow cosponsors on bipartisan House and Senate legislation to help



address the nation's shortage of CDL drivers. Currently, the House bill (H.R. 1374) has the support of more than 100 members and approximately one-third of the Senate has signed on to the Senate companion (S. 569).

NBWA's Federal Affairs team has also been closely monitoring other recent activities in Washington. Congress has returned from its August district work period and members have hit the ground running as they try to tackle several must-pass bills before the end of September, the year-end mark of the federal government's fiscal year.

Prior to the August break, Congress and the President brokered a deal to raise the budget caps and lift the federal government's debt ceiling, clearing the way for a series of spending bills that will provide funding to the federal government. These appropriations bills have been the primary focus of Congress during September in an all-out effort to avoid the mistakes of the recent past which have resulted in government shutdowns.

In conclusion, NBWA's leadership and Federal Affairs team remain focused on advancing your interests before Congress and the Administration. The relationships that you have built with your elected officials, as well as those that NBWA continues to foster, remain vital to our efforts on your behalf in Washington.



# Sharing the Story of Beer Distributors

By: Lauren Kane, NBWA Vice President, Communications



**N**BWA is committed to advocating for and sharing the good work of beer distributors, as well as the value of the independent beer distribution system. Many consumers across the United States take for granted the variety and authenticity of beer on shelves and taps. Through NBWA's robust earned media strategy, using timely holidays and events as news hooks, the association has published several national and local pieces highlighting the success of distributors and the independent beer distribution system.

These pieces, published in the last year, illustrate how this system continues to work so well for suppliers, retailers, consumers and more.

## Fox Business

Independent beer distributors proud to 'serve' America



## The Hill

Female lobbyists change face of beer industry



## Real Clear Policy

Regulations help keep American alcohol safe to drink



## Bloomberg Radio

Distributors: Quarterbacks of the beer industry this Super Bowl



## Yellowhammer News

YELLOWHAMMER

Alabama beer distributors deliver vital message in Washington, D.C.

## MLive

Beer is \$10.2 billion business in Michigan, report says



## WUSA 9 (DC) CBS

NBWA CEO shares beers you'll want to try this summer



## Washington Examiner

WASHINGTON  
Examiner

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# Kentucky Eagle Honored with Public Affairs Award

**N**BWA is thrilled to award its 2019 Public Affairs Award to Kentucky Eagle Inc. The folks at Kentucky Eagle Inc. have truly outdone themselves to ensure Kentuckians—and more broadly, Americans—understand and appreciate the significant role of beer distributors and the independent beer distribution network.

For Kentucky Eagle Inc.'s 70th anniversary, President Tate Sherman commissioned a comprehensive rebranding campaign. After analyzing the most significant issues facing the industry, including self-distribution, challenges to independent beer distribution network and public awareness, Kentucky Eagle Inc. created a strategy to communicate its history and the story of beer distributors. And Tate went one step further, sharing it with other NBWA members.



Kentucky Eagle Inc. says of itself, “Kentucky Eagle is in the happy hour, long weekend, after 5 o’clock business. We are a family-built company, delivering the best beer, wine, and spirits come hell or high water.



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Kentucky Eagle Inc.'s rebranding efforts demonstrated the true embodiment of the beer industry. The company established new core values, which include teamwork, accountability, integrity and community. They embraced being family-owned and operated, coining ‘family-owned, locally-driven’ on their branding. Each of these characteristics sets beer distributors apart from many other industries.

The rebranding also leaned in on distributors’ continued commitment to keeping store shelves and bar taps stocked with a wide variety of beers. The bottom line is that no matter the time of year, it’s beer season and beer distributors are working on overdrive to deliver America’s favorite beverage.



Our team works harder and longer, striving for excellence in everything we do. We are leaders in the industry. And we’re proud of it.”

Most notable was the strategic decision to completely re-wrap Kentucky Eagle Inc.’s trucks. Now, when these trucks are on the road making their deliveries, they advertise Kentucky Eagle Inc.’s new branding and slogans. This is certainly unique in the beer distribution industry, especially since we often put our brewers and their brands first. But there has never been a more critical time for distributors to share their stories and importance.

