

2021 U.S. Distilled Spirits Exports Overview



DISTILLED SPIRITS COUNCIL
OF THE UNITED STATES

Export Markets

Fast Facts

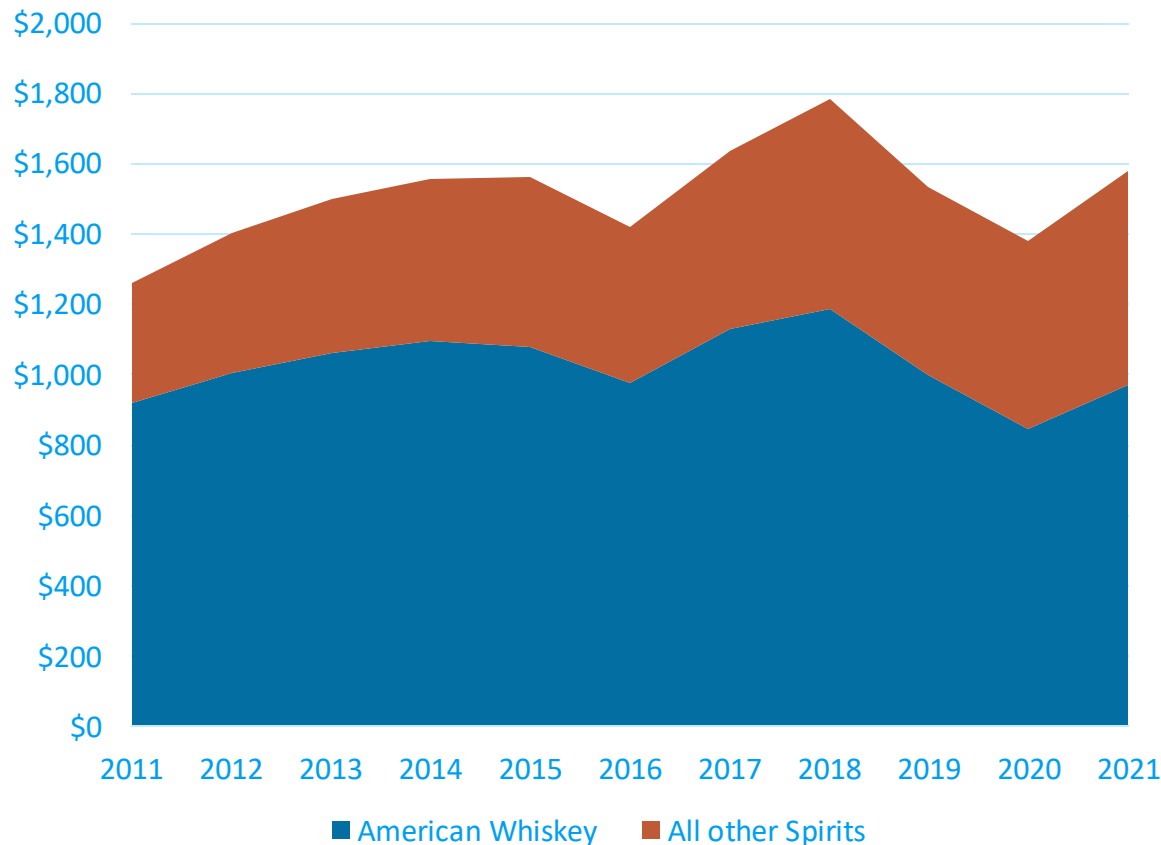


- Since 2001, U.S. spirits exports increased 220% to reach \$1.6 billion in 2021
- American Whiskeys account for 62% of all U.S. spirits exports
- Spirits were exported from 45 states
- About 37% of all U.S. spirits exports go to the EU

