

**SB 763 - MD DC AFL-CIO - SUPPORT.pdf**

Uploaded by: Edwards, Donna

Position: FAV



# MARYLAND STATE & D.C. AFL-CIO

AFFILIATED WITH NATIONAL AFL-CIO

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*President*

Donna S. Edwards

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## **SB 763 – Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments (Healthy Food Accountability Act of 2021)**

**Senate Education, Health, and Environmental Affairs Committee**

**March 5, 2021**

### **SUPPORT**

**Donna S. Edwards**

**President**

**Maryland State and DC AFL-CIO**

Chairman and members of the Committee, thank you for the opportunity to submit testimony in support of SB 763 – Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments (Healthy Food Accountability Act of 2021). My name is Donna S. Edwards, and I am the President of the Maryland State and District of Columbia AFL-CIO. On behalf of the 340,000 union members, I offer the following comments.

The time for retail sales of beer and wine in Maryland's grocery stores has come. For decades we have operated under a byzantine system of twenty-four jurisdictions and their individualized alcohol laws regarding the sale of beer and wine. SB 763 provides some level of continuity, across the state, when it comes to low alcohol content beverages.

Maryland consumers benefit from the convenience of one-stop shopping. Currently, trips to the grocery store can require a second trip to a beer or wine store, as an "add on" trip, for no discernible reason other than our existing law. And it is unclear how Marylanders are being served by requiring this distinction. We are only 1 of 3 States that prohibit beer in chain stores and one 1 of 10 states that prohibit wine sales in chain stores. Every state, and D.C., that surrounds us allows for beer and wine sales in chain grocery stores. Maryland stands as an extreme outlier when it comes to our retail beer and wine sales.

Marylanders should have the freedom to be able to pick up wine when they are shopping for their groceries. **We ask that you provide that freedom and give a favorable report to SB 763.**

# **SB 763-Royal Farms Testimony\_Alcoholic Beverages L**

Uploaded by: Kemp, Shelby

Position: FAV



March 3, 2021

Senator Paul G. Pinsky  
Chair, Education, Health, and Environmental Affairs Committee  
2 East, Miller Senate Office Building  
11 Bladen Street  
Annapolis, Maryland 21401

Re: SB 763 - Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments - FAVORABLE

Dear Chairman Pinsky and Members of the Committee,

My name is Shelby Kemp, and I am a Marketing Project Manager for Royal Farms Convenience Stores. Royal Farms main business includes convenience, fuel, and quick service restaurants. Our company headquarters is in Baltimore, MD, and we operate 161 stores in the state of Maryland, employing 3,167 employees in the state total. We are also a 3<sup>rd</sup> generation family-owned business.

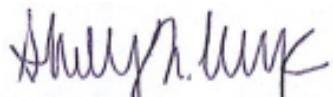
We strongly support having the ability to purchase a license to sell beer and wine in our stores. At Royal Farms, we strive to cater to our customers and provide them with what they want. Data points to the fact that customers want the ability to purchase beer and wine at their local convenience or grocery store. A poll completed by the Gonzales Polls Inc., in October 2020, reported that 73% of Marylanders support selling beer in wine in grocery stores. The link to that report is included here: [https://irp-cdn.multiscreensite.com/cf5489a9/files/uploaded/GonzalesReport\\_Maryland\\_Sales\\_Poll2020.pdf](https://irp-cdn.multiscreensite.com/cf5489a9/files/uploaded/GonzalesReport_Maryland_Sales_Poll2020.pdf). Customers will not only gain the increased convenience of beer and wine being offered in more locations, but they will also benefit from the decreased prices that competition ultimately will bring to the current market. By bringing in competition to the beer and wine market, Maryland will strengthen and continue to improve and grow.

Maryland is one out of 3 states that does not allow beer and one out of 10 that does not allow wine to be sold their customers to purchase beer in grocery or convenience stores. Most of the other states have seen the benefits of allowing us to also sell beer and wine. According to a study done by John Dunham & Associates, published on the Maryland Retailers Association site, allowing beer and wine to be sold in additional food retail establishments would bring more jobs, sales revenue, and tax revenue to our state. They estimated that Maryland overall revenue on beer and wine would increase by \$192.8 million, would create 780 new jobs, and bring in an additional \$24.1 million tax revenue. A link to that study is provided here: [https://irp-cdn.multiscreensite.com/cf5489a9/files/uploaded/Dunham\\_EconomicStudy.pdf](https://irp-cdn.multiscreensite.com/cf5489a9/files/uploaded/Dunham_EconomicStudy.pdf)

The argument against this bill points to fear that independent liquor stores will suffer. Royal Farms will only offer beer and wine, and a very limited selection at that due to space constraints. Consumers are still going to frequently visit their independent liquor stores for a wide array of choice for beer and wine, and to get their liquor. We know firsthand from other states where we can sell beer and wine, specifically Virginia and Pennsylvania, there are still many thriving independent liquor stores.

In conclusion, allowing convenience stores and grocery stores to purchase the license to sell beer and wine will benefit consumers, our economy, and our state. Please vote in favor of SB 763.

Sincerely,

A handwritten signature in black ink, appearing to read "Shelby Kemp".

Shelby Kemp  
Marketing Project Manager  
[skemp@royalfarms.com](mailto:skemp@royalfarms.com)

**SB763.Testimony.pdf**

Uploaded by: Kilberg, Cameron

Position: FAV

**Maryland Senate Education, Health and Environmental Affairs Committee**  
**March 5, 2021**

**Testimony in Support of SB 763**

Chairman Pinsky, Vice Chair Kagan, and Committee Members:

For the record, my name is Cameron Kilberg. I am the Government Affairs Principal for goPuff.

I am writing today in support of Senate Bill 763, the Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments (Healthy Food Accountability Act of 2021).

goPuff is the go-to solution for immediate everyday needs, delivering customer orders of food products, cleaning and home goods, and over-the-counter medications.

With micro-fulfillment centers in every market we serve, goPuff delivers thousands of products quickly and for a flat delivery charge of just \$1.95.

goPuff is open 24/7 in many markets and late night everywhere else in order to bring customers what they need, when they need it most. We pride ourselves on fulfilling customer orders and delivering essential goods in just minutes.

Founded in 2013, goPuff currently operates more than 200 micro-fulfillment centers servicing over 500 U.S. cities, including Baltimore City, Baltimore County and Prince George's County.

goPuff is more than a snack supplier – we are able to deliver healthy food items and much needed home supplies to consumers in real time. This allows consumers to remain at home when they are unable to or simply do not want to go to the store, or as is the case with many communities, consumers simply lack safe, convenient options to purchase healthy foods and home goods.

Each of our micro-fulfillment centers services the direct neighborhood in which they reside and due to their size of an average of 4000 to 7000 sq ft., we can more easily find appropriate space to open in all communities and our flat, low delivery fee ensures we remain affordable. goPuff's flexibility allows us to service communities that struggle to attract appropriate fresh food and convenience stores, as we are able to open more easily, in smaller space, and with little development needs.

SB763 will ensure goPuff's continued growth in Maryland and our ability to serve residents in communities throughout Maryland.

We respectfully ask for your support of SB763.

Thank you,

Cameron Kilberg  
Government Affairs Principal  
[gopuff.com](http://gopuff.com)  
Cameron.Kilberg@gopuff.com

**SB763 wmda.pdf**

Uploaded by: McCauley, Kirk

Position: FAV



WMDA/CAR Service Station  
and Automotive Repair Association

February 17, 2021

Chairman: Paul G. Pinsky  
Members of Education, Health, and Environmental Affairs

RE: SB763 Healthy Food Accountability Act of 2021

Position: Favorable

The limited locations this bill would affect will serve as an incentive to build or rebuild locations that would better fit the needs of the communities.

Communities would benefit with employment opportunities, Beer, and wine sales would make some location viable that might not be otherwise. Giving customers choices and keeping purchases local, providing improved selection of food items in neighborhood stores.

I live in St. Mary's county and we have a wide range of stores that sell beer and wine but only one license per store owners. Being able to have more than one license would keep some of their rural locations operating in communities that have no other choices.

. It is time to break the License lock on beer and wine sales.

Please Give SB763 a favorable report.

Kirk McCauley  
WMDA/CAR  
301-775-0221  
kmccauley@wmda.net

## **763- Senator McCray's Testimony - Senate Bill 763.**

Uploaded by: McCray, Cory

Position: FAV

CORY V. McCRAY  
Legislative District 45  
Baltimore City

Budget and Taxation Committee

Capital Budget Subcommittee  
Health and Human Services Subcommittee



James Senate Office Building  
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Annapolis, Maryland 21401  
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## THE SENATE OF MARYLAND ANNAPOLIS, MARYLAND 21401

### Vote Yes on Senate Bill 763

**Bill Title: The Health Food Accountability Act of 2021**

**Hearing Date: March 5, 2021 - Education, Health, and Environmental Affairs Committee**

**Chair: The Honorable Paul Pinsky; Vice Chair: The Honorable Cheryl Kagan**

I write to you today in **support** of Senate Bill 763. It is estimated that food insecurity threatens nearly one in nine Maryland – including one in seven children. Despite our State being ranked the wealthiest, In 2021, residents, especially those in rural and urban areas, still face difficulties in accessing fresh and healthy food. All Marylanders, no matter what zip code they live in, should have access to fresh and affordable food.

The Healthy Food Accountability Act of 2021 would benefit low-income, priority funding areas that have limited access to healthy food by providing incentives to new supermarkets and grocery stores that provide food services in underserved communities. This Bill would establish a certain exception to the prohibition against issuing certain alcoholic beverages licenses for use in conjunction with or on the premises of grocery stores and supermarkets. It would require for local licensing boards to issue Class A beer or beer and wine licenses to said establishments. Applicants for licensure would be required to pay appropriate annual fees to the Alcohol and Tobacco Commission, which shall be empowered to distribute the proceeds of fees to the Community Legacy Financial Assistance Fund.

According to the U.S. Centers for Disease Control and Prevention, the majority of American adults are now obese or overweight. Our children are on par. Obesity-related conditions make-up several leading causes of death, including heart disease and strokes. The availability and affordability of healthy food can be a tool in addressing this obesity epidemic.

In efforts to improve health outcomes and address disparities in our neighborhoods, we hope that you will move for a **favorable** report of Senate Bill 763.

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Cory V. McCray".

Cory V. McCray  
State Senator

**SB763\_FAV\_MRA.pdf**

Uploaded by: Price, Sarah

Position: FAV

# MARYLAND RETAILERS ASSOCIATION

*The Voice of Retailing in Maryland*



## **SB763 Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments (Healthy Food Accountability Act of 2021) Education, Health, and Environmental Affairs Committee**

**March 5, 2021**

**Position:** Favorable

**Background:** SB763 would allow local jurisdictions to provide a Class A license to sell alcohol on the premises of certain chain stores and would incentivize grocery stores to locate in priority funding areas.

**Comments:** The State of Maryland is one of only four states in the United States that fully bans the sale of beer in grocery and other chain stores, exempting the few locations that were grandfathered in across the state when the prohibition was put in place in 1978. At the same time, many Marylanders, including one in four Baltimoreans, lives in a healthy food priority area, or “food desert”. SB763 aims to address both of these concerns by granting county governments the authority to allow Class A beer and wine licenses to be granted to chain grocery, pharmacy, and convenience stores that meet specific criteria to ensure access to healthy food options. It would also require that such a license be provided to a qualifying store planning to locate in a priority funding area in an effort to attract new food retailers to these areas.

The bill seeks to incentivize grocery stores to locate in priority funding areas, which often include food deserts. The U.S. Department of Agriculture Economic Research Service defines “food deserts” simply as “neighborhoods that lack healthy food sources”. This often means that there may be an overabundance of fast-food restaurants in an area and no grocery stores within an accessible walking distance, coupled with a low-income population that has little access to cars and fewer resources for public transportation. Measures in Maryland to combat low access to healthy food have included a pilot program in which rideshare company Lyft offered limited one-way trips to grocery stores for \$2.50 per ride. Such measures are a creative attempt to connect people with the healthy food that they need, but the Maryland Retailers Association feels that it would be more effective to help grocery stores locate in these priority neighborhoods.

Profit margins in the grocery industry are a contributing factor to the existence of food deserts; grocery stores often operate with a profit margin of about 1-3%, the lowest in the retail industry. Allowing the sale of beer and wine at stores in these locations would be a stabilizing measure for a retailer, and local alcohol regulations are often a deciding factor as chains determine potential locations for new stores nationwide. An economic study conducted by Dunham & Dunham Associates in February 2020 (included as additional testimony) found that allowing beer and wine to be sold in

additional food retailers would increase overall sales in Maryland by \$192.8 million, create 760 new jobs, and bring in \$24.1 million in additional tax revenues.

The qualifying criteria required by SB763 is strict. A store seeking a Class A license must offer a full line of items for sale in at least six of the following categories: fresh fruits and vegetables; fresh and uncooked meat, poultry, and seafood; dairy products; canned foods; frozen foods; dry groceries and baked goods; and nonalcoholic beverages. Additionally, a store must dedicate a minimum of 50% of its public square footage to the sale of those qualifying food or beverage items. A smaller store of at least 6,000 square feet must dedicate a minimum of 5% of its public area to the sale of those qualifying food or beverage items. By including a steep threshold for stores to qualify for a license, SB763 ensures that licenses will not be automatically granted to every corner convenience store in a given district.

In addition to the economic and health benefits of assisting grocery stores to locate in priority areas, we would also urge the Committee to consider the health and safety benefits of allowing Marylanders to complete more of their errands in a one-stop-shop by allowing grocery stores to sell beer and wine. For the past year, Marylanders have been advised to stay home, to be careful about their time spent shopping and to cut out extraneous trips. For some who are immunocompromised or have other at-risk health factors, limiting their exposure in public is a necessity. With Maryland's current alcohol laws in place, this means that consenting adults with health risks have had to make choices about their consumption and often forego the local liquor store as it would mean an extra stop and more potential exposure. Allowing shoppers to pick up certain alcohol items at the same store as the rest of their groceries will minimize the risk for our vulnerable populations while allowing them to make safer choices about completing their errands.

Finally, the narrative that package stores will go out of business has been debunked over and over again. There is no data from other states that have made similar changes that supports the argument that the industry will be decimated. Colorado and Oklahoma, which both passed similar changes to their alcohol laws in the past several years, saw minimal initial decline in sales in package stores while net jobs and tax revenue increased dramatically. Look no further than the 30 or so chain stores that were grandfathered into the Maryland state law as well, all of which are surrounded by thriving package stores.

For these reasons, the Maryland Retailers Association urges a favorable report on SB763. Thank you for your consideration.

# **SB763\_FAV\_MRA\_DunhamEconomicStudy.pdf**

Uploaded by: Price, Sarah

Position: FAV

The Potential Benefits of Allowing Beer and Wine Sales  
In Supermarkets, Grocery, and Convenience Stores in Maryland

Prepared for the:



**MRA**  
Maryland Retailers Association

Prepared by:



**February 28, 2020**

**DRAFT**

## The Potential Benefits of Allowing Beer and Wine Sales In Supermarkets, Groceries, and Convenience Stores in Maryland

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### Introduction and Executive Summary

Following the repeal of Prohibition in December of 1933, most control over the sale of beverage alcohol products (including distilled spirits, wines, and malt beverages) was given to state governments. Each of the states implemented alcohol control laws, some of which were extremely stringent. In Maryland, most liquor laws are implemented at the county level, making it unique among states in this regard.

Adults who choose to purchase beverage alcohol products in the state have traditionally faced many restrictions which have encouraged a fairly non-competitive retail system and forced consumers to pay relatively higher prices. This in turn has led many shoppers to seek out both lower prices and better selections, particularly in the bordering jurisdictions of Delaware and Washington D.C.

**Table 1**  
**Grocery Store Alcohol Sales by Restrictions**

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Number of		
	States	Percent
No Sales	7	13.7%
Beer Only	9	17.6%
Beer and Wine	15	29.4%
Total Beverage Alcohol	20	39.2%
Total	51	100.0%

While all of Maryland's counties allow for the sale of beer and wine in stores beyond package liquor stores, the majority of Maryland's 24 county-equivalent jurisdictions limit the number of retailers allowed to sell alcohol, and access to beer and wine is quite limited. Equivalently stringent restrictions exist in only 6 other states.<sup>1</sup>

Over the last several years, states have been loosening the restrictions on grocery store sales of beer and wine. In 2016, the Commonwealth of Pennsylvania, a state with some of the most restrictive beverage alcohol sales laws in the country, began allowing certain grocers to sell up to four bottles of wine to each legal-age customer. In the year following, according to the State Department of Revenue, overall liquor tax collections were up by 6.5 percent over the prior year. This is nearly double the growth rate in liquor tax revenue prior to the change in the law.<sup>2</sup>

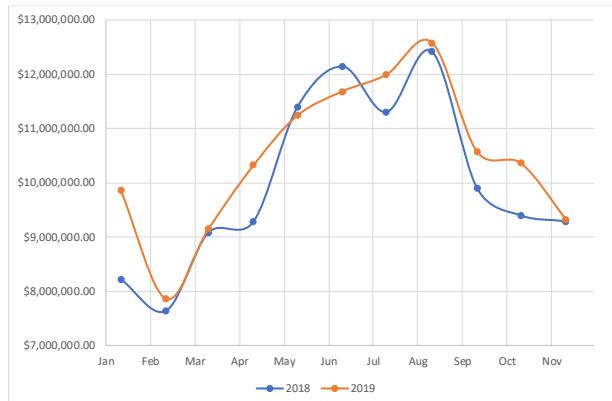
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<sup>1</sup> Alaska, Delaware, Minnesota, New Jersey, North Dakota, and Rhode Island

<sup>2</sup> *Monthly Revenue Report*, Pennsylvania Department of Revenue, at:

<http://www.revenue.pa.gov/General/TaxInformation/News%20and%20Statistics/Pages/Reports%20and%20Statistics/MRR/2016%20Monthly%20Revenue%20Reports.aspx#.WHj0ZhsrKUk>

**Figure 1**  
**Colorado Growth in Beer Excise Tax Collection**



At the beginning of 2019, the state of Colorado loosened its restrictions on sales of beer by grocery retailers. Previously grocers in Colorado could only sell beer with an alcohol by weight below 3.2 percent, effectively limiting beer, wine, and liquor sales to package stores. While the law has only been in place for a year, data collected by the Colorado Department of Revenue has demonstrated an increase in beer sales in the period following the passage of the law, with growth near 7.5 percent over the years prior.<sup>3</sup>

According to the Food Marketing Institute, consumers average 1.6 trips to the supermarket per week.<sup>4</sup> Maryland's restrictions on beer and wine sales at these stores limit taxable sales, and cost the state jobs and tax revenues. Based on this analysis of the Maryland retail economy, allowing beer and wine to be sold in additional food retailers (as is allowed in 15 states) would increase overall alcohol sales in Maryland by \$192.8 million resulting in 760 net additional retail jobs and \$24.1 million in increased tax revenues.<sup>5</sup>

**Table 2**  
**Potential Impact of Allowing Non-Package Store Beer and Wine Sales in Maryland**

	Net Sales Increase	Net Job Increase	Net Tax Increase
Allowing Beers Sales	\$146,262,000	576	\$18,270,000
Allowing Wine Sales	\$46,611,000	184	\$5,903,000
Total Impact	\$192,873,000	760	\$24,173,000

### Beverage Alcohol Retailing in Maryland

While the regulations and licensing governing firms involved in distributing and selling alcoholic products is handled primarily by county governments in Maryland, the State Comptroller maintains a database of licensed businesses for the purpose of tracking collection of excise taxes. This includes licenses for retailers that sell for on-premise consumption, including in taverns, restaurants, and brewpubs as well as licenses for sale for off-premise consumption. These licenses also differentiate the types of products permitted for sale by businesses, separating stores based on their sales of beer, wine, and/or spirits.

<sup>3</sup> *Liquor Excise Taxes*, Colorado Department of Revenue, at:<https://www.colorado.gov/pacific/revenue/colorado-liquor-excise-taxes>  
<sup>4</sup> 2016 figures. See: <http://www.fmi.org/research-resources/supermarket-facts>

<sup>5</sup> This is even after offsetting any sales that might be lost to current package store sellers.

As of February of 2020, a total of 929 package stores in Maryland had been authorized to sell liquor, wine and beer, and 603 additional stores had also been licensed to sell beer and wine in certain counties. These retail establishments range in size from large supermarkets to small local delis and convenience stores. These stores exist throughout the state, with the largest number located in Montgomery County, where the control retail system is managed by the Alcohol Beverage Services Department. This control system dramatically limits the number of package stores in the county to just 25 government-controlled establishments. Other counties with significant percentages of retailers allowed to sell beer and wine include: Worcester (56 percent), Dorchester (34 percent), Somerset (33 percent), Garrett (32 percent) and Wicomico (31 percent). Table 3 on the following page shows the number of retailers by county.

