

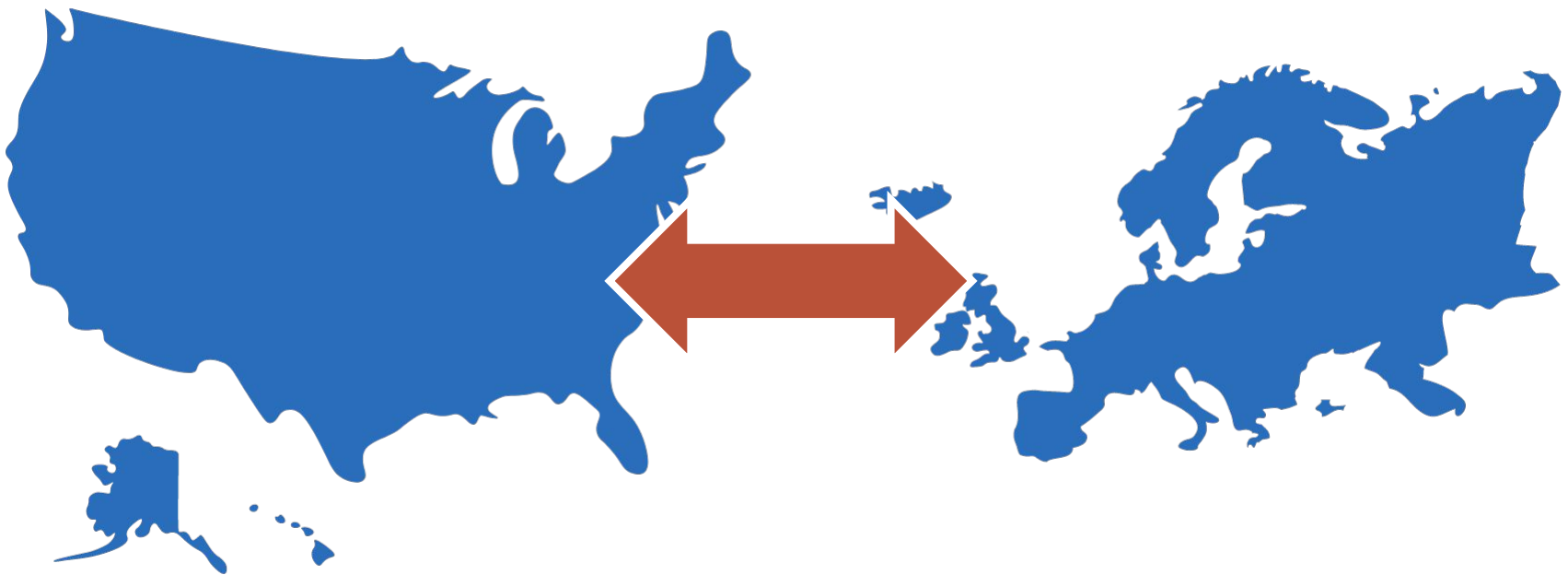
Trade: Impacts of Tariffs



**DISTILLED SPIRITS COUNCIL
OF THE UNITED STATES**

Tariffs on Distilled Spirits

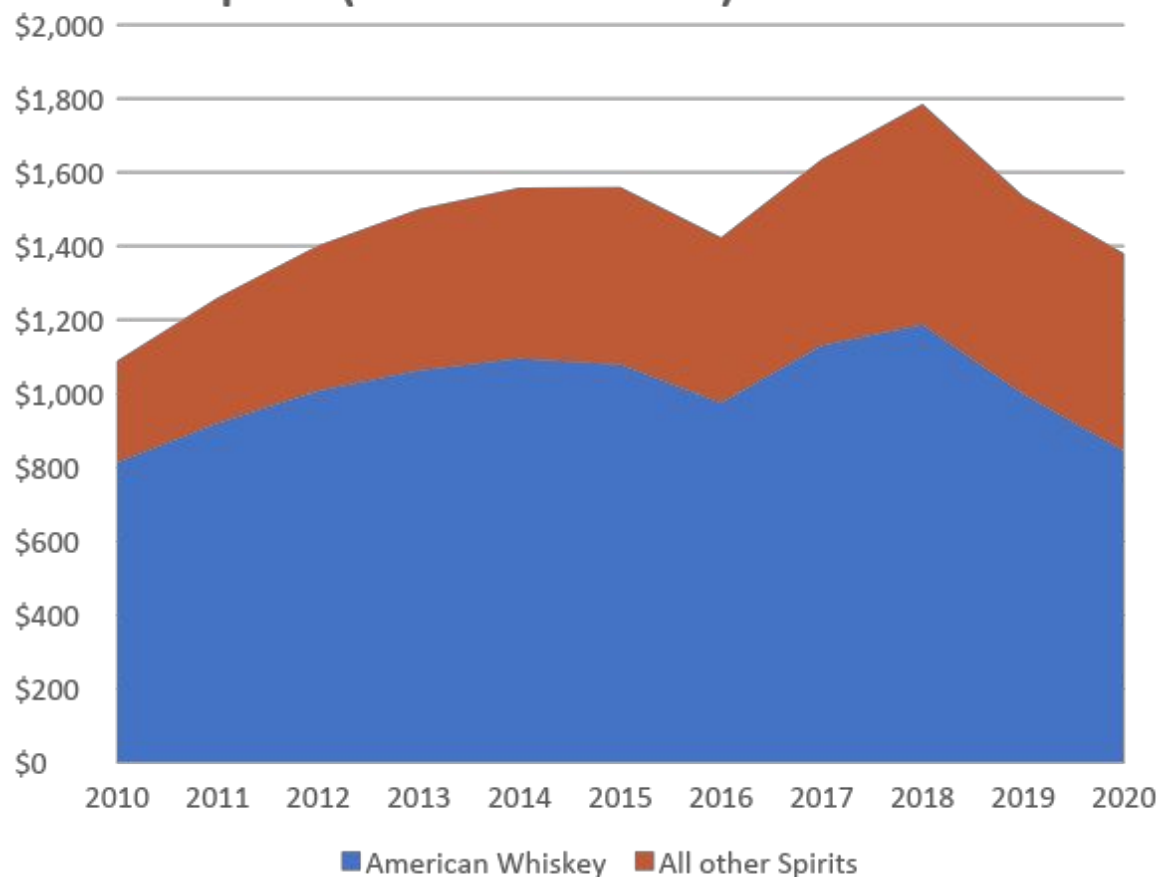
From 1997 through June 2018, there were *no tariffs* on distilled spirits between the U.S. and EU.



Decade in Review: U.S. Export Growth



Global U.S. Spirits and American Whiskey Exports (in millions of USD)



- Over the past 10 years, total U.S. spirits exports grew by **27 percent**.
- In June 2018, the EU imposed a **25 percent retaliatory tariff** on American Whiskey.
- From 2018 to 2020, total U.S. spirits exports were **down 23 percent** to \$1.4 billion.
- American Whiskey exports were **down 29 percent** to \$846 million from 2018 to 2020.