We commend Tate Sherman and the entire Kentucky Eagle Inc. team for setting this example and leading.



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# Elevating Beer and Growing the Category

**N**BWA is leading the charge to grow the beer category. Last Convention, NBWA, in partnership with the Beer Institute and the Brewers Association, launched the Beer Growth Initiative to identify opportunities to elevate beer and to unite large brewers, small brewers, distributors and other industry players. NBWA remains committed to this goal.

NBWA recently unveiled “Beer First” Sell Sheets using customized research from Nielsen and Nielsen CGA to help members tell the positive story about beer in markets nationwide. These data-driven Sell Sheets showcase specific data for: on-premise, off-premise grocery, off-premise convenience store, off-premise chain grocery and off-premise mass retailer. Many members have quickly embraced these new resources, using them to maximize sales.

## Here’s what people are saying:

“I had a conversation with a national buyer this week and simply included the Sell Sheet presentation as a follow up. To engage the buyer, I asked why his goal was to be the dominant wine destination when beer offers his business so many more benefits. I used the Sell Sheets to demonstrate that beer builds basket transaction sizes greater and more frequently than wine, then went through a series of questions on inventory turns and days on hand. I am happy to report that we scheduled a follow up meeting to focus solely on the Beer First data!”

-**Mike Barnes**, EVP GM Revenue, Andrews Distributing

“We have enthusiastically incorporated the positive messages included on the Beer First Sell Sheets in all sales calls and team meetings. We are training the sales team how to use them and getting them to role play sales calls using the Sell Sheets. And we are tracking how the data has been successfully used and posting victories.”

-**Mark Doll**, CEO, Doll Distributing

Sell Sheets are available at [www.nbwa.org](http://www.nbwa.org).



# NBWA Recognizes Three Outstanding Brewers with Brewer Partner of the Year Awards

**N**BWA will present the Brewer Partner of the Year Awards for the fifth consecutive year at the 82nd Annual Convention and Trade Show. Each of these awards highlights a brewer's commitment to building strong partnerships with beer distributors – relationships that form the foundation of the beer industry. These relationships are critical for the growth of any brand, and the Brewer Partner of the Year Awards recognize brewers for their successful partnerships.

NBWA will present three Brewer Partner of the Year awards: Gold, Silver and Bronze, and while you'll have to wait until the presentation to find out the results, here are the three finalists.

## Lone Pine Brewing Portland, Maine



In 2018, Lone Pine was named the fifth fastest growing brewery in the country. Already this year, the brewer has doubled its production and they are showing no signs of slowing. This rapid growth, according to the brewer, is in large part because of their relationship with distributors. Lone Pine has even adopted the motto 'distributors first.'

Lone Pine Brewing goes above and beyond to help distributors promote its brand, partnering with major sports teams in the area to host innovative events and place creative advertisements. Lone Pine has even created a custom beer for a nightclub in Portland, Maine.

On a more holistic level, Lone Pine understands the value of the three-tier system and continuously works to complement its distribution partners' efforts. Lone Pine also treats

distributors as part of their family. The brewer promotes an open-door policy for its tasting room and brewery, allowing distributors to come at any time.

Lone Pine creates an environment for distributors that is positive and personal.

## Remedy Brewing Sioux Falls, South Dakota



Tyler, Matt and Jason were sick of being told what to do, seeking a venture where they could express their creativity. Recognizing a lack of craft beer in Sioux Falls, S.D., Remedy Brewing was born.

The three friends began brewing beer in a garage and now the company has grown into a genuinely original operation. As the owners of Remedy like to explain it, they put every ounce of creativity and love into their beers.

And, they take the same approach with their distribution partners.

Remedy Brewing has mastered the art of beer branding, providing distributors with creative and attention-grabbing marketing collateral, including coasters, tap handles, tap dangles, flyers and table tents. They also have a full-time media specialist who works closely with distributors to coordinate truck wraps and banners.