**Table 3**  
**Off-Premise Alcohol Retail Licenses by County and Independent City in Maryland**

County	Package	Food Beer/Wine	Total Alcohol	Food No Beer Wine
Allegany MD	3	14	17	49
Anne Arundel MD	84	25	109	276
Baltimore City MD	175	61	236	521
Baltimore MD	167	25	192	487
Calvert MD	26	14	40	33
Caroline MD	7	6	13	27
Carroll MD	34	4	38	81
Cecil MD	20	11	31	67
Charles MD	24	17	41	71
Dorchester MD	9	18	27	26
Frederick MD	53	33	86	124
Garrett MD	-	15	15	32
Harford MD	39	11	50	133
Howard MD	55	7	62	117
Kent MD	10	5	15	20
Montgomery MD	1	167	168	407
Prince George's MD	125	33	158	544
Queen Anne's MD	16	6	22	25
Somerset MD	2	10	12	18
St. Mary's MD	33	9	42	50
Talbot MD	6	7	13	31
Washington MD	32	8	40	91
Wicomico MD	5	43	48	91
Worcester MD	3	54	57	40
Total	929	603	1,532	3,361

Based on data from the State, a total of 108 million gallons of beer and wine were sold in Maryland through off-premise retailers and on-premise establishments like hotels, restaurants, taverns, and stadiums in FY 2019, generating a total of \$14.7 million in excise tax payments.<sup>6</sup>

**Table 4**  
**Total Beverage Alcohol Sales and Tax Collections in Maryland**

	Volume Sales	Excise Tax Collections
Beer	92,821,408	\$8,353,927
Wine	15,932,914	\$6,373,165
Subtotal	108,754,321	\$14,727,092
Spirits	11,620,969	\$17,431,453
Total	229,129,612	\$46,885,637

<sup>6</sup> Comptroller of Maryland, General Accounting Division, <https://www.marylandtaxes.gov/finances/revenue/detailview/default.aspx>

## The Economic Impact of Beverage Alcohol Retailing in Maryland

In order to estimate the impact of allowing for expanded beer and wine sales in various types of retailers, it's important to understand the current market. This section compares the number of jobs in package stores (including other retail locations that currently are allowed to sell beer and wine), and retail locations likely to acquire a beer and wine license should it become available, including convenience stores, grocery stores, large supermarkets, and warehouse clubs.

While the state of Maryland identifies the company that is licensed to sell alcohol, the licensee is not always the same as the name of the store. In addition, the state does not differentiate between licensees in terms of size and provides no employment data. Licenses were therefore linked to detailed business data provided by Infogroup.<sup>7</sup> The Infogroup database provides information on the address of businesses in the United States, along with data on total full-time equivalent employment and estimates of sales. Based on these data, package stores in Maryland tend to be small businesses, though there are retailers with as many as 50 jobs. Among the small number of food retailers that are licensed to sell beer and wine are a handful of supermarkets and grocery stores, as well as a large number of smaller corner convenience stores. Combining data from the Federal government's Supplemental Nutrition Assistant Program (SNAP) and the Infogroup database, gives a list of food retailers in the state, including their location, type, and employment levels. There are over 3,700 food retailers in the Old Line State.

**Table 5**  
**Current and Potential Off-Premise Beverage Alcohol Retailers in Maryland**

		Stores	Jobs	Jobs/Store
Stores Currently Selling Alcohol	Package Stores	929	4,519	4.86
	Other Stores	603	3,437	5.70
	Convenience Stores	1,627	15,002	9.22
	Variety Stores	370	3,571	9.65
	Grocery Stores	1,019	17,993	17.66
	Supermarkets and Superstores	317	47,992	151.39
Alcohol Retailers		Warehouse Clubs	34	5,695
				167.50

Table 5 shows the current number of licensed stores (and their associated employment) as well as the number of additional stores that could be licensed to sell wine and spirits under an expansion of the licensing regime.

**Table 6**  
**Economic Impact of the Food Retailing Industry in Maryland**

	Direct	Supplier	Induced	Total
Jobs	91,682	16,994	22,300	130,976
Wages	\$3,539,855,000	\$1,120,689,000	\$1,237,684,000	\$5,898,228,000
Economic Output	\$7,822,444,000	\$3,047,441,000	\$3,703,714,000	\$14,573,598,000
Federal Taxes				\$1,261,296,000
State and Local Taxes				\$1,379,338,000

Overall, food retailers in Maryland provide over 91,600 full-time equivalent jobs, paying \$3.5 billion in wages and benefits. In addition, nearly 17,000 jobs are generated in Maryland based firms that supply

<sup>7</sup> Job numbers are from Infogroup, the leading provider of business and consumer data for the top search engines and leading in-car navigation systems in North America. Infogroup gathers data from a variety of sources, by sourcing, refining, matching, appending, filtering, and delivering the best quality data. Infogroup verifies its data at the rate of almost 100,000 phone calls per day to ensure absolute accuracy. Where jobs are not available, median job numbers were used.

grocery retailers with services and equipment that they need to operate like shelving, electricity, or accounting services.<sup>8</sup> The re-spending of wages received by the 91,682 food retail employees and the 16,994 people working in supplier firms generates an additional 22,300 jobs in the Maryland economy.<sup>9</sup>

All told, the grocery retailing industry creates nearly \$14.6 billion in economic activity in the state, and generates \$1.4 billion in various state and local taxes (not including excise and sales taxes on the products sold to consumers). Table 6 on the prior page outlines the overall economic impact of the grocery industry in the state.<sup>10</sup>

**Table 7**  
**Economic Impact of the Off-Premise Alcohol Retailing Industry in Maryland**  
**Including Jobs from Alcohol Sales from Food Retailers Licensed to Sell Beer and Wine**

	Direct	Supplier	Induced	Total
Jobs	7,956	1,459	2,026	11,441
Wages	\$330,226,000	\$93,111,000	\$112,439,000	\$535,775,000
Economic Output	\$690,036,000	\$262,391,000	\$336,426,000	\$1,288,853,000
Federal Taxes				\$111,643,000
State and Local Taxes				\$105,800,000

While grocery retailers are responsible for over 91,600 full-time equivalent jobs in Maryland, the off-premise alcohol retailing industry is much smaller. The 1,532 stores in the state employ about 7,960 full-time equivalent workers, and pay just over \$330.2 million in wages and benefits.<sup>11</sup> In total, about 11,441 full-time equivalent positions in the state are dependent on off-premise alcohol sales. These stores generate just under \$1.29 billion in economic activity and drive about \$105.8 million in state and local taxes (again not including sales and excise taxes on the products which are directly paid by consumers).

### Measuring Potential Additional Sales from Expanded Food Retailers Licensure

While it is impossible to know which of Maryland's 3,360 food retailers that do not currently sell beer or wine would purchase licenses were the state to open up the sale of beer and wine by food retailers, the effect this change would have on the industry, and thus the state and local economies, can be estimated using data from other jurisdictions where similar proposals were implemented.

The current sales of beer and wine in Maryland can be calculated by multiplying the average prices by the volume data shown in Table 4.

**Table 8**  
**Current Beer and Wine Sales in Maryland**

	Volume (gallons)	Average Price (per gallon)	Sales
Beer	92,821,408	\$18.07	\$1,676,939,000
Wine	15,932,914	\$59.74	\$951,793,000
Total	108,754,321	n/a	\$2,628,732,000

<sup>8</sup> Note that this does not include jobs in companies that provide the products that are sold in the stores like meat, vegetables or milk.  
<sup>9</sup> Often economic impact studies present results with very large multipliers – as high as 4 or 5. These studies invariably include the firms supplying the supplier industries as part of the induced impact. John Dunham & Associates believes that this is not an appropriate definition of the induced impact and as such limits this calculation to only the effect of spending by direct and supplier employees. Multipliers have fallen dramatically throughout the economy over the past few years reflecting stagnant income levels, higher levels of saving, and lower levels of spending.

<sup>10</sup> Detailed data by state legislative district can be found in the Appendix.

<sup>11</sup> Job numbers are from Infogroup. Where jobs are not available estimated using median job numbers.

These numbers represent the current sales of beer and wine by package stores and other retailers currently licensed to sell beer and wine in Maryland. A mathematical model is used to derive the impact of a modernization of the sales restrictions on overall beverage alcohol sales, and specifically which of these sales will transfer to food retailers. This model examines those states that have passed measures reducing restrictions on food retailers selling alcohol, in order to predict the percent change that will occur to alcohol sales if Maryland implements similar measures. The tables on the following page are the output of seasonally adjusted semi-logarithmic regression models to measure such changes.

**Table 9**  
**Regression Outputs Measuring Impact of Policy Changes in Colorado and Oklahoma**

Percent Effect on Package Store Employment				Percent Effect on Sales Volume			
Variable Name	Coeffecient	P-Value	Significance	Variable Name	Coeffecient	P-Value	Significance
Year	2.04%	0.00	0.99	Year	0.67%	0.01	0.98
Policy Change	-3.71%	0.00	0.99	Policy Change	7.34%	0.00	0.99
January	1.45%	0.31	Not significant	January	-11.79%	0.01	0.99
February	0.80%	0.57	Not significant	February	-17.76%	0.00	0.99
March	1.49%	0.29	Not significant	March	-0.58%	0.89	Not significant
April (baseline)	0.00%	0.00	0.99	April (baseline)	2.99%	0.00	1.00
May	1.13%	0.43	Not significant	May	10.52%	0.02	0.98
June	2.74%	0.06	0.94	June	19.75%	0.00	0.99
July	1.60%	0.29	Not significant	July	15.79%	0.00	0.99
August	0.97%	0.52	Not significant	August	22.51%	0.00	0.99
September	2.61%	0.09	0.91	September	6.76%	0.11	Not significant
October	4.74%	0.00	0.99	October	0.59%	0.89	Not significant
November	5.35%	0.00	0.99	November	-5.58%	0.19	Not significant
December	5.96%	0.00	0.99	December	-2.70%	0.55	Not significant
Model F Statistic:	6.446	R <sup>2</sup> :	0.6769	Model F Statistic:	17.04	R <sup>2</sup> :	0.8164
Model Significance:	0.99	Adjusted R <sup>2</sup> :	0.5719	Model Signficance:	0.99	Adjusted R <sup>2</sup> :	0.7685

Using data collected over the last half decade on employment in package stores in Oklahoma and Colorado, two states which recently passed similar measures to the policy change advocated for in Maryland, it is possible to model the percent change that occurs due to opening sales of beer and wine to retail food stores. The model shows that, despite beer and wine sales constituting a core part of package store's business, there is only a 3.7 percent decline in employment in that sector.<sup>12</sup>

**Table 10**  
**Estimated New Off-Premise Beverage Alcohol Sales from Food Retailers in Maryland**

	Beer	Wine	Total
Food Retailer Sales	\$196,877,000	\$93,548,000	\$290,425,000
"Cannibalized" Package Store Sales	-\$50,615,000	-\$46,937,000	-\$97,552,000
Net Change in Sales	\$146,262,000	\$46,611,000	\$192,873,000

Multiplying the sales figures in Table 8 by the rates from the regression models, provides an estimate of additional sales of about \$290.4 million for food retailers, with an associated \$97.6 million decline in sales for current retailers of alcohol, netting \$192.8 million in additional sales for retailers across the state of Maryland. In volume terms, the net sales increase in Maryland is estimated to be 86.3 million additional bottles of beer and about 3.9 million bottles of wine. (See Table 11 on the following page)

A second model, generated using beer and wine excise tax collection data collected from the Colorado Department of Revenue and the Oklahoma Taxpayer Access Point, demonstrates that, while there is a small decline in employment in package liquor store employment following the passage of these laws,

<sup>12</sup>

*Quarterly Census of Employment and Wages*, US Department of Labor, Bureau of Labor Statistics, at: <https://www.bls.gov/cew/>

there is a significant 7.3 percent increase in overall sales of beer and wine in these states.<sup>13,14</sup> This is similar to the growth in sales and tax revenues in other states that have rationalized their alcohol sales restrictions.

It should be noted that the sales lost by package stores are calculated in volume terms. It is impossible to know exactly how an individual store will react to the increased competition from grocery type retail stores selling beverage alcohol. It is possible that some package stores will go out of business, while on the other hand some may actually expand. When supermarkets began selling beer in Pennsylvania, the existing beer retailers worried that they would be devastated by the competition. This proved to be unfounded, and as the Pennsylvania Supreme Court commented, the number of active beer distributor licenses has remained steady since 2007 (when grocery stores began selling beer), despite the fact that 117 new grocery store/café licenses have been granted during that period of time.<sup>15</sup>

**Table 11**  
**Estimated Effect of Proposal on Beer and Wine Sales by Volume, Sales and Excise Tax Collection**

	<b>Net Volume Increase (gallons)</b>	<b>Net Volume Increase (bottles)</b>	<b>Net Sales Increase</b>	<b>Net Tax Increase</b>
Beer Sales	8,096,000	86,311,000	\$146,262,000	\$18,270,000
Wine Sales	780,000	3,939,000	\$46,611,000	\$5,903,000
<b>Total Impact</b>	<b>8,876,000</b>	<b>90,250,000</b>	<b>\$192,873,000</b>	<b>\$24,173,000</b>

#### **Potential Additional Tax Revenues from Additional Alcohol Sales**

The higher sales volumes will come from three sources. First, and most importantly, some Maryland consumers purchase wine and spirits from retailers located outside of the state, thereby avoiding paying Maryland state excise and sales taxes. Some of these tax-avoiding sales may come home to Maryland retailers from these other jurisdictions. In addition, by opening up the market to more retailers, the state will make it more convenient for shoppers to purchase wine and spirits. Since the time involved in shopping constitutes a “cost” for consumers, this convenience factor should not be overlooked. By making it easier to purchase wine and spirits, the State will be in effect reducing the overall cost of these products, and as with all normal goods, lower costs equate to higher sales. Finally, more competition will lead to lower costs and greater variety as supermarkets and other food retailers will compete with local package stores mainly in the lower end of the market. As Table 11 shows, these three factors together should increase overall beer sales by 86.3 million 12 oz bottles (or 18.4 bottles per adult in the state), and wine sales by 3.9 million 750 ml bottles (or 0.84 bottles per adult).<sup>16</sup>

**Table 12**  
**Estimated New Revenue from Wine Sales in Food Retailers**

<b>Revenue Source</b>	<b>From Beer</b>	<b>From Wine</b>	<b>Total</b>
Sales Taxes	\$8,776,000	\$2,797,000	\$11,573,000
Excises Taxes	\$729,000	\$312,000	\$1,041,000
Corporate Taxes	\$8,765,000	\$2,794,000	\$11,559,000
<b>Total</b>	<b>\$18,270,000</b>	<b>\$5,903,000</b>	<b>\$24,173,000</b>

<sup>13</sup> Colorado Department of Revenue, Liquor Excise Taxes, <https://www.colorado.gov/pacific/revenue/colorado-liquor-excise-taxes>

<sup>14</sup> Oklahoma Tax Commission, Oklahoma Taxpayer Access Point, [https://oktap.tax.ok.gov/OkTAP/Web/\\_#12](https://oktap.tax.ok.gov/OkTAP/Web/_#12)

<sup>15</sup> Malt. Beverages. Distributors. Ass'n. v. PA Liquor Control Board, 8 A. 3d 885 (Pa. 2010) (“Wegmans”).

<sup>16</sup> Based on US Census Estimates, <https://www.census.gov/quickfacts/MD>

Since Maryland's excise taxes on beer and wine are based on volumes, and sales taxes are based on overall dollar sales, these increased taxable sales will increase overall state revenues. Overall, the state of Maryland should see a net increase of about \$18.3 million in new taxes from beer sales and \$5.9 million from wine sales (this is net of any lost sales from package stores). Total revenue for the state can be expected to increase by up to \$24.2 million.

### **Economic Impact of Additional Alcohol Sales**

The change in sales volumes can be used to estimate the larger impact on jobs, wages, and the Maryland economy using IMPLAN, an input-output analysis model designed for performing impact analyses<sup>17</sup>. As Table 13 below shows, JDA estimates that 760 new jobs (on net) would be directly created in the retailing sectors as a result of the change in sales, with supermarkets gaining about 1,144 jobs and package stores losing 384 jobs.

**Table 13**  
**Estimated Direct Economic Impact in Terms of Jobs**

	<b>Food Retailers</b>	<b>Package Stores</b>	<b>Total</b>
Jobs from Beer Sales	775	(199)	576
Jobs from Wine Sales	368	(185)	184
Total Job Change	1,144	(384)	760

These new retailing jobs will also create new supplier and induced economic activity in the state. In addition to the 760 new jobs created in retailing locations, this loosening of sales restrictions will create 135 additional jobs in firms that supply those retailers with the goods and services that they need to operate, and an additional 175 full-time equivalent jobs will be created throughout the state as a result of the re-spending of employee wages. All told, workers in Maryland will receive over \$45.6 million in additional wages and benefits as a result of this change and the state economy will grow by \$114.2 million.

**Table 14**  
**Estimated Economic Impact from Change**

	<b>Direct</b>	<b>Supplier</b>	<b>Induced</b>	<b>Total</b>
Jobs	760	135	175	1,069
Wages	\$27,017,800	\$9,034,545	\$9,572,049	\$45,624,394
Economic Output	\$61,555,690	\$24,015,806	\$28,631,801	\$114,203,297
Federal Taxes				\$9,942,951
State and Local Taxes				\$11,559,749

In addition to the \$12.6 million in on-going additional revenues that the State would receive from excise and sales taxes paid by consumers, state and local governments will receive nearly \$11.6 million in additional business and personal tax revenues (for example property taxes, income taxes, gasoline excise taxes) resulting from the increased employment and economic activity.

### **Conclusions**

Maryland has an opportunity to create a “win-win” scenario by opening up beer and wine sales to more food retailers. Not only will these retailers earn new revenues with which to hire new workers, but

<sup>17</sup>

See the appendix titled “Economic Impact Methodology” for more detail on input-output analysis and IMPLAN

consumers gain convenience and greater access to lower-priced products. All told, as many as 1,069 new jobs could be created in Maryland simply by eliminating these prohibition era restrictions.

On top of the economic benefits, the State of Maryland could benefit from additional tax revenues. It is not often that state revenues can increase without legislatively increasing tax rates, but in this case, constituents would be happy to pay taxes as they are receiving the benefit of increased convenience and lower overall costs to purchase products that they would buy normally. It is estimated that Maryland could receive as much as \$12.6 million in new excise and sales tax revenue as a result of this regulatory change.

While some jobs will be lost in the package store business, these losses will be more than offset by new jobs at food retailers, netting tens of millions of dollars in wages and tax revenue for the people and state of Maryland.

