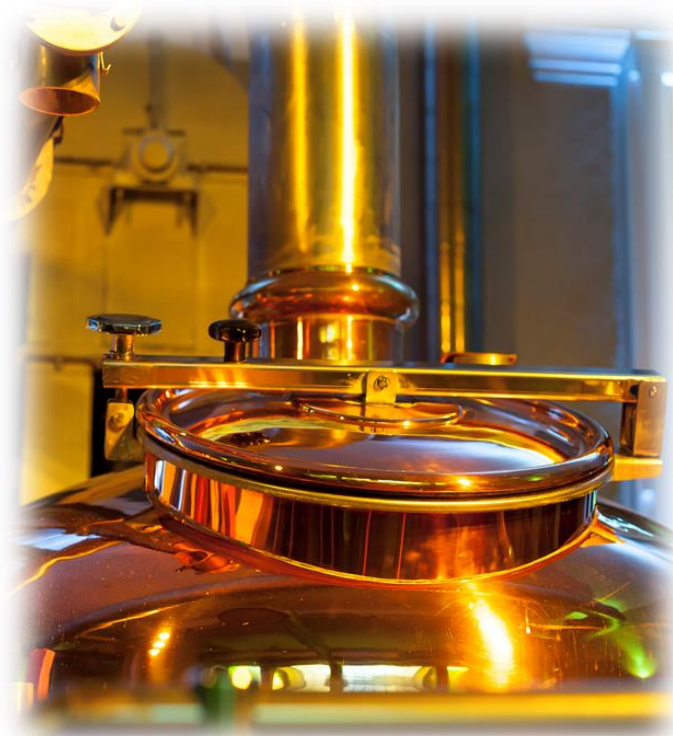


Annual Economic Briefing Support Tables – 2018
February 12, 2019



For further information please contact
David M. Ozgo
Senior Vice President,
Economic & Strategic Analysis
Distilled Spirits Council
DOzgo@DistilledSpirits.org
202-682-8840

U.S. Spirits Market - 2018 Volumes					
<i>9-Liter Cases (000s)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,744	7,280	-	-	10,024
American Whiskey	3,801	6,457	11,410	2,848	24,516
Canadian	7,909	2,618	212	6,620	17,359
Scotch - Blended	1,669	2,471	2,574	529	7,243
Scotch - Single Malt	-	157	1,279	833	2,270
Irish	-	40	4,091	555	4,686
Total Whiskey	16,123	19,025	19,565	11,385	66,098
					-
Vodka	25,931	20,839	20,188	5,514	72,472
Rum	5,480	14,941	2,760	692	23,874
Tequila/Mezcal	3,415	9,364	2,209	3,550	18,538
Gin	5,720	1,306	2,554	183	9,762
	-	-	-	-	-
Brandy & Cognac	7,630	486	4,372	2,273	14,761
Cordials	7,477	10,020	2,240	14	19,751
Cocktails	2,201	3,681	-	-	5,882
Total	73,977	79,660	53,887	23,613	231,136

U.S. Spirits Market - 2018 Volumes					
<i>Percentage Change Y/Y</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	1.8%	2.6%			2.4%
American Whiskey	2.0%	7.5%	3.9%	16.9%	5.9%
Canadian	-3.4%	-4.1%	3.5%	3.0%	-1.1%
Scotch - Blended	-5.3%	-3.2%	7.5%	13.4%	1.0%
Scotch - Single Malt		-9.7%	8.1%	10.8%	7.6%
Irish		0.0%	9.3%	18.3%	10.2%
Total Whiskey	-1.5%	2.3%	5.7%	7.9%	3.2%
Vodka	-2.0%	-1.2%	11.4%	-2.6%	1.6%
Rum	-1.4%	-5.5%	0.9%	26.8%	-3.1%
Tequila/Mezcal	1.5%	7.1%	18.2%	9.7%	7.7%
Gin	-1.5%	2.4%	-2.9%	14.7%	-1.1%
Brandy & Cognac	1.8%	2.0%	10.7%	26.2%	7.6%
Cordials	0.0%	0.6%	6.9%	2.3%	1.0%
Cocktails	1.5%	2.9%			2.3%
Total	-1.0%	0.2%	8.0%	7.5%	2.2%