Decade in Review: U.S. Export Growth

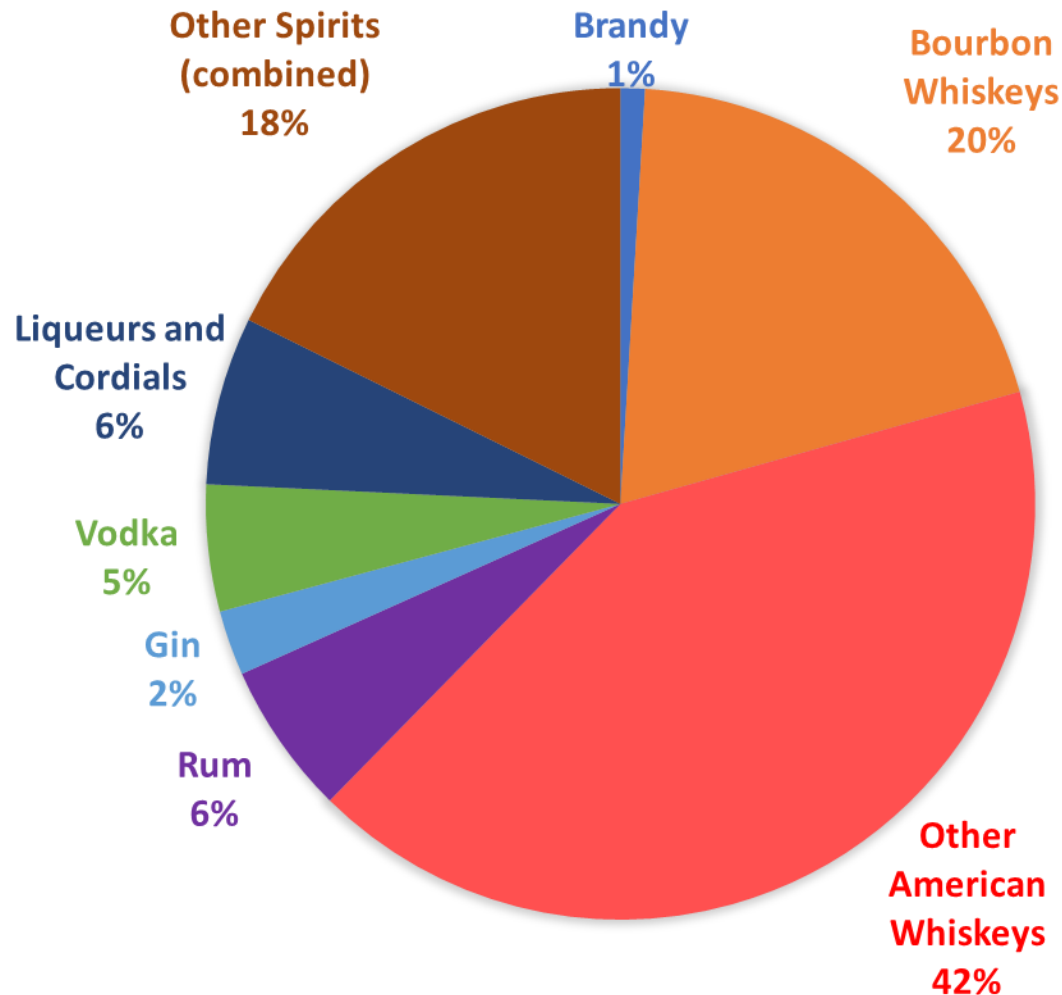


Global U.S. Spirits and American Whiskey Exports (in millions of USD)



- Over the past 10 years, total U.S. spirits exports grew by **25 percent**.
- In June 2018, the EU/UK imposed a **25 percent retaliatory tariff** on American Whiskey.
- From 2018 to 2021, total U.S. spirits exports were **down 12 percent** to \$1.6 billion.
- American Whiskey exports were **down 18 percent** to \$975 million from 2018 to 2020.

