

Annual Economic Briefing Support Tables – 2020



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U.S. Spirits Market - 2020 Volumes

9-Liter Cases (000s)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,718	8,243	207	90	11,258
American Whiskey	3,789	7,817	12,742	4,087	28,434
Canadian	8,255	2,564	345	7,524	18,688
Scotch - Blended	1,616	2,668	2,316	594	7,193
Scotch - Single Malt	-	131	1,246	891	2,269
Irish	-	40	4,164	807	5,011
Total Whiskey	16,378	21,463	21,020	13,993	72,854
Vodka	25,147	21,986	24,752	4,978	76,863
Rum	4,920	16,423	2,987	756	25,086
Tequila/Mezcal	3,073	10,804	3,182	5,113	22,172
Gin	5,657	1,371	2,878	261	10,167
Brandy & Cognac	7,899	513	5,186	2,600	16,198
Cordials	7,272	10,171	2,125	18	19,586
Cocktails	2,690	5,313	423	-	8,425
Total	73,036	88,043	62,553	27,719	251,351

U.S. Spirits Market - 2020 Case Growth

9-Liter Cases (000s)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	(61)	787	91	20	837
American Whiskey	114	752	394	605	1,866
Canadian	495	28	(47)	309	785
Scotch - Blended	19	265	(213)	24	95
Scotch - Single Malt	-	(11)	(86)	(62)	(158)
Irish	-	-	(103)	243	140
Total Whiskey	567	1,822	37	1,139	3,565
	-	-	-	-	-
Vodka	(528)	1,041	2,350	(147)	2,716
Rum	(376)	1,096	214	18	952
Tequila/Mezcal	(418)	893	549	1,030	2,054
Gin	114	81	194	20	409
	-	-	-	-	-
Brandy & Cognac	(102)	25	809	384	1,117
Cordials	(128)	(1)	(222)	1	(350)
Cocktails	456	1,309	423	-	2,187
Total	(415)	6,266	4,353	2,446	12,650

2020 Y/Y Volume Growth

Percentage

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-2.2%	10.6%	78.7%	27.8%	8.0%
American	3.1%	10.6%	3.2%	17.4%	7.0%
Canadian	6.4%	1.1%	-12.0%	4.3%	4.4%
Scotch - Blended	1.2%	11.0%	-8.4%	4.2%	1.3%
Scotch - Single Malt		-7.5%	-6.5%	-6.5%	-6.5%
Irish		0.0%	-2.4%	43.1%	2.9%
Total Whiskey	3.6%	9.3%	0.2%	8.9%	5.1%
Vodka	-2.1%	5.0%	10.5%	-2.9%	3.7%
Rum	-7.1%	7.2%	7.7%	2.5%	3.9%
Tequila	-12.0%	9.0%	20.9%	25.2%	10.2%
Gin	2.1%	6.3%	7.2%	8.4%	4.2%
Brandy & Cognac	-1.3%	5.1%	18.5%	17.3%	7.4%
Cordials	-1.7%	0.0%	-9.5%	7.2%	-1.8%
Cocktails	20.4%	32.7%			35.1%
Total	-0.6%	7.7%	7.5%	9.7%	5.3%

U.S. Spirits Market - Supplier Revenues

Gross Revenues - Includes FET (Millions)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 146	\$ 630	\$ 34	\$ 28	838
American Whiskey	\$ 234	\$ 826	\$ 2,293	\$ 953	\$ 4,306
Canadian	\$ 429	\$ 261	\$ 54	\$ 1,489	\$ 2,233
Scotch - Blended	\$ 112	\$ 414	\$ 633	\$ 285	\$ 1,444
Scotch - Single Malt	\$ -	\$ 23	\$ 397	\$ 485	\$ 905
Irish	\$ -	\$ -	\$ 825	\$ 309	\$ 1,134
Total Whiskey	\$ 921	\$ 2,155	\$ 4,236	\$ 3,550	\$ 10,861
Vodka	\$ 1,018	\$ 1,618	\$ 3,247	\$ 1,038	\$ 6,922
Rum	\$ 237	\$ 1,663	\$ 385	\$ 200	\$ 2,486
Tequila/Mezcal	\$ 257	\$ 1,248	\$ 596	\$ 1,868	\$ 3,969
Gin	\$ 330	\$ 164	\$ 432	\$ 46	\$ 972
Brandy & Cognac	\$ 607	\$ 79	\$ 1,208	\$ 1,191	\$ 3,086
Cordials	\$ 453	\$ 1,496	\$ 522	\$ 8	\$ 2,479
Cocktails	\$ 135	\$ 317	\$ 36	\$ -	\$ 489
Total	\$ 3,958	\$ 8,741	\$ 10,662	\$ 7,901	\$ 31,262

