

Industry Review Supplemental Tables – 2016
February 7, 2017
Distilled Spirits Council



U.S. Spirits Market - 2016 Volumes					
<i>9-Liter Cases (000s)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,729	6,816			9,545
American Whiskey	3,677	5,648	10,367	2,061	21,753
Canadian	8,111	2,706	198	6,128	17,144
Scotch - Blended	1,845	2,830	2,326	417	7,418
Scotch - Single Malt	-	200	1,247	688	2,135
Irish	-	44	3,457	320	3,821
Total Whiskey	16,362	18,243	17,595	9,615	61,816
Vodka	26,809	20,826	15,841	6,306	69,782
Rum	5,581	15,743	2,930	495	24,749
Tequila	3,132	8,215	1,637	2,883	15,867
Gin	5,984	1,274	2,531	143	9,932
Brandy & Cognac	7,407	457	3,668	1,491	13,024
Cordials	7,683	9,572	2,308	14	19,576
Cocktails	2,033	3,570	-	-	5,602
Total	74,991	77,899	46,511	20,949	220,349

U.S. Spirits Market - 2016 Volume Growth					
<i>Y/Y Percentage Growth</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-3.5%	2.6%			0.8%
American Whiskey	11.4%	5.6%	5.0%	11.8%	6.8%
Canadian	-2.0%	2.2%	-8.6%	9.3%	2.4%
Scotch - Blended	-4.7%	-1.0%	2.4%	6.4%	-0.5%
Scotch - Single Malt		-11.8%	-1.9%	9.3%	0.4%
Irish		-43.9%	21.4%	9.9%	18.7%
Total Whiskey	0.1%	2.5%	6.8%	9.7%	4.1%
Vodka	0.0%	0.9%	4.6%	13.4%	2.4%
Rum	-3.5%	1.7%	-4.4%	7.7%	-0.2%
Tequila	4.6%	6.5%	16.0%	7.3%	7.1%
Gin	-2.1%	-3.2%	9.8%	11.8%	0.7%
Brandy & Cognac	0.9%	1.0%	11.7%	16.0%	5.4%
Cordials	0.8%	-4.2%	-3.8%	-10.6%	-2.3%
Cocktails	-2.6%	-1.7%			-2.0%
Total	-0.1%	1.1%	5.5%	10.8%	2.4%

U.S. Spirits Market - 2016 Volume Growth					
<i>Y/Y Case Growth (000)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	(99)	173	-	-	74
American Whiskey	376	298	495	218	1,386
Canadian	(162)	59	(19)	521	399
Scotch - Blended	(91)	(28)	55	25	(39)
Scotch - Single Malt	-	(27)	(24)	59	8
Irish	-	(34)	608	29	603
Total Whiskey	24	440	1,116	851	2,431
Vodka	(6)	193	691	744	1,621
Rum	(201)	257	(136)	36	(44)
Tequila	138	499	225	195	1,058
Gin	(131)	(43)	225	15	67
Brandy & Cognac	69	4	383	205	662
Cordials	60	(418)	(91)	(2)	(451)
Cocktails	(53)	(63)	-	-	(116)
Total	(100)	871	2,413	2,044	5,228

Supplier Revenues - 2016					
<i>Millions, Including FET</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 145	\$ 495	\$ -	\$ -	\$ 640
American Whiskey	\$ 217	\$ 598	\$ 1,833	\$ 467	\$ 3,116
Canadian	\$ 427	\$ 282	\$ 29	\$ 1,221	\$ 1,959
Scotch - Blended	\$ 130	\$ 442	\$ 613	\$ 200	\$ 1,385
Scotch - Single Malt	\$ -	\$ 39	\$ 379	\$ 345	\$ 763
Irish	\$ -	\$ 7	\$ 667	\$ 121	\$ 795
Total Whiskey	\$ 920	\$ 1,862	\$ 3,522	\$ 2,354	\$ 8,658
Vodka	\$ 1,106	\$ 1,566	\$ 2,059	\$ 1,312	\$ 6,042
Rum	\$ 275	\$ 1,574	\$ 357	\$ 129	\$ 2,335
Tequila	\$ 241	\$ 909	\$ 297	\$ 1,038	\$ 2,485
Gin	\$ 347	\$ 149	\$ 356	\$ 25	\$ 876
	\$ -	\$ -	\$ -	\$ -	
Brandy & Cognac	\$ 571	\$ 69	\$ 812	\$ 670	\$ 2,122
Cordials	\$ 465	\$ 1,363	\$ 526	\$ 6	\$ 2,359
Cocktails	\$ 101	\$ 210	\$ -	\$ -	\$ 311
Totals	\$ 4,025	\$ 7,701	\$ 7,929	\$ 5,534	\$ 25,188