American Whiskeys Remain Top U.S. Export, Accounting for 62% of the Total



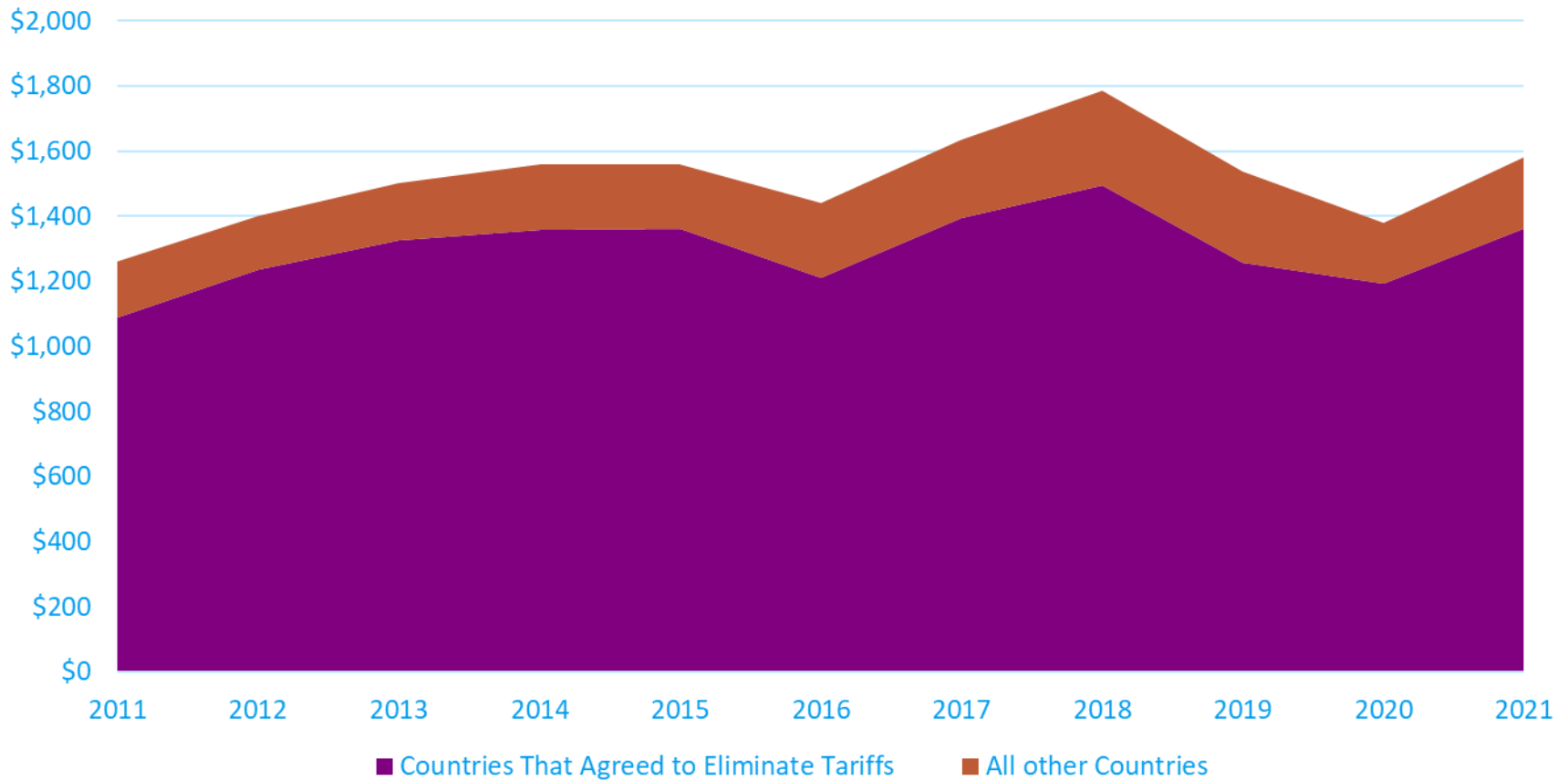
The Top Five Categories:

- 1) All American Whiskeys (\$974M)
- 2) Liqueurs/Cordials (\$103.8M)
- 3) Rum (\$94.2M)
- 4) Vodka (\$78.2M)
- 5) Gin (\$40.1M)

Trade Agreements Have Fostered Growth in U.S. Spirits Exports



U.S. spirits exports to countries that eliminated tariffs through trade agreements **accounted for 86% total U.S. exports**