As young, vibrant gentlemen, known by their colleagues as 'the nicest people in the industry,' Remedy owners Tyler, Matt and Jason often host interactive, widely-attended local events such as Oktoberfest, the 605 Summer Classic music festival, JazzFest and local tap takeovers. Remedy Brewing works tirelessly with its distributor partners to not only promote its brand locally, but the entire beer category.

## Urban Chestnut Brewing St. Louis, Missouri



Urban Chestnut Brewing, based in St. Louis, Mo., has a keen understanding of the beer marketplace and the role that distributors play in building brands. That is why they strive to be a wholesalers' best supplier, prioritizing flexibility and the needs of its distribution partners.

Urban Chestnut prides itself on providing distributors with an abundance of educational and sales materials. From banners and detailed

sell sheets to tastings and events, Urban Chestnut has a clear vision and provides its distribution partners with the tools to maximize sales. The brewer also helps distributor employees understand the German beer culture that inspires the Urban Chestnut operation in St. Louis.

Urban Chestnut sees the value in local partnerships and community involvement, which is evident in their continued sponsorship of local events, including those with city sporting teams, the St. Louis Zoo, St. Louis-based Purina and more. At each of these events, Urban Chestnut

encourages distributors to host retail partners to further strengthen the partnerships that get great beer from the brewery to beer lovers.

## Beer Serves America Economic Report Finds Beer Distributors Are Responsible for 141,600 American Jobs



Just ahead of Memorial Day, one of the busiest and biggest beer occasions of the year, NBWA partnered with the Beer Institute to release the *Beer Serves America* economic report. This biennial study produces a comprehensive economic analysis of the beer industry.

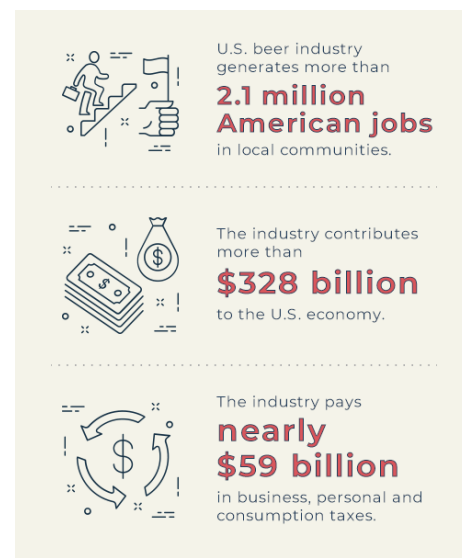
The *Beer Serves America* findings demonstrate just how much the U.S. beer industry benefits the American economy—and the data is robust! Most notably, the beer industry sustains more than 2.1 million good-paying, local jobs across a wide variety of industries, including farming, manufacturing, construction, transportation and more. It also contributes more than \$328 billion to the nation's economy, or 1.6 percent of U.S. GDP, and directly employs more than 1.1 million Americans in brewing, distributing and retailing.

Data on beer distributors alone shows the impressive economic contributions the industry makes in communities nationwide. There are more than 3,000 beer distributors across the country that employ 141,600 men and women—an increase of 19 percent

over the last decade. And, we know that these jobs are not limited to thriving metropolitan areas. They are located in every corner of the country, including rural towns and developing neighborhoods, helping to spur growth and support communities.

“America’s 3,000 independent beer distribution companies are proud to employ 141,600 hardworking Americans with jobs that pay a collective \$9.5 billion in wages, offer solid benefits and provide the opportunity for advancement,” said Craig Purser, President and CEO of the National Beer Wholesalers Association upon *Beer Serves America*’s release. “Independent beer distributors are Main Street businesses whose economic contributions are felt in every community and congressional district across the country as they work with brewers large and small to grow brands and safely deliver America’s favorite alcohol beverage to more than 640,000 licensed retailers nationwide.”

On the supplier side, brewers and importers are responsible for 70,000 American jobs, with 58 percent



coming from large and mid-sized businesses. Today there are a more than 7,000 breweries in the U.S., large and small, brewing new flavors and long-standing favorite brands. Connecting producers and retailers are distributors helping to grow brands and safely deliver high-quality products to market.