American Whiskey Exports to the EU 28 and the UK



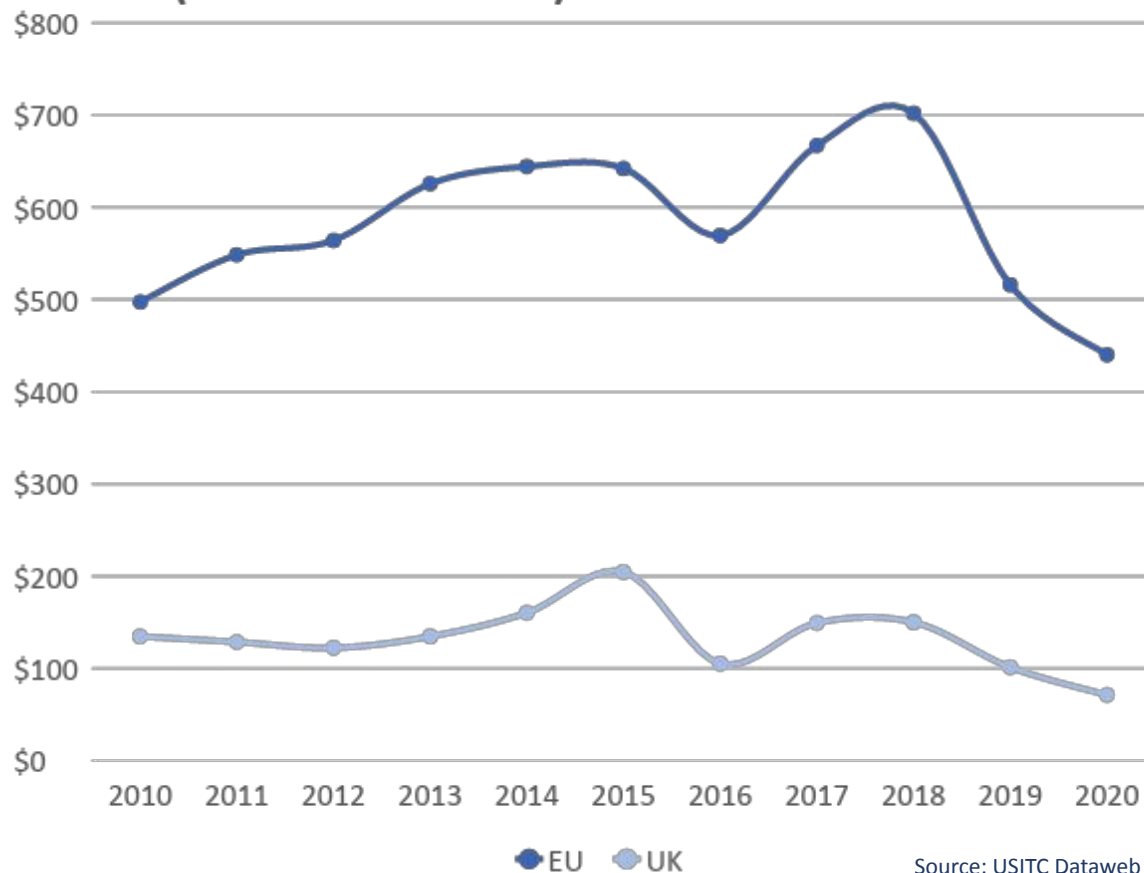
2020:

- The EU accounted for **52 percent** of total American Whiskey exports.
- The UK accounted for **16 percent** of American Whiskey exports to the EU.

2018-2020:

- Since the imposition of retaliatory tariffs, American Whiskey exports to the UK have decreased **53 percent** and **37 percent** to the EU.

American Whiskey Exports to the EU and UK
(in millions of USD)



Source: USITC Dataweb

Top 10 Export Markets for American Spirits



	2019 Total U.S. Spirits Exports (In millions of USD)	2020 Total U.S. Spirits Exports (In millions of USD)	2019-2020 Percent Change
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Canada	\$202	\$249	23.2
Japan	\$138	\$125	-9.4
Australia	\$102	\$114	11.2
UK*	\$112	\$83	-25.4
France*	\$93	\$81	-13.0
Germany*	\$83	\$77	-7.7
Spain*	\$72	\$76	4.9
Mexico	\$72	\$66	-8.1
Netherlands*	\$51	\$57	11.4
Latvia*	\$52	\$42	-19.5