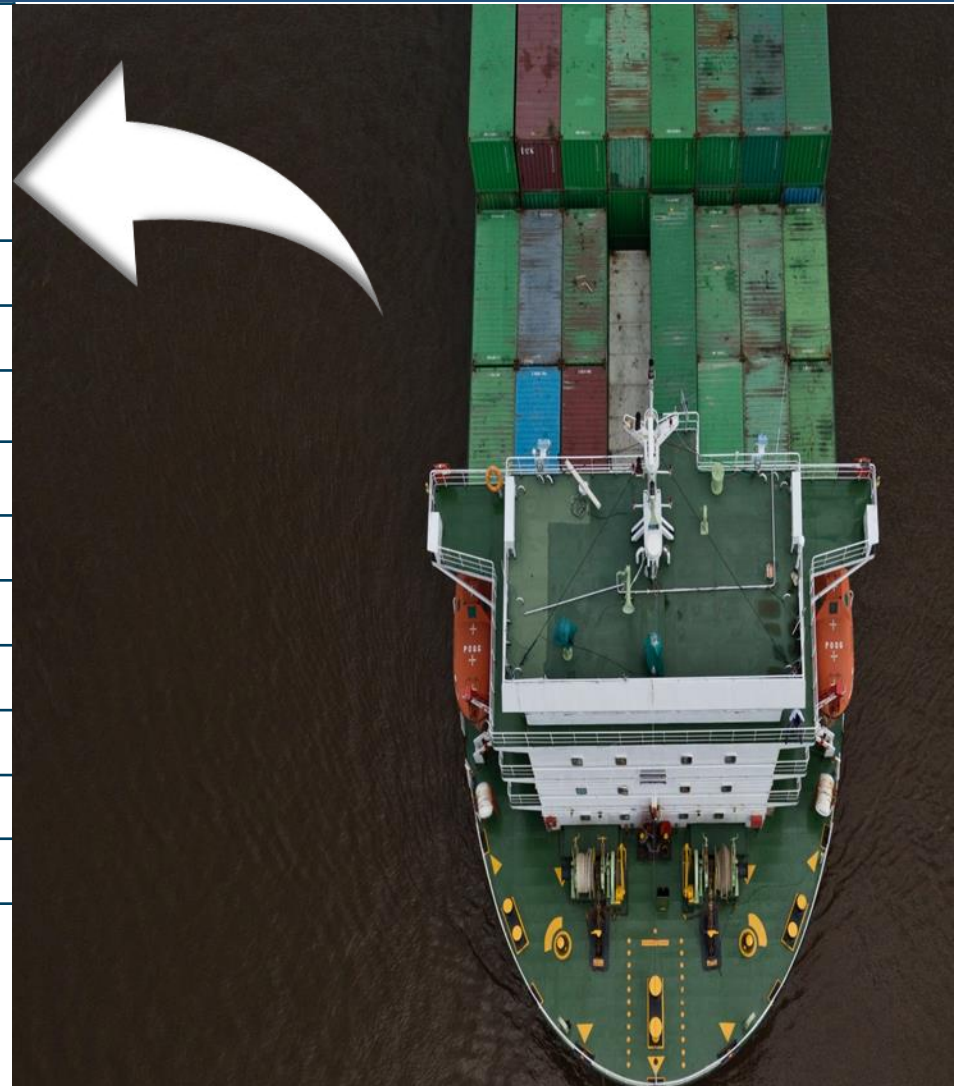


Source: USITC Dataweb

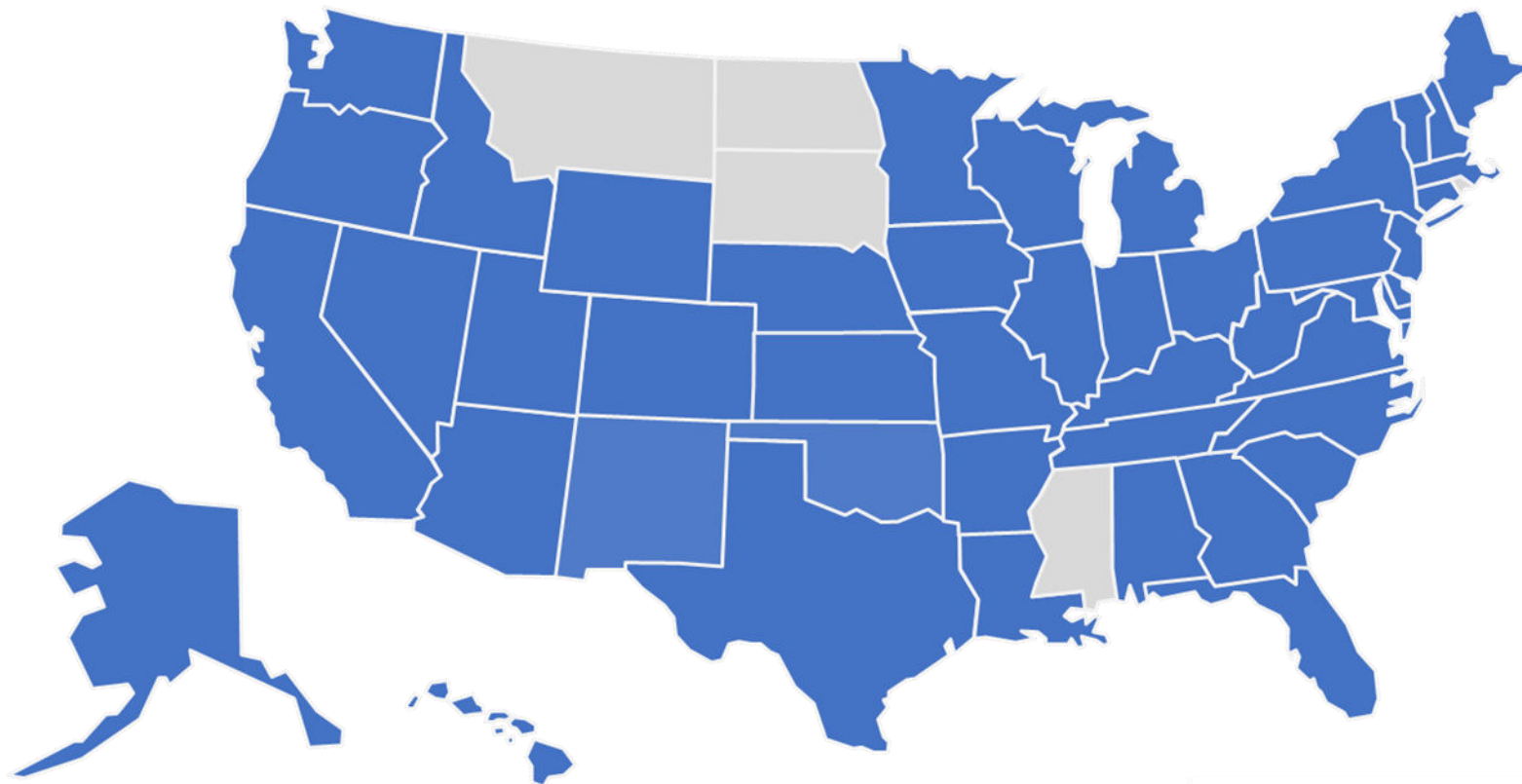
Top 10 Export Markets for All American Spirits



	2020 (In millions of USD)	2021 (In millions of USD)	2020-2021 Percent Change
Canada	\$249	\$242	-3.0
Netherlands*	\$57	\$121	111.7
Japan	\$125	\$120	-4.5
UK	\$83	\$107	27.9
Australia	\$114	\$102	-10.6
Spain*	\$77	\$93	21
France*	\$81	\$86	5.6
Germany*	\$77	\$83	7.8
Mexico	\$66	\$78	18.8
Latvia*	\$42	\$51	22.6



45 States Export American Spirits



■ States that exported
U.S. spirits in 2021

Top 10 Export Markets for American Whiskeys

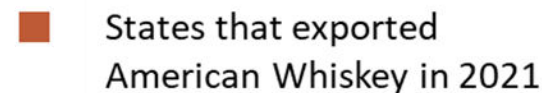


	2020 (In millions of USD)	2021 (In millions of USD)	2020-2021 Percent Change
Japan	\$103	\$96	-0.07
UK	\$71	\$88	23.1
Australia	\$97	\$85	-13.6
Germany*	\$76	\$81	6.6
France*	\$70	\$78	-10.9
Netherlands*	\$30	\$77	157.4
Canada	\$56	\$68	20.5
Spain*	\$57	\$61	7.16
Latvia*	\$40	\$49	22.8
Poland*	\$31	\$30	-1.8

