

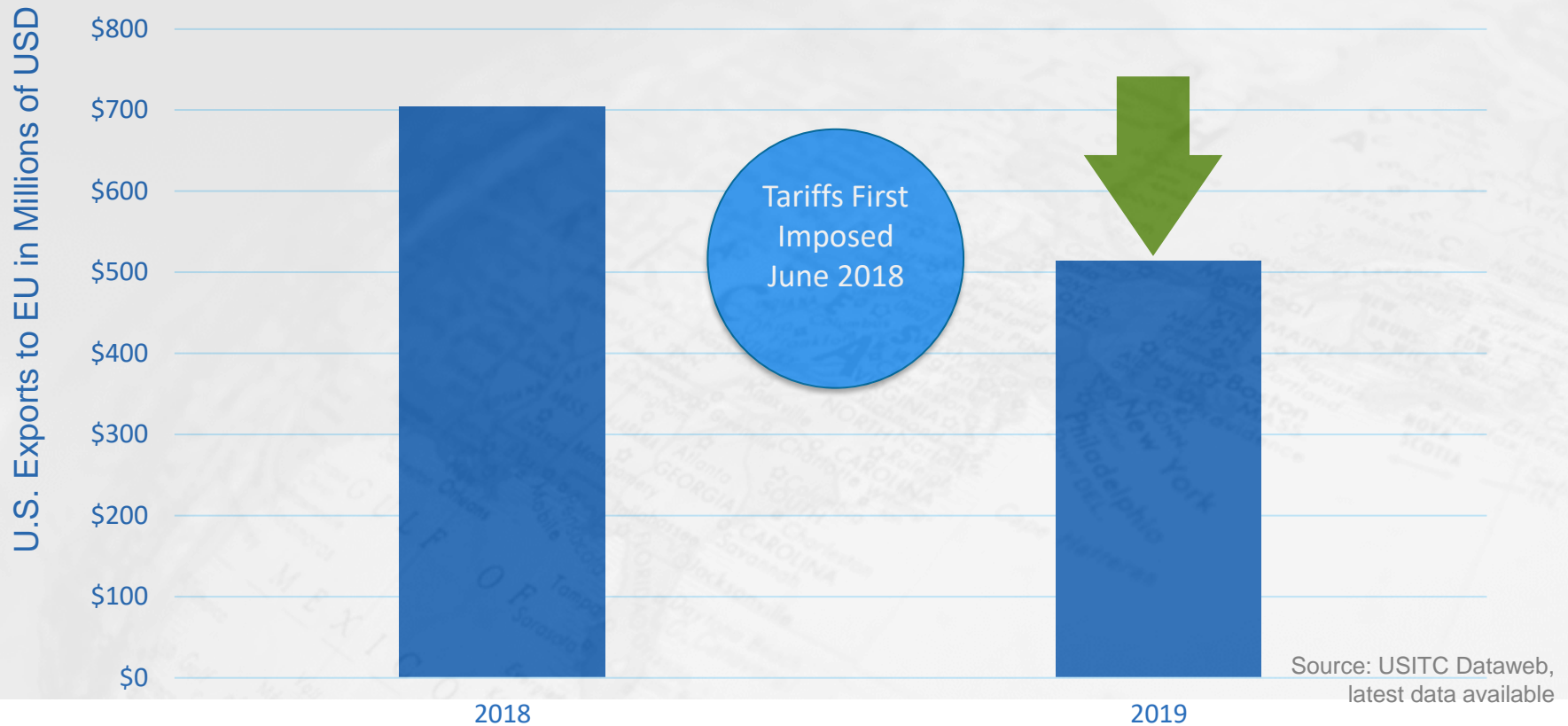
U.S. Export Growth Stunted by Tariffs

- Over the past 10 years, total U.S. spirits exports grew by **55.3 percent**.
- In June 2018, the EU imposed a **25 percent retaliatory tariff** on American Whiskey.
- From 2018 to 2019, total U.S. spirits exports were **down 14.3 percent** to \$1.5 billion.
- American Whiskey exports were **down 16.0 percent** to \$996 million from 2018 to 2019.