*EU Member State



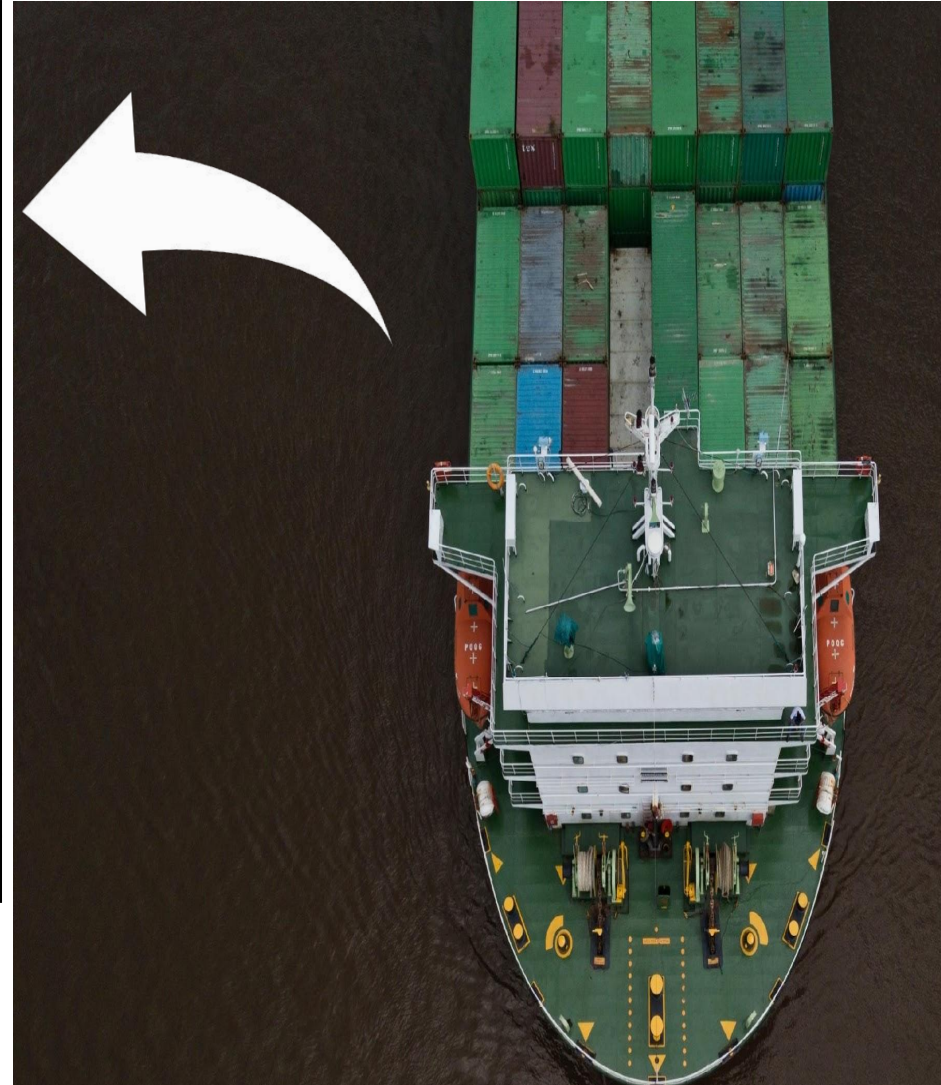
Top 10 Export Markets for American Whiskey