*EU Member State



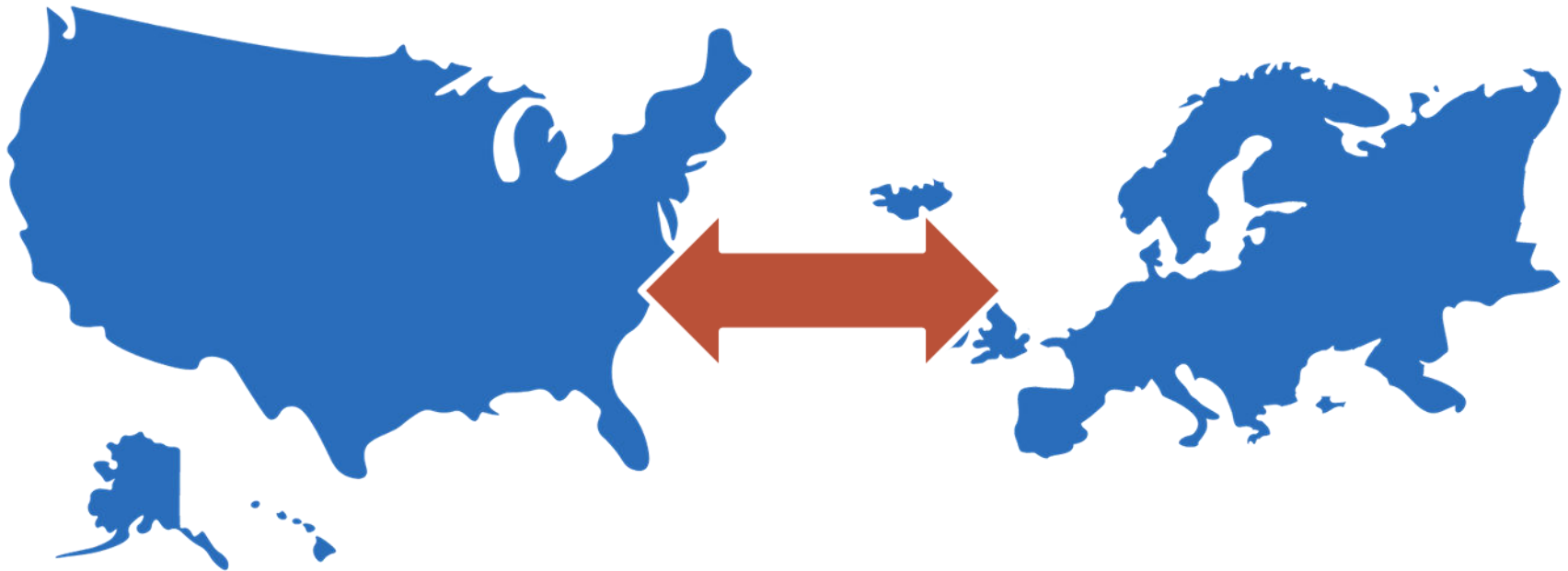
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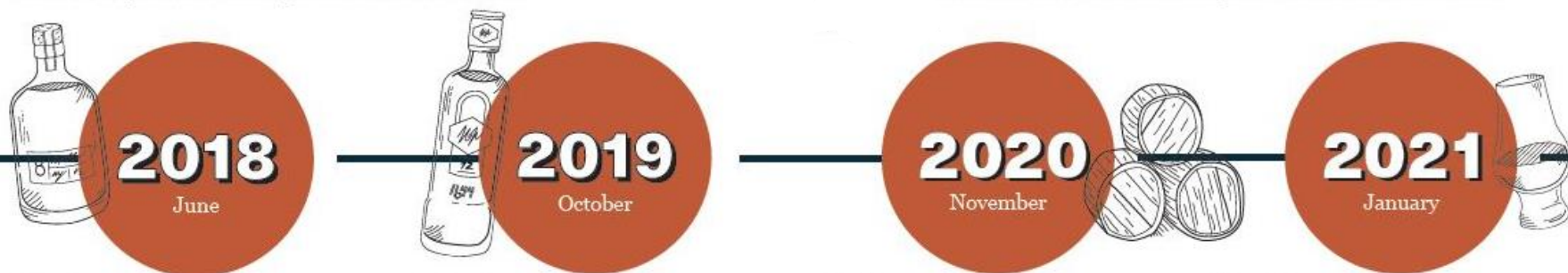
Distilled Spirits: History of Duty-Free Trade



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



Retaliatory Tariffs on Distilled Spirits



EU 25% tariff on:

- American Whiskey

U.S. 25% tariff on:

