

SCOTCH WHISKY

Uisge Beath: 'The Water of Life'

DISTILLED SPIRITS COUNCIL OF THE UNITED STATES

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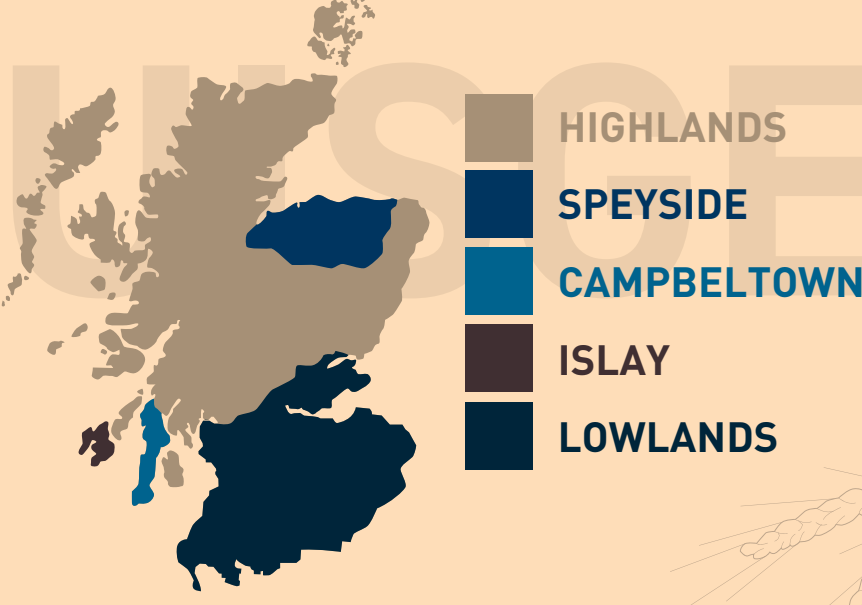


500 YEARS

Scotch Whisky has a unique heritage spanning more than 500 years, with the earliest documented record of distilling dating back to 1494. Today consumers all over the world are drawn to the category, which is steeped in history and known for its complexity and quality.

FIVE SCOTCH WHISKY REGIONS

Each region offers different flavor profiles & whisky characteristics



130+ DISTILLERIES

There are more than 130 Scotch Whisky distilleries in Scotland. Scotch Whisky is made from just three natural ingredients - cereals, water and yeast. It must be distilled and matured in Scotland for at least three years and bottled at a minimum ABV of 40%.



U.S. SCOTCH VOLUMES BY PRICE CATEGORY

9-Liter Cases, 000, includes blends & single malts

YEAR	VALUE	PREMIUM	HIGH END PREMIUM	SUPER PREMIUM	GRAND TOTAL
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
2019	1,597	2,545	3,861	1,523	9,526
2020	1,616	2,799	3,562	1,485	9,462
2021	1,446	2,505	4,114	1,718	9,783
20 - 21 Growth	-10.5%	-10.5%	15.5%	15.7%	3.4%

Source: Distilled Spirits Council of the U.S., Econ. & Strategic Analysis

9.8 MILLION

(9-liter cases sold)

The U.S. remains the top export market for Scotch Whisky. In 2021, 9.8 million 9-liter cases of Scotch were sold in the United States, generating \$2.6 billion in revenues for distillers.

U.S. SCOTCH SUPPLIER REVENUES

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

YEAR	VALUE	PREMIUM	HIGH END PREMIUM	SUPER PREMIUM	GRAND 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	\$1,539
2007	\$190	\$519	\$671	\$159	\$1,500
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
2019	\$111	\$398	\$1,101	\$760	\$2,370
2020	\$112	\$437	\$1,031	\$770	\$2,350
2021	\$100	\$392	\$1,198	\$899	\$2,589
20 - 21 Growth	-10.5%	-10.3%	16.2%	16.6%	10.2%

Source: Distilled Spirits Council of the U.S., Econ. & Strategic Analysis

HIGH END & SUPER PREMIUM

Scotch has benefited from the last decade of premiumization trends, with consumers flocking to Premium to High-End and Super Premium products. More than half of Scotch revenues are derived from High-End and Super Premium brands.