The Effects of Tariffs: European Union

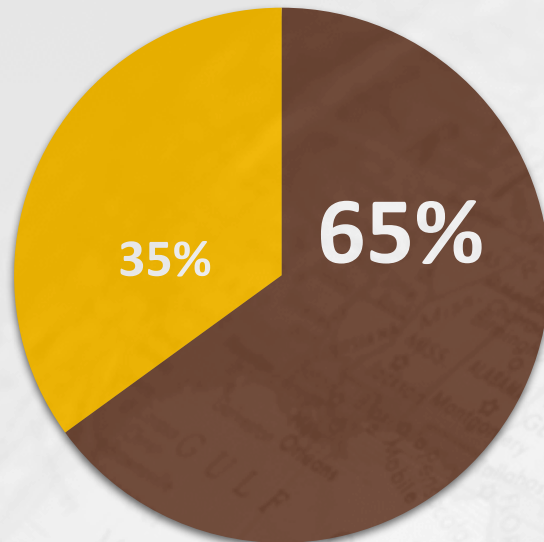
U.S. Whiskey exports to the EU were **down 27 percent** from 2018 to 2019.



American Whiskey Drives U.S. Spirits Exports

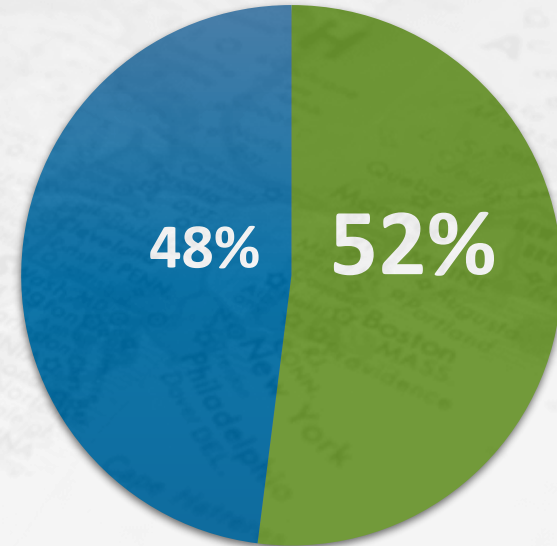
American Whiskey accounts for **65 percent of all U.S. spirits exports**.
The EU is the top export market for American Whiskey.

**Total U.S. Spirits Exports
(\$1.5B)**



- American Whiskey (\$996 M)
- All other U.S. spirits (\$537 M)

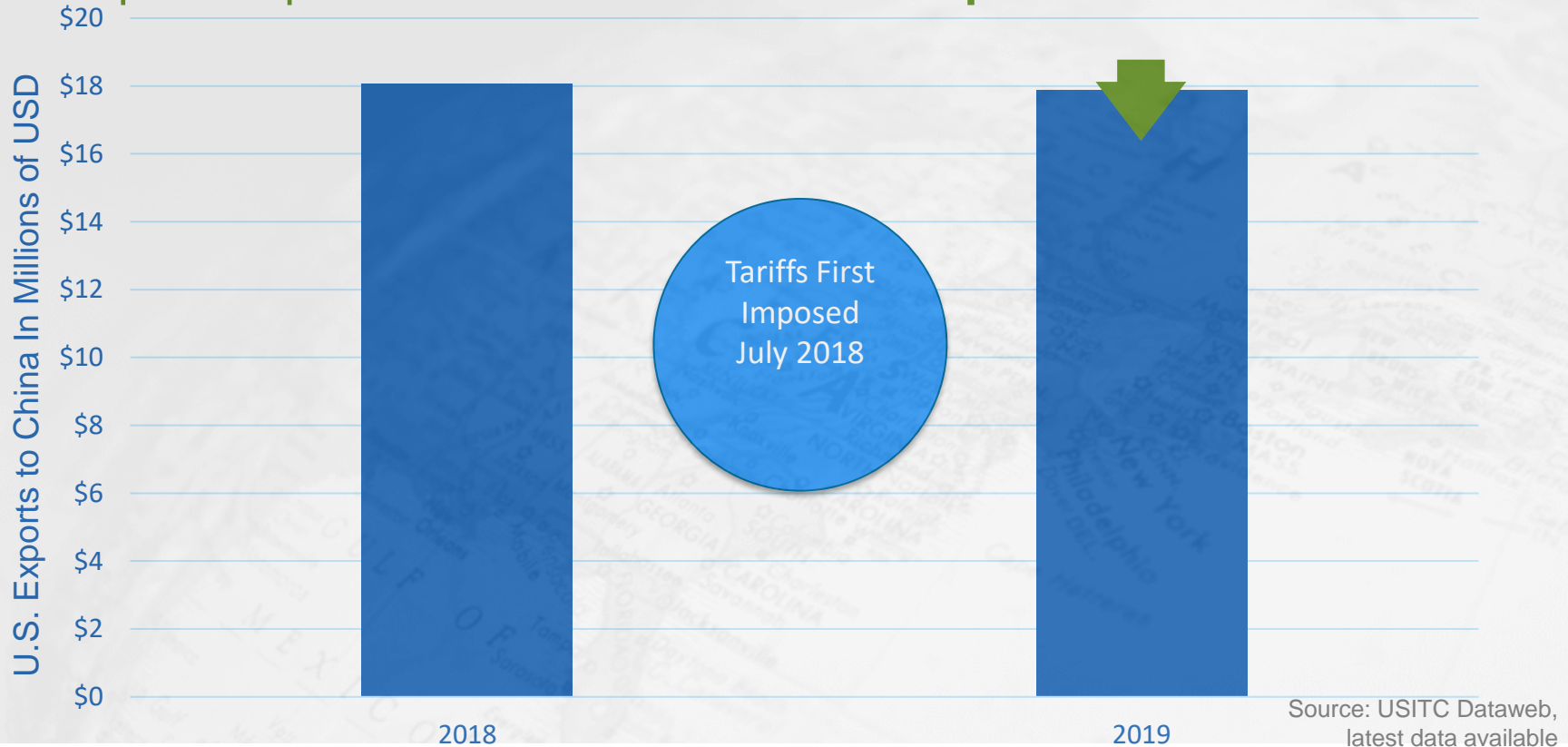
**Total American Whiskey
Exports (\$996 M)**