## Appendix A

### Economic Impact of Package Stores by State Senate District

District	Package Store			Multiplier			Total		
	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output
MD 1	33	\$ 1,369,720	\$ 2,862,140	39	\$ 2,418,490	\$ 7,334,410	72	\$ 3,788,210	\$ 10,196,550
MD 2	129	\$ 5,354,350	\$ 11,188,360	40	\$ 2,322,850	\$ 6,660,150	169	\$ 7,677,200	\$ 17,848,510
MD 3	142	\$ 5,893,930	\$ 12,315,870	38	\$ 2,154,090	\$ 6,079,840	180	\$ 8,048,020	\$ 18,395,710
MD 4	126	\$ 5,229,830	\$ 10,928,170	38	\$ 2,127,250	\$ 5,691,690	164	\$ 7,357,080	\$ 16,619,860
MD 5	107	\$ 4,441,200	\$ 9,280,270	29	\$ 1,565,930	\$ 4,370,980	136	\$ 6,007,130	\$ 13,651,250
MD 6	91	\$ 3,777,100	\$ 7,892,570	31	\$ 1,921,100	\$ 5,122,890	122	\$ 5,698,200	\$ 13,015,460
MD 7	96	\$ 3,963,880	\$ 8,282,860	25	\$ 1,429,010	\$ 4,569,290	121	\$ 5,392,890	\$ 12,852,150
MD 8	74	\$ 3,071,490	\$ 6,418,130	37	\$ 1,892,920	\$ 5,279,760	111	\$ 4,964,410	\$ 11,697,890
MD 9	117	\$ 4,856,270	\$ 10,147,590	32	\$ 1,725,240	\$ 4,992,180	149	\$ 6,581,510	\$ 15,139,770
MD 10	97	\$ 4,026,140	\$ 8,412,960	28	\$ 1,595,710	\$ 4,979,410	125	\$ 5,621,850	\$ 13,392,370
MD 11	98	\$ 4,067,640	\$ 8,499,690	67	\$ 4,339,430	\$ 12,630,380	165	\$ 8,407,070	\$ 21,130,070
MD 12	208	\$ 8,633,360	\$ 18,040,150	53	\$ 3,210,340	\$ 8,972,780	261	\$ 11,843,700	\$ 27,012,930
MD 13	159	\$ 6,599,540	\$ 13,790,310	82	\$ 5,130,240	\$ 13,805,350	241	\$ 11,729,780	\$ 27,595,660
MD 14	-	\$ -	\$ -	30	\$ 1,627,360	\$ 4,617,170	30	\$ 1,627,360	\$ 4,617,170
MD 15	-	\$ -	\$ -	42	\$ 2,432,130	\$ 7,860,160	42	\$ 2,432,130	\$ 7,860,160
MD 16	-	\$ -	\$ -	82	\$ 5,189,690	\$ 17,630,940	82	\$ 5,189,690	\$ 17,630,940
MD 17	-	\$ -	\$ -	58	\$ 3,431,830	\$ 10,891,950	58	\$ 3,431,830	\$ 10,891,950
MD 18	4	\$ 166,030	\$ 346,930	59	\$ 3,552,960	\$ 10,575,020	63	\$ 3,718,990	\$ 10,921,950
MD 19	-	\$ -	\$ -	27	\$ 1,377,210	\$ 4,358,950	27	\$ 1,377,210	\$ 4,358,950
MD 20	-	\$ -	\$ -	36	\$ 2,210,210	\$ 6,205,020	36	\$ 2,210,210	\$ 6,205,020
MD 21	116	\$ 4,814,760	\$ 10,060,860	58	\$ 3,227,000	\$ 8,472,790	174	\$ 8,041,760	\$ 18,533,650
MD 22	66	\$ 2,739,430	\$ 5,724,280	38	\$ 2,326,180	\$ 6,760,090	104	\$ 5,065,610	\$ 12,484,370
MD 23	65	\$ 2,697,930	\$ 5,637,550	30	\$ 1,673,260	\$ 5,494,990	95	\$ 4,371,190	\$ 11,132,540
MD 24	104	\$ 4,316,680	\$ 9,020,080	25	\$ 1,463,360	\$ 4,075,060	129	\$ 5,780,040	\$ 13,095,140
MD 25	130	\$ 5,395,850	\$ 11,275,100	25	\$ 1,358,860	\$ 4,289,140	155	\$ 6,754,710	\$ 15,564,240
MD 26	107	\$ 4,441,200	\$ 9,280,270	22	\$ 1,199,920	\$ 3,996,960	129	\$ 5,641,120	\$ 13,277,230
MD 27	119	\$ 4,939,280	\$ 10,321,050	30	\$ 1,715,320	\$ 6,086,500	149	\$ 6,654,600	\$ 16,407,550
MD 28	99	\$ 4,109,150	\$ 8,586,420	34	\$ 1,709,200	\$ 5,512,280	133	\$ 5,818,350	\$ 14,098,700
MD 29	156	\$ 6,475,020	\$ 13,530,120	26	\$ 1,528,510	\$ 5,156,960	182	\$ 8,003,530	\$ 18,687,080
MD 30	196	\$ 8,135,290	\$ 16,999,380	47	\$ 2,544,340	\$ 7,261,550	243	\$ 10,679,630	\$ 24,260,930
MD 31	107	\$ 4,441,200	\$ 9,280,270	29	\$ 1,477,700	\$ 4,453,350	136	\$ 5,918,900	\$ 13,733,620
MD 32	73	\$ 3,029,980	\$ 6,331,400	65	\$ 3,685,120	\$ 10,689,270	138	\$ 6,715,100	\$ 17,020,670
MD 33	81	\$ 3,362,030	\$ 7,025,250	52	\$ 2,674,660	\$ 7,624,590	133	\$ 6,036,690	\$ 14,649,840
MD 34	132	\$ 5,478,870	\$ 11,448,560	26	\$ 1,590,730	\$ 4,316,410	158	\$ 7,069,600	\$ 15,764,970
MD 35	115	\$ 4,773,250	\$ 9,974,120	50	\$ 2,793,370	\$ 7,208,700	165	\$ 7,566,620	\$ 17,182,820
MD 36	200	\$ 8,301,310	\$ 17,346,300	49	\$ 2,990,550	\$ 10,178,690	249	\$ 11,291,860	\$ 27,524,990
MD 37	83	\$ 3,424,290	\$ 7,155,350	73	\$ 4,415,510	\$ 11,872,000	155	\$ 7,839,800	\$ 19,027,350
MD 38	61	\$ 2,531,900	\$ 5,290,620	48	\$ 2,702,090	\$ 7,859,500	109	\$ 5,233,990	\$ 13,150,120
MD 39	-	\$ -	\$ -	25	\$ 1,500,580	\$ 5,022,590	25	\$ 1,500,580	\$ 5,022,590
MD 40	192	\$ 7,969,260	\$ 16,652,450	58	\$ 3,823,890	\$ 9,730,770	250	\$ 11,793,150	\$ 26,383,220
MD 41	57	\$ 2,365,870	\$ 4,943,700	29	\$ 1,871,630	\$ 4,708,370	86	\$ 4,237,500	\$ 9,652,070
MD 42	203	\$ 8,425,830	\$ 17,606,500	67	\$ 4,128,960	\$ 12,188,740	270	\$ 12,554,790	\$ 29,795,240
MD 43	110	\$ 4,565,720	\$ 9,540,470	23	\$ 1,467,610	\$ 3,606,230	133	\$ 6,033,330	\$ 13,146,700
MD 44	114	\$ 4,731,750	\$ 9,887,390	27	\$ 1,583,970	\$ 4,492,310	141	\$ 6,315,720	\$ 14,379,700
MD 45	107	\$ 4,441,200	\$ 9,280,270	45	\$ 2,996,030	\$ 8,158,830	152	\$ 7,437,230	\$ 17,439,100
MD 46	104	\$ 4,316,680	\$ 9,020,080	85	\$ 5,463,260	\$ 14,843,490	189	\$ 9,779,940	\$ 23,863,570
MD 47	142	\$ 5,893,930	\$ 12,315,870	21	\$ 1,186,210	\$ 3,439,090	163	\$ 7,080,140	\$ 15,754,960
<b>Total</b>	<b>4,519</b>	<b>\$ 187,568,140</b>	<b>\$ 391,939,710</b>	<b>1,979</b>	<b>\$ 116,751,810</b>	<b>\$ 340,127,570</b>	<b>6,498</b>	<b>\$ 304,319,950</b>	<b>\$ 732,067,280</b>

## Appendix B

### Economic Impact of Package Stores by State Delegate District

District	Package Store			Multiplier			Total		
	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output
MD 1A	-	\$ 539,585	\$ 1,127,510	13	\$ 775,090	\$ 2,381,680	13	\$ 775,090	\$ 2,381,680
MD 1B	13	\$ 830,131	\$ 1,734,630	13	\$ 802,091	\$ 2,428,307	26	\$ 1,341,677	\$ 3,555,817
MD 1C	20	\$ 2,822,446	\$ 5,897,743	14	\$ 841,308	\$ 2,524,423	34	\$ 1,671,439	\$ 4,259,053
MD 2A	68	\$ 2,531,900	\$ 5,290,622	35	\$ 2,048,610	\$ 5,836,443	103	\$ 4,871,056	\$ 11,734,186
MD 2B	61	\$ 4,275,175	\$ 8,933,346	18	\$ 1,020,893	\$ 2,918,396	121	\$ 5,296,068	\$ 11,851,742
MD 3A	39	\$ 1,618,756	\$ 3,382,529	21	\$ 1,133,201	\$ 3,161,447	60	\$ 2,751,957	\$ 6,543,976
MD 4	126	\$ 5,229,826	\$ 10,928,170	38	\$ 2,127,254	\$ 5,691,684	164	\$ 7,357,080	\$ 16,619,855
MD 5	107	\$ 4,441,202	\$ 9,280,272	29	\$ 1,565,934	\$ 4,370,979	136	\$ 6,007,135	\$ 13,651,251
MD 6	91	\$ 3,777,097	\$ 7,892,568	31	\$ 1,921,105	\$ 5,122,885	122	\$ 5,698,201	\$ 13,015,453
MD 7	96	\$ 3,963,876	\$ 8,282,859	25	\$ 1,429,011	\$ 4,569,289	121	\$ 5,392,887	\$ 12,852,148
MD 8	74	\$ 3,071,485	\$ 6,418,132	37	\$ 1,892,915	\$ 5,279,755	111	\$ 4,964,400	\$ 11,697,887
MD 9A	98	\$ 4,067,643	\$ 8,499,688	23	\$ 1,197,937	\$ 3,373,066	121	\$ 5,265,579	\$ 11,872,754
MD 9B	19	\$ 788,625	\$ 1,647,899	9	\$ 527,298	\$ 1,619,113	28	\$ 1,315,922	\$ 3,267,012
MD 10	97	\$ 4,026,136	\$ 8,412,957	28	\$ 1,595,708	\$ 4,979,411	125	\$ 5,621,844	\$ 13,392,368
MD 11	98	\$ 4,067,643	\$ 8,499,688	67	\$ 4,339,435	\$ 12,630,377	165	\$ 8,407,077	\$ 21,130,065
MD 12	208	\$ 8,633,364	\$ 18,040,154	53	\$ 3,210,338	\$ 8,972,780	261	\$ 11,843,702	\$ 27,012,935
MD 13	159	\$ 6,599,543	\$ 13,790,310	82	\$ 5,130,239	\$ 13,805,353	241	\$ 11,729,782	\$ 27,595,663
MD 14	-	\$ -	\$ -	30	\$ 1,627,357	\$ 4,617,168	30	\$ 1,627,357	\$ 4,617,168
MD 15	-	\$ -	\$ -	42	\$ 2,432,128	\$ 7,860,160	42	\$ 2,432,128	\$ 7,860,160
MD 16	-	\$ -	\$ -	82	\$ 5,189,694	\$ 17,630,944	82	\$ 5,189,694	\$ 17,630,944
MD 17	-	\$ -	\$ -	58	\$ 3,431,829	\$ 10,891,948	58	\$ 3,431,829	\$ 10,891,948
MD 18	4	\$ 166,026	\$ 346,926	59	\$ 3,552,956	\$ 10,575,020	63	\$ 3,718,983	\$ 10,921,946
MD 19	-	\$ -	\$ -	27	\$ 1,377,212	\$ 4,358,953	27	\$ 1,377,212	\$ 4,358,953
MD 20	-	\$ -	\$ -	36	\$ 2,210,211	\$ 6,205,016	36	\$ 2,210,211	\$ 6,205,016
MD 21	116	\$ 4,814,761	\$ 10,060,855	58	\$ 3,226,997	\$ 8,472,788	174	\$ 8,041,757	\$ 18,533,644
MD 22	66	\$ 2,739,433	\$ 5,724,280	38	\$ 2,326,185	\$ 6,760,086	104	\$ 5,065,617	\$ 12,484,366
MD 23A	14	\$ 581,092	\$ 1,214,241	6	\$ 348,875	\$ 997,597	20	\$ 929,967	\$ 2,211,838
MD 23B	51	\$ 2,116,834	\$ 4,423,307	23	\$ 1,324,380	\$ 4,497,392	74	\$ 3,441,214	\$ 8,920,699
MD 24	104	\$ 4,316,682	\$ 9,020,077	25	\$ 1,463,362	\$ 4,075,056	129	\$ 5,780,044	\$ 13,095,133
MD 25	130	\$ 5,395,852	\$ 11,275,097	25	\$ 1,358,861	\$ 4,289,140	155	\$ 6,754,713	\$ 15,564,237
MD 26	107	\$ 4,441,202	\$ 9,280,272	22	\$ 1,199,922	\$ 3,996,961	129	\$ 5,641,124	\$ 13,277,233
MD 27A	18	\$ 747,118	\$ 1,561,167	10	\$ 556,732	\$ 2,082,726	28	\$ 1,303,850	\$ 3,643,894
MD 27B	42	\$ 1,743,275	\$ 3,642,723	10	\$ 611,778	\$ 2,249,593	52	\$ 2,355,054	\$ 5,892,317
MD 27C	59	\$ 2,448,887	\$ 5,117,159	10	\$ 546,806	\$ 1,754,178	69	\$ 2,995,693	\$ 6,871,337
MD 28	99	\$ 4,109,149	\$ 8,586,420	34	\$ 1,709,203	\$ 5,512,280	133	\$ 5,818,352	\$ 14,098,700
MD 29A	47	\$ 1,950,808	\$ 4,076,381	5	\$ 369,531	\$ 1,395,325	52	\$ 2,320,339	\$ 5,471,706
MD 29B	57	\$ 2,365,874	\$ 4,943,696	10	\$ 541,308	\$ 1,489,481	67	\$ 2,907,182	\$ 6,433,177
MD 29C	52	\$ 2,158,341	\$ 4,510,039	11	\$ 617,674	\$ 2,272,158	63	\$ 2,776,015	\$ 6,782,196
MD 30A	129	\$ 5,354,346	\$ 11,188,365	37	\$ 2,049,460	\$ 5,870,974	166	\$ 7,403,806	\$ 17,059,339
MD 30B	67	\$ 2,780,939	\$ 5,811,011	10	\$ 494,885	\$ 1,390,575	77	\$ 3,275,824	\$ 7,201,586
MD 31A	25	\$ 1,037,664	\$ 2,168,288	9	\$ 451,102	\$ 1,352,598	34	\$ 1,488,766	\$ 3,520,886
MD 31B	82	\$ 3,403,538	\$ 7,111,984	20	\$ 1,026,601	\$ 3,100,744	102	\$ 4,430,139	\$ 10,212,728
MD 32	73	\$ 3,029,979	\$ 6,331,400	65	\$ 3,685,124	\$ 10,689,273	138	\$ 6,715,103	\$ 17,020,673
MD 33	81	\$ 3,362,031	\$ 7,025,252	52	\$ 2,674,659	\$ 7,624,590	133	\$ 6,036,690	\$ 14,649,843
MD 34A	78	\$ 3,237,511	\$ 6,765,058	17	\$ 1,002,394	\$ 2,705,769	95	\$ 4,239,906	\$ 9,470,827
MD 34B	54	\$ 2,241,354	\$ 4,683,502	10	\$ 588,340	\$ 1,610,639	64	\$ 2,829,694	\$ 6,294,141
MD 35A	33	\$ 1,369,716	\$ 2,862,140	26	\$ 1,508,578	\$ 3,607,506	59	\$ 2,878,295	\$ 6,469,645
MD 35B	82	\$ 3,403,538	\$ 7,111,984	24	\$ 1,284,792	\$ 3,601,205	106	\$ 4,688,330	\$ 10,713,189
MD 36	200	\$ 8,301,311	\$ 17,346,302	49	\$ 2,990,550	\$ 10,178,686	249	\$ 11,291,861	\$ 27,524,989
MD 37A	16	\$ 664,105	\$ 1,387,704	10	\$ 705,626	\$ 1,939,379	26	\$ 1,369,731	\$ 3,327,083
MD 37B	67	\$ 2,760,186	\$ 5,767,646	62	\$ 3,709,883	\$ 9,932,620	129	\$ 6,470,070	\$ 15,700,266
MD 38A	15	\$ 622,598	\$ 1,300,973	9	\$ 586,218	\$ 1,647,833	24	\$ 1,208,816	\$ 2,948,806
MD 38B	34	\$ 1,411,223	\$ 2,948,871	11	\$ 727,965	\$ 1,985,223	45	\$ 2,139,188	\$ 4,934,094
MD 38C	12	\$ 498,079	\$ 1,040,778	27	\$ 1,387,909	\$ 4,226,439	39	\$ 1,885,987	\$ 5,267,217
MD 39	-	\$ -	\$ -	25	\$ 1,500,581	\$ 5,022,587	25	\$ 1,500,581	\$ 5,022,587
MD 40	192	\$ 7,969,259	\$ 16,652,450	58	\$ 3,823,892	\$ 9,730,771	250	\$ 11,793,151	\$ 26,383,221
MD 41	57	\$ 2,365,874	\$ 4,943,696	29	\$ 1,871,630	\$ 4,708,365	86	\$ 4,237,504	\$ 9,652,061
MD 42A	23	\$ 954,651	\$ 1,994,825	13	\$ 836,468	\$ 2,236,327	36	\$ 1,791,119	\$ 4,231,151
MD 42B	180	\$ 7,471,180	\$ 15,611,672	53	\$ 3,292,494	\$ 9,952,413	233	\$ 10,763,674	\$ 25,564,086
MD 43	110	\$ 4,565,721	\$ 9,540,466	23	\$ 1,467,608	\$ 3,606,230	133	\$ 6,033,329	\$ 13,146,696
MD 44A	54	\$ 2,241,354	\$ 4,683,502	7	\$ 422,309	\$ 1,121,699	61	\$ 2,663,663	\$ 5,805,201
MD 44B	60	\$ 2,490,393	\$ 5,203,891	20	\$ 1,161,664	\$ 3,370,614	80	\$ 3,652,058	\$ 8,574,505
MD 45	107	\$ 4,441,202	\$ 9,280,272	45	\$ 2,996,026	\$ 8,158,826	152	\$ 7,437,228	\$ 17,439,098
MD 46	104	\$ 4,316,682	\$ 9,020,077	85	\$ 5,463,257	\$ 14,843,488	189	\$ 9,779,939	\$ 23,863,566
MD 47A	115	\$ 4,773,254	\$ 9,974,124	18	\$ 1,009,775	\$ 2,882,696	133	\$ 5,783,029	\$ 12,856,820
MD 47B	27	\$ 1,120,677	\$ 2,341,751	4	\$ 176,431	\$ 556,396	31	\$ 1,297,108	\$ 2,898,147
Total	4,519	\$ 187,568,130	\$ 391,939,701	1,979	\$ 116,751,828	\$ 340,127,537	6,498	\$ 304,319,958	\$ 732,067,238

## Appendix C

### Economic Impact of Food Retailers by State Senate District

District	Food Store			Multiplier			Total		
	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output
MD 1	2,456	\$ 94,807,710	\$ 209,508,050	767	\$ 48,521,990	\$ 144,132,320	3,222	\$ 143,329,700	\$ 353,640,370
MD 2	2,803	\$ 108,224,810	\$ 239,157,420	785	\$ 46,521,560	\$ 131,807,300	3,588	\$ 154,746,370	\$ 370,964,720
MD 3	3,818	\$ 147,395,010	\$ 325,716,540	753	\$ 43,113,750	\$ 119,833,990	4,570	\$ 190,508,760	\$ 445,550,530
MD 4	1,322	\$ 51,042,880	\$ 112,795,620	744	\$ 42,635,020	\$ 112,539,150	2,066	\$ 93,677,900	\$ 225,334,770
MD 5	2,208	\$ 85,251,650	\$ 188,390,860	572	\$ 31,802,590	\$ 87,182,550	2,780	\$ 117,054,240	\$ 275,573,410
MD 6	2,273	\$ 87,742,020	\$ 193,894,130	630	\$ 39,156,830	\$ 102,477,540	2,903	\$ 126,898,850	\$ 296,371,670
MD 7	1,799	\$ 69,460,020	\$ 153,494,190	501	\$ 28,508,850	\$ 89,494,420	2,300	\$ 97,968,870	\$ 242,988,610
MD 8	2,205	\$ 85,135,820	\$ 188,134,900	719	\$ 37,469,770	\$ 103,682,710	2,924	\$ 122,605,590	\$ 291,817,610
MD 9	1,519	\$ 58,629,820	\$ 129,561,380	629	\$ 34,948,640	\$ 99,007,870	2,148	\$ 93,578,460	\$ 228,569,250
MD 10	1,033	\$ 39,865,190	\$ 88,094,910	558	\$ 32,165,980	\$ 98,638,430	1,591	\$ 72,031,170	\$ 186,733,340
MD 11	3,366	\$ 129,943,130	\$ 287,151,020	1,352	\$ 89,468,590	\$ 253,661,590	4,717	\$ 219,411,720	\$ 540,812,610
MD 12	1,734	\$ 66,950,350	\$ 147,948,260	1,060	\$ 64,849,310	\$ 178,793,600	2,794	\$ 131,799,660	\$ 326,741,860
MD 13	2,088	\$ 80,618,410	\$ 178,152,230	1,631	\$ 102,927,780	\$ 273,500,790	3,719	\$ 183,546,210	\$ 451,653,020
MD 14	1,494	\$ 57,683,860	\$ 127,470,990	598	\$ 33,182,040	\$ 92,285,820	2,092	\$ 90,865,900	\$ 219,756,810
MD 15	664	\$ 25,617,970	\$ 56,611,110	825	\$ 48,117,320	\$ 153,904,970	1,489	\$ 73,735,290	\$ 210,516,080
MD 16	2,016	\$ 77,819,160	\$ 171,966,390	1,621	\$ 103,409,060	\$ 344,703,040	3,637	\$ 181,228,220	\$ 516,669,430
MD 17	2,606	\$ 100,618,570	\$ 222,349,000	1,136	\$ 67,952,000	\$ 213,243,930	3,742	\$ 168,570,570	\$ 435,592,930
MD 18	2,186	\$ 84,382,920	\$ 186,471,120	1,159	\$ 70,696,220	\$ 207,643,780	3,344	\$ 155,079,140	\$ 394,114,900
MD 19	1,006	\$ 38,842,010	\$ 85,833,880	521	\$ 27,109,440	\$ 84,583,100	1,527	\$ 65,951,450	\$ 170,416,980
MD 20	1,873	\$ 72,317,190	\$ 159,808,010	703	\$ 43,590,380	\$ 121,297,290	2,576	\$ 115,907,570	\$ 281,105,300
MD 21	1,561	\$ 60,270,760	\$ 133,187,560	1,170	\$ 65,925,070	\$ 170,456,110	2,731	\$ 126,195,830	\$ 303,643,670
MD 22	2,189	\$ 84,518,060	\$ 186,769,750	751	\$ 47,557,750	\$ 135,530,160	2,940	\$ 132,075,810	\$ 322,299,910
MD 23	2,034	\$ 78,514,150	\$ 173,502,180	585	\$ 33,897,320	\$ 108,478,650	2,618	\$ 112,411,470	\$ 281,980,830
MD 24	2,170	\$ 83,765,150	\$ 185,105,970	493	\$ 29,652,170	\$ 81,408,250	2,662	\$ 113,417,320	\$ 266,514,220
MD 25	1,590	\$ 61,390,460	\$ 135,661,900	497	\$ 27,117,810	\$ 84,556,530	2,087	\$ 88,508,270	\$ 220,218,430
MD 26	1,243	\$ 47,992,660	\$ 106,055,180	426	\$ 23,897,970	\$ 78,763,680	1,669	\$ 71,890,630	\$ 184,818,860
MD 27	2,565	\$ 99,035,550	\$ 218,850,800	582	\$ 33,620,320	\$ 117,650,830	3,147	\$ 132,655,870	\$ 336,501,630
MD 28	2,158	\$ 83,321,130	\$ 184,124,770	655	\$ 33,515,310	\$ 106,969,780	2,813	\$ 116,836,440	\$ 291,094,550
MD 29	1,600	\$ 61,776,560	\$ 136,515,120	515	\$ 30,352,340	\$ 100,247,990	2,115	\$ 92,128,900	\$ 236,763,110
MD 30	2,416	\$ 93,282,610	\$ 206,137,830	939	\$ 52,237,550	\$ 145,896,190	3,355	\$ 145,520,160	\$ 352,034,020
MD 31	2,744	\$ 105,946,800	\$ 234,123,430	565	\$ 29,594,660	\$ 87,747,770	3,309	\$ 135,541,460	\$ 321,871,200
MD 32	2,932	\$ 113,205,550	\$ 250,163,960	1,275	\$ 73,875,660	\$ 211,854,120	4,207	\$ 187,081,210	\$ 462,018,080
MD 33	1,504	\$ 58,050,660	\$ 128,281,550	1,023	\$ 54,349,950	\$ 152,018,890	2,527	\$ 112,400,610	\$ 280,300,440
MD 34	3,151	\$ 121,641,910	\$ 268,806,800	524	\$ 31,637,450	\$ 85,074,240	3,674	\$ 153,279,360	\$ 353,881,040
MD 35	1,344	\$ 51,892,310	\$ 114,672,700	1,019	\$ 57,493,370	\$ 146,845,530	2,363	\$ 109,385,680	\$ 261,518,230
MD 36	1,809	\$ 69,826,820	\$ 154,304,750	1,006	\$ 62,146,540	\$ 203,269,740	2,815	\$ 131,973,360	\$ 357,574,490
MD 37	2,330	\$ 89,962,110	\$ 198,800,140	1,473	\$ 91,588,420	\$ 240,924,070	3,803	\$ 181,550,530	\$ 439,724,210
MD 38	3,411	\$ 131,699,900	\$ 291,033,170	936	\$ 54,220,470	\$ 154,859,400	4,347	\$ 185,920,370	\$ 445,892,570
MD 39	2,146	\$ 82,838,510	\$ 183,058,240	487	\$ 29,684,060	\$ 98,770,080	2,632	\$ 112,522,570	\$ 281,828,320
MD 40	783	\$ 30,212,600	\$ 66,764,430	1,160	\$ 78,521,320	\$ 196,632,900	1,942	\$ 108,733,920	\$ 263,397,330
MD 41	923	\$ 35,637,350	\$ 78,752,160	574	\$ 38,086,730	\$ 94,267,760	1,497	\$ 73,724,080	\$ 173,019,920
MD 42	2,801	\$ 108,147,590	\$ 238,986,780	1,323	\$ 84,107,170	\$ 243,432,010	4,124	\$ 192,254,760	\$ 482,418,790
MD 43	738	\$ 28,494,440	\$ 62,967,600	453	\$ 29,278,210	\$ 71,177,920	1,191	\$ 57,772,650	\$ 134,145,520
MD 44	897	\$ 34,614,180	\$ 76,491,130	539	\$ 31,998,910	\$ 89,820,830	1,435	\$ 66,613,090	\$ 166,311,960
MD 45	786	\$ 30,347,730	\$ 67,063,050	896	\$ 60,366,570	\$ 162,100,210	1,682	\$ 90,714,300	\$ 229,163,260
MD 46	1,689	\$ 65,212,880	\$ 144,108,770	1,744	\$ 113,964,460	\$ 302,276,570	3,433	\$ 179,177,340	\$ 446,385,340
MD 47	1,707	\$ 65,907,870	\$ 145,644,570	420	\$ 23,538,100	\$ 67,709,700	2,127	\$ 89,445,970	\$ 213,354,270
Total	91,682	\$ 3,539,854,800	\$ 7,822,444,300	39,294	\$ 2,358,372,800	\$ 6,751,154,100	130,976	\$ 5,898,227,600	\$ 14,573,598,400