U.S. SCOTCH VOLUMES 2003-2021

9-Liter Cases, 000

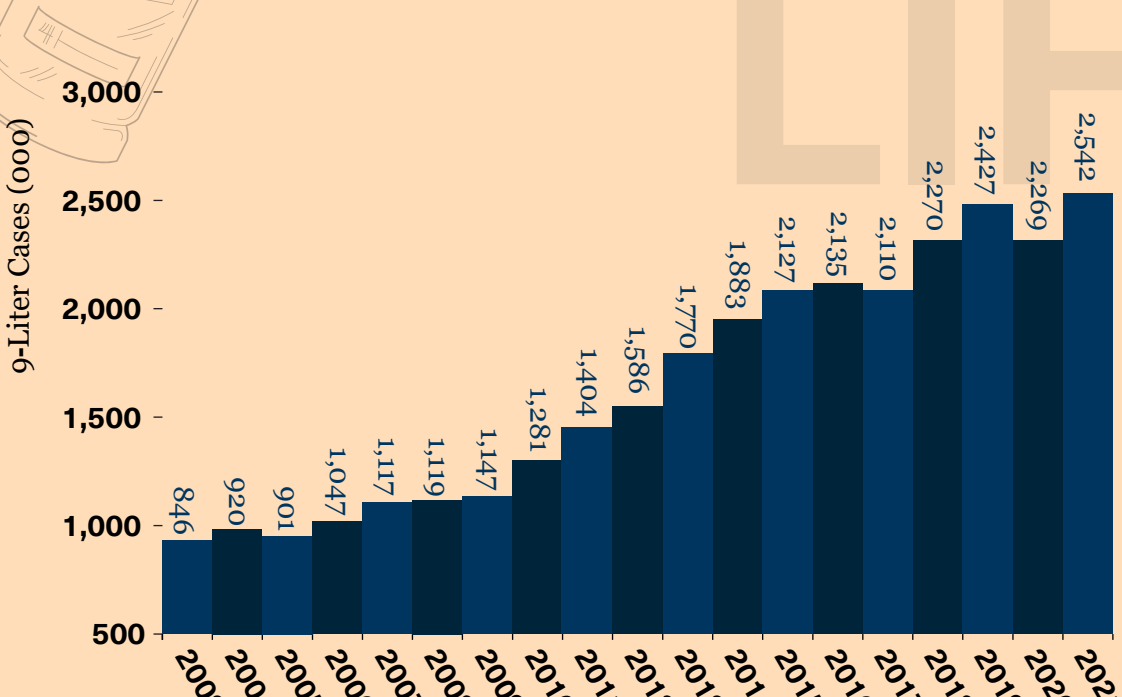
YEAR	BLEND	SINGLE MALT	GRAND TOTAL
2003	8,474	846	9,321
2004	8,701	920	9,621
2005	8,606	901	9,507
2006	8,471	1,047	9,518
2007	8,444	1,117	9,561
2008	8,307	1,119	9,426
2009	7,882	1,147	9,029
2010	7,774	1,281	9,056
2011	7,668	1,404	9,072
2012	7,640	1,586	9,226
2013	7,791	1,770	9,561
2014	7,554	1,883	9,436
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
2019	7,099	2,427	9,526
2020	7,193	2,269	9,462
2021	7,241	2,542	9,783
03 - 21 Growth	-14.6%	200.3%	5.0%

Source: Distilled Spirits Council of the U.S., Econ. & Strategic Analysis

200% VOLUME GROWTH

One of the driving factors behind the growth in Super Premium Scotch brands has been American's continuing interest in Single Malt Scotch. Since 2003, 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 2003-2021



Source: Distilled Spirits Council of the U.S., Econ. & Strategic Analysis

MIXING IT UP

New generations of adult drinkers have shifted traditional perceptions of Scotch and how it should be enjoyed. Increasingly, consumers have used Scotch in cocktails, particularly highballs, making it more approachable to next adult consumers.

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