U.S. Spirits Market - 2016 Revenue Growth					
<i>Y/Y Percentage Growth</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-3.4%	2.5%			1.1%
American Whiskey	13.1%	7.6%	5.7%	13.5%	7.7%
Canadian	-2.7%	2.9%	-7.6%	10.3%	5.8%
Scotch - Blended	-4.5%	-0.8%	3.2%	7.4%	1.7%
Scotch - Single Malt		-9.5%	-0.1%	11.6%	4.3%
Irish		-43.9%	22.7%	12.2%	19.8%
Total Whiskey	0.3%	2.7%	7.3%	11.0%	6.4%
Vodka	-0.5%	-0.2%	4.7%	13.1%	4.1%
Rum	-3.5%	1.5%	-3.8%	8.7%	0.4%
Tequila	4.0%	6.6%	14.9%	7.2%	7.5%
Gin	-3.4%	-3.2%	10.6%	12.2%	2.3%
Brandy & Cognac	2.0%	1.9%	13.0%	18.1%	10.9%
Cordials	1.8%	-4.1%	-3.7%	-8.4%	-2.9%
Cocktails	-2.2%	-1.5%			-1.7%
Total	0.0%	0.8%	6.2%	11.5%	4.5%

U.S. Spirits Market - 2016 Revenue Growth					
<i>Y/Y Revenue Growth (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ (5)	\$ 12	\$ -	\$ -	\$ 7
American Whiskey	\$ 25	\$ 42	\$ 99	\$ 56	\$ 222
Canadian	\$ (12)	\$ 8	\$ (2)	\$ 114	\$ 108
Scotch - Blended	\$ (6)	\$ (3)	\$ 19	\$ 14	\$ 24
Scotch - Single Malt	\$ -	\$ (4)	\$ (1)	\$ 36	\$ 31
Irish	\$ -	\$ (5)	\$ 124	\$ 13	\$ 131
Total Whiskey	\$ 2	\$ 49	\$ 239	\$ 233	\$ 523
Vodka	\$ (5)	\$ (3)	\$ 93	\$ 152	\$ 236
Rum	\$ (10)	\$ 23	\$ (14)	\$ 10	\$ 9
Tequila	\$ 9	\$ 56	\$ 39	\$ 70	\$ 174
Gin	\$ (12)	\$ (5)	\$ 34	\$ 3	\$ 19
Brandy & Cognac	\$ 11	\$ 1	\$ 94	\$ 103	\$ 209
Cordials	\$ 8	\$ (58)	\$ (20)	\$ (1)	\$ (70)
Cocktails	\$ (2)	\$ (3)	\$ -	\$ -	\$ (5)
Total	\$ 1	\$ 61	\$ 463	\$ 570	\$ 1,095

Distilled Spirits Pricing Categories

Canadians, Blends	Supplier Rev/ 9 Liters	Major Brands
Value	<\$65	Black Velvet, Beam 8 Star, Kessler
Premium	\$65 to \$115	Seagrams VO, Canadian Club, Seagram 7
High End Premium	\$115 to \$170	Seagrams VO Gold, Canadian Club 12 Year
Super Premium	\$170+	Crown Royal
Bourbon, Tennessee, Rye, Corn	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Early Times, Old Crow 3Y, Bellows
Premium	\$80 to \$140	Jim Beam White, Old Forrester, George Dickel
High End Premium	\$140 to \$200	Jack Daniels, Makers Mark, Jim Beam Black, Wild Turkey
Super Premium	\$200+	Woodford Reserve, Knob Creek, Jack Daniels Single Barrel
Scotch	Supplier Rev/ 9 Liters	Major Brands
Value	<\$110	Scorsby, Passport, Vat 69
Premium	\$110 to \$160	Dewars White Label, Johnnie Walker Red, Famous Grouse
High End Premium	\$160 to \$260	Johnnie Walker Black, Chivas Regal, Dewars 12
Super Premium	\$260+	Glenlivet, Glenmorangie, Macallan, Johnnie Walker Blue