U.S. Spirits Market - 2020 Revenue Growth

Gross Revenues - Includes FET (Millions)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ (3)	\$ 67	\$ 17	\$ 6	87
American Whiskey	\$ 10	\$ 87	\$ 81	\$ 149	\$ 327
Canadian	\$ 26	\$ 3	\$ (6)	\$ 80	\$ 102
Scotch - Blended	\$ 1	\$ 43	\$ (56)	\$ 11	\$ (1)
Scotch - Single Malt	\$ -	\$ (4)	\$ (14)	\$ (2)	\$ (19)
Irish	\$ -	\$ -	\$ (20)	\$ 93	\$ 73
Total Whiskey	\$ 34	\$ 196	\$ 1	\$ 338	\$ 569
	\$ -	\$ -	\$ -	\$ -	\$ -
Vodka	\$ (21)	\$ 77	\$ 313	\$ (31)	\$ 337
Rum	\$ (18)	\$ 118	\$ 31	\$ 7	\$ 138
Tequila/Mezcal	\$ (30)	\$ 132	\$ 108	\$ 378	\$ 587
Gin	\$ 9	\$ 10	\$ 31	\$ 4	\$ 54
	\$ -	\$ -	\$ -	\$ -	\$ -
Brandy & Cognac	\$ (8)	\$ 4	\$ 219	\$ 193	\$ 409
Cordials	\$ (0)	\$ 27	\$ (18)	\$ 1	\$ 9
Cocktails	\$ 23	\$ 78	\$ 36	\$ -	\$ 137
Total	\$ (11)	\$ 642	\$ 721	\$ 889	\$ 2,241

2020 Y/Y Revenue Growth

Percentage

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-2.2%	12.0%	98.4%	27.8%	11.6%
American Whiskey	4.7%	11.8%	3.7%	18.5%	8.2%
Canadian	6.4%	1.1%	-10.3%	5.7%	4.8%
Scotch - Blended	1.2%	11.6%	-8.2%	4.2%	0.0%
Scotch - Single Malt		-14.2%	-3.4%	-0.3%	-2.1%
Irish			-2.4%	43.1%	6.9%
Total Whiskey	3.9%	10.0%	0.0%	10.5%	5.5%
Vodka	-2.1%	5.0%	10.7%	-2.9%	5.1%
Rum	-7.1%	7.6%	8.7%	3.7%	5.9%
Tequila/Mezcal	-10.5%	11.8%	22.1%	25.4%	17.4%
Gin	2.9%	6.3%	7.7%	8.7%	5.9%
Brandy & Cognac	-1.3%	5.6%	22.2%	19.3%	15.3%
Cordials	0.0%	1.8%	-3.4%	8.5%	0.4%
Cocktails	20.4%	32.7%			39.1%
Total	-0.3%	7.9%	7.3%	12.7%	7.7%

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%
2020	\$ 35.15	\$ 31.26	\$ 13.48	\$ 79.89	44.0%	39.1%	16.9%
Sources: Industry financial reports, BIG Handbooks, Council Estimates							
Distilled Spirits Council, Economic & Strategic Analysis Dept.							

Canadians, Blends	Supplier Rev/ 9 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, High West America Prairie
Bourbon, Tennessee, Rye, Corn	Supplier Rev/ 9 Liters	Major Brands
Value	<\$90	Ten High, 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, Knob Creek
Super Premium	\$210+	Woodford Reserve, Jack Daniels Single Barrel, Jim Beam Signature, Bullet 10 Yr., Angels Envy Rye
Scotch	Supplier Rev/ 9 Liters	Major Brands
Value	<\$110	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, Kilbeggan
Super Premium	>\$200	Jameson 12, Tyrconnell, Redbreast

Vodka	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Kamchatka, Gilbey, Burnetts
Premium	\$70 to \$120	Smirnoff, Svedka, Skyy, Pinnacle, New Amsterdam
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, Ron Rio
Premium	\$70 to \$130	Bacardi Superior, Capt. Morgan Original, Malibu, Cruzan
High End Premium	\$130 to \$175	Mount Gay Eclipse, Bacardi Gran Reserva
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, Olmeca Altos
High End Premium	\$160 to \$240	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	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 Liters	Major Brands
Value	<\$75	Dekuyper, Hiram Walker, Leroux, Aristocrat
Premium	\$75 to \$180	Paul Masson Grande Amber, Korbel, Salignac VS, St. Remy, E&J 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, Tequila Rose
High End Premium	\$180 to \$280	Chambord, Godiva, St. Germain
Super Premium	\$280+	Patron Citronge, Grand Marnier
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