## Appendix D

### Economic Impact of Package Stores by State Delegate District

District	Food Store			Multiplier			Total		
	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output
MD 1A	847	\$ 32,683,660	\$ 72,225,030	254	\$ 16,204,690	\$ 47,913,600	1,101	\$ 48,888,350	\$ 120,138,630
MD 1B	889	\$ 34,305,296	\$ 75,808,552	244	\$ 15,727,590	\$ 46,993,861	1,132	\$ 50,032,886	\$ 122,802,413
MD 1C	721	\$ 27,818,757	\$ 61,474,464	269	\$ 16,589,695	\$ 49,224,786	990	\$ 44,408,452	\$ 110,699,251
MD 2A	1,240	\$ 47,857,529	\$ 105,756,556	692	\$ 40,997,589	\$ 115,475,042	1,931	\$ 88,855,117	\$ 221,231,598
MD 2B	1,564	\$ 60,367,282	\$ 133,400,868	93	\$ 5,523,968	\$ 16,332,259	1,657	\$ 65,891,250	\$ 149,733,127
MD 3A	2,583	\$ 99,730,533	\$ 220,386,595	349	\$ 20,463,237	\$ 57,517,915	2,932	\$ 120,193,770	\$ 277,904,510
MD 3B	1,235	\$ 47,664,477	\$ 105,329,946	404	\$ 22,650,506	\$ 62,316,046	1,639	\$ 70,314,983	\$ 167,645,992
MD 4	1,322	\$ 51,042,882	\$ 112,795,617	744	\$ 42,635,019	\$ 112,539,125	2,066	\$ 93,677,901	\$ 225,334,742
MD 5	2,208	\$ 85,251,652	\$ 188,390,864	572	\$ 31,802,588	\$ 87,182,548	2,780	\$ 117,054,240	\$ 275,573,412
MD 6	2,273	\$ 87,742,020	\$ 193,894,130	630	\$ 39,156,830	\$ 102,477,542	2,903	\$ 126,898,850	\$ 296,371,672
MD 7	1,799	\$ 69,460,019	\$ 153,494,187	501	\$ 28,508,853	\$ 89,494,419	2,300	\$ 97,968,873	\$ 242,988,606
MD 8	2,205	\$ 85,135,821	\$ 188,134,898	719	\$ 37,469,775	\$ 103,682,706	2,924	\$ 122,605,596	\$ 291,817,604
MD 9A	1,148	\$ 44,305,376	\$ 97,906,937	446	\$ 24,318,284	\$ 67,089,488	1,593	\$ 68,623,660	\$ 164,996,425
MD 9B	371	\$ 14,324,440	\$ 31,654,443	184	\$ 10,630,345	\$ 31,918,349	555	\$ 24,954,784	\$ 63,572,792
MD 10	1,033	\$ 39,865,186	\$ 88,094,913	558	\$ 32,165,984	\$ 98,638,430	1,591	\$ 72,031,170	\$ 186,733,343
MD 11	3,366	\$ 129,943,132	\$ 287,151,020	1,352	\$ 89,468,587	\$ 253,661,594	4,717	\$ 219,411,720	\$ 540,812,615
MD 12	1,734	\$ 66,950,347	\$ 147,948,260	1,060	\$ 64,849,313	\$ 178,793,601	2,794	\$ 131,799,659	\$ 326,741,861
MD 13	2,088	\$ 80,618,410	\$ 178,152,230	1,631	\$ 102,927,803	\$ 273,500,780	3,719	\$ 183,546,214	\$ 451,653,010
MD 14	1,494	\$ 57,683,863	\$ 127,470,992	598	\$ 33,182,035	\$ 92,285,821	2,092	\$ 90,865,898	\$ 219,756,814
MD 15	664	\$ 25,617,967	\$ 56,611,113	825	\$ 48,117,323	\$ 153,904,970	1,489	\$ 73,735,290	\$ 210,516,083
MD 16	2,016	\$ 77,819,160	\$ 171,966,389	1,621	\$ 103,409,056	\$ 344,703,042	3,637	\$ 181,228,216	\$ 516,669,431
MD 17	2,606	\$ 100,618,572	\$ 222,349,000	1,136	\$ 67,951,995	\$ 213,243,930	3,742	\$ 168,570,567	\$ 435,592,930
MD 18	2,186	\$ 84,382,919	\$ 186,471,120	1,159	\$ 70,696,217	\$ 207,643,776	3,344	\$ 155,079,137	\$ 394,114,896
MD 19	1,006	\$ 38,842,012	\$ 85,833,881	521	\$ 27,109,436	\$ 84,583,100	1,527	\$ 65,951,448	\$ 170,416,981
MD 20	1,873	\$ 72,317,185	\$ 159,808,011	703	\$ 43,590,378	\$ 121,297,283	2,576	\$ 115,907,564	\$ 281,105,294
MD 21	1,561	\$ 60,270,756	\$ 133,187,563	1,170	\$ 65,925,076	\$ 170,456,114	2,731	\$ 126,195,832	\$ 303,643,677
MD 22	2,189	\$ 84,518,056	\$ 186,769,747	751	\$ 47,557,747	\$ 135,530,156	2,940	\$ 132,075,803	\$ 322,299,903
MD 23A	145	\$ 5,579,196	\$ 12,329,022	126	\$ 7,315,366	\$ 20,162,667	270	\$ 12,894,561	\$ 32,491,688
MD 23B	1,889	\$ 72,934,951	\$ 161,173,162	459	\$ 26,581,958	\$ 88,315,982	2,348	\$ 99,516,908	\$ 249,489,144
MD 24	2,170	\$ 83,765,154	\$ 185,105,969	493	\$ 29,652,178	\$ 81,408,260	2,662	\$ 113,417,332	\$ 266,514,229
MD 25	1,590	\$ 61,390,456	\$ 135,661,899	497	\$ 27,117,809	\$ 84,556,532	2,087	\$ 88,508,265	\$ 220,218,431
MD 26	1,243	\$ 47,992,665	\$ 106,055,183	426	\$ 23,897,973	\$ 78,763,684	1,669	\$ 71,890,638	\$ 184,818,867
MD 27A	1,216	\$ 46,930,880	\$ 103,708,829	195	\$ 10,902,114	\$ 39,980,716	1,411	\$ 57,832,994	\$ 143,689,545
MD 27B	475	\$ 18,320,611	\$ 40,485,265	200	\$ 12,038,548	\$ 43,669,278	675	\$ 30,359,159	\$ 84,154,542
MD 27C	875	\$ 33,784,056	\$ 74,656,706	186	\$ 10,679,663	\$ 34,000,863	1,061	\$ 44,463,719	\$ 108,657,569
MD 28	2,158	\$ 83,321,135	\$ 184,124,767	655	\$ 33,515,315	\$ 106,969,784	2,813	\$ 116,836,449	\$ 291,094,551
MD 29A	373	\$ 14,401,660	\$ 31,825,087	106	\$ 7,314,398	\$ 26,842,900	479	\$ 21,716,058	\$ 58,667,987
MD 29B	870	\$ 33,591,004	\$ 74,230,096	198	\$ 11,057,951	\$ 29,925,651	1,068	\$ 44,648,955	\$ 104,155,747
MD 29C	357	\$ 13,783,895	\$ 30,459,936	210	\$ 11,979,996	\$ 43,479,435	567	\$ 25,763,891	\$ 73,939,371
MD 30A	1,964	\$ 75,830,727	\$ 167,572,308	741	\$ 42,374,029	\$ 118,304,863	2,705	\$ 118,204,756	\$ 285,877,171
MD 30B	452	\$ 17,451,878	\$ 38,565,521	198	\$ 9,863,522	\$ 27,591,326	650	\$ 27,315,400	\$ 66,156,847
MD 31A	1,272	\$ 49,093,060	\$ 108,486,859	172	\$ 8,883,745	\$ 26,382,526	1,443	\$ 57,976,805	\$ 134,869,385
MD 31B	1,473	\$ 56,853,740	\$ 125,636,570	393	\$ 20,710,887	\$ 61,365,159	1,866	\$ 77,564,627	\$ 187,001,729
MD 32	2,932	\$ 113,205,546	\$ 250,163,955	1,275	\$ 73,875,700	\$ 211,854,225	4,207	\$ 187,081,246	\$ 462,018,180
MD 33	1,504	\$ 58,050,661	\$ 128,281,551	1,023	\$ 54,349,950	\$ 152,018,894	2,527	\$ 112,400,611	\$ 280,300,445
MD 34A	1,345	\$ 51,911,615	\$ 114,715,361	337	\$ 20,050,822	\$ 53,564,044	1,682	\$ 71,962,437	\$ 168,279,404
MD 34B	1,806	\$ 69,730,292	\$ 154,091,440	186	\$ 11,586,633	\$ 31,510,201	1,992	\$ 81,316,924	\$ 185,601,641
MD 35A	549	\$ 21,177,777	\$ 46,799,089	538	\$ 31,985,325	\$ 75,912,540	1,087	\$ 53,163,102	\$ 122,711,629
MD 35B	796	\$ 30,714,533	\$ 67,873,611	481	\$ 25,508,097	\$ 70,933,205	1,276	\$ 56,222,630	\$ 138,806,816
MD 36	1,809	\$ 69,826,818	\$ 154,304,745	1,006	\$ 62,146,539	\$ 203,269,740	2,815	\$ 131,973,356	\$ 357,574,486
MD 37A	976	\$ 37,664,396	\$ 83,231,562	205	\$ 14,095,322	\$ 38,211,847	1,180	\$ 51,759,719	\$ 121,443,409
MD 37B	1,355	\$ 52,297,719	\$ 115,568,580	1,268	\$ 77,493,058	\$ 202,712,140	2,623	\$ 129,790,777	\$ 318,280,721
MD 38A	706	\$ 27,258,907	\$ 60,237,296	181	\$ 11,662,480	\$ 32,279,927	887	\$ 38,921,387	\$ 92,517,223
MD 38B	2,025	\$ 78,185,958	\$ 172,776,947	224	\$ 14,414,848	\$ 38,953,186	2,249	\$ 92,600,806	\$ 211,730,133
MD 38C	680	\$ 26,255,038	\$ 58,018,926	531	\$ 28,143,145	\$ 83,626,281	1,211	\$ 54,398,183	\$ 141,645,206
MD 39	2,146	\$ 82,838,505	\$ 183,058,242	487	\$ 29,684,064	\$ 98,770,078	2,632	\$ 112,522,569	\$ 281,828,320
MD 40	783	\$ 30,212,599	\$ 66,764,425	1,160	\$ 78,521,320	\$ 196,632,903	1,942	\$ 108,733,919	\$ 263,397,329
MD 41	923	\$ 35,637,353	\$ 78,752,159	574	\$ 38,086,729	\$ 94,267,757	1,497	\$ 73,724,082	\$ 173,019,916
MD 42A	570	\$ 22,007,899	\$ 48,633,511	260	\$ 16,867,180	\$ 44,470,309	830	\$ 38,875,079	\$ 93,103,820
MD 42B	2,231	\$ 86,139,690	\$ 190,353,269	1,063	\$ 67,239,979	\$ 198,961,672	3,294	\$ 153,379,669	\$ 389,314,940
MD 43	738	\$ 28,494,438	\$ 62,967,599	453	\$ 29,278,212	\$ 71,177,926	1,191	\$ 57,772,650	\$ 134,145,525
MD 44A	150	\$ 5,791,552	\$ 12,798,292	147	\$ 8,721,777	\$ 22,684,527	297	\$ 14,513,330	\$ 35,482,819
MD 44B	747	\$ 28,822,626	\$ 63,692,835	392	\$ 23,277,128	\$ 67,136,283	1,138	\$ 52,099,754	\$ 130,829,118
MD 45	786	\$ 30,347,735	\$ 67,063,052	896	\$ 60,366,572	\$ 162,100,212	1,682	\$ 90,714,307	\$ 229,163,264
MD 46	1,689	\$ 65,212,881	\$ 144,108,772	1,744	\$ 113,964,459	\$ 302,276,570	3,433	\$ 179,177,340	\$ 446,385,342
MD 47A	1,252	\$ 48,340,158	\$ 106,823,081	351	\$ 20,043,583	\$ 56,821,234	1,603	\$ 68,383,741	\$ 163,644,315
MD 47B	455	\$ 17,567,709	\$ 38,821,487	69	\$ 3,494,524	\$ 10,888,484	524	\$ 21,062,234	\$ 49,709,971
Total	91,682	\$ 3,539,854,783	\$ 7,822,444,295	39,294	\$ 2,358,372,815	\$ 6,751,154,093	130,976	\$ 5,898,227,597	\$ 14,573,598,388

**Appendix E**  
**Economic Impact of All Current Alcohol Retailers by State Senate District**

District	Package Store			Multiplier			Total		
	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output
MD 1	160	\$ 6,641,050	\$ 13,877,040	68	\$ 4,257,910	\$ 12,912,720	228	\$ 10,898,960	\$ 26,789,760
MD 2	166	\$ 6,890,090	\$ 14,397,430	70	\$ 4,089,530	\$ 11,725,640	236	\$ 10,979,620	\$ 26,123,070
MD 3	248	\$ 10,272,870	\$ 21,466,050	67	\$ 3,792,430	\$ 10,703,970	315	\$ 14,065,300	\$ 32,170,020
MD 4	197	\$ 8,176,790	\$ 17,086,110	67	\$ 3,745,170	\$ 10,020,590	264	\$ 11,921,960	\$ 27,106,700
MD 5	138	\$ 5,727,900	\$ 11,968,950	51	\$ 2,756,930	\$ 7,695,400	189	\$ 8,484,830	\$ 19,664,350
MD 6	123	\$ 5,105,310	\$ 10,667,970	55	\$ 3,382,230	\$ 9,019,180	178	\$ 8,487,540	\$ 19,687,150
MD 7	141	\$ 5,831,670	\$ 12,185,780	45	\$ 2,515,870	\$ 8,044,540	185	\$ 8,347,540	\$ 20,230,320
MD 8	107	\$ 4,441,200	\$ 9,280,270	65	\$ 3,332,600	\$ 9,295,360	172	\$ 7,773,800	\$ 18,575,630
MD 9	138	\$ 5,727,900	\$ 11,968,950	56	\$ 3,037,390	\$ 8,789,070	194	\$ 8,765,290	\$ 20,758,020
MD 10	100	\$ 4,150,660	\$ 8,673,150	50	\$ 2,809,350	\$ 8,766,580	150	\$ 6,960,010	\$ 17,439,730
MD 11	204	\$ 8,467,340	\$ 17,693,230	119	\$ 7,639,860	\$ 22,236,620	323	\$ 16,107,200	\$ 39,929,850
MD 12	208	\$ 8,633,360	\$ 18,040,150	94	\$ 5,652,010	\$ 15,797,170	302	\$ 14,285,370	\$ 33,837,320
MD 13	181	\$ 7,512,690	\$ 15,698,400	145	\$ 9,032,130	\$ 24,305,240	326	\$ 16,544,820	\$ 40,003,640
MD 14	126	\$ 5,229,830	\$ 10,928,170	53	\$ 2,865,070	\$ 8,128,830	179	\$ 8,094,900	\$ 19,057,000
MD 15	55	\$ 2,262,110	\$ 4,726,870	74	\$ 4,281,920	\$ 13,838,330	129	\$ 6,544,030	\$ 18,565,200
MD 16	130	\$ 5,395,850	\$ 11,275,100	145	\$ 9,136,800	\$ 31,040,450	275	\$ 14,532,650	\$ 42,315,550
MD 17	161	\$ 6,661,800	\$ 13,920,410	102	\$ 6,041,960	\$ 19,176,000	262	\$ 12,703,760	\$ 33,096,410
MD 18	125	\$ 5,167,570	\$ 10,798,070	104	\$ 6,255,220	\$ 18,618,020	228	\$ 11,422,790	\$ 29,416,090
MD 19	61	\$ 2,531,900	\$ 5,290,620	47	\$ 2,424,670	\$ 7,674,230	108	\$ 4,956,570	\$ 12,964,850
MD 20	100	\$ 4,150,660	\$ 8,673,150	63	\$ 3,891,220	\$ 10,924,340	163	\$ 8,041,880	\$ 19,597,490
MD 21	193	\$ 8,010,760	\$ 16,739,180	103	\$ 5,681,340	\$ 14,916,910	296	\$ 13,692,100	\$ 31,656,090
MD 22	157	\$ 6,516,530	\$ 13,616,850	66	\$ 4,095,400	\$ 11,901,580	223	\$ 10,611,930	\$ 25,518,430
MD 23	102	\$ 4,233,670	\$ 8,846,610	52	\$ 2,945,880	\$ 9,674,290	154	\$ 7,179,550	\$ 18,520,900
MD 24	169	\$ 6,993,850	\$ 14,614,260	44	\$ 2,576,350	\$ 7,174,410	212	\$ 9,570,200	\$ 21,788,670
MD 25	130	\$ 5,395,850	\$ 11,275,100	44	\$ 2,392,360	\$ 7,551,320	174	\$ 7,788,210	\$ 18,826,420
MD 26	128	\$ 5,312,840	\$ 11,101,630	38	\$ 2,112,540	\$ 7,036,920	166	\$ 7,425,380	\$ 18,138,550
MD 27	203	\$ 8,425,830	\$ 17,606,500	53	\$ 3,019,930	\$ 10,715,680	256	\$ 11,445,760	\$ 28,322,180
MD 28	189	\$ 7,844,740	\$ 16,392,250	59	\$ 3,009,170	\$ 9,704,730	248	\$ 10,853,910	\$ 26,096,980
MD 29	216	\$ 8,965,420	\$ 18,734,000	46	\$ 2,691,050	\$ 9,079,180	262	\$ 11,656,470	\$ 27,813,180
MD 30	245	\$ 10,169,110	\$ 21,249,220	83	\$ 4,479,490	\$ 12,784,440	328	\$ 14,648,600	\$ 34,033,660
MD 31	118	\$ 4,897,770	\$ 10,234,320	50	\$ 2,601,600	\$ 7,840,410	168	\$ 7,499,370	\$ 18,074,730
MD 32	164	\$ 6,807,070	\$ 14,223,970	114	\$ 6,487,900	\$ 18,819,160	278	\$ 13,294,970	\$ 33,043,130
MD 33	145	\$ 6,018,450	\$ 12,576,070	91	\$ 4,708,910	\$ 13,423,600	236	\$ 10,727,360	\$ 25,999,670
MD 34	164	\$ 6,807,070	\$ 14,223,970	47	\$ 2,800,590	\$ 7,599,320	211	\$ 9,607,660	\$ 21,823,290
MD 35	194	\$ 8,052,270	\$ 16,825,910	88	\$ 4,917,910	\$ 12,691,390	282	\$ 12,970,180	\$ 29,517,300
MD 36	284	\$ 11,787,860	\$ 24,631,750	87	\$ 5,265,060	\$ 17,920,250	371	\$ 17,052,920	\$ 42,552,000
MD 37	362	\$ 15,004,620	\$ 31,353,440	128	\$ 7,773,800	\$ 20,901,450	490	\$ 22,778,420	\$ 52,254,890
MD 38	536	\$ 22,226,760	\$ 46,444,720	84	\$ 4,757,210	\$ 13,837,160	619	\$ 26,983,970	\$ 60,281,880
MD 39	101	\$ 4,171,410	\$ 8,716,520	44	\$ 2,641,870	\$ 8,842,600	144	\$ 6,813,280	\$ 17,559,120
MD 40	262	\$ 10,853,960	\$ 22,680,290	101	\$ 6,732,220	\$ 17,131,670	363	\$ 17,586,180	\$ 39,811,960
MD 41	102	\$ 4,212,920	\$ 8,803,250	51	\$ 3,295,130	\$ 8,289,390	152	\$ 7,508,050	\$ 17,092,640
MD 42	209	\$ 8,674,870	\$ 18,126,880	117	\$ 7,269,310	\$ 21,459,090	326	\$ 15,944,180	\$ 39,585,970
MD 43	134	\$ 5,541,120	\$ 11,578,660	41	\$ 2,583,820	\$ 6,349,010	174	\$ 8,124,940	\$ 17,927,670
MD 44	131	\$ 5,437,360	\$ 11,361,830	48	\$ 2,788,690	\$ 7,909,020	179	\$ 8,226,050	\$ 19,270,850
MD 45	141	\$ 5,852,420	\$ 12,229,140	79	\$ 5,274,700	\$ 14,364,160	220	\$ 11,127,120	\$ 26,593,300
MD 46	169	\$ 7,014,610	\$ 14,657,620	150	\$ 9,618,430	\$ 26,132,950	319	\$ 16,633,040	\$ 40,790,570
MD 47	145	\$ 6,018,450	\$ 12,576,070	38	\$ 2,088,390	\$ 6,054,750	183	\$ 8,106,840	\$ 18,630,820
<b>Total</b>	<b>7,956</b>	<b>\$ 330,226,140</b>	<b>\$ 690,035,880</b>	<b>3,485</b>	<b>\$ 205,549,320</b>	<b>\$ 598,817,120</b>	<b>11,441</b>	<b>\$ 535,775,460</b>	<b>\$ 1,288,853,000</b>

