

Annual Economic Briefing Support Tables – 2019  
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| <b>U.S. Spirits Market - 2019 Volumes</b>             |               |               |                  |               |                |
|---|---------------|---------------|------------------|---------------|----------------|
| <i>9-Liter Cases (000s)</i>                           |               |               |                  |               |                |
| Category  | Value         | Premium       | High End Premium | Super Premium | Total          |
| Blended Whiskey                                       | 2,779         | 7,456         | 116              | 70            | 10,421         |
| American Whiskey                                      | 3,674         | 7,065         | 12,348           | 3,481         | 26,569         |
| Canadian  | 7,760         | 2,536         | 392              | 7,215         | 17,903         |
| Scotch - Blended                                      | 1,597         | 2,403         | 2,529            | 570           | 7,099          |
| Scotch - Single Malt                                  | -             | 142           | 1,332            | 953           | 2,427          |
| Irish   | -             | 40            | 4,266            | 564           | 4,871          |
| <b>Total Whiskey</b>                                  | <b>15,811</b> | <b>19,641</b> | <b>20,984</b>    | <b>12,854</b> | <b>69,289</b>  |
| Vodka   | 25,676        | 20,945        | 22,402           | 5,126         | 74,148         |
| Rum   | 5,295         | 15,327        | 2,774            | 738           | 24,133         |
| Tequila/Mezcal  | 3,492         | 9,910         | 2,633            | 4,083         | 20,118         |
| Gin   | 5,544         | 1,290         | 2,684            | 241           | 9,758          |
| Brandy & Cognac                                       | 8,001         | 488           | 4,376            | 2,216         | 15,081         |
| Cordials  | 7,400         | 10,172        | 2,348            | 16            | 19,936         |
| Cocktails   | 2,234         | 4,004         | -                | -             | 6,238          |
| <b>Total</b>  | <b>73,452</b> | <b>81,777</b> | <b>58,200</b>    | <b>25,273</b> | <b>238,701</b> |
| <b>U.S. Spirits Market - 2019 Incremental Volumes</b> |               |               |                  |               |                |
| <i>9-Liter Cases (000s)</i>                           |               |               |                  |               |                |
| Category  | Value         | Premium       | High End Premium | Super Premium | Total          |
| Blended Whiskey                                       | 35            | 176           | 116              | 70            | 397            |
| American Whiskey                                      | (126)         | 607           | 938              | 633           | 2,052          |
| Canadian  | (148)         | (83)          | 180              | 595           | 544            |
| Scotch - Blended                                      | (72)          | (69)          | (45)             | 41            | (144)          |
| Scotch - Single Malt                                  | -             | (15)          | 53               | 120           | 157            |
| Irish   | -             | -             | 176              | 9             | 185            |
| <b>Total Whiskey</b>                                  | <b>(312)</b>  | <b>616</b>    | <b>1,418</b>     | <b>1,468</b>  | <b>3,191</b>   |
| Vodka   | (256)         | 106           | 2,214            | (389)         | 1,676          |
| Rum   | (185)         | 386           | 13               | 45            | 260            |
| Tequila/Mezcal  | 77            | 546           | 424              | 533           | 1,580          |
| Gin   | (176)         | (16)          | 130              | 58            | (4)            |
| Brandy & Cognac                                       | 371           | 2             | 5                | (57)          | 321            |
| Cordials  | (77)          | 152           | 108              | 2             | 185            |
| Cocktails   | 33            | 323           | -                | -             | 356            |
| <b>Total</b>  | <b>(525)</b>  | <b>2,117</b>  | <b>4,313</b>     | <b>1,660</b>  | <b>7,565</b>   |

| <b>U.S. Spirits Market - 2019 Growth</b> |              |             |                  |               |             |
|--|--------------|-------------|------------------|---------------|-------------|
| <i>Percentage Volume Growth</i>          |              |             |                  |               |             |
| Category                                 | Value        | Premium     | High End Premium | Super Premium | Total       |
| Blended Whiskey                          | 1.3%         | 2.4%        |                  |               | 4.0%        |
| American Whiskey                         | -3.3%        | 9.4%        | 8.2%             | 22.2%         | 8.4%        |
| Canadian                                 | -1.9%        | -3.2%       | 84.8%            | 9.0%          | 3.1%        |
| Scotch - Blended                         | -4.3%        | -2.8%       | -1.7%            | 7.7%          | -2.0%       |
| Scotch - Single Malt                     |              | -9.7%       | 4.1%             | 14.4%         | 6.9%        |
| Irish                                    |              | 0.0%        | 4.3%             | 1.6%          | 3.9%        |
| Total Whiskey                            | -1.9%        | 3.2%        | 7.2%             | 12.9%         | 4.8%        |
|  |              |             |                  |               |             |
| Vodka                                    | -1.0%        | 0.5%        | 11.0%            | -7.0%         | 2.3%        |
| Rum                                      | -3.4%        | 2.6%        | 0.5%             | 6.6%          | 1.1%        |
| Tequila/Mezcal                           | 2.3%         | 5.8%        | 19.2%            | 15.0%         | 8.5%        |
| Gin                                      | -3.1%        | -1.2%       | 5.1%             | 31.7%         | 0.0%        |
|  |              |             |                  |               |             |
| Brandy & Cognac                          | 4.9%         | 0.5%        | 0.1%             | -2.5%         | 2.2%        |
| Cordials                                 | -1.0%        | 1.5%        | 4.8%             | 17.7%         | 0.9%        |
| Cocktails                                | 1.5%         | 8.8%        |                  |               | 6.1%        |
|  |              |             |                  |               |             |
| <b>Total</b>                             | <b>-0.7%</b> | <b>2.7%</b> | <b>8.0%</b>      | <b>7.0%</b>   | <b>3.3%</b> |