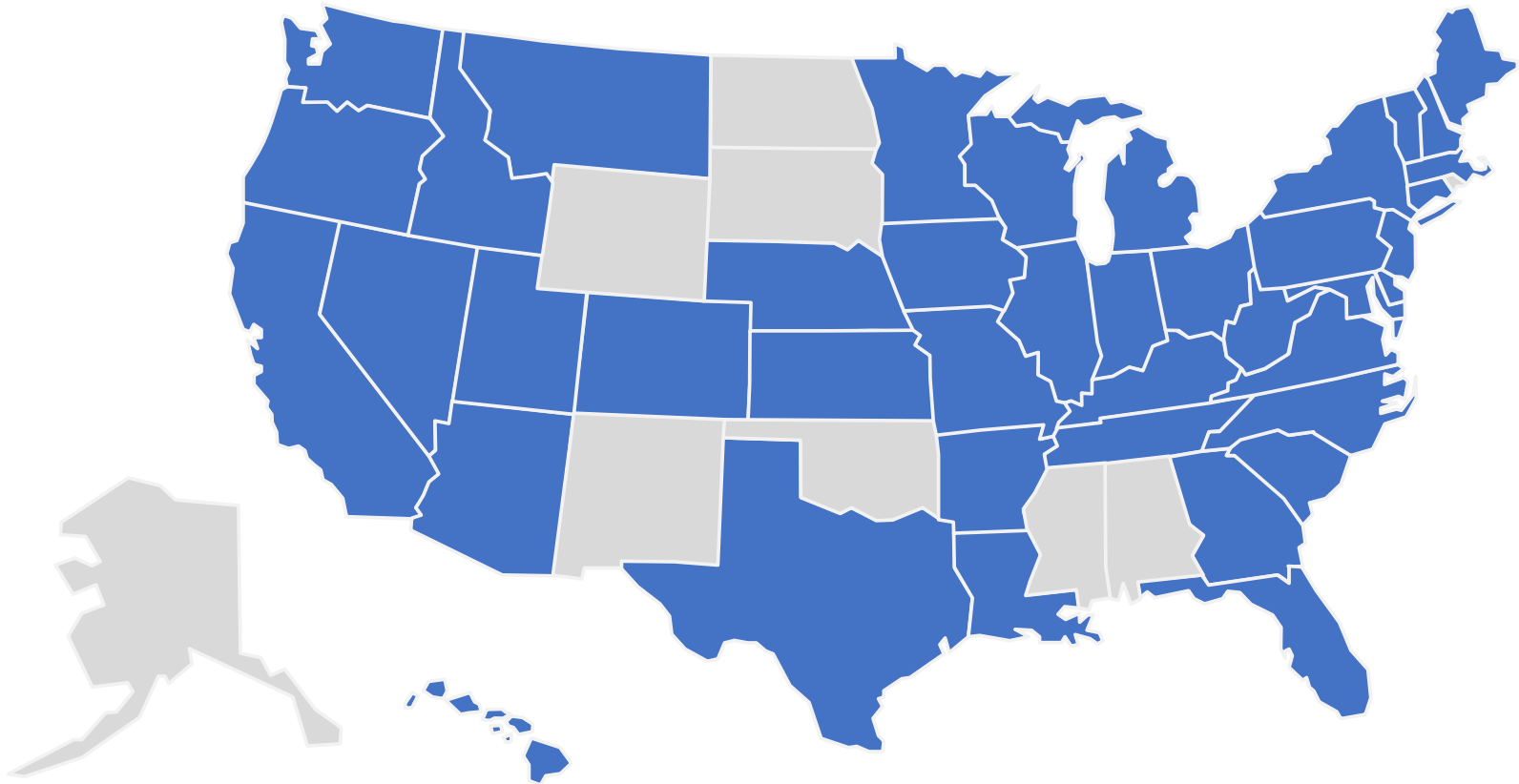
	2019 Total U.S. Spirits Exports (In millions of USD)	2020 Total U.S. Spirits Exports (In millions of USD)	2019-2020 Percent Change
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Japan	\$122	\$103	-15.7
Australia	\$84	\$98	15.8
Germany*	\$82	\$76	-7.2
UK*	\$101	\$71	-29.6
France*	\$86	\$70	-18.5
Spain*	\$63	\$57	-8.5
Canada	\$52	\$56	7.0
Latvia*	\$50	\$40	-19.4
Poland*	\$27	\$31	17.4
Netherlands*	\$29	\$30	4.9