**Appendix F**  
**Economic Impact of All Current Alcohol Retailers by State Delegate District**

District	Package Store			Multiplier			Total		
	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output
MD 1A	79	\$ 3,279,020	\$ 6,851,790	22	\$ 1,364,590	\$ 4,193,110	101	\$ 4,643,610	\$ 11,044,900
MD 1B	38	\$ 1,577,249	\$ 3,295,797	22	\$ 1,412,135	\$ 4,275,195	60	\$ 2,989,384	\$ 7,570,993
MD 1C	43	\$ 1,784,782	\$ 3,729,455	24	\$ 1,481,179	\$ 4,444,414	67	\$ 3,265,960	\$ 8,173,868
MD 2A	85	\$ 3,528,057	\$ 7,372,178	62	\$ 3,606,713	\$ 10,275,446	147	\$ 7,134,770	\$ 17,647,623
MD 2B	81	\$ 3,362,031	\$ 7,025,252	8	\$ 482,815	\$ 1,450,198	89	\$ 3,844,846	\$ 8,475,450
MD 3A	174	\$ 7,201,387	\$ 15,047,916	31	\$ 1,797,349	\$ 5,138,030	205	\$ 8,998,736	\$ 20,185,945
MD 3B	74	\$ 3,071,485	\$ 6,418,131	36	\$ 1,995,076	\$ 5,565,937	110	\$ 5,066,561	\$ 11,984,069
MD 4	197	\$ 8,176,791	\$ 17,086,106	67	\$ 3,745,172	\$ 10,020,588	264	\$ 11,921,963	\$ 27,106,694
MD 5	138	\$ 5,727,904	\$ 11,968,947	51	\$ 2,756,930	\$ 7,695,399	189	\$ 8,484,835	\$ 19,664,347
MD 6	123	\$ 5,105,306	\$ 10,667,975	55	\$ 3,382,232	\$ 9,019,180	178	\$ 8,487,538	\$ 19,687,155
MD 7	141	\$ 5,831,671	\$ 12,185,776	45	\$ 2,515,868	\$ 8,044,536	185	\$ 8,347,539	\$ 20,230,313
MD 8	107	\$ 4,441,201	\$ 9,280,271	65	\$ 3,332,602	\$ 9,295,359	172	\$ 7,773,804	\$ 18,575,630
MD 9A	108	\$ 4,482,708	\$ 9,367,002	40	\$ 2,109,047	\$ 5,938,507	148	\$ 6,591,755	\$ 15,305,509
MD 9B	30	\$ 1,245,197	\$ 2,601,945	16	\$ 928,342	\$ 2,850,556	46	\$ 2,173,539	\$ 5,452,501
MD 10	100	\$ 4,150,655	\$ 8,673,150	50	\$ 2,809,349	\$ 8,766,584	150	\$ 6,960,005	\$ 17,439,734
MD 11	204	\$ 8,467,337	\$ 17,693,227	119	\$ 7,639,863	\$ 22,236,616	323	\$ 16,107,200	\$ 39,929,842
MD 12	208	\$ 8,633,363	\$ 18,040,153	94	\$ 5,652,013	\$ 15,797,175	302	\$ 14,285,376	\$ 33,837,328
MD 13	181	\$ 7,512,686	\$ 15,698,402	145	\$ 9,032,126	\$ 24,305,240	326	\$ 16,544,812	\$ 40,003,642
MD 14	126	\$ 5,229,826	\$ 10,928,169	53	\$ 2,865,070	\$ 8,128,830	179	\$ 8,094,896	\$ 19,056,999
MD 15	55	\$ 2,262,107	\$ 4,726,867	74	\$ 4,281,923	\$ 13,838,333	129	\$ 6,544,030	\$ 18,565,200
MD 16	130	\$ 5,395,852	\$ 11,275,095	145	\$ 9,136,800	\$ 31,040,447	275	\$ 14,532,652	\$ 42,315,542
MD 17	161	\$ 6,661,802	\$ 13,920,406	102	\$ 6,041,962	\$ 19,175,997	262	\$ 12,703,764	\$ 33,096,404
MD 18	125	\$ 5,167,566	\$ 10,798,072	104	\$ 6,255,215	\$ 18,618,025	228	\$ 11,422,781	\$ 29,416,097
MD 19	61	\$ 2,531,900	\$ 5,290,622	47	\$ 2,424,673	\$ 7,674,227	108	\$ 4,956,572	\$ 12,964,848
MD 20	100	\$ 4,150,655	\$ 8,673,150	63	\$ 3,891,223	\$ 10,924,342	163	\$ 8,041,878	\$ 19,597,492
MD 21	193	\$ 8,010,765	\$ 16,739,180	103	\$ 5,681,342	\$ 14,916,906	296	\$ 13,692,107	\$ 31,656,086
MD 22	157	\$ 6,516,529	\$ 13,616,846	66	\$ 4,095,402	\$ 11,901,580	223	\$ 10,611,931	\$ 25,518,426
MD 23A	21	\$ 871,638	\$ 1,821,362	11	\$ 614,218	\$ 1,756,335	32	\$ 1,485,856	\$ 3,577,696
MD 23B	81	\$ 3,362,031	\$ 7,025,252	41	\$ 2,331,659	\$ 7,917,956	122	\$ 5,693,690	\$ 14,943,208
MD 24	169	\$ 6,993,854	\$ 14,614,258	44	\$ 2,576,345	\$ 7,174,406	212	\$ 9,570,200	\$ 21,788,665
MD 25	130	\$ 5,395,852	\$ 11,275,095	44	\$ 2,392,364	\$ 7,551,316	174	\$ 7,788,216	\$ 18,826,411
MD 26	128	\$ 5,312,839	\$ 11,101,632	38	\$ 2,112,543	\$ 7,036,916	166	\$ 7,425,381	\$ 18,138,548
MD 27A	44	\$ 1,826,288	\$ 3,816,186	18	\$ 980,164	\$ 3,666,778	62	\$ 2,806,453	\$ 7,482,964
MD 27B	56	\$ 2,324,367	\$ 4,856,964	18	\$ 1,077,076	\$ 3,960,558	74	\$ 3,401,443	\$ 8,817,522
MD 27C	103	\$ 4,275,175	\$ 8,933,345	17	\$ 962,689	\$ 3,088,346	120	\$ 5,237,864	\$ 12,021,691
MD 28	189	\$ 7,844,739	\$ 16,392,254	59	\$ 3,009,166	\$ 9,704,735	248	\$ 10,853,904	\$ 26,096,989
MD 29A	93	\$ 3,860,109	\$ 8,066,030	10	\$ 650,584	\$ 2,456,561	103	\$ 4,510,694	\$ 10,522,591
MD 29B	59	\$ 2,448,887	\$ 5,117,159	17	\$ 953,009	\$ 2,622,330	76	\$ 3,401,896	\$ 7,739,489
MD 29C	64	\$ 2,656,419	\$ 5,550,816	19	\$ 1,087,456	\$ 4,000,284	83	\$ 3,743,876	\$ 9,551,100
MD 30A	145	\$ 6,018,450	\$ 12,576,068	66	\$ 3,608,210	\$ 10,336,239	211	\$ 9,626,660	\$ 22,912,307
MD 30B	100	\$ 4,150,655	\$ 8,673,150	18	\$ 871,277	\$ 2,448,199	118	\$ 5,021,932	\$ 11,121,349
MD 31A	33	\$ 1,369,716	\$ 2,862,140	15	\$ 794,194	\$ 2,381,338	48	\$ 2,163,911	\$ 5,243,478
MD 31B	85	\$ 3,528,057	\$ 7,372,178	35	\$ 1,807,400	\$ 5,459,065	120	\$ 5,335,457	\$ 12,831,243
MD 32	164	\$ 6,807,075	\$ 14,223,967	114	\$ 6,487,906	\$ 18,819,173	278	\$ 13,294,981	\$ 33,043,140
MD 33	145	\$ 6,018,450	\$ 12,576,068	91	\$ 4,708,914	\$ 13,423,597	236	\$ 10,727,364	\$ 25,999,665
MD 34A	106	\$ 4,399,695	\$ 9,193,539	30	\$ 1,764,781	\$ 4,763,685	136	\$ 6,164,476	\$ 13,957,225
MD 34B	58	\$ 2,407,380	\$ 5,030,427	17	\$ 1,035,811	\$ 2,835,637	75	\$ 3,443,191	\$ 7,866,065
MD 35A	94	\$ 3,901,616	\$ 8,152,761	45	\$ 2,655,952	\$ 6,351,253	139	\$ 6,557,568	\$ 14,504,014
MD 35B	100	\$ 4,150,655	\$ 8,673,150	43	\$ 2,261,962	\$ 6,340,160	143	\$ 6,412,618	\$ 15,013,311
MD 36	284	\$ 11,787,861	\$ 24,631,747	87	\$ 5,265,061	\$ 17,920,252	371	\$ 17,052,923	\$ 42,551,999
MD 37A	124	\$ 5,146,813	\$ 10,754,706	18	\$ 1,242,301	\$ 3,414,406	142	\$ 6,389,114	\$ 14,169,112
MD 37B	238	\$ 9,857,806	\$ 20,598,732	110	\$ 6,531,496	\$ 17,487,037	347	\$ 16,389,302	\$ 38,085,769
MD 38A	129	\$ 5,333,592	\$ 11,144,998	16	\$ 1,032,076	\$ 2,901,119	145	\$ 6,365,668	\$ 14,046,117
MD 38B	130	\$ 5,395,852	\$ 11,275,095	20	\$ 1,281,631	\$ 3,495,116	150	\$ 6,677,483	\$ 14,770,212
MD 38C	277	\$ 11,497,315	\$ 24,024,626	47	\$ 2,443,505	\$ 7,440,927	324	\$ 13,940,821	\$ 31,465,553
MD 39	101	\$ 4,171,409	\$ 8,716,516	44	\$ 2,641,872	\$ 8,842,598	144	\$ 6,813,280	\$ 17,559,114
MD 40	262	\$ 10,853,964	\$ 22,680,288	101	\$ 6,732,216	\$ 17,131,667	363	\$ 17,586,179	\$ 39,811,956
MD 41	102	\$ 4,212,915	\$ 8,803,248	51	\$ 3,295,129	\$ 8,289,389	152	\$ 7,508,044	\$ 17,092,637
MD 42A	25	\$ 1,037,664	\$ 2,168,288	23	\$ 1,472,658	\$ 3,937,201	48	\$ 2,510,322	\$ 6,105,489
MD 42B	184	\$ 7,637,206	\$ 15,958,597	94	\$ 5,796,654	\$ 17,521,884	278	\$ 13,433,860	\$ 33,480,481
MD 43	134	\$ 5,541,125	\$ 11,578,656	41	\$ 2,583,821	\$ 6,349,007	174	\$ 8,124,946	\$ 17,927,662
MD 44A	64	\$ 2,656,419	\$ 5,550,816	13	\$ 743,503	\$ 1,974,825	77	\$ 3,399,923	\$ 7,525,642
MD 44B	67	\$ 2,780,939	\$ 5,811,011	35	\$ 2,045,187	\$ 5,934,190	102	\$ 4,826,126	\$ 11,745,201
MD 45	141	\$ 5,852,424	\$ 12,229,142	79	\$ 5,274,703	\$ 14,364,155	220	\$ 11,127,127	\$ 26,593,297
MD 46	169	\$ 7,014,607	\$ 14,657,624	150	\$ 9,618,426	\$ 26,132,946	319	\$ 16,633,034	\$ 40,790,570
MD 47A	118	\$ 4,897,773	\$ 10,234,317	31	\$ 1,777,776	\$ 5,075,178	149	\$ 6,675,550	\$ 15,309,495
MD 47B	27	\$ 1,120,677	\$ 2,341,751	6	\$ 310,618	\$ 979,573	33	\$ 1,431,295	\$ 3,321,323
Total	7,956	\$ 330,226,138	\$ 690,035,843	3,485	\$ 205,549,331	\$ 598,817,095	11,441	\$ 535,775,468	\$ 1,288,852,938

## Appendix G

### Economic Impact of Proposed Change in Laws by State Senate District

District	Package Store			Multiplier			Total		
	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output
MD 1	22	\$ 791,410	\$ 1,803,100	6	\$ 382,360	\$ 1,117,560	28	\$ 1,173,770	\$ 2,920,660
MD 2	13	\$ 472,060	\$ 1,075,520	6	\$ 365,830	\$ 1,027,720	19	\$ 837,890	\$ 2,103,240
MD 3	32	\$ 1,146,740	\$ 2,612,670	6	\$ 337,890	\$ 928,770	38	\$ 1,484,630	\$ 3,541,440
MD 4	3	\$ 120,420	\$ 274,360	6	\$ 334,580	\$ 874,980	9	\$ 455,000	\$ 1,149,340
MD 5	16	\$ 561,200	\$ 1,278,610	5	\$ 252,470	\$ 683,480	20	\$ 813,670	\$ 1,962,090
MD 6	20	\$ 714,630	\$ 1,628,160	5	\$ 310,020	\$ 801,110	25	\$ 1,024,650	\$ 2,429,270
MD 7	17	\$ 598,200	\$ 1,362,900	4	\$ 222,450	\$ 688,930	21	\$ 820,650	\$ 2,051,830
MD 8	18	\$ 628,790	\$ 1,432,590	6	\$ 291,120	\$ 801,990	23	\$ 919,910	\$ 2,234,580
MD 9	8	\$ 282,150	\$ 642,820	5	\$ 276,520	\$ 772,180	13	\$ 558,670	\$ 1,415,000
MD 10	4	\$ 140,040	\$ 319,060	4	\$ 253,630	\$ 768,490	8	\$ 393,670	\$ 1,087,550
MD 11	29	\$ 1,037,800	\$ 2,364,450	11	\$ 719,280	\$ 2,001,230	40	\$ 1,757,080	\$ 4,365,680
MD 12	16	\$ 567,250	\$ 1,292,390	8	\$ 510,950	\$ 1,397,730	24	\$ 1,078,200	\$ 2,690,120
MD 13	6	\$ 231,050	\$ 526,420	13	\$ 802,120	\$ 2,120,030	19	\$ 1,033,170	\$ 2,646,450
MD 14	21	\$ 761,990	\$ 1,736,070	5	\$ 263,580	\$ 722,930	26	\$ 1,025,570	\$ 2,459,000
MD 15	9	\$ 313,410	\$ 714,060	6	\$ 373,290	\$ 1,189,120	15	\$ 686,700	\$ 1,903,180
MD 16	30	\$ 1,060,060	\$ 2,415,160	13	\$ 808,850	\$ 2,662,940	43	\$ 1,868,910	\$ 5,078,100
MD 17	33	\$ 1,174,140	\$ 2,675,080	9	\$ 527,610	\$ 1,645,880	42	\$ 1,701,750	\$ 4,320,960
MD 18	24	\$ 838,950	\$ 1,911,420	9	\$ 553,280	\$ 1,610,030	33	\$ 1,392,230	\$ 3,521,450
MD 19	16	\$ 568,170	\$ 1,294,470	4	\$ 209,880	\$ 648,930	20	\$ 778,050	\$ 1,943,400
MD 20	28	\$ 978,900	\$ 2,230,260	5	\$ 339,740	\$ 938,090	33	\$ 1,318,640	\$ 3,168,350
MD 21	9	\$ 329,970	\$ 751,780	9	\$ 521,380	\$ 1,335,770	19	\$ 851,350	\$ 2,087,550
MD 22	22	\$ 771,230	\$ 1,757,130	6	\$ 379,270	\$ 1,067,960	28	\$ 1,150,500	\$ 2,825,090
MD 23	17	\$ 608,100	\$ 1,385,450	5	\$ 268,510	\$ 844,700	22	\$ 876,610	\$ 2,230,150
MD 24	16	\$ 575,510	\$ 1,311,210	4	\$ 234,330	\$ 638,040	20	\$ 809,840	\$ 1,949,250
MD 25	7	\$ 237,490	\$ 541,080	4	\$ 212,160	\$ 656,990	11	\$ 449,650	\$ 1,198,070
MD 26	7	\$ 242,970	\$ 553,570	3	\$ 187,300	\$ 614,000	10	\$ 430,270	\$ 1,167,570
MD 27	21	\$ 745,790	\$ 1,699,160	5	\$ 259,710	\$ 899,450	26	\$ 1,005,500	\$ 2,598,610
MD 28	17	\$ 597,300	\$ 1,360,850	5	\$ 259,040	\$ 820,570	22	\$ 856,340	\$ 2,181,420
MD 29	9	\$ 309,190	\$ 704,430	4	\$ 236,250	\$ 767,310	13	\$ 545,440	\$ 1,471,740
MD 30	14	\$ 493,220	\$ 1,123,710	7	\$ 417,920	\$ 1,149,920	21	\$ 911,140	\$ 2,273,630
MD 31	21	\$ 730,760	\$ 1,664,930	4	\$ 231,780	\$ 679,750	25	\$ 962,540	\$ 2,344,680
MD 32	24	\$ 869,580	\$ 1,981,200	10	\$ 580,370	\$ 1,651,580	34	\$ 1,449,950	\$ 3,632,780
MD 33	16	\$ 556,610	\$ 1,268,160	8	\$ 431,000	\$ 1,189,930	24	\$ 987,610	\$ 2,458,090
MD 34	29	\$ 1,025,510	\$ 2,336,450	4	\$ 246,000	\$ 658,110	33	\$ 1,271,510	\$ 2,994,560
MD 35	12	\$ 416,610	\$ 949,170	8	\$ 455,940	\$ 1,157,570	20	\$ 872,550	\$ 2,106,740
MD 36	13	\$ 464,920	\$ 1,059,240	8	\$ 496,890	\$ 1,582,000	21	\$ 961,810	\$ 2,641,240
MD 37	23	\$ 834,200	\$ 1,900,590	12	\$ 734,690	\$ 1,904,590	35	\$ 1,568,890	\$ 3,805,180
MD 38	31	\$ 1,105,120	\$ 2,517,840	7	\$ 427,510	\$ 1,202,900	38	\$ 1,532,630	\$ 3,720,740
MD 39	28	\$ 992,520	\$ 2,261,300	4	\$ 230,040	\$ 763,950	32	\$ 1,222,560	\$ 3,025,250
MD 40	1	\$ 51,200	\$ 116,650	9	\$ 627,930	\$ 1,554,560	11	\$ 679,130	\$ 1,671,210
MD 41	8	\$ 292,810	\$ 667,130	5	\$ 303,350	\$ 740,560	13	\$ 596,160	\$ 1,407,690
MD 42	18	\$ 629,100	\$ 1,433,300	10	\$ 670,850	\$ 1,917,870	28	\$ 1,299,950	\$ 3,351,170
MD 43	2	\$ 70,060	\$ 159,610	4	\$ 229,010	\$ 552,840	6	\$ 299,070	\$ 712,450
MD 44	1	\$ 41,100	\$ 93,640	4	\$ 253,400	\$ 705,860	5	\$ 294,500	\$ 799,500
MD 45	3	\$ 90,810	\$ 206,890	7	\$ 475,970	\$ 1,267,140	10	\$ 566,780	\$ 1,474,030
MD 46	18	\$ 633,360	\$ 1,443,000	14	\$ 917,210	\$ 2,396,360	32	\$ 1,550,570	\$ 3,839,360
MD 47	9	\$ 315,420	\$ 718,640	3	\$ 183,310	\$ 525,200	12	\$ 498,730	\$ 1,243,840
Total	760	\$ 27,017,820	\$ 61,555,680	310	\$ 18,606,570	\$ 52,647,600	1,069	\$ 45,624,390	\$ 114,203,280