- American Whiskey exports to the EU (\$514 M)
- American Whiskey exports to rest of world (\$482 M)

The Effects of Tariffs: China

U.S. spirits exports to China were **down 0.98 percent** from 2018 to 2019.



Source: USITC Dataweb, latest data available

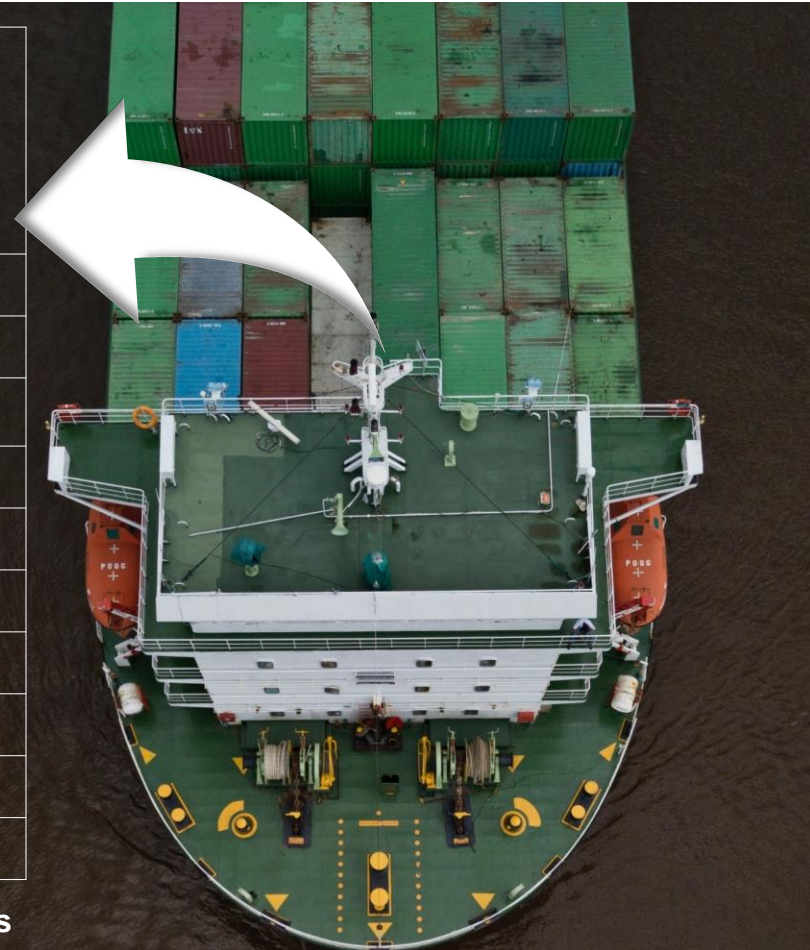
Source: USITC Dataweb, latest data available

The Effects of Tariffs:

Top 10 Export Markets for U.S. Spirits

	2018 Total U.S. Spirits Exports (In millions of USD)	2019 Total U.S. Spirits Exports (In millions of USD)	2018-2019 Percent Change
Canada	\$234	\$202	- 13.6
Japan	\$118	\$138	+ 17.7
UK*	\$190	\$111	- 41.5
Australia	\$121	\$102	- 15.9
France*	\$115	\$93	- 18.9
Germany*	\$120	\$83	- 30.4
Mexico	\$61	\$72	+ 18
Spain*	\$119	\$70	- 41.3
Vietnam	\$62	\$63	+ 0.8
Latvia*	\$44	\$52	+ 19.5