U.S. Spirits Market - 2018 Volumes					
<i>Case Growth Y/Y</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	49	188	-	-	236
American Whiskey	73	448	431	411	1,363
Canadian	(277)	(113)	7	193	(191)
Scotch - Blended	(93)	(80)	179	63	68
Scotch - Single Malt	-	(17)	96	81	160
Irish	-	-	349	86	435
Total Whiskey	(249)	425	1,062	833	2,071
	-	-	-	-	-
Vodka	(523)	(261)	2,060	(146)	1,130
Rum	(79)	(864)	25	146	(772)
Tequila/Mezcal	52	622	340	315	1,329
Gin	(86)	31	(77)	23	(108)
	-	-	-	-	-
Brandy & Cognac	136	9	422	471	1,039
Cordials	-	56	145	0	202
Cocktails	32	103	-	-	135
	-	-	-	-	-
Total	(716)	121	3,978	1,643	5,026

U.S. Spirits Market - 2018 Revenues					
<i>Supplier Gross Revenues (Millions, Includes FET)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 148	\$ 527	\$ -	\$ -	\$ 674
American	\$ 230	\$ 676	\$ 2,043	\$ 643	\$ 3,592
Canadian	\$ 413	\$ 267	\$ 31	\$ 1,293	\$ 2,005
Scotch - Blended	\$ 116	\$ 383	\$ 699	\$ 257	\$ 1,454
Scotch - Single Malt	\$ -	\$ 30	\$ 393	\$ 421	\$ 843
Irish	\$ -	\$ -	\$ 793	\$ 211	\$ 1,004
Total Whiskey	\$ 907	\$ 1,881	\$ 3,959	\$ 2,825	\$ 9,573
Vodka	\$ 1,060	\$ 1,541	\$ 2,647	\$ 1,152	\$ 6,400
Rum	\$ 265	\$ 1,503	\$ 350	\$ 179	\$ 2,298
Tequila/Mezcal	\$ 274	\$ 1,042	\$ 405	\$ 1,289	\$ 3,010
Gin	\$ 328	\$ 153	\$ 378	\$ 32	\$ 891
	\$ -	\$ -	\$ -	\$ -	\$ -
Brandy & Cognac	\$ 585	\$ 74	\$ 990	\$ 1,012	\$ 2,662
Cordials	\$ 445	\$ 1,428	\$ 511	\$ 6	\$ 2,390
Cocktails	\$ 110	\$ 217	\$ -	\$ -	\$ 327
Totals	\$ 3,975	\$ 7,839	\$ 9,240	\$ 6,496	\$ 27,550

U.S. Spirits Market - 2018 Revenues					
<i>Percentage Change Y/Y</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	1.6%	1.9%			1.9%
American	2.5%	7.5%	4.0%	16.9%	6.6%
Canadian	-3.8%	-6.0%	3.5%	3.1%	0.3%
Scotch - Blended	-5.8%	-3.3%	8.3%	13.3%	4.6%
Scotch - Single Malt		-9.1%	8.3%	12.0%	9.4%
Irish		-100.0%	10.9%	20.6%	12.0%
Total Whiskey	-1.7%	1.0%	6.5%	9.4%	5.4%
Vodka	-3.1%	-1.8%	11.4%	-2.5%	2.9%
Rum	-2.0%	-5.2%	5.5%	28.5%	-1.3%
Tequila/Mezcal	5.5%	7.7%	18.9%	10.8%	10.2%
Gin	-2.3%	3.1%	-1.4%	15.6%	-0.5%
Brandy & Cognac	1.8%	2.6%	15.3%	30.4%	16.6%
Cordials	-2.5%	0.5%	6.8%	7.4%	1.2%
Cocktails	1.3%	2.7%			2.2%
Totals	-1.2%	0.0%	8.9%	10.5%	5.0%

U.S. Spirits Market - 2018 Revenues					
<i>Y/Y Revenue Growth</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 2	\$ 10	\$ -	\$ -	\$ 12
American	\$ 6	\$ 47	\$ 78	\$ 93	\$ 224
Canadian	\$ (16)	\$ (17)	\$ 1	\$ 39	\$ 7
Scotch - Blended	\$ (7)	\$ (13)	\$ 54	\$ 30	\$ 64
Scotch - Single Malt	\$ -	\$ (3)	\$ 30	\$ 45	\$ 72
Irish	\$ -	\$ (7)	\$ 78	\$ 36	\$ 108
Total Whiskey	\$ (15)	\$ 18	\$ 241	\$ 243	\$ 486
	\$ -	\$ -	\$ -	\$ -	\$ -
Vodka	\$ (34)	\$ (28)	\$ 271	\$ (30)	\$ 178
Rum	\$ (5)	\$ (83)	\$ 18	\$ 40	\$ (31)
Tequila/Mezcal	\$ 14	\$ 74	\$ 64	\$ 126	\$ 279
Gin	\$ (8)	\$ 5	\$ (5)	\$ 4	\$ (4)
	\$ -	\$ -	\$ -	\$ -	\$ -
Brandy & Cognac	\$ 11	\$ 2	\$ 131	\$ 236	\$ 379
Cordials	\$ (11)	\$ 7	\$ 32	\$ 0	\$ 29
Cocktails	\$ 1	\$ 6	\$ -	\$ -	\$ 7
	\$ -	\$ -	\$ -	\$ -	\$ -
Totals	\$ (48)	\$ 0	\$ 752	\$ 619	\$ 1,324