## Appendix H

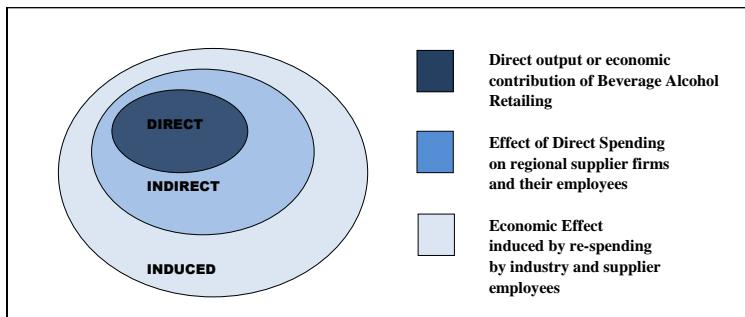
### Economic Impact of Proposed Change in Laws by State Delegate District

District	Package Store			Multiplier			Total		
	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output
MD 1A	7 \$	257,210 \$	586,010	2 \$	131,440 \$	378,310	9 \$	388,650 \$	964,320
MD 1B	8 \$	290,536 \$	661,939	2 \$	121,821 \$	359,814	10 \$	412,357 \$	1,021,753
MD 1C	7 \$	243,666 \$	555,154	2 \$	129,090 \$	379,438	9 \$	372,756 \$	934,592
MD 2A	5 \$	186,377 \$	424,631	5 \$	322,139 \$	900,015	11 \$	508,516 \$	1,324,646
MD 2B	8 \$	285,684 \$	650,886	1 \$	43,691 \$	127,709	9 \$	329,375 \$	778,595
MD 3A	21 \$	757,714 \$	1,726,329	3 \$	160,676 \$	446,339	24 \$	918,391 \$	2,172,669
MD 3B	11 \$	389,030 \$	886,341	3 \$	177,214 \$	482,427	14 \$	566,244 \$	1,368,768
MD 4	3 \$	120,422 \$	274,363	6 \$	334,579 \$	874,977	9 \$	455,002 \$	1,149,340
MD 5	16 \$	561,205 \$	1,278,614	5 \$	252,474 \$	683,481	20 \$	813,679 \$	1,962,095
MD 6	20 \$	714,626 \$	1,628,161	5 \$	310,021 \$	801,105	25 \$	1,024,648 \$	2,429,266
MD 7	17 \$	598,197 \$	1,362,896	4 \$	222,452 \$	688,926	21 \$	820,649 \$	2,051,822
MD 8	18 \$	628,787 \$	1,432,590	6 \$	291,119 \$	801,990	23 \$	919,906 \$	2,234,580
MD 9A	5 \$	164,776 \$	375,415	4 \$	192,661 \$	524,294	8 \$	357,437 \$	899,710
MD 9B	3 \$	117,370 \$	267,408	1 \$	83,856 \$	247,882	5 \$	201,225 \$	515,290
MD 10	4 \$	140,042 \$	319,064	4 \$	253,632 \$	768,494	8 \$	393,674 \$	1,087,557
MD 11	29 \$	1,037,797 \$	2,364,452	11 \$	719,283 \$	2,001,226	40 \$	1,757,080 \$	4,365,679
MD 12	16 \$	567,251 \$	1,292,390	8 \$	510,951 \$	1,397,726	24 \$	1,078,202 \$	2,690,116
MD 13	6 \$	231,052 \$	526,415	13 \$	802,123 \$	2,120,028	19 \$	1,033,175 \$	2,646,443
MD 14	21 \$	761,990 \$	1,736,070	5 \$	263,575 \$	722,930	26 \$	1,025,565 \$	2,459,000
MD 15	9 \$	313,412 \$	714,059	6 \$	373,292 \$	1,189,122	15 \$	686,704 \$	1,903,181
MD 16	30 \$	1,060,055 \$	2,415,164	13 \$	808,845 \$	2,662,936	43 \$	1,868,900 \$	5,078,100
MD 17	33 \$	1,174,137 \$	2,675,082	9 \$	527,615 \$	1,645,877	42 \$	1,701,752 \$	4,320,959
MD 18	24 \$	838,951 \$	1,911,415	9 \$	553,282 \$	1,610,031	33 \$	1,392,234 \$	3,521,446
MD 19	16 \$	568,166 \$	1,294,474	4 \$	209,883 \$	648,929	20 \$	778,049 \$	1,943,403
MD 20	28 \$	978,896 \$	2,230,257	5 \$	339,737 \$	938,085	33 \$	1,318,633 \$	3,168,342
MD 21	9 \$	329,967 \$	751,777	9 \$	521,385 \$	1,335,774	19 \$	851,352 \$	2,087,551
MD 22	22 \$	771,233 \$	1,757,129	6 \$	379,267 \$	1,067,962	28 \$	1,150,499 \$	2,825,091
MD 23A	(0) \$	(16,421) \$	(37,414)	1 \$	59,326 \$	159,442	1 \$	42,904 \$	122,029
MD 23B	18 \$	624,520 \$	1,422,867	4 \$	209,185 \$	685,253	21 \$	833,704 \$	2,108,120
MD 24	16 \$	575,510 \$	1,311,207	4 \$	234,334 \$	638,043	20 \$	809,844 \$	1,949,250
MD 25	7 \$	237,487 \$	541,075	4 \$	212,165 \$	656,986	11 \$	449,652 \$	1,198,062
MD 26	7 \$	242,970 \$	553,568	3 \$	187,301 \$	614,003	10 \$	430,271 \$	1,167,572
MD 27A	11 \$	373,785 \$	851,609	2 \$	84,012 \$	303,205	12 \$	457,797 \$	1,154,814
MD 27B	3 \$	111,264 \$	253,497	2 \$	93,216 \$	335,230	5 \$	204,480 \$	588,727
MD 27C	7 \$	260,740 \$	594,054	1 \$	82,484 \$	261,017	9 \$	343,224 \$	855,071
MD 28	17 \$	597,299 \$	1,360,849	5 \$	259,042 \$	820,570	22 \$	856,341 \$	2,181,419
MD 29A	3 \$	119,153 \$	271,471	1 \$	57,084 \$	204,175	4 \$	176,237 \$	475,646
MD 29B	5 \$	166,067 \$	378,357	2 \$	87,322 \$	233,767	6 \$	253,389 \$	612,124
MD 29C	1 \$	23,966 \$	54,603	2 \$	91,845 \$	329,373	2 \$	115,811 \$	383,976
MD 30A	13 \$	461,471 \$	1,051,388	6 \$	341,256 \$	935,991	19 \$	802,727 \$	1,987,379
MD 30B	1 \$	31,745 \$	72,326	2 \$	76,660 \$	213,930	2 \$	108,405 \$	286,255
MD 31A	10 \$	346,976 \$	790,528	1 \$	68,876 \$	203,254	11 \$	415,852 \$	993,782
MD 31B	11 \$	383,788 \$	874,400	3 \$	162,905 \$	476,499	14 \$	546,693 \$	1,350,898
MD 32	24 \$	869,581 \$	1,981,201	10 \$	580,368 \$	1,651,584	34 \$	1,449,949 \$	3,632,785
MD 33	16 \$	556,614 \$	1,268,155	8 \$	431,001 \$	1,189,933	24 \$	987,615 \$	2,458,088
MD 34A	15 \$	538,877 \$	1,227,743	3 \$	156,508 \$	415,526	18 \$	695,384 \$	1,643,270
MD 34B	14 \$	486,632 \$	1,108,712	1 \$	89,495 \$	242,580	15 \$	576,126 \$	1,351,292
MD 35A	5 \$	168,702 \$	384,360	4 \$	257,617 \$	608,684	9 \$	426,318 \$	993,044
MD 35B	7 \$	247,906 \$	564,813	4 \$	198,328 \$	548,890	11 \$	446,234 \$	1,113,704
MD 36	13 \$	464,916 \$	1,059,236	8 \$	496,895 \$	1,581,998	21 \$	961,811 \$	2,641,234
MD 37A	11 \$	387,825 \$	883,595	2 \$	110,759 \$	297,435	13 \$	498,584 \$	1,181,031
MD 37B	13 \$	446,375 \$	1,016,994	10 \$	623,931 \$	1,607,155	23 \$	1,070,306 \$	2,624,148
MD 38A	5 \$	174,567 \$	397,724	1 \$	91,506 \$	249,723	6 \$	266,073 \$	647,447
MD 38B	17 \$	622,075 \$	1,417,297	2 \$	112,442 \$	301,837	19 \$	734,517 \$	1,719,134
MD 38C	9 \$	308,481 \$	702,824	4 \$	223,559 \$	651,340	13 \$	532,040 \$	1,354,164
MD 39	28 \$	992,521 \$	2,261,299	4 \$	230,037 \$	763,947	32 \$	1,222,558 \$	3,025,247
MD 40	1 \$	51,199 \$	116,649	9 \$	627,928 \$	1,554,561	11 \$	679,128 \$	1,671,210
MD 41	8 \$	292,813 \$	667,127	5 \$	303,347 \$	740,561	13 \$	596,160 \$	1,407,688
MD 42A	5 \$	164,875 \$	375,642	2 \$	133,625 \$	348,937	7 \$	298,500 \$	724,578
MD 42B	13 \$	464,223 \$	1,057,656	8 \$	537,227 \$	1,568,935	21 \$	1,001,450 \$	2,626,591
MD 43	2 \$	70,056 \$	159,612	4 \$	229,006 \$	552,838	6 \$	299,062 \$	712,450
MD 44A	(2) \$	(81,261) \$	(185,140)	1 \$	69,772 \$	178,831	(1) \$	(11,489) \$	(6,309)
MD 44B	3 \$	122,363 \$	278,784	3 \$	183,631 \$	527,033	7 \$	305,994 \$	805,816
MD 45	3 \$	90,809 \$	206,893	7 \$	475,973 \$	1,267,145	10 \$	566,781 \$	1,474,037
MD 46	18 \$	633,358 \$	1,443,004	14 \$	917,208 \$	2,396,365	32 \$	1,550,567 \$	3,839,369
MD 47A	6 \$	219,599 \$	500,320	3 \$	156,074 \$	440,935	9 \$	375,672 \$	941,255
MD 47B	3 \$	95,823 \$	218,317	1 \$	27,237 \$	84,269	3 \$	123,060 \$	302,586
Total	760 \$	27,017,801 \$	61,555,689	310 \$	18,606,589 \$	52,647,607	1,069 \$	45,624,390 \$	114,203,296

## Economic Impact Methodology

The economic impact of the beverage retailing industry begins with an accounting of the direct employment in the various sectors – grocery stores, supermarkets and package stores.

It is sometimes mistakenly thought that initial spending accounts for all of the impact of an economic activity or a product. For example, at first glance it may appear that consumer expenditures for a product are the sum total of the impact on the local economy. However, one economic activity always leads to a ripple effect whereby other sectors and industries benefit from this initial spending. This inter-industry effect of an economic activity can be assessed using multipliers from regional input-output modeling.



The economic activities of events are linked to other industries in the state and national economies. The activities required to sell a bottle of wine, from storage, to customer service, to ensuring that sales are made to legal age consumers, generate the direct effects on the economy. Regional (or indirect) impacts occur when these activities require purchases of goods and services such as building materials from local or regional suppliers. Additional, induced impacts occur when workers involved in direct and indirect activities spend their wages in the region. The ratio between total economic impact and direct impact is termed the multiplier. The framework in the chart illustrates these linkages.

This method of analysis allows the impact of local production activities to be quantified in terms of final demand, earnings, and employment in the states and the nation as a whole.

Once the direct impact of the industry has been calculated, the input-output methodology discussed below is used to calculate the contribution of the supplier sector and of the re-spending in the economy by employees in the industry and its suppliers. This induced impact is the most controversial part of economic impact studies and is often quite inflated. In the case of this model, only the most conservative estimate of the induced impact has been used.

This analysis utilizes the IMPLAN model (2014 Tables) in order to quantify the economic impact of the beverage alcohol retailing industry in Maryland. The model adopts an accounting framework through which the relationships between different inputs and outputs across industries and sectors are computed. This model can show the impact of a given economic decision – such as a factory opening or other operation of a sports facility – on a pre-defined, geographic region. It is based on the national income accounts generated by the US Department of Commerce, Bureau of Economic Analysis (BEA).<sup>18</sup>

The analysis begins with the identification of companies and facilities engaged in the retail sales of beverage alcohol. Individual store data are gathered from both Infogroup, and from the State of Connecticut Department of Consumer Protection

All of the data sources were combined and duplicate records, or records for companies that did not handle beverage alcohol were eliminated. These data were used for facility based employment estimates where they existed, with missing data replaced by either jobs per square foot figures, or median job numbers.

<sup>18</sup>

RIMS II is a product developed by the U.S. Department of Commerce, Bureau of Economic Analysis as a policy and economic decision analysis tool. IMPLAN was originally developed by the US Forest Service, the Federal Emergency Management Agency and the Bureau of Land Management. It was converted to a user-friendly model by the Minnesota IMPLAN Group in 1993.

Once the initial direct employment figures have been established, they are entered into a model linked to the IMPLAN database. The IMPLAN data are used to generate estimates of direct wages and output in each of the retail sectors, as well as the supplier and induced impacts of the industry on the larger economy. IMPLAN was originally developed by the US Forest Service, the Federal Emergency Management Agency and the Bureau of Land Management. It was converted to a user-friendly model by the Minnesota IMPLAN Group in 1993. The IMPLAN data and model closely follow the conventions used in the “Input-Output Study of the US Economy,” which was developed by the BEA.

- ❖ **Wages:** Data from the US Department of Labor’s ES-202 reports are used to provide annual average wage and salary establishment counts, employment counts and payrolls at the county level. Since this data only covers payroll employees, it is modified to add information on independent workers, agricultural employees, construction employees, and certain government employees. Data are then adjusted to account for counties where non-disclosure rules apply. Wage data include not only cash wages, but health and life insurance payments, retirement payments and other non-cash compensation. It includes all income paid to workers by employees. Further details are available from the IMPLAN at <http://www.implan.com>.
- ❖ **Output:** Total output is the value of production by industry in a given state. It is estimated by IMPLAN from sources similar to those used by the BEA in its RIMS II series. Where no Census or government surveys are available, IMPLAN uses models such as the Bureau of Labor Statistics Growth model to estimate the missing output.
- ❖ **Taxes:** The model also includes information on income received by the Federal, state and local governments, and produces estimates for the following taxes at the Federal level: Corporate income; payroll, personal income, estate and gift, and excise taxes, customs duties; and fines, fees, etc. State and local tax revenues include estimates of: Corporate profits, property, sales, severance, estate and gift and personal income taxes; licenses and fees and certain payroll taxes.

While IMPLAN is used to calculate the state level impacts, Infogroup data provide the basis for congressional and state legislative district, and county level estimates. Publicly available data at the county and Congressional district level is limited by disclosure restrictions, especially for smaller sectors of the economy. The model uses actual physical location data provided by Infogroup in order to allocate jobs – and the resulting economic activity – by physical address or when that is not available, zip code. For zips entirely contained in a single congressional district, jobs are allocated based on the percentage of total sector jobs in each zip. For zips that are broken by congressional districts, allocations are based on the percentage of total jobs physically located in each segment of the zip. Physical locations are based on either actual address of the facility, or the zip code of the facility, with facilities placed randomly throughout the zip code area. All supplier and indirect jobs are allocated based on the percentage of a state’s employment in that sector in each of the districts. Again, these percentages are based on Infogroup data.

#### IMPLAN Methodology:<sup>19</sup>

Francois Quesnay, one of the fathers of modern economics, first developed the analytical concept of inter-industry relationships in 1758. The concept was actualized into input-output analysis by Wassily Leontief during the Second World War, an accomplishment for which he received the 1973 Nobel Prize in Economics.

Input-Output analysis is an econometric technique used to examine the relationships within an economy. It captures all monetary market transactions for consumption in a given period and for a specific geography. The IMPLAN model uses data from many different sources such as published government

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<sup>19</sup> This section is paraphrased from IMPLAN Professional: Users Guide, Analysis Guide, Data Guide, Version 2.0, MIG, Inc., June 2000.

data series, unpublished data, sets of relationships, ratios, or as estimates. The Minnesota IMPLAN group gathers this data, converts it into a consistent format, and estimates the missing components.

There are three different levels of data generally available in the United States: federal, state and county. Most of the detailed data is available at the county level, and as such there are many issues with disclosure, especially in the case of smaller industries. IMPLAN overcomes these disclosure problems by combining a large number of datasets and by estimating those variables that are not found from any of them. The data is then converted into national input-output matrices (Use, Make, By-products, Absorption and Market Shares) as well as national tables for deflators, regional purchase coefficients and margins.

The IMPLAN Make matrix represents the production of commodities by industry. The Bureau of Economic Analysis (BEA) Benchmark I/O Study of the US Make Table forms the basis of the IMPLAN model. The Benchmark Make Table is updated to current year prices, and rearranged into the IMPLAN sector format. The IMPLAN Use matrix is based on estimates of final demand, value-added by sector and total industry and commodity output data as provided by government statistics or estimated by IMPLAN. The BEA Benchmark Use Table is then bridged to the IMPLAN sectors. Once the re-sectoring is complete, the Use Tables can be updated based on the other data and model calculations of interstate and international trade.

In the IMPLAN model, as with any input-output framework, all expenditures are in terms of producer prices. This allocates all expenditures to the industries that produce goods and services. As a result, all data not received in producer prices is converted using margins which are derived from the BEA Input-Output model. Margins represent the difference between producer and consumer prices. As such, the margins for any good add to one. If, for example, 10 percent of the consumer price of a bottle of wine is from the purchase of electricity, then the electricity margin would be 0.1.

Deflators, which account for relative price changes during different time periods, are derived from the Bureau of Labor Statistics (BLS) Growth Model. The 224 sector BLS model is mapped to the 536 sectors of the IMPLAN model. Where data are missing, deflators from BEA's Survey of Current Businesses are used.

Finally, one of the most important parts of the IMPLAN model, the Regional Purchase Coefficients (RPCs) must be derived. IMPLAN is derived from a national model, which represents the "average" condition for a particular industry. Since national production functions do not necessarily represent particular regional differences, adjustments need to be made. Regional trade flows are estimated based on the Multi-Regional Input-Output Accounts, a cross-sectional database with consistent cross interstate trade flows developed in 1977. These data are updated and bridged to the 536 sector IMPLAN model.

Once the databases and matrices are created, they go through an extensive validation process. IMPLAN builds separate state and county models and evaluates them, checking to ensure that no ratios are outside of recognized bounds. The final datasets and matrices are not released before extensive testing takes place.

# **SB763 Written Testimony from EBDI - FINAL.pdf**

Uploaded by: Washington, Cheryl

Position: FAV



**east baltimore development inc.**

Community. Business. Opportunity.