This economic data is a testament to the time-tested, constantly improving alcohol distribution system, which encourages consumer choice, ensures safety and allows America’s beer industry to be the biggest and best in the world. It is also an excellent resource to use when educating elected officials, the media and the public about the value of beer distributors and the larger industry. For more on the *Beer Serves America* report, including detailed economic data by congressional district, visit [www.beerservesamerica.org](http://www.beerservesamerica.org).



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# Economic Update: How Data Drives Policy, the Industry and Your Company



By: Lester Jones, Chief Economist

## Local and Independent Beer Distribution, How Important Is It?

Pop Quiz – What's so important about the number 1,923?

That number – 1,923 – is the number of laws that have been passed since 2012 regulating the alcohol beverage industry around the country. While we frequently hear complaints that beer regulations are stagnant and out of date, these 1,923 changes prove otherwise.

And it shows that the beer market is dynamic and ever-evolving. Each year suppliers, distributors and retailers work together in their statehouses, alongside regulators and health policy advocates, for changes to accommodate new business models, emerging technologies and evolving consumer demand. While adapting to change is important, adaption must also maintain an orderly market that balances the economic and public health goals that communities want and need.

Today the U.S. has more breweries and more retailers with more choices than ever before and this continues to expand; our independent beer distribution system is a key reason we have the greatest beer market in the world.

## Beer Distribution 101 – Knowing Your Local Market

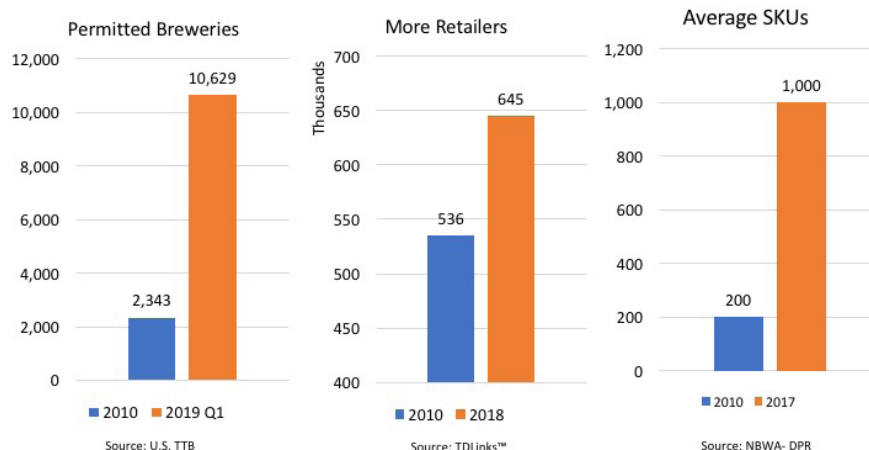
The economics of beer distribution is simple: when brewers, distributors and retailers all do the jobs that they do best, the industry wins, and consumers win too. Put another way, the principles of comparative and absolute advantage create a profitable marketplace across all three tiers where consumers have an abundant selection of brands, styles, packages and price points.

In addition to all the merchandising, warehousing, account management and basic logistics that beer distributors do every day to add value, having feet on the street, local retailer relationships and knowledge of consumer preferences is just as important. That hyper-local market knowledge is often underestimated as a true value-add that

beer distributors provide both retailers and brewers. It is even more important today, when an abundance of data and analytics are competing for everyone's attention.

Our industry has never faced such a diverse and complex marketplace. Not only is our economy rapidly shifting between white-collar and blue-collar jobs, but our workforce has followed employment opportunities from rural and suburban markets into urban areas. Where people live and how they work defines both where beer and what beers will be sold. How different is your local beer market from these national trends?