*EU Member State

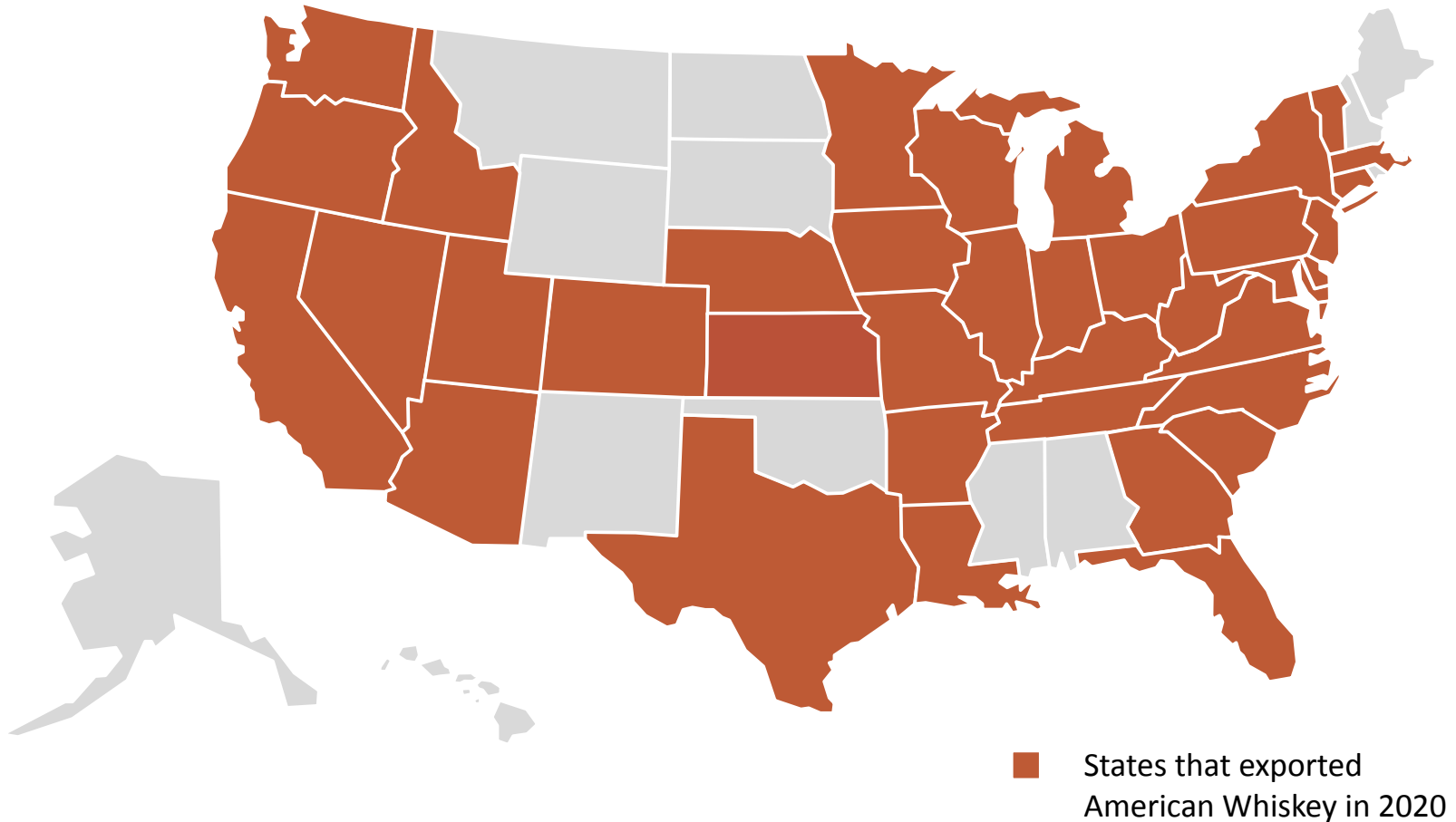


41 States Exported U.S. Spirits in 2020



■ States that exported
U.S. spirits in 2020

37 States Exported American Whiskey in 2020



Source: 2020 U.S. Census & ITC Data

Imports of Scotch Whisky



- In October 2019, the U.S. imposed a **25 percent retaliatory tariff** on Single Malt Scotch Whisky.