Distilled Spirits Pricing Categories

Irish	Supplier Rev/ 9 Liters	Major Brands
Value		
Premium		
High End Premium	<\$200	John Jameson,
Super Premium	>\$200	Jameson 12, Tyrconnell, Redbreast
Vodka	Supplier Rev/ 9 Liters	Major Brands
Value	<\$60	Popov, Kamchatka, Gilbey
Premium	\$60 to \$110	Smirnoff, Svedka, Skyy, Pinnacle, Finlandia
High End Premium	\$110 to \$170	Absolut, Effen,
Super Premium	\$170+	Grey Goose, Belvedere, Ciroc
Rum	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Castillo, Ronrico, Calico Jack
Premium	\$70 to \$130	Bacardi Superior, Capt. Morgan Original, Malibu
High End Premium	\$130 to \$175	Mount Gay Eclipse, Bacardi 8, Cruzan Single Barrel, 10 Cane
Super Premium	\$175+	Mount Gay XO, Ron Zacapa XO, Pyrat XO
Tequila	Supplier Rev/ 9 Liters	Major Brands
Value	>\$90	Juarez, Sauza Giro, Pepe Lopez
Premium	\$90 to \$160	Sauza Blanco, El Jimador Blanco
High End Premium	\$160 to \$240	El Jimador, Cazadores Blanco, Sauza Hornitos
Super Premium	\$240+	Patron, Herradura, Don Julio, Sauza Tres Generaciones, Avion

Distilled Spirits Pricing Categories

Gin	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Gilby's, Gordon's, Seagrams
Premium	\$75 to \$125	Beefeater, Bombay Original
High End Premium	\$125 to \$170	Tanqueray, Bombay Sapphire, Beefeater 24
Super Premium	\$170+	Plymouth, Tanqueray 10, Oxley
Brandy & Cognac	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Dekuyper, Hiram Walker
Premium	\$75 to \$120	Paul Masson Grande Amber, Korbel, Salignac VS, Presidente
High End Premium	\$120 to \$240	Hennessey VS, Martell VS, Courvoisier VS, Jacques Cardin VSOP
Super Premium	\$240+	Remy Martin VSOP, Hennessey VSOP, Most Xos
Cordials	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Dekuyper, Hiram Walker
Premium	\$70 to \$170	Jagermeister, Baileys, Kahlua, Yukon Jack
High End Premium	\$170 to \$250	Grand Marnier, Cointreau, Drambuie, Chambord
Super Premium	\$250+	Grand Marnier Centenaire
Cocktails	Supplier Rev/ 9 Liters	Major Brands
Value	All except Premium	Club
Premium	If associated with a brand carrying a Premium or above designation	Kahlua RTDs, Jack Daniels Country Coolers, Skinny Girl, Malibu Cocktails, Bacardi Cocktails, Smirnoff Cocktails

Beverage Alcohol Market Share - Revenue Based							
Year	Supplier Gross Revenues (Billions)				Market Share		
	Beer	Spirits	Wine	Total	Beer	Spirits	Wine
1999	\$ 21.20	\$ 10.66	\$ 6.00	\$ 37.86	56.0%	28.2%	15.8%
2000	\$ 22.60	\$ 11.70	\$ 6.41	\$ 40.71	55.5%	28.7%	15.7%
2001	\$ 23.80	\$ 12.22	\$ 6.63	\$ 42.65	55.8%	28.7%	15.5%
2002	\$ 24.10	\$ 13.17	\$ 7.04	\$ 44.31	54.4%	29.7%	15.9%
2003	\$ 24.87	\$ 13.87	\$ 7.50	\$ 46.24	53.8%	30.0%	16.2%
2004	\$ 25.62	\$ 15.12	\$ 7.90	\$ 48.64	52.7%	31.1%	16.2%
2005	\$ 25.62	\$ 16.00	\$ 8.30	\$ 49.92	51.3%	32.1%	16.6%
2006	\$ 26.34	\$ 17.20	\$ 8.62	\$ 52.15	50.5%	33.0%	16.5%
2007	\$ 27.49	\$ 18.20	\$ 9.24	\$ 54.93	50.1%	33.1%	16.8%
2008	\$ 28.46	\$ 18.72	\$ 9.38	\$ 56.56	50.3%	33.1%	16.6%
2009	\$ 28.82	\$ 18.74	\$ 9.48	\$ 57.04	50.5%	32.9%	16.6%
2010	\$ 28.64	\$ 19.16	\$ 9.76	\$ 57.56	49.8%	33.3%	16.9%
2011	\$ 29.24	\$ 20.36	\$ 10.19	\$ 59.79	48.9%	34.1%	17.0%
2012	\$ 30.32	\$ 21.29	\$ 10.53	\$ 62.13	48.8%	34.3%	16.9%
2013	\$ 30.96	\$ 22.22	\$ 10.89	\$ 64.07	48.3%	34.7%	17.0%
2014	\$ 31.45	\$ 23.15	\$ 11.22	\$ 65.82	47.8%	35.2%	17.0%
2015	\$ 32.30	\$ 24.09	\$ 11.57	\$ 67.96	47.5%	35.4%	17.0%
2016	\$ 33.04	\$ 25.19	\$ 12.03	\$ 70.26	47.0%	35.9%	17.1%
Sources: Industry financial reports, BIG Handbooks, DISCUS Estimates Distilled Spirits Council, Economic & Strategic Analysis Dept.							