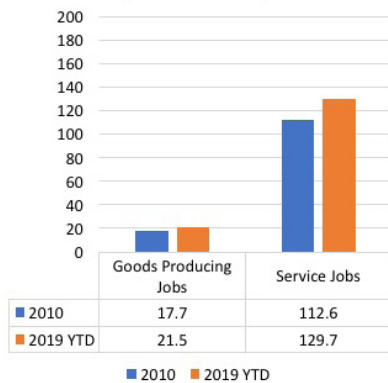
## More Brewers, More Places, More SKUs





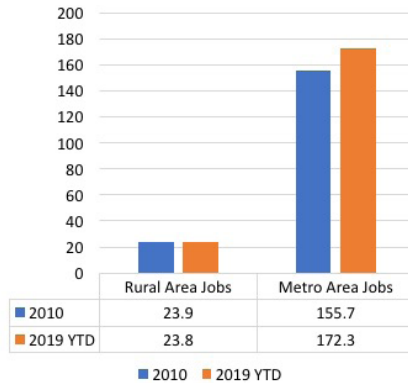
## Changes in Employment 2010 to 2019

Goods Producing vs Service Jobs  
(Millions of Jobs)



Source: U.S. BLS, 2019

Metro vs Rural Employment  
Millions of Jobs



Source: US BEA, 2019

## The Local Market Experts

The ability to track changes in your local market is an important task, but it often falls to the lowest spot on the priority list when considering all that must get done. Each day, merchandisers, route drivers, sales reps and account reps are out in the marketplace visiting accounts. The standard operating procedure has always been for these “feet on the street” to take stock of the openings and closings, new residential and business developments going up and significant market developments. Then they bring it back to the office to add it to the new accounts list.

Data and analytics are becoming more important every day to beer distributors and their supplier and retail partners. With a faster pace of change and a growing economy, there are plenty of new and existing tools available to keep up with the pace of change.

The U.S. Census Bureau recently released the Census Business Builder on their website (<https://www.census.gov/data/data-tools/cbb.html>). This site allows you to build custom geographies on the fly and track economic and demographic changes in your market. The Bureau of Labor Statistics ([www.bls.gov](http://www.bls.gov)) continues to be a reliable source of employment trends at state and county level.

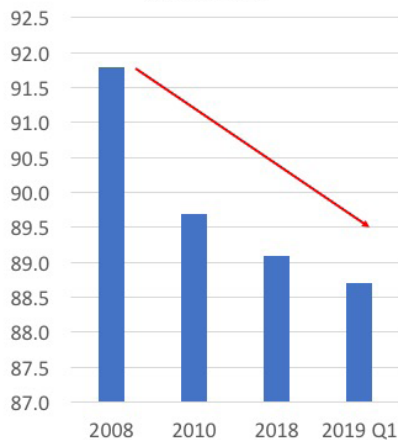
NBWA continues to provide insights through the Distributor Productivity Report, Compensation and Benefits Study and the Beer Purchaser’s index. In order to strengthen these tools and the value they add to your business, NBWA needs your increased participation in each of these data programs.

All in, your feet on the street knowledge, combined with these other data sources makes your local beer distributorship and employees the real local markets experts.

Staying ahead of the data and understanding your market better than anyone else will build value for your business, help shape alcohol beverage policy at your state capitol and ensure consumers have the best beer market possible.

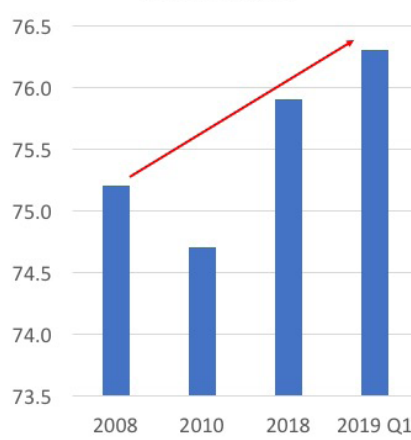
## U.S Labor Force Participation Rates Who is Working?

Men 25-34



Source: U.S. BLS: Labor Force Statistics from the Current Population Survey

Women 25-34



The country has also seen its workforce demographics change. A recent *Wall Street Journal* story noted, “The growing clout of women as drivers of the U.S. economy will radically alter the business and investing landscape in years to come...” All the data support this trend with higher rates of female labor force participation and more female college graduates than ever before. With all these changes, the beer market has evolved as well with more light beer alternatives, seltzers and ciders, along with package innovations.