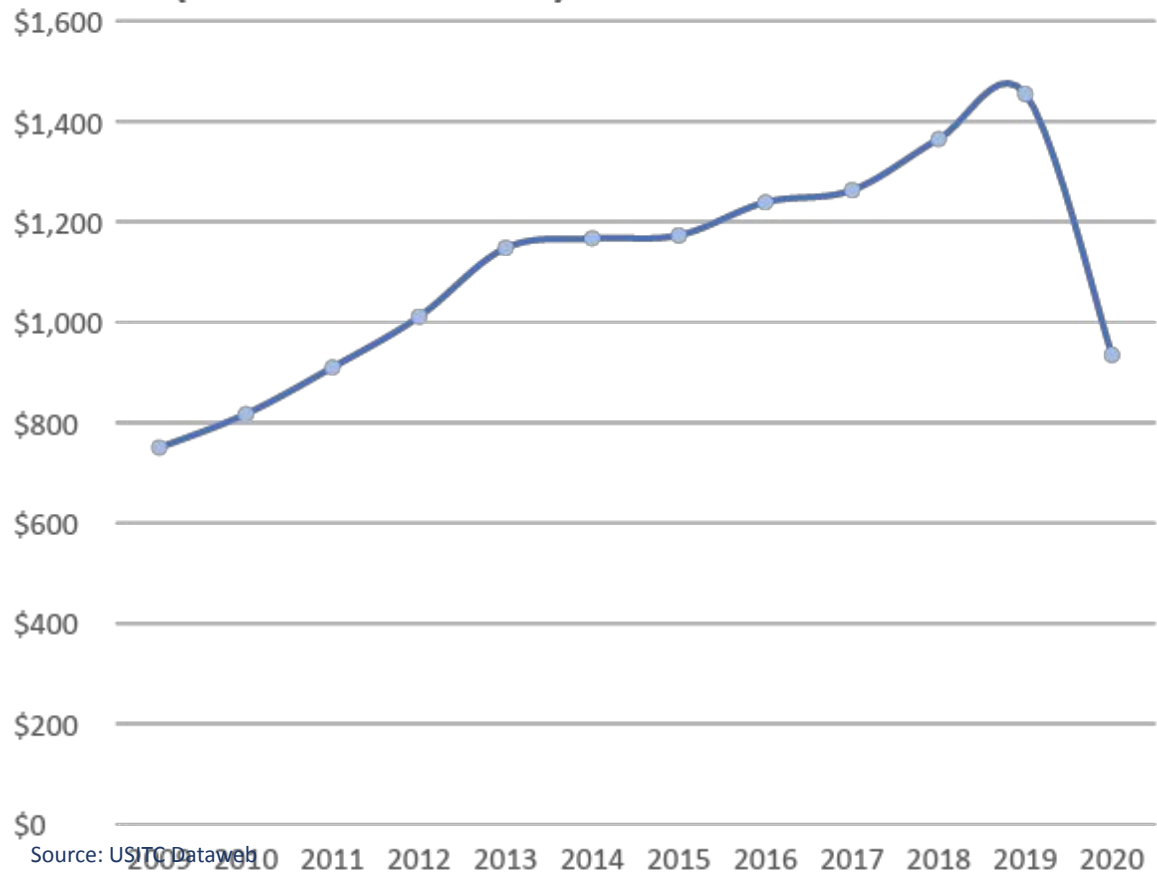
2009-2019:

- U.S. imports of Scotch Whisky increased by **94 percent**

2019-2020:

- U.S. imports of Scotch Whisky decreased by **36 percent**.