March 3, 2021

Senator Paul G. Pinsky, Chair  
Senator Cheryl C. Kagan, Vice Chair  
Education, Health, and Environmental Affairs Committee  
2 West, Miller Senate Office Building  
Annapolis, MD 21401

Re: Written Testimony Supporting Senate Bill 763 (Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments (Healthy Food Accountability Act of 2021)

Dear Senators Pinsky, Kagan and members of the Committee:

On behalf of East Baltimore Development, Inc. (EBDI), I welcome the opportunity to submit to the record written testimony in support of Senate Bill 763 (SB 763). SB 763 would allow for exceptions to the prohibitions surrounding retail alcoholic beverages licenses and would in turn require annual fees to be distributed to the Community Legacy Financial Assistance Fund (“Fund”). This Fund provides local governments and community development organizations with funding for essential projects aimed at strengthening communities. In addition, the bill requires that licenses be authorized only for use in conjunction with, or on the premises of, a retail establishment that offers fresh, healthy foods to its customers. As a result, the enactment of SB 763 would provide another avenue for Maryland businesses to contribute to the economy and would help to address key issues related to food insecurity. EBDI enthusiastically supports any efforts to bolster community development efforts within Baltimore City and SB 763 presents a unique opportunity to do so.

EBDI, which operates within Maryland Legislative District 45, was established in 2003 by community, government, institutional and philanthropic partners to stabilize and revitalize an 88-acre community in East Baltimore. East Baltimore has consistently experienced some of the worst outcomes in Baltimore’s basic quality of life indicators, such as employment, health, educational achievement, adequate housing, and crime and safety. At EBDI, our charge is to execute an ambitious plan to transform the neighborhood into a healthier, thriving community, now called Eager Park. Since redevelopment began, Eager Park now includes over 400 completed mixed-income homeownership and rental housing units; over one million square feet of new commercial office, lab, and retail space; a hotel; a community learning campus with an early childhood center and a public K-8 school; and a new 5-acre park. When completed, the project will include 1,600 total units of housing and additional retail, life sciences, research and office space.

Despite the overwhelming success EBDI has had in redeveloping Eager Park, there is still plenty of opportunity for economic growth and expansion in and around our neighborhood. Increased financial support toward the Fund would complement our community development efforts in the areas of business attraction/retention/expansion, job creation and increasing homeownership, all of which are crucial to the success of our revitalization initiative. In our project area, we continually strive to increase homeownership opportunities (particularly for residents who have been relocated and otherwise impacted during the project); have developed a multi-pronged retail strategy; and have established a Community Reinvestment Fund to support local businesses and workforce development. However, we have found that limited access to financing has become a barrier for many businesses and residents to participate in these programs.

Senator Paul G. Pinsky, Chair  
Senator Cheryl C. Kagan, Vice Chair  
March 3, 2021  
Page 2

In addition, EBDI, in partnership with the Baltimore Development Corp., is working to attract a grocer to Eager Park or an adjacent East Baltimore community. According to the latest market study EBDI procured in June 2020, securing a permanent grocery store within the project area unfortunately is years ahead. In the meantime, the residents of Eager Park and its surrounding neighborhoods continue to struggle to access fresh food options in and near their communities. To make matters worse, in September 2020, one of the last grocery stores within the vicinity of the project area closed its doors. The lack of a grocery store has negatively impacted Eager Park and East Baltimore residents, many of whom have limited or no access to transportation to travel to other grocery stores. This bill would incentivize grocers to locate in disinvested communities, like East Baltimore, and address the food insecurity residents are facing each day.

For these reasons, we are eager to support SB 763, which not only would support community development efforts via the Community Legacy Financial Assistance Fund, but also would require that qualifying businesses provide access to healthy food to neighborhoods like those found in East Baltimore.

I hope that you will issue a favorable report of SB 763. Thank you for the opportunity to share my written testimony in support.

Sincerely,



Cheryl Washington  
President & CEO

## **20210305Testimony in Support of SB763.pdf**

Uploaded by: Wilson, Michael

Position: FAV

**Testimony in Support of SB763**  
**Alcoholic Beverages - Class A Licenses - Retail Grocery Establishments (Healthy**  
**Food Accountability Act of 2021**  
**March 5, 2021**

**To:** Hon. Paul Pinsky, Chair, and members of the Senate Education, Health, and Environmental Affairs Committee  
**From:** Michael Wilson, Executive Assistant to the President  
United Food and Commercial Workers Union, Local 400

Chair Pinsky and members of the Senate Education, Health, and Environmental Affairs Committee, I appreciate the chance to share my testimony on behalf of the over 25,000 members of United Food and Commercial Workers Locals 400 and 27 in Maryland, working on the front lines of the ongoing pandemic in grocery, retail, food distribution, food processing, law enforcement, and health care.

**We strongly support SB 763 and urge you to vote it favorably.** This bill will be a revenue generator for the state at a time when Maryland needs it and it will create hundreds of new, well paid, family supporting, union jobs.

Our economy needs a boost and expanding beer and wine sales to chain grocery stores, like Giant, Safeway, and Shoppers, where our members work, will help drive a much needed recovery and keep Maryland in a strong economic position going forward. This bill provides a real opportunity for the state to **create up to 300 full time jobs for our members**. These will be union jobs with family sustaining wages and benefits that will increase our tax base and strengthen our communities and our state for the long term.

It is time for Maryland to join neighboring states, and the District of Columbia, in allowing beer and wine sales in chain grocery stores. It will continue our economic recovery, generate revenue, and, most importantly, employ hundreds of residents in good, family sustaining jobs.

**UFCW Locals 27 and 400 urge a favorable vote on Senate Bill 763.**

# **MDDCSAM - SB 763 UNF - Alcohol - Retail Grocery Es**

Uploaded by: Adams, MD, Joseph

Position: UNF



*MDDCSAM is the Maryland state chapter of the American Society of Addiction Medicine whose members are physicians and other health providers who treat people with substance use disorders.*

**SB 763 (HB 996). Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments (Healthy Food Accountability Act of 2021)**

Senate Education, Health, and Environmental Affairs Committee. March 5, 2021

**OPPOSE**

**The high density of alcohol sales establishments in low income communities is a well-recognized public health problem.** Public health advocates and researchers have worked to reduce the density of alcohol establishments in low income areas, but this bill would exacerbate the problem.

**This bill would pre-empt local authority** over siting and regulation of alcohol sales, which would further increase public health harms. Tobacco and alcohol industries have tried for years to undermine local authority regarding tobacco and alcohol sales, and these efforts have been appropriately resisted by public health advocates. **Local control is a well-known component of preventing harms associated with these products.**

**Alcohol is the fourth leading cause of preventable death in the U.S.** and causes double the number of deaths annually than opioids do.

Although the bill attempts to address a public health problem, food deserts, **it is not supported by public health organizations, or organizations that are concerned about food deserts.**

Increasing the prevalence of one public health problem is not an appropriate approach to addressing another public health problem. We are not aware of any evidence that increasing alcohol sales in food establishments would reduce either food deserts or obesity. **States and localities that allow alcohol sales in food establishments appear to have similar problems with food deserts and obesity.**

As written, the bill would not result in increasing the number of food establishments in low income areas permitted to sell alcohol. But even if it were re-written to accomplish this purpose, this would not result in the reduction of food deserts. There would be an overall negative impact on public health.

We request an unfavorable report.

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## **Dear Committee Member.pdf**

Uploaded by: Carter, Kimberly

Position: UNF

Dear Committee Member,

I just want to tell you that I hope and pray that you vote against the Bill that would allow grocery and convenience stores to get alcohol licenses.

My family has a liquor store in Taneytown, MD that we have had for 34 years next month. We have abided by all local liquor laws in investing and running that business and do not understand how those laws can be changed in an instant to destroy the business that we have built over time and much hard work.

To give a grocery or convenience store a license, without any consideration of population needs, or without any compensation to the stores already located near it, or without any time to deal with it, just doesn't seem fair or just. To those types of stores, our product would just be another aisle in their store and would be taken care of by the employees already in place. To us, those products and the business that comes with them is not just an aisle but are whole lives and livelihood. We have about 15 part-time, because they choose to be part-time to supplement their incomes due to parenting, schooling, or retirement considerations, workers that many of them have been with us for 20 plus years that would be out of work as well.

Please vote on the side of small businesses in Maryland and vote against this bill.

Thank you for your time,

Kimberly Carter

The Liquor Barn

Taneytown, MD

**SB763--Alcohol\_in\_chain\_stores-2021.pdf**

Uploaded by: Eck, Raimee

Position: UNF



**Mission:** To improve public health in Maryland through education and advocacy  
**Vision:** Healthy Marylanders living in Healthy Communities

**SB763: Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments (Healthy Food**

**Accountability Act of 2021)**

**Hearing Date: March 5, 2021**

**Committee: Education, Health, and Environmental Affairs**

**Position: OPPOSE**

**Co-signatory: Baltimore Good Neighbors Coalition**

On behalf of the Maryland Public Health Association's (MdPHA) Alcohol & Tobacco Network, we would like to thank you all for your work to establish alcohol regulations that will keep our youth and communities safe. We are opposed to SB763, which would expand alcohol sales exponentially across the state for the purpose of curbing the obesity epidemic.

MdPHA is deeply disappointed and more than a little confused on how expanding access to alcohol can be promoted as a solution to the obesity epidemic. Many of our members have worked on numerous bills and/or community projects to both address food deserts and reduce obesity over the years, legislation and interventions stemming from scientific study and evaluation. We feel the frustration, inequity, and pain stemming from these incredibly difficult issues. Much of the research can be seen coming from our own experts at academic centers such as University of Maryland, Towson, and Johns Hopkins or from community advocacy organizations working to increase urban farms; strengthen nutrition standards in public schools; or require only milk, water, or 100% juice instead of soda in kids' meals. And although the preamble of this legislation is framed around the obesity epidemic, the rest of the bill is targeted only to expanding alcohol sales and deliveries.

There is no research that we are aware of that supports expanding alcohol sales to grocery, chain, and convenient stores as an intervention for food insecurity or obesity.

Increasing off-premise alcohol outlets from 1,800 to 3,100 through this legislation would massively increase the density of alcohol availability in these target areas. Increased alcohol outlet density, especially for off-premise outlets, is associated with an increase in a number of harms, including violence, criminal activity, domestic violence, and child maltreatment. It is also very costly; a recent study in Baltimore City demonstrated that alcohol-related harms cost \$582 million each year, almost 40% of which the government is responsible for. Alcohol consumption has been steadily rising nationally, especially for women and minorities; as consumption rises, so do alcohol-related harms.

What this bill also does is further strip local jurisdictions of their authority and ability to regulate the alcohol environment locally. It creates yet another license at the state level that leads to additional burdens on liquor board staff and enforcement officers for administration, enforcement, education, and adjudication, but provides no resources with which to undertake these activities. Liquor boards already frequently struggle with limited resources, and adding an estimated 1,300 new licensed outlets to the existing 1,800 outlets would completely overwhelm the capacity of our system.

The "priority funding areas" (Figure 1 below) that are the target areas for these establishments cover a significantly large area of the state and do not appear to be related to areas with higher rates of obesity in children and/or adults or areas that are categorized as food deserts. This legislation also does not ensure that a new entity applying for this license would establish itself in an area with the highest needs

for access to healthy foods; in fact, it is highly doubtful that they would, given the economics that guide decisions on where to locate grocery establishments. We have included a map from the Johns Hopkins University Center for a Livable Future of areas with limited supermarket access (Figure 2 below) to demonstrate the lack of overlay of areas of need and areas targeted with this legislation.

The size parameters of this bill also are concerning. Part (c)(2)(I)(2)(B) (page 4 line 7) allows for a minimum of 6,000 sq ft, with only 5% dedicated to the sale of the listed food items--this seems to allow for a Costco-sized alcohol superstore with a few shelves at the front for food sales. This area of the bill needs further explanation. Additional explanation of what a “convenience and food product delivery company” is also requested.

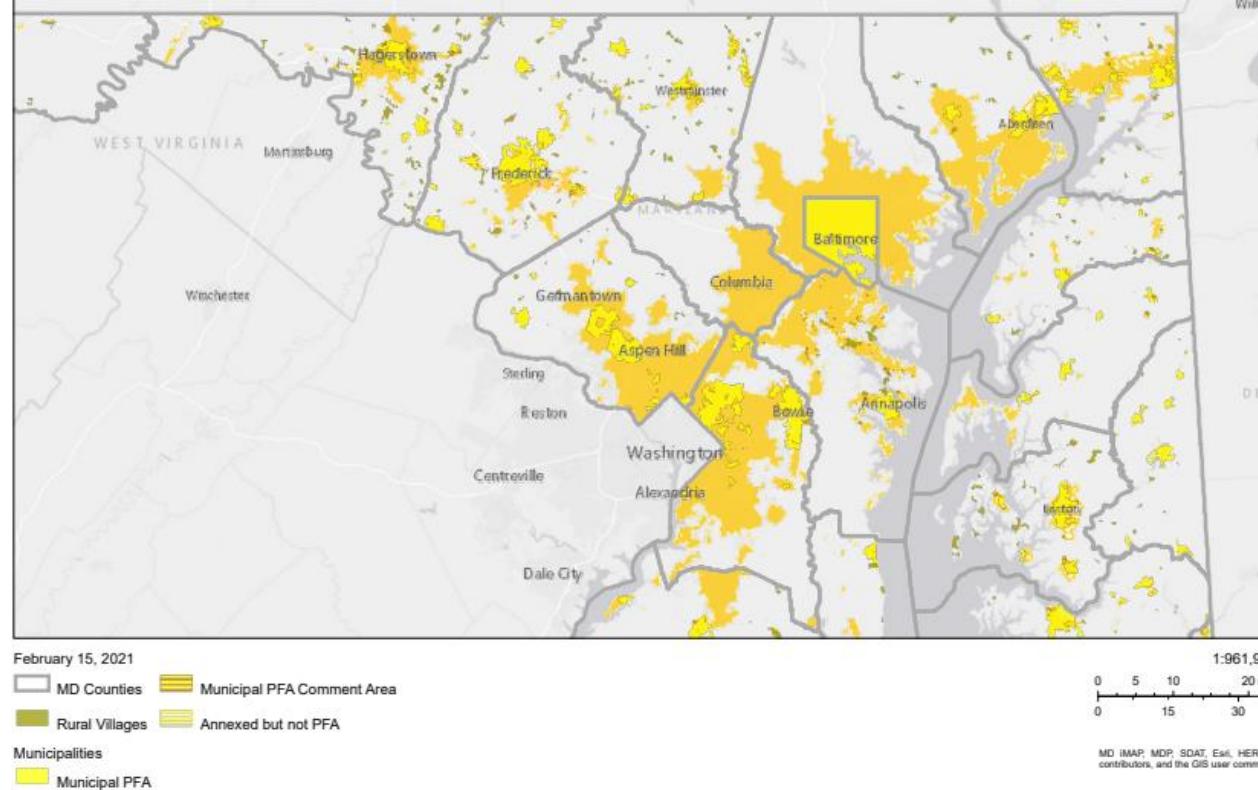
There are numerous well-researched interventions to address childhood nutrition, adult and youth obesity rates, and availability of healthy foods that do not involve a ½ increase in the number of alcohol outlets at the same time and the inevitable harms of expanded access and consumption. We are happy to work with this committee and bill sponsors to connect them with the expertise present here in Maryland.

Further, MD Code, Alcoholic Beverages, Section 1-308 (effective January 1, 2021) states that "The [Alcohol and Tobacco] Commission shall develop best practices for: (8) the development of a public health impact statement for all changes to the State alcoholic beverages laws.

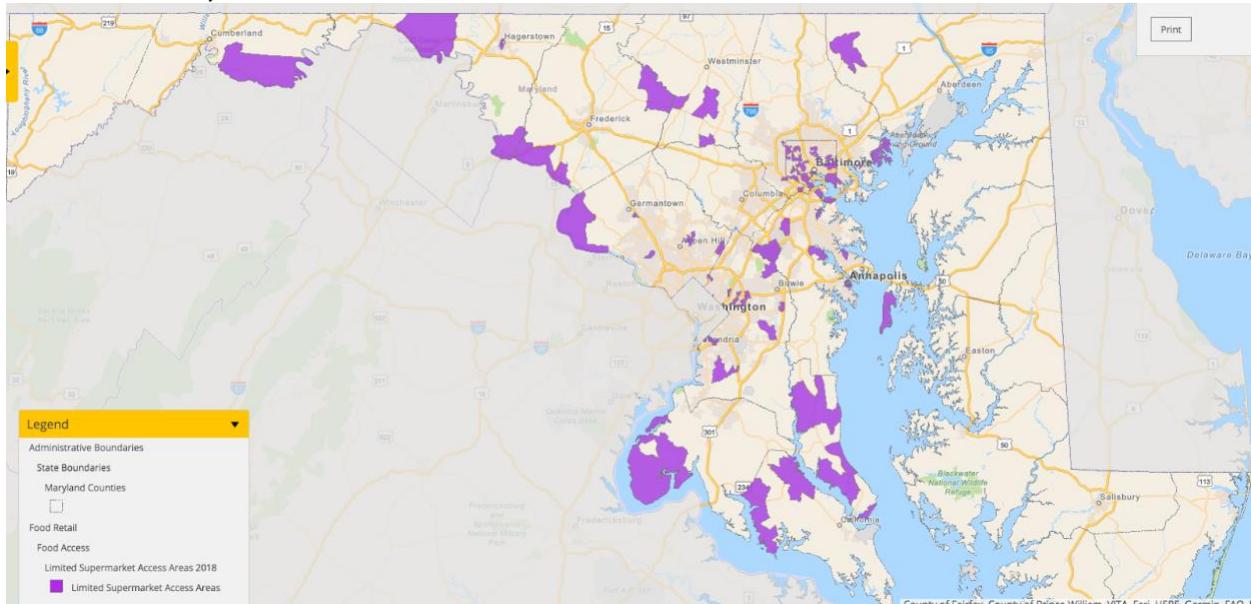
Given the substantial changes to the manner in which alcohol can be sold and distributed and the potential, serious health and safety harms that could result from expansion of license privileges without adequate enforcement/compliance, no further action on HB996 should be taken without a public health impact statement.

We urge an unfavorable report on SB763.

**Fig 1. Priority funding area map, State of Maryland, 2021**



**Figure 2. Limited supermarket access areas, Johns Hopkins University Center for a Livable Future, 2018**



*MdPHA is a nonprofit, statewide organization of public health professionals dedicated to improving the lives of all Marylanders through education efforts and advocacy of public policies consistent with our vision of healthy Marylanders living in healthy communities. MdPHA is the state affiliate of the American Public Health Association, a nearly 150-year-old professional organization dedicated to improving population health and reducing the health disparities that plague our nation.*

# **SB763 testimony.pdf**

Uploaded by: Lawson, Kim

Position: UNF

Oppose SB763  
Kim Lawson  
Fishpaws Marketplace  
954 Ritchie Hwy  
Arnold, Md 21012  
Anne Arundel County  
klawson@fishpawsmarket.com

I'm writing in opposition to HB996 and SB763. My business, Fishpaws Marketplace is a third-generation alcohol retailer in Anne Arundel County which dates back to 1935. My family purchased the business in 1983 and now my children are learning the business. We employ between 20 and 25 people depending on the season. We donate at a minimum \$10,000 yearly to local charities. Not only do we employ local residents but are supported by distributors, breweries, distilleries which encompasses about 50 – 60 people weekly which includes salespeople, drivers, and support personnel. We carry over 260 local beers, wines and spirits to support locally made products.

I know the opposition is touting convenience as the reason for this legislation. Maryland is positioned to best serve the customer. We have licensees in every shopping center which houses a grocery service so the goods are available in the same shopping trip for the consumer. The supermarkets and chains aren't going to employ the number of employees that each one of these licensees have employed. Currently many licensees are offering home delivery which adds to convenience for the consumer.

I'm in a unique position because my father has worked all aspects in the liquor business. He worked as a Maryland wholesaler, Maryland retailer and as a multistate manager and international manager for Remy Amerique and for a Florida retailer. He has told me many times that Maryland in fact is one of the best states for the consumer. Our system allows the best selection available to the consumer because of the free market which allows small independently owned distributors and supplies to market to both independent on and off premise outlets. Large chains only sell the top selling SKU/s so with the elimination of independent retailers the selection and availability will not be available to the public. The small distributors and locally made products won't be carried in these chain operations.

The bill automatically will allow these outlets 1300 to 1500 additional outlets with no regard to saturation of a market area or the legal control of alcohol a controlled substance.