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%
2017	\$ 33.07	\$ 26.22	\$ 12.40	\$ 71.69	46.1%	36.6%	17.3%
2018	\$ 33.66	\$ 27.55	\$ 12.71	\$ 73.92	45.5%	37.3%	17.2%

Sources: Industry financial reports, BIG Handbooks, Council Estimates
Distilled Spirits Council, Economic & Strategic Analysis Dept.

Price Category Tables

Canadians, Blends	Supplier Rev/ 9 Liters	Major Brands
Value	<70	Black Velvet, Beam 8 Star, Kessler
Premium	\$70 to \$115	Canadian Club 6Y, Seagram 7
High End Premium	\$115 to \$170	Canadian Club 12 Year, Collingwood
Super Premium	\$170+	Crown Royal
Bourbon, Tennessee, Rye, Corn	Supplier Rev/ 9 Liters	Major Brands
Value	<\$90	Early Times, Old Crow 3Y
Premium	\$90 to \$140	Jim Beam White, Old Forrester
High End Premium	\$140 to \$210	Jack Daniels, Makers Mark, Jim Beam Black, Wild Turkey, Bulleit
Super Premium	\$210+	Woodford Reserve, Knob Creek, Jack Daniels Single Barrel, Jim Beam Signature, Bullet 10 Yr.
Scotch	Supplier Rev/ 9 Liters	Major Brands
Value	<\$110	Cutty Sark, Vat 69, Teachers
Premium	\$110 to \$160	Dewars White Label, Johnnie Walker Red, Famous Grouse
High End Premium	\$160 to \$300	Johnnie Walker Black, Chivas Regal 12, Dewars 12
Super Premium	\$300+	Glenlivet, Glenmorangie, Macallan, Johnnie Walker Blue, Ardbeg
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	<\$70	Kamchatka, Gilbey,
Premium	\$70 to \$120	Smirnoff, Svedka, Skyy, Pinnacle
High End Premium	\$120 to \$170	Absolut, Effen, Ketel One
Super Premium	\$170+	Grey Goose, Ciroc, Belvedere
Rum	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Castillo, Ronrico
Premium	\$70 to \$130	Bacardi Superior, Capt. Morgan Original, Malibu, Cruzan
High End Premium	\$130 to \$175	Mount Gay Eclipse, Bacardi Gran Reserva, Brugal Anejo
Super Premium	\$175+	Mount Gay XO, Ron Zacapa XO, Brugal 1888, Bacardi Anejo Cuatro,
Tequila	Supplier Rev/ 9 Liters	Major Brands
Value	>\$90	Sauza Giro, Pepe Lopez
Premium	\$90 to \$160	Sauza Blanco, El Jimador Silver
High End Premium	\$160 to \$240	El Jimador, Cazadores Blanco, Sauza Hornitos
Super Premium	\$240+	Patron, Herradura, Don Julio, Sauza Tres Generaciones, Avion, Casa Noble
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 \$200	Tanqueray, Bombay Sapphire, Beefeater 24
Super Premium	\$200+	Plymouth, Tanqueray 10, Oxley, The Botanist

Brandy & Cognac	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Dekuyper, Hiram Walker, Leroux
Premium	\$75 to \$180	Paul Masson Grande Amber, Korbel, Salignac VS, St. Remy VSOP
High End Premium	\$180 to \$280	Hennessey VS, Martell VS, Courvoisier VS
Super Premium	\$280+	Remy Martin VSOP, Hennessey VSOP, Most XOs
Cordials	Supplier Rev/ 9 Liters	Major Brands
Value	<\$80	Dekuyper, Hiram Walker, Leroux
Premium	\$80 to \$180	Jagermeister, Baileys, Kahlua, Rumchata
High End Premium	\$180 to \$280	Chambord, Godiva
Super Premium	\$280+	Jagermeister Manifest
Cocktails	Supplier Rev/ 9 Liters	Major Brands
Value	All except Premium	Seagram's Gin & Juice
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