- Single Malt Scotch Whisky
- Single Malt Irish Whiskey from Northern Ireland
- Cordials and Liqueurs from Germany, Ireland, Italy, Spain and the UK

EU 25% tariff on:

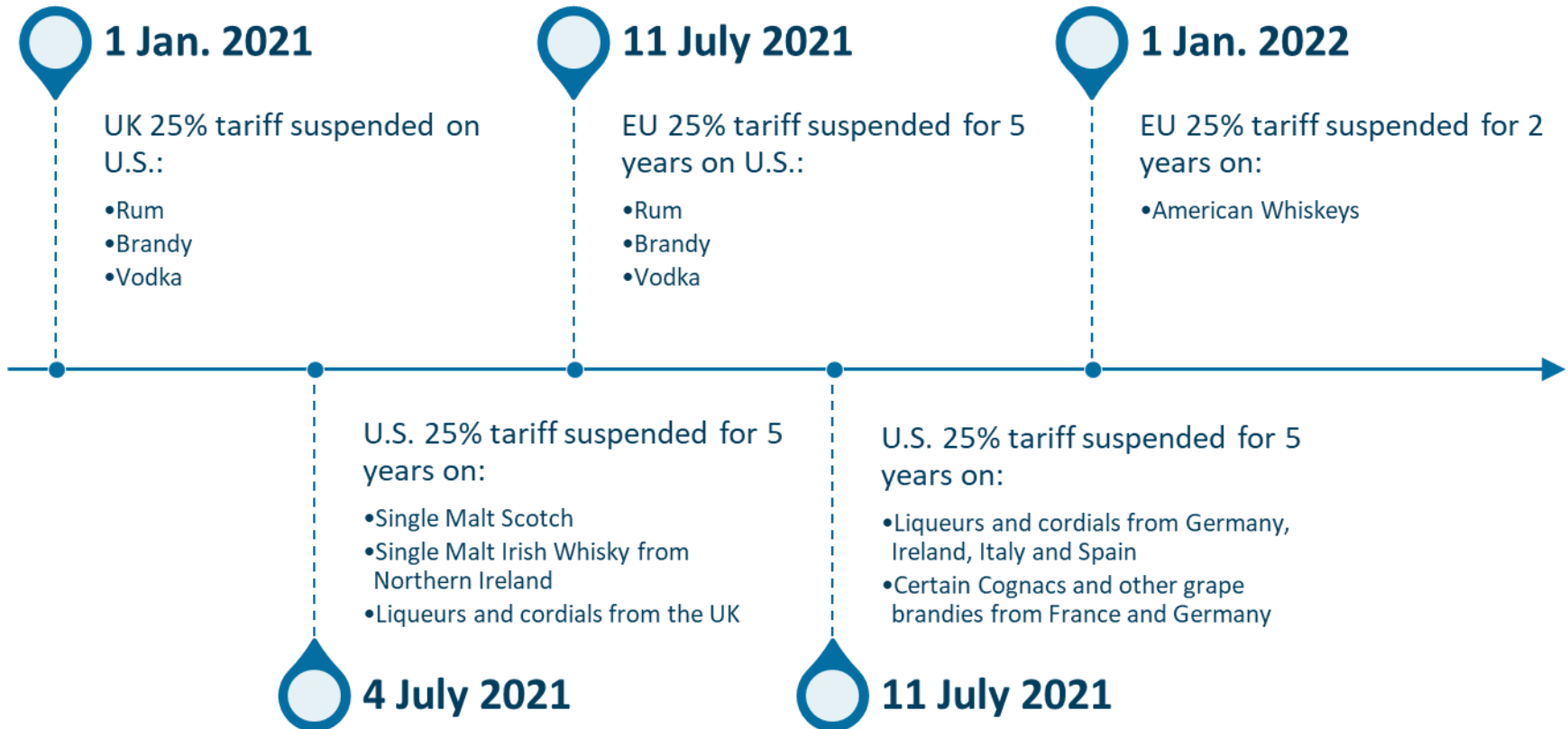
- Rum
- Brandy
- Vodka
- Vermouth

U.S. 25% tariff on:

- Cognac
- Other grape brandies from France and Germany

The EU 25 percent tariff on American Whiskey **was** set to double to 50 percent in June 2021.

