



Scotch: Take the High Road

In 2018, 9.5 million 9-liter cases of Scotch were sold in the United States, generating \$2.3 billion in revenues for distillers.

U.S. Scotch Volumes by Price Category
(9-Liter Cases, 000, includes blends and single malts)

Year	Value	Premium	High End Premium	Super Premium	Total
2002	3,291	3,460	2,192	155	9,098
2003	3,241	3,574	2,268	238	9,321
2004	3,264	3,636	2,449	272	9,621
2005	3,162	3,599	2,458	288	9,507
2006	2,976	3,558	2,657	327	9,518
2007	2,918	3,514	2,752	376	9,561
2008	2,960	3,366	2,728	372	9,426
2009	2,800	3,304	2,566	358	9,028
2010	2,727	3,139	2,763	426	9,056
2011	2,504	3,115	2,901	552	9,072
2012	2,297	3,068	3,186	675	9,226
2013	2,133	3,180	3,399	849	9,561
2014	2,018	2,970	3,538	910	9,436
2015	1,936	3,084	3,542	1,022	9,585
2016	1,845	3,030	3,573	1,106	9,554
2017	1,762	2,726	3,578	1,219	9,285
2018	1,669	2,628	3,853	1,362	9,513
02 - 18 Growth	-5.3%	-3.6%	7.7%	11.8%	2.5%

U.S. Scotch Supplier Revenues

Gross Revenues Including FET (millions), includes blends and single malts

Year	Value	Premium	High End Premium	Super Premium	Total
2003	\$192	\$510	\$513	\$94	\$1,310
2004	\$207	\$524	\$574	\$117	\$1,423
2005	\$201	\$524	\$596	\$117	\$1,438
2006	\$190	\$525	\$651	\$134	\$1,500
2007	\$190	\$519	\$671	\$159	\$1,539
2008	\$201	\$506	\$676	\$161	\$1,544
2009	\$194	\$522	\$649	\$158	\$1,523
2010	\$189	\$494	\$720	\$189	\$1,591
2011	\$174	\$490	\$774	\$248	\$1,685
2012	\$159	\$484	\$856	\$307	\$1,806
2013	\$149	\$507	\$929	\$394	\$1,979
2014	\$142	\$470	\$964	\$433	\$2,008
2015	\$136	\$488	\$973	\$496	\$2,093
2016	\$130	\$480	\$992	\$545	\$2,148
2017	\$124	\$428	\$1,008	\$602	\$2,162
2018	\$116	\$412	\$1,092	\$677	\$2,298
03 - 18 Growth	-5.8%	-3.7%	8.3%	12.5%	6.3%

Source: Distilled Spirits Council, Economic & Strategic Analysis Dept.

Scotch has benefited from drinkers' desire to "trade up" from Premium to High-End and Super-Premium products. Super Premium products offer a wider variety of the complex flavors that Scotch is known for. Since many of these higher end products are either aged longer or in special casks they also command higher prices for suppliers and importers. Over half of Scotch revenues are derived from High-End and Super Premium brands.

**U.S. Scotch Volumes by Price Category
(9-Liter Cases, 000)**

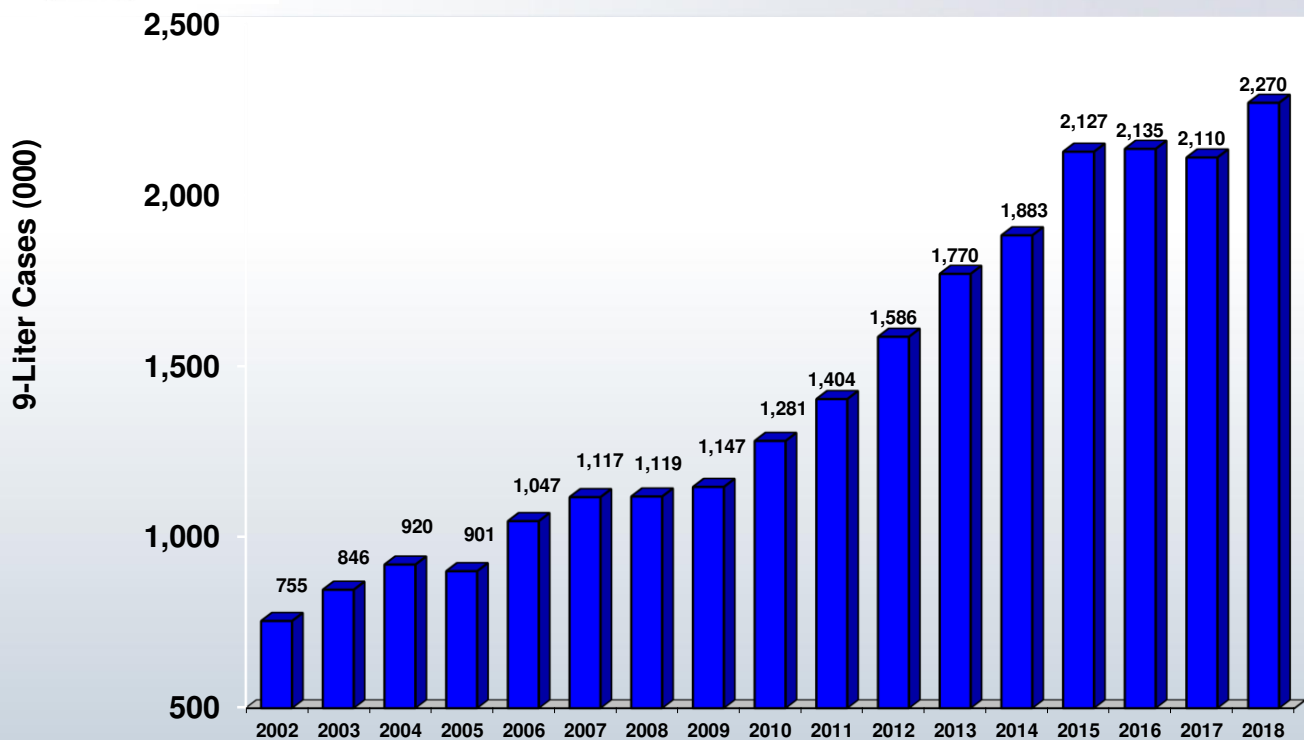
Year	Blend	Single Malt	Total
2002	8,343	755	9,098
2003	8,474	846	9,321
2004	8,701	920	9,621
2005	8,606	901	9,507
2006	8,471	1,047	9,518
2007	8,444	1,117	9,561
2008	8,307	1,119	9,426
2009	7,882	1,147	9,029
2010	7,774	1,281	9,056
2011	7,668	1,404	9,072
2012	7,640	1,586	9,226
2013	7,791	1,770	9,561
2014	7,554	1,883	9,436
2015	7,457	2,127	9,585
2016	7,418	2,135	9,554
2017	7,175	2,110	9,285
2018	7,243	2,270	9,513
02 - 18 Growth	-13.2%	200.7%	4.6%

Source: Distilled Spirits Council, Economic & Strategic Analysis Dept.

One of the driving factors behind the growth in Super Premium Scotch brands has been American's continuing interest in Single Malt Scotch. Since 2002, Single Malt Scotch volumes have grown by 200%. As the name implies, Single Malt Scotch is made from the product of a single distillery.



U.S. Single-Malt Scotch, 2002-2018



Source: The Distilled Spirits Council of the U.S.

Data provided by Distilled Spirits Council's Economic & Strategic Analysis Department.