* EU Member Countries



The Effects of Tariffs:

Top 10 Export Markets for American Whiskey

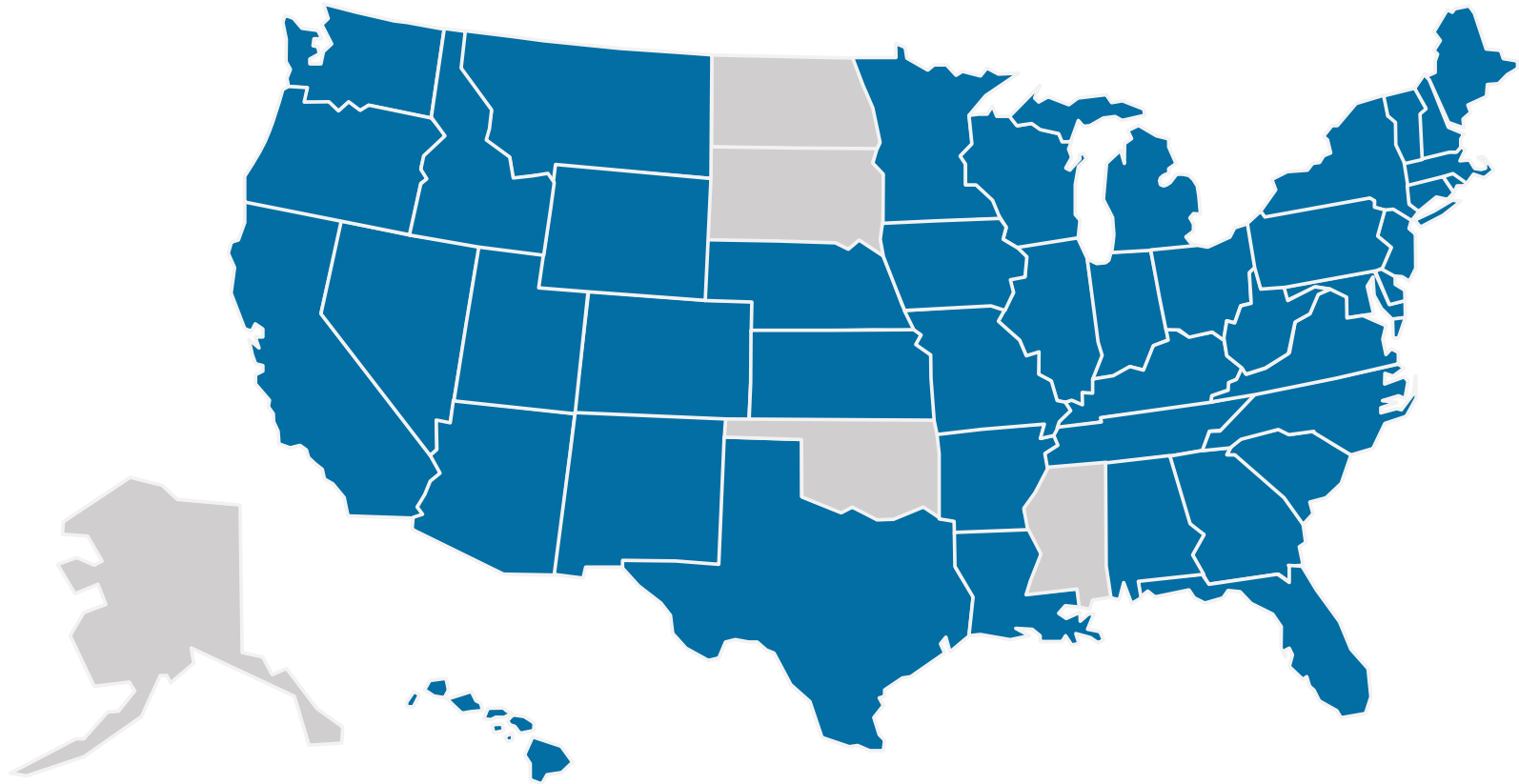


	2018 American Whiskey Exports (In millions of USD)	2019 American Whiskey Exports (In millions of USD)	2018-2019 Percent Change
Japan	\$98	\$122	+ 24.6
UK*	\$150	\$101	- 32.7
France *	\$108	\$86	- 19.9
Australia	\$101	\$84	- 16.6
Germany*	\$100	\$82	- 18.2
Spain*	\$108	\$61	- 43.8
Canada	\$50	\$52	+ 5.1
Latvia*	\$42	\$50	+ 18.9
Netherlands*	\$45	\$29	- 37.1
Poland*	\$33	\$27	- 18.5