| <b>U.S. Spirits Market - 2019 Revenues</b>             |          |          |                  |               |           |
|--|----------|----------|------------------|---------------|-----------|
| <i>Supplier Gross Revenues (Milions, Includes FET)</i> |          |          |                  |               |           |
| Category   | Value    | Premium  | High End Premium | Super Premium | Total     |
| Blended Whiskey  | \$ 150   | \$ 563   | \$ 17            | \$ 22         | \$ 751    |
| American   | \$ 224   | \$ 739   | \$ 2,212         | \$ 804        | \$ 3,979  |
| Canadian   | \$ 403   | \$ 258   | \$ 60            | \$ 1,409      | \$ 2,131  |
| Scotch - Blended                                       | \$ 111   | \$ 371   | \$ 689           | \$ 274        | \$ 1,445  |
| Scotch - Single Malt                                   | \$ -     | \$ 27    | \$ 411           | \$ 487        | \$ 925    |
| Irish  | \$ -     | \$ -     | \$ 845           | \$ 216        | \$ 1,061  |
| Total Whiskey  | \$ 887   | \$ 1,958 | \$ 4,235         | \$ 3,212      | \$ 10,291 |
| Vodka  | \$ 1,040 | \$ 1,542 | \$ 2,935         | \$ 1,069      | \$ 6,585  |
| Rum  | \$ 255   | \$ 1,545 | \$ 355           | \$ 193        | \$ 2,348  |
| Tequila  | \$ 287   | \$ 1,116 | \$ 488           | \$ 1,490      | \$ 3,382  |
| Gin  | \$ 320   | \$ 155   | \$ 401           | \$ 43         | \$ 918    |
| Brandy & Cognac  | \$ 615   | \$ 75    | \$ 989           | \$ 998        | \$ 2,677  |
| Cordials   | \$ 453   | \$ 1,469 | \$ 540           | \$ 8          | \$ 2,470  |
| Cocktails  | \$ 112   | \$ 239   | \$ -             | \$ -          | \$ 351    |
|  | \$ 3,969 | \$ 8,099 | \$ 9,941         | \$ 7,012      | \$ 29,022 |
|  |          |          |                  |               |           |
|  |          |          |                  |               |           |
|  |          |          |                  |               |           |
| <b>U.S. Spirits Market - 2019 Incremental Revenues</b> |          |          |                  |               |           |
| <i>Supplier Gross Revenues (Milions, Includes FET)</i> |          |          |                  |               |           |
| Category   | Value    | Premium  | High End Premium | Super Premium | Total     |
| Blended Whiskey  | \$ 2     | \$ 36    | \$ 17            | \$ 22         | \$ 77     |
| American   | \$ (6)   | \$ 64    | \$ 169           | \$ 161        | \$ 387    |
| Canadian   | \$ (10)  | \$ (8)   | \$ 29            | \$ 116        | \$ 126    |
| Scotch - Blended                                       | \$ (6)   | \$ (11)  | \$ (9)           | \$ 17         | \$ (9)    |
| Scotch - Single Malt                                   | \$ -     | \$ (3)   | \$ 18            | \$ 66         | \$ 81     |
| Irish  | \$ -     | \$ -     | \$ 52            | \$ 5          | \$ 57     |
| Total Whiskey  | \$ (20)  | \$ 77    | \$ 275           | \$ 387        | \$ 719    |
| Vodka  | \$ (21)  | \$ 0     | \$ 288           | \$ (83)       | \$ 185    |
| Rum  | \$ (10)  | \$ 42    | \$ 4             | \$ 14         | \$ 50     |
| Tequila  | \$ 13    | \$ 74    | \$ 83            | \$ 201        | \$ 372    |
| Gin  | \$ (8)   | \$ 2     | \$ 23            | \$ 10         | \$ 27     |
| Brandy & Cognac  | \$ 30    | \$ 1     | \$ (1)           | \$ (15)       | \$ 15     |
| Cordials   | \$ 8     | \$ 41    | \$ 28            | \$ 1          | \$ 79     |
| Cocktails  | \$ 2     | \$ 22    | \$ -             | \$ -          | \$ 25     |
|  | \$ (5)   | \$ 260   | \$ 701           | \$ 516        | \$ 1,471  |