Imports of Scotch Whisky
(in millions of USD)



Scotch Whisky



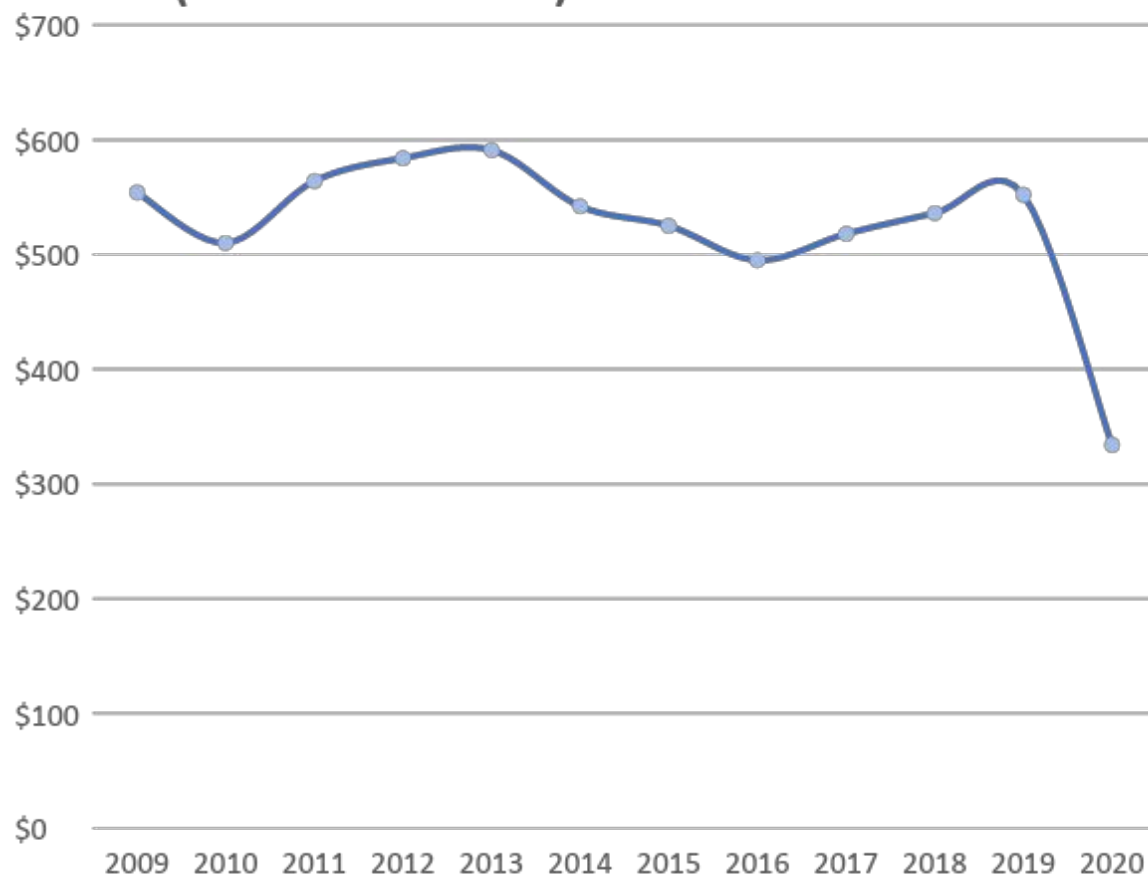
Single Malt

- Volumes down 6.5% to 2.4 million cases
- Revenue down 2.1% to \$905 million
- Previous 10 years volume grew average of 7.8% annually and revenue 10.7%
- Impacted by retaliatory tariffs

Imports of Liqueurs and Cordials



Imports of Liqueurs and Cordials
(in millions of USD)



Source: USITC Dataweb

- In October 2019, the U.S. imposed a **25 percent retaliatory tariff** on liqueurs and cordials from Germany, Ireland, Italy, Spain and the UK.

2009-2019:

- U.S. imports of affected liqueurs and cordials were relatively consistent.

2019-2020:

- U.S. imports of affected liqueurs and cordials decreased by **39 percent**.