* EU Member Countries



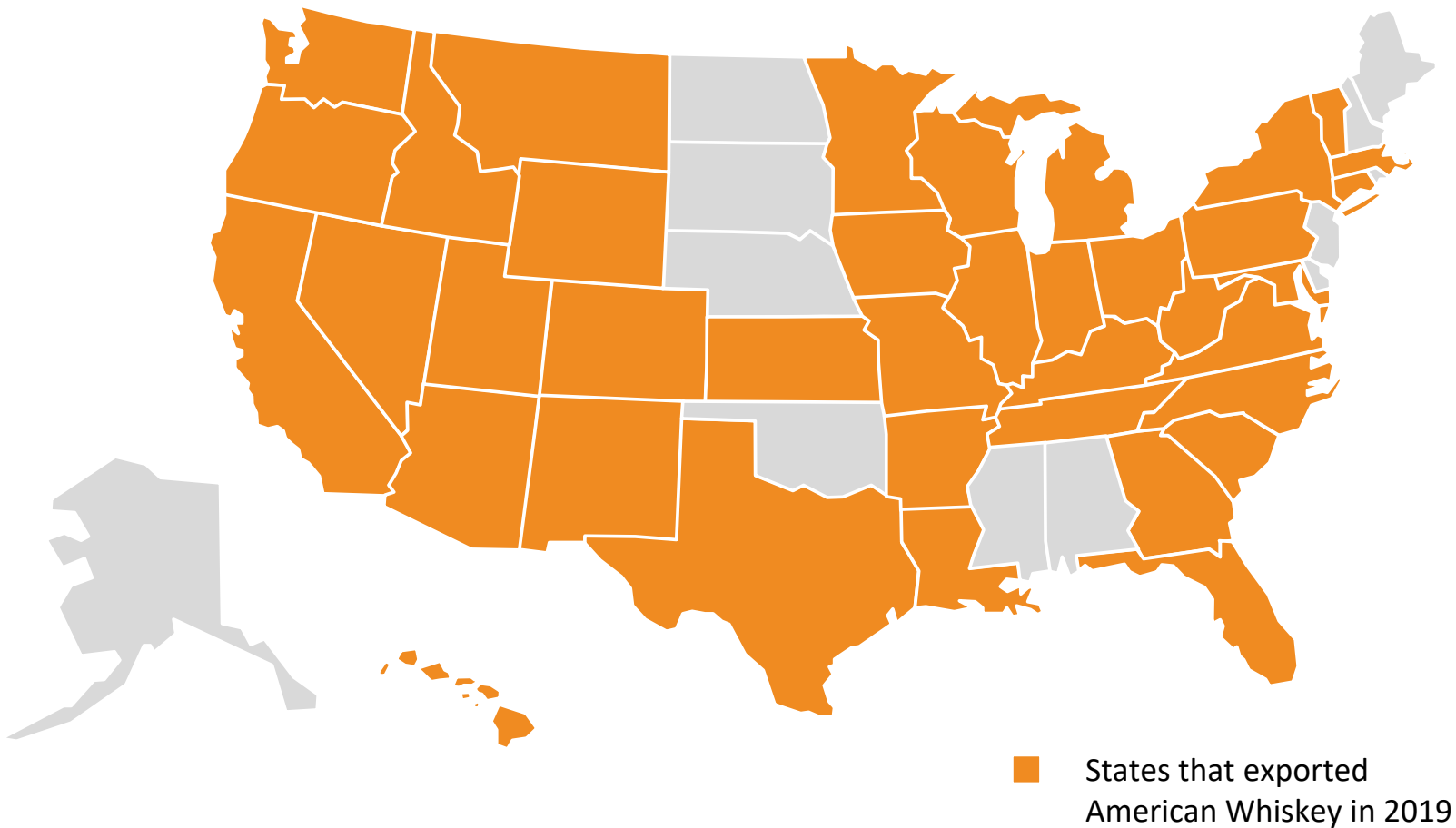
45 States Exported U.S. Spirits in 2019



■ States that exported U.S. spirits in 2019

Source: 2019 U.S. Census & ITC Data

39 States Exported American Whiskey in 2019



Source: 2019 U.S. Census & ITC Data