| <b>U.S. Spirits Market - 2019 Growth</b> |       |         |                  |               |       |
|--|-------|---------|------------------|---------------|-------|
| <i>Percentage Gross Revenue Growth</i>   |       |         |                  |               |       |
| Category                                 | Value | Premium | High End Premium | Super Premium | Total |
| Blended Whiskey                          | 1.4%  | 6.9%    |                  |               | 11.4% |
| American                                 | -2.7% | 9.4%    | 8.3%             | 25.0%         | 10.8% |
| Canadian                                 | -2.5% | -3.2%   | 91.4%            | 9.0%          | 6.3%  |
| Scotch - Blended                         | -5.0% | -3.0%   | -1.3%            | 6.6%          | -0.6% |
| Scotch - Single Malt                     |       | -10.5%  | 4.6%             | 15.7%         | 9.6%  |
| Irish                                    |       |         | 6.5%             | 2.4%          | 5.6%  |
| Total Whiskey                            | -2.2% | 4.1%    | 6.9%             | 13.7%         | 7.5%  |
| Vodka                                    | -2.0% | 0.0%    | 10.9%            | -7.2%         | 2.9%  |
| Rum                                      | -3.7% | 2.8%    | 1.2%             | 7.6%          | 2.2%  |
| Tequila                                  | 4.9%  | 7.1%    | 20.6%            | 15.6%         | 12.4% |
| Gin                                      | -2.5% | 1.2%    | 6.0%             | 32.6%         | 3.0%  |
| Brandy & Cognac                          | 5.1%  | 1.3%    | -0.1%            | -1.4%         | 0.6%  |
| Cordials                                 | 1.9%  | 2.9%    | 5.5%             | 20.2%         | 3.3%  |
| Cocktails                                | 1.9%  | 10.4%   |                  |               | 7.5%  |
|  | -0.1% | 3.3%    | 7.6%             | 7.9%          | 5.3%  |

| 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% |
| 2019  | \$ 34.66                           | \$ 29.02 | \$ 13.03 | \$ 76.71 | 45.2%        | 37.8%   | 17.0% |

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

Price Category Tables

| Canadians,<br>Blends                | Supplier Rev/ 9<br>Liters | Major Brands  |
|-------------------------------------|---------------------------|---|
| Value                               | <70                       | Beam 8 Star, Kessler  |
| Premium                             | \$70 to \$115             | Canadian Club 6Y, Seagram 7   |
| High End Premium                    | \$115 to \$170            | Canadian Club 12 Year, Collingwood. Ole Smoky Blended                                       |
| Super Premium                       | \$170+                    | Crown Royal   |
|                                     |                           |   |
|                                     |                           |   |
|                                     |                           |   |
| Bourbon,<br>Tennessee, Rye,<br>Corn | Supplier Rev/ 9<br>Liters | Major Brands  |
| Value                               | <\$90                     | Early Times, Old Crow 3Y  |
| Premium                             | \$90 to \$145             | Jim Beam White, Old Forrester   |
| High End Premium                    | \$145 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<br>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<br>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 Extra                               |
| Super Premium    | \$175+                 | Mount Gay XO, Ron Zacapa XO, Brugal 1888, Bacardi Anejo Cuatro, Realy McCoy Rum 12Y |
|                  |                        |   |
|                  |                        |   |
|                  |                        |   |
| 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         | Cazadores Blanco, Sauza Hornitos, Olmeca Altos                                      |
| Super Premium    | \$240+                 | Patron, Herradura, Don Julio, Sauza Tres Generaciones, Avion, Casa Noble            |
|                  |                        |   |
|                  |                        |   |
|                  |                        |   |
| Gin              | Supplier Rev/ 9 Liters | Major Brands  |
| Value            | <\$75                  | Gordon's, Seagrams, Gilbys  |
| Premium          | \$75 to \$130          | Beefeater, Bombay Original  |
| High End Premium | \$130 to \$200         | Tanqueray, Bombay Sapphire, Beefeater 24  |
| Super Premium    | \$200+                 | Plymouth, Tanqueray 10, Oxley, The Botanist   |



|                  |  |   |
|------------------|--|---|
| Brandy & Cognac  | Supplier Rev/ 9<br>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<br>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<br>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 |
|                  |  |   |