# The Center for Alcohol Policy 12<sup>th</sup> Annual Alcohol Law and Policy Conference

In August, the Center for Alcohol Policy (Center) held its 12th Annual Alcohol Law and Policy Conference in Boston, Mass. This flagship conference brought together more than 150 industry leaders representing a wide array of experiences, perspectives and opinions to network and review issues and trends relating to alcohol regulation.

As in past years, the Center was proud to offer eight dynamic sessions with expert guest speakers covering a range of topics. In addition to the educational sessions, Massachusetts Attorney General Maura Healey offered keynote remarks and Lori Weigel, principal of New Bridge Strategy, presented the results of the Center's 2019 biennial public opinion survey on attitudes toward alcohol regulation. Additionally, constitutional law experts analyzed the U.S. Supreme Court's recent decision in *Tennessee Wine and Spirits Retailers Association v. Thomas* and the implications for many other court cases around the country.

The Center was pleased to have noted members of the public health community and government present to discuss liquor bans on college campuses and the unique challenges of 'problem bars,' as well as public health advocates' influence in many of the alcohol deregulation debates around the nation. Other experts examined the current status of marijuana regulation; challenges within the states concerning illegal direct shipping and cross border sales of alcohol; and the added benefits that come from the state liquor law enforcement efforts of alcohol and its authorities, such as



detection and prevention of human trafficking.

One of the most anticipated events at the conference was the presentation of the Center's Leadership in Alcohol Regulation Award at the Monday evening reception. The Center was honored to present the Seventh Annual Leadership in Alcohol Regulation Award to Debbi Beavers, Director of the Kansas Alcohol Beverage Control.



Overall, the Center's 2019 Conference held a record-breaking attendance with representation from state regulators and legislators, attorneys, industry representatives and public health advocates from across 35 states and Washington, D.C. As the Center's influence continues to expand, we look forward to its 13th Annual Conference in 2020!





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BEER DISTRIBUTORS**

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**HARDWORKING  
MEN AND WOMEN**

NBWA's 3,000 independent beer distributors operate in every congressional district in America. Together they are delivering local jobs with solid wages and great benefits and bringing more choice and variety to the beer market than ever before.

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# Next Generation Success in Leadership Conference

**N**BWA's Seventh Annual Next Generation Success in Leadership Conference is quickly approaching! Don't forget to sign up for this fun and educational conference, which will take place from Nov. 6-8, 2019, in New Orleans, La. Based on informative member feedback we have moved the conference to November. Hopefully this change will better meet your needs and help us continue to grow the Next Generation Group.

The NBWA Next Generation Group includes over 550 future leaders of the beer distribution industry. It aims to help members learn more about the beer business, get involved with the association and network with other distributors representing all brands from across the country. Next Generation Group members have the opportunity to learn from leaders inside and outside of the beer industry about what it takes to make a company successful, as well as learn the skills that will help them excel as leaders.



At this year's Next Generation Success in Leadership Conference, attendees will participate in several educational and networking events and will have the chance to talk with beer industry experts and NBWA leadership about the issues our industry faces. There will also be operational roundtables where attendees can learn from experts and share best practices.

NBWA is also thrilled to welcome our four dynamic keynote speakers—Jessica Yellin, Brent Schutte, Bonnie Herzog and Dr. Beth Cabrera—to the Next Generation Success in Leadership Conference.

## Keynote Speakers:



**Jessica Yellin,**  
former chief  
White House  
correspondent for  
CNN and Emmy  
and Gracie  
award-winning  
political journalist  
reporting for CNN,

ABC News and MSNBC:

Jessica Yellin is the founder of #NewsNotNoise, a fresh voice in media that broadcasts daily news

reports on Instagram.

The mission: deliver quality reporting and analysis that leaves the audience feeling informed and empowered. Her first novel, *SAVAGE NEWS*, about reporting-while-female, is available now. You can find her on Instagram with the news of the day at @JessicaYellin.

Jessica will help Next Generation leaders make sense of the news and decide which sources they should trust.



**Brent Schutte,**  
Chief Investment  
Strategist,  
Northwestern  
Mutual Wealth  
Management  
Company:

Brent Schutte oversees Northwestern Mutual's retail investment strategy, which represents more than \$118 billion in assets under management. He is responsible for the company's retail investment philosophy through investment policy, asset allocation and research.