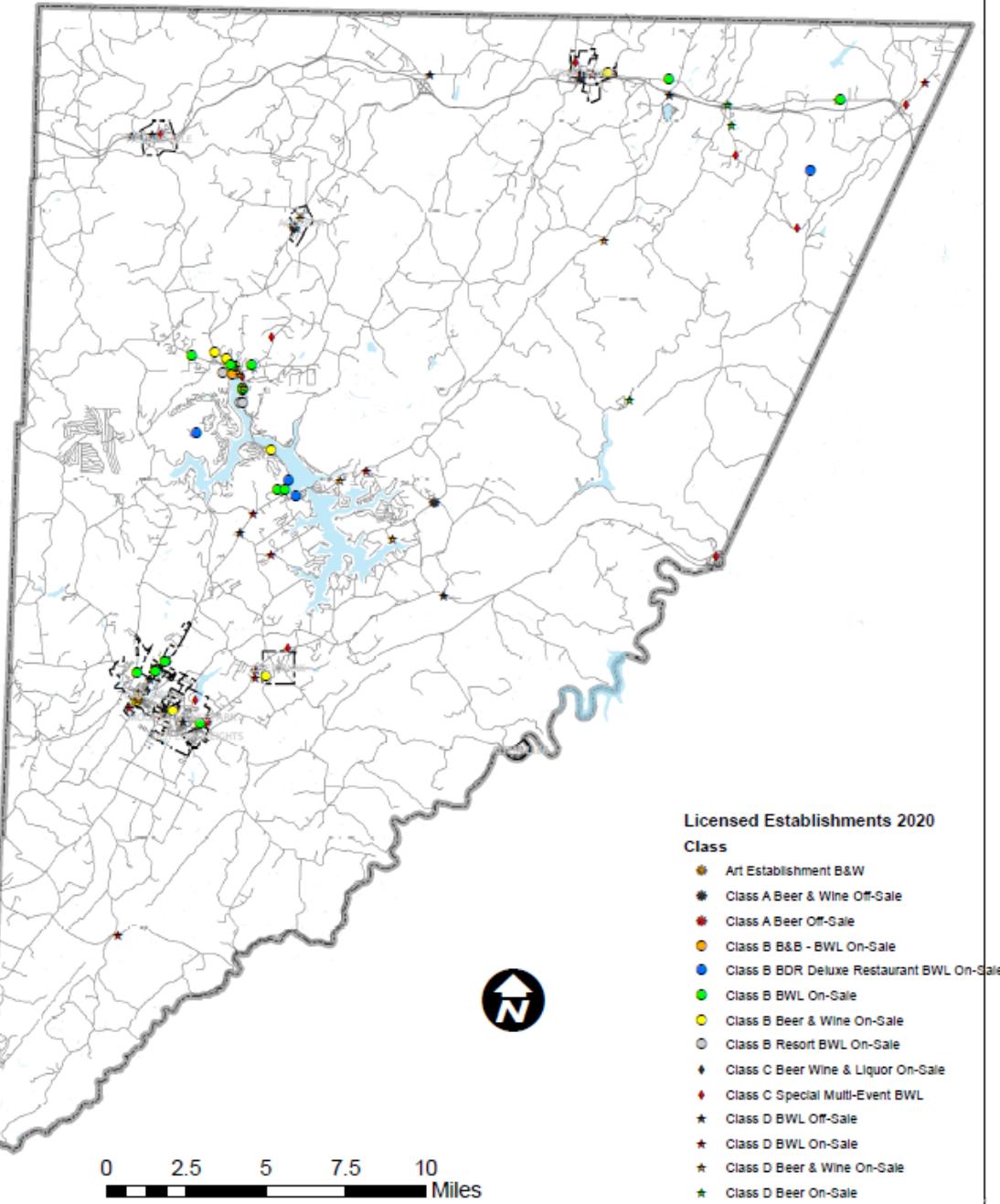
I ask you to oppose this bill. Let's support local small business in all ways by keeping jobs, taxes, local product sales in Maryland. Let's keep Maryland pride in Maryland.

# **GC map establishments PFA 03-02-2021.pdf**

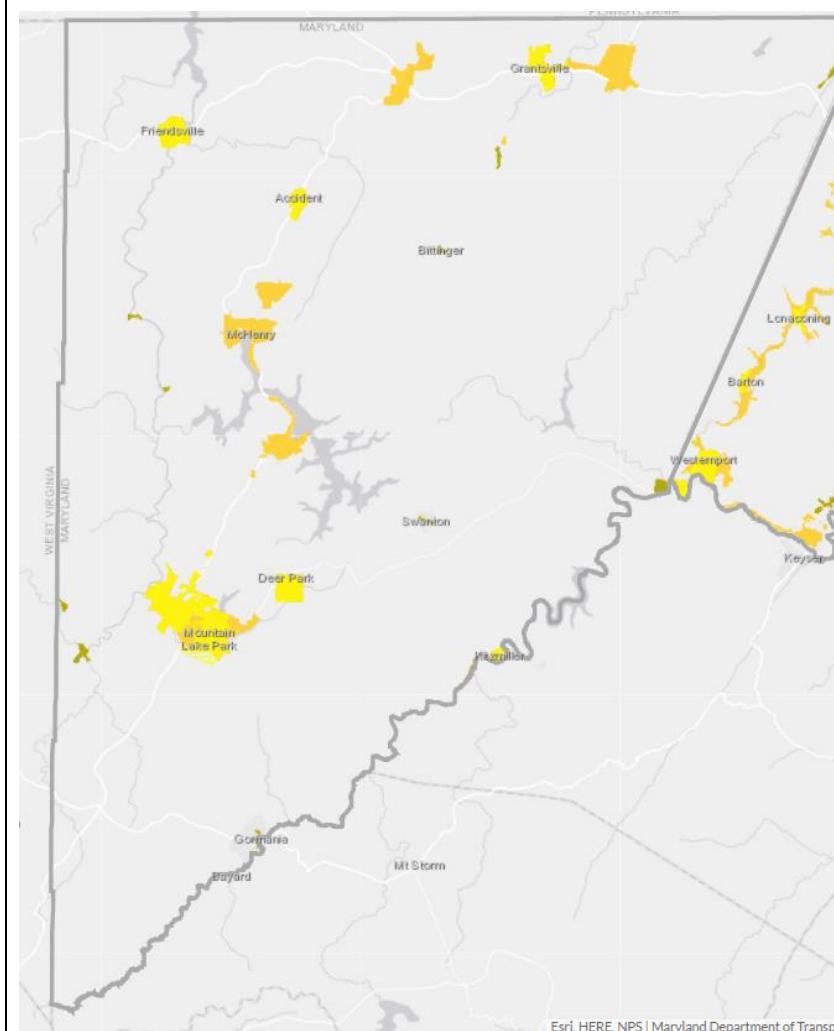
Uploaded by: Owston, Deborah

Position: UNF

## Licensed Establishments in Garrett County



<http://mdpgis.mdp.state.md.us/PFA/publicinfotemplate/index.html>



# **SB 763 Class A Licenses Retail Grocery Est letter**

Uploaded by: Owston, Deborah

Position: UNF



**Deborah R. Owston**  
Administrator to the Board

# *Board of License Commissioners*

## *Liquor Control Board of Garrett County*

Garrett County Government Administrative Office Building  
203 South Fourth Street, Room 208  
Oakland, Maryland 21550  
Phone 301-334-1925  
Fax 301-334-5023  
E-mail – liquorcontrolboard@garrettcounty.org

**Michael J. Fratz**  
McHenry, Maryland 21541

**David L. Moe**  
Oakland, Maryland 21550

**Lisa M. Herman**  
Friendsville, Maryland 21531

March 3, 2021

The Honorable Paul G. Pinsky, Chairman  
Education, Health, and Environmental Affairs Committee  
2 West Miller Senate Office Building - 11 Bladen Street  
Annapolis, MD 21401

RE: SB 763 Alcoholic Beverages  
Class A Licenses – Retail Grocery Establishments (Health Food Accountability Act of 2021)

Dear Chairman Pinsky:

On behalf of the Garrett County Board of License Commissioners, this office urges you to oppose Senate Bill 0763 Alcoholic Class A Licenses – Retail Grocery Establishments (Health Food Accountability Act of 2021). Although, we recognize that hardship some communities in priority funding areas may have with limited access to the availability of healthy foods at a retail grocery establishment, this impacts all jurisdictions and existing small business owners. The preamble to the bill outlines concerns of obesity, health risks and lack of availability to healthy food. How does permitting retail grocery establishments to sell alcoholic beverages relate to promoting healthy lifestyles. In fact, some may view it as the total opposite. This bill further takes away our local authority and states the license shall be issued and additional State annual and renewal license fees shall be paid to the Commission.

The bill does not take into consideration that there are currently jurisdictions that have existing rules, regulations and licenses available that allow a qualifying small business owner to apply for an off-sale alcoholic beverage license as long as it is not a chain store, supermarket or discount house. The allowance of a retail grocery establishment license as proposed in the bill will cause detrimental financial loss to many licensed establishments located in the priority funding areas. The bill allows the minimum of 6,000 sq ft, with only 5% dedicated to the sale of the listed food items. This seems to allow for a super-sized package store that also sells at least six of the food items listed in the bill. The section of the bill that states that delivery-based Class A license holders are not required to obtain a letter of authorization from the local licensing board to make deliveries must be considered. Alcohol is defined as a drug and is regulated for good reason and the delivery of alcohol should have guidelines and regulations in place to ensure it is sold and delivered responsibly. The language is very vague. Additional delivery regulations should be in place that restrict the delivery to only in the jurisdiction that issues the license. For the reasons stated above, we would request to be excluded from the bill.

In closing, it would have been beneficial for a collaboration with the local jurisdictions on the drafting of the legislation as it directly impacts local budgets, staffing requirements and safety of our communities. The Garrett County Board of License Commissioners requests you oppose Senate Bill 0763 and thank you for the attention you may give this legislative issue.

Sincerely,

*Deborah R. Owston*

Deborah R. Owston,  
Administrator of the Board of License Commissioners

cc: Senator George Edwards  
Delegate Wendell Beitzel

# **Testimony In Opposition of SB 763 and HB 0996 \_ Ke**

Uploaded by: Patel, Keta

Position: UNF

Respected Chair and Legislative Members,

Current language of SB 763 provides:

"Establishing a certain exception to the prohibition against issuing certain retail alcoholic beverages licenses for use in conjunction with or on the premises of certain establishments; requiring a local licensing board to issue a Class A beer or beer and wine license for use in conjunction with or on the premises of certain self-service or delivery-based grocery establishments"

I respectfully request you to

This bill essentially puts at the least Wine & Spirits in the Grocery and other chain stores. There are multiple issues in allowing sale of alcoholic beverages in Grocery Stores. I would like to highlight a few here:

**Economic Development:** Proponents of SB 763 claim that providing licensees to Grocery/Chain stores will lead to economic development. This misleading premise overlooks a proven fact that small retailers in MD help stimulate consumer spending, collect tax revenues, and provides employment, all by 18-times in comparison to grocery/chain stores (according to a Study).

**Tax Revenue:** The 7000 licensees in state of MD contribute more than \$1.5 billion in tax revenue to the state. State of MD engages in many economy stimulating activities with these tax revenues.

**Private Labels:** The proposed bill opens door for a very unfair competitive practice called "Private Label" that is currently adopted by big box stores in the industry (Total Wines). They go to the manufacturers directly and create their own labels that no other retailer would have access to and then manipulate the pricing on those products in their favor with no chance to other retailers on being able to compete with them for the same products.

**Regulated Beverages in Grocery Stores:** At previous public hearings for similar bills, it was said that the shopping environment should be kept safe for the entire family. We agree, why should our kids be exposed to regulated beverages (brands, even small containers) in grocery stores. That shopping environment shall be kept favorable for families. There is also a logistical challenge in putting regulated beverages in grocery stores, currently there are many young adults (who are not allowed to purchase or handle alcohol) who work at grocery stores. Putting alcoholic beverages in front of them not only exposes them to those products and makes it logically difficult to restock, move around, or handle these products but also (in some cases) allows them to (potentially and illegally) consume or steal these beverages!

**Precedent:** We strongly believe that one license approval will take a domino-effect and inspire other supermarkets to apply for licenses and eventually run most of the small retailers out of business/existence. This bill sets a wrong precedent. The proponents of the bill might claim that it only allows for 3 stores to get it within the city limits of college park but its impact goes well beyond college park. Other supermarkets will surely follow the suit and apply for license. We strongly oppose such precedents and practices.

For all of the above reasons, I would like this committee to vote against this bill and help small retailers like us survive in this increasingly difficult economic environment for small businesses like ours.

Thank you for your time and consideration.

Sincerely,

Ketan Patel

# **Oppose SB0763.pdf**

Uploaded by: Patel, Shrikant

Position: UNF

Dear Respected Senator,  
Hon Mr. Bryan Simonaire,

## **Opposition to SB0763 or Any Similar Bills**

We own the Liquor Store Business in Pasadena, Maryland, named HariPramukh, Inc. DBA "Turner's Liquors" at 8052 Ritchie Highway, Pasadena, MD 21122.

Last month, at the beginning of January, 2021; a similar information to oppose the legislation was submitted by our business to House Representative.

Allowing Liquor/Alcohol products such as Liquor, Wine and Beer in to grocery stores, would be a devastating impacts on small business like ours. At our location, we have a grocery store very next to us, few shops away in a shopping center and also have Walmart and BJ's near by vicinity. Giving permission to sell Alcohol Products to those Big Box stores, would definitely impact our bottom line to stay open and operate. Due to the substantial loss of revenue; It is very difficult to sustain the small business operation. It will be very difficult to cover the standard expenses such as rent cost, utility charges, payroll and of course the products inventory. Also, We face substantial financial loss due to the closure of business and even loose our investment capital vested in to business.

We humbly request you and your colleagues in the State Senate House; to strongly oppose this legislation which allow Liquor, beer and wine products sell in grocery stores. Otherwise, we have no choice left except closing business and loose all our vested capital value.

**OPPOSE ANY SIMILAR BILLS, SAVE SMALL BUSINESS LIKE OURS!**

Thanks.

SHRIKANT PATEL  
[shri.patel3525@gmail.com](mailto:shri.patel3525@gmail.com)

**NCADD-MD - SB 763 UNF - Alcohol at Grocery Stores.**

Uploaded by: Rosen-Cohen, Nancy

Position: UNF



**Senate Education, Health & Environmental Affairs Committee**

**March 5, 2021**

**Senate Bill 763**

**Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments**

**Oppose**

NCADD-Maryland respectfully opposes *Senate Bill 763 - Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments*. This legislation would increase the number of alcohol outlets throughout the state for off-premises drinking by almost two-fold. The Centers for Disease Control and Prevention report that high alcohol outlet density is known to be an environmental risk factor for excessive drinking. Based on strong scientific evidence of intervention efficacy, they recommend using public policy to limit, not expand, alcohol outlet density.<sup>1</sup> Excessive drinking in turn leads to increases in violence, criminal activity, domestic violence, and child maltreatment.

It is also true that with an increase in alcohol outlets, the opportunity for people under the age of 21 to purchase alcohol increases. There have been studies that show that reducing the commercial availability of alcohol as part of a comprehensive prevention strategy can contribute to a reduction in underage drinking and alcohol-related problems.<sup>2</sup> Research has also shown that liquor stores do a much better job than grocery stores in checking identification of people purchasing alcohol. We know the harms that result from underage drinking are far reaching, contributing to negative consequences including injuries, sexual assaults, and deaths.

While the subtitle and preamble to this bill imply that the goal of the bill is to promote healthy eating and reduce obesity, increasing the sale of alcohol will accomplish neither. The consumption of alcohol is associated with the development of adult obesity.<sup>3</sup> There are many other policies and practices the State could embrace to address obesity, especially with regard to young people.

We ask for an unfavorable report.

*The Maryland Affiliate of the National Council on Alcoholism and Drug Dependence (NCADD-Maryland) is a statewide organization that works to influence public and private policies on addiction, treatment, and recovery, reduce the stigma associated with the disease, and improve the understanding of addictions and the recovery process. We advocate for and with individuals and families who are affected by alcoholism and drug addiction.*

<sup>1</sup> <https://www.cdc.gov/alcohol/pdfs/CDC-Guide-for-Measuring-Alcohol-Outlet-Density.pdf>

<sup>2</sup> [https://www.researchgate.net/publication/6560131\\_Alcohol\\_Outlet\\_Characteristics\\_and\\_Alcohol\\_Sales\\_to\\_Youth\\_Results\\_of\\_Alcohol\\_Purchase\\_Surveys\\_in\\_45\\_Oregon\\_Communities](https://www.researchgate.net/publication/6560131_Alcohol_Outlet_Characteristics_and_Alcohol_Sales_to_Youth_Results_of_Alcohol_Purchase_Surveys_in_45_Oregon_Communities)

<sup>3</sup> <https://iard.org/getattachment/e8599ddc-395f-48f4-910d-f3d5fd4ae67d/hr-obesity1.pdf>

## **Testimony In Opposition of SB 763 and HB 0996 \_ Bi**

Uploaded by: Sheth, Birju

Position: UNF

Respected Chair and Legislative Members,

SB 763 states:

“Establishing a certain exception to the prohibition against issuing certain retail alcoholic beverages licenses for use in conjunction with or on the premises of certain establishments; requiring a local licensing board to issue a Class A beer or beer and wine license for use in conjunction with or on the premises of certain self-service or delivery-based grocery establishments”

I respectfully request you to

This bill essentially puts Wine & Spirits in the Grocery and other chain stores. I would like to share my viewpoints against allowing Grocery/Chain stores:

**Employment:** Proposed bill, if implemented will result in 1.4 net loss in Jobs. More than 7000 licensees in the state of MD employ more than 115,000 residents with payrolls exceeding \$1.7 billion. Studies have shown that if licenses are issued to supermarkets and chain stores, the employment within the industry will drop significantly and payrolls will shrink. This submission is not ours, it has been floored by many payroll processors and economic analyst across the state.

**Competition:** The supporters of bill 763 claim that small retailers are afraid of the competition and that is why opposing this bill. The truth is: providing liquor licenses to supermarkets will create unleveled and unjustified, one-sided competition.

**Convenience:** The supporters of supermarkets getting liquor license also claim that having alcoholic beverages in supermarket makes it convenient for them to buy alcoholic beverages. There are more than 7000 licensees in the state and many of them are located in the same shopping center as the grocery stores/supermarkets. How much more convenient cant it get. In addition to the packaged goods stores located next to supermarkets, there are also some licensees residing in free-standing buildings making it even more convenient for consumers. If these types of bills are passed and implemented most of these packaged goods stores will be driven out of business and then consumers will be forced to make a trip to a grocery store and to spend time in long lines, a trip they are accomplishing at packaged good stores in a few minutes, at the most.

**MD is Small Business Friendly:** Maryland has traditionally been a small business friendly state. Recent attacks on their existence by politicians siding with big chain store companies are ill founded and promoted by financial backing and donations by these big companies. Sure, small retailers don't have the same amount of money as big box chain stores but small retailers

sure are passionate about serving their customers. We know our customers by their first names and know their family members, their life stories and have the ability to personally engage with them, there is NO WAY big box stores can provide that level of personal focus and attention to valued customers. The continual effort to hurt small retailers by allowing big box stores to sell alcohol is BAD for the state, retailers, and most of all consumers.

**Denied Bills & License Applications:** We should note that bills that attempted to achieve that same result in the past have been denied unanimously. Examples: PG 760-12 was denied that attempted to provide license to supermarkets. There are several examples of bills that were denied by the same committee in the past based on potential economic impact on small retailers, safety and other regulatory reasons, and so on. In the pandemic world, things have not changed to better for most small businesses, in fact, they have gotten worse. There are NO reasons why this committee should override their past voting records, specifically in these challenging times, and revisit the same legislation again and again!

I sincerely thank all of you for your time and consideration and hope that you will vote against SB 763 and HB 0996.

Sincerely,

Birju Sheth

# **1 - SB 763 - MDH - LOIWA.pdf**

Uploaded by: Bennardi, Maryland Department of Health /Office of Government

Position: INFO



## DEPARTMENT OF HEALTH

*Larry Hogan, Governor · Boyd K. Rutherford, Lt. Governor · Dennis R. Schrader, Acting Secretary*

March 5, 2021

The Honorable Paul G. Pinsky  
Chair, Education, Health, and Environmental Affairs Committee  
2 West, Miller Senate Office Building  
Annapolis, Maryland 21401

**RE: SB 763 – Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments (Healthy Food Accountability Act of 2021) – Letter of Information with Amendment**

Dear Chair Pinsky and Committee Members:

The Maryland Department of Health (MDH) is submitting this letter of information with amendment for Senate Bill 763 (SB 763) – Alcoholic Beverages – Class A Licenses – Retail Grocery Establishments (Healthy Food Accountability Act of 2021).

SB 763 creates a Class A beer or beer and wine license for retail establishments that offer for sale food products. MDH offers the attached amendment to clarify that while the sale of food products is a prerequisite for obtaining a Class A beer or beer and wine license under the proposed legislation, the sale of the food products is not covered under the Class A license and the establishment would still be subject to all applicable licensing requirements for the sale of food products under Article Health-General Title 21.

I hope this information is useful. If you would like to discuss this further, please contact me at (410) 260-3190 or [webster.ye@maryland.gov](mailto:webster.ye@maryland.gov) or Heather Shek, Director of Governmental Affairs at [heather.shek@maryland.gov](mailto:heather.shek@maryland.gov) or the same phone number.

Sincerely,

A handwritten signature in blue ink, appearing to read "Webster Ye".

Webster Ye  
Assistant Secretary, Health Policy

AMENDMENTS TO SENATE BILL 763  
(First Reading File Bill)

AMENDMENT NO. 1

On page 5, after line 12, insert:

**"(8) AN ESTABLISHMENT WHICH OFFERS FOR SALE FOOD PRODUCTS IS ALSO SUBJECT TO ALL APPLICABLE FOOD LICENSING PROVISIONS."**