Tariffs: Return to Duty-Free Trade

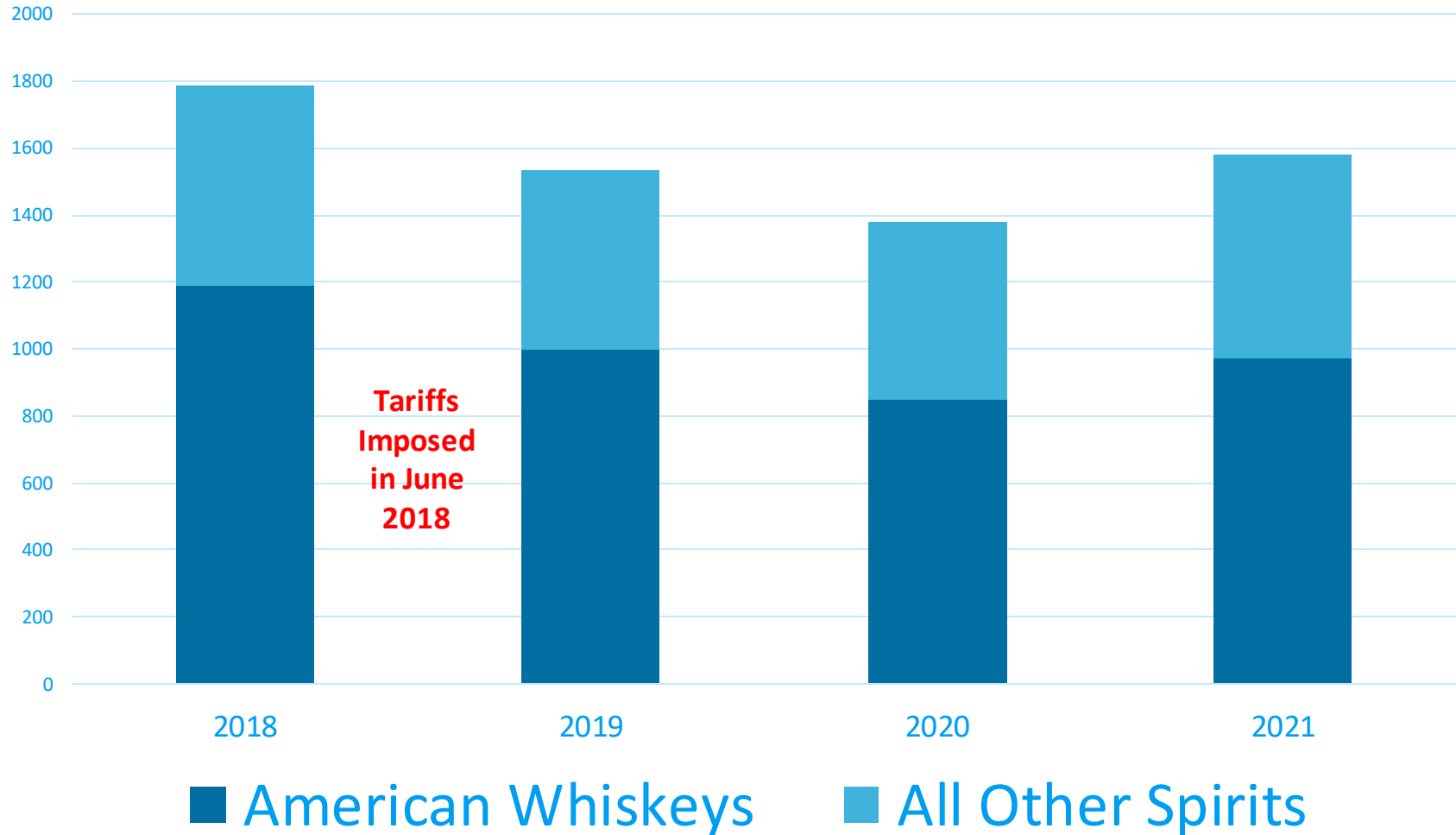


U.S.-UK reach agreement in the steel/aluminum dispute to remove the 25% tariff on American Whiskeys on June 1, 2022

Total U.S. Spirits Exports Up in 2021, but Still Below Pre-Tariff Period



(in millions of USD)





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