Schutte also communicates the company's investment perspectives to Northwestern Mutual's field members, clients and the public. He is frequently interviewed by national news outlets including *CNBC*, *The Wall Street Journal*, *Cheddar TV* and *Bloomberg*. Brent will share an economic update and market outlook.

*Sponsored by Northwestern Mutual*



**Bonnie Herzog,**  
Managing Director  
and Senior  
Consumer Equity  
Analyst, Wells  
Fargo:

Bonnie Herzog is a Managing Director and Senior Consumer Equity Analyst at Wells Fargo covering the Beverage, Household & Personal Care, Tobacco and Convenience Store sectors. During her 20 years of experience as a sell-side equity research analyst, Bonnie has been a top-ranked *Institutional Investor* analyst. For more than ten years, Bonnie has been recognized by *Institutional Investor* magazine for the All-America Research Team, most recently ranking No. 5 (runner-up) in the Beverage/HPC sector and historically ranking as No. 2 in the tobacco sector. Bonnie consistently ranks in the U.S. Thomson Reuters Awards and most recently ranked No. 3 stock picker and No. 2 earnings estimator in the beverage sector.

Bonnie will discuss what's ahead for the beer industry and the impact from burgeoning categories including seltzers and cannabis.



**Beth Cabrera,**  
Ph.D., Senior  
Scholar, Center for  
the Advancement  
of Well-Being,  
George Mason  
University:

Dr. Cabrera is the author of "Beyond Happy: Women, Work and Well-Being."

Beth is passionate about helping organizations and individuals apply knowledge from the field of positive



psychology to achieve greater success and well-being.

Dr. Cabrera's expertise was gained through years of experience teaching, conducting research, advising organizations and coaching individuals on how to maximize engagement and performance.

## Cultivating Mindfulness

Mindfulness can improve decision making and enhance focus. It also promotes greater emotional intelligence. In this presentation, Dr. Cabrera will explore the benefits of mindfulness and Next Generation leaders will learn practical techniques for that can lead to improvements in leadership, communication skill and innovative thinking.

## Women, Work and Well-Being

Women face several challenges that result in their underrepresentation at the top level of organizations. Join us for breakfast on Friday morning as Dr. Cabrera discusses how to create work environments that enhance women's well-being so they can thrive while advancing their careers.

## The Venue

The Next Generation Success in Leadership Conference will be held at the Sheraton New Orleans Hotel.



Experience the best of New Orleans when you stay at downtown's Sheraton New Orleans Hotel. Ideally set in the vibrant French Quarter, hotel guests are within walking distance of Bourbon Street. Relax and recharge in spacious accommodations that feature floor-to-ceiling windows, Wi-Fi and views of the Mississippi River and the city. Guests can take advantage of the rooftop pool, sun deck and modern fitness center.

Visit the NBWA website to register for the conference and for details on hotel reservations at the Sheraton New Orleans Hotel. For more information or to join the Next Generation Group, **please contact NBWA Manager, Member Programs and Meetings, Maggie Moreland at [mmoreland@nbwa.org](mailto:mmoreland@nbwa.org).**





## ALCOHOL LAW REVIEW

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[www.AlcoholLawReview.com](http://www.AlcoholLawReview.com)*



The NBWA Beer Purchasers' Index (BPI) is an informal monthly statistical release giving distributors a timely and reliable indicator of industry beer purchasing activity. The BPI is based on surveyed responses from participating beer purchasers.

Visit [www.nbwa.org/BPI](http://www.nbwa.org/BPI) to register.

**DON'T MISS THE  
TTB BOOTH  
ON THE  
TRADE SHOW  
FLOOR!**

**BOOTH #1509**





# SAVE THE DATE

## **NBWA 2020 Legislative Conference**

March 29 - April 1, 2020

For further information,  
please contact the Membership  
and Meetings Department at  
800-300-6417 or [info@nbwa.org](mailto:info@nbwa.org).

[nbwa.org/events/legislative-conference](https://nbwa.org/events/legislative-conference)





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