

Industry Review Support Tables – 2011  
Distilled Spirits Council  
Revised April 18, 2012



<b>U.S. Spirits Market 2011 , 9-Liter Cases by Price Category</b>					
<i>9-Liter Cases (000)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,858	2,490		-	5,348
Bourbon & Tennessee	2,717	4,637	7,782	907	16,042
Canadian	8,636	2,635	96	4,330	15,698
Scotch - Blended	2,504	2,978	2,009	177	7,668
Scotch - Single Malt	-	137	892	375	1,404
Irish	-	-	1,673	92	1,765
<b>Total Whiskey</b>	<b>16,715</b>	<b>12,877</b>	<b>12,451</b>	<b>5,881</b>	<b>47,924</b>
Vodka	26,109	18,750	12,120	5,686	62,665
Rum	5,772	16,174	2,813	357	25,116
Tequila	2,827	6,374	1,044	1,737	11,982
Gin	7,421	954	2,110	80	10,566
Brandy & Cognac	7,270	299	2,451	844	10,863
Cordials	7,357	11,265	1,653	9	20,285
Cocktails	2,048	4,643	-	-	6,690
<b>Total</b>	<b>75,518</b>	<b>71,336</b>	<b>34,643</b>	<b>14,594</b>	<b>196,091</b>

<b>U.S. Spirits Market 2011 , Y/Y Percentage Increase</b>					
<i>Volume</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-0.3%	-1.7%			-0.9%
Bourbon & Tennessee	-2.2%	2.4%	5.6%	18.6%	3.9%
Canadian	-0.2%	-0.7%	3.9%	-1.9%	-0.7%
Scotch - Blended	-8.2%	-0.8%	3.6%	66.9%	-1.4%
Scotch - Single Malt		0.0%	8.2%	17.1%	9.5%
Irish			27.0%	31.0%	27.2%
<b>Total Whiskey</b>	<b>-1.8%</b>	<b>0.2%</b>	<b>7.9%</b>	<b>3.6%</b>	<b>1.8%</b>
Vodka	1.2%	11.3%	3.7%	12.7%	5.5%
Rum	-2.8%	-2.7%	32.5%	76.8%	0.9%
Tequila	7.0%	-1.2%	14.6%	11.3%	3.6%
Gin	-5.6%	-6.6%	7.6%	23.8%	-3.1%
Brandy & Cognac	-2.0%	-2.5%	1.3%	5.3%	-0.7%
Cordials	-0.9%	0.6%	28.6%	20.0%	1.8%
Cocktails	-2.2%	20.0%			12.2%
<b>Total</b>	<b>-0.9%</b>	<b>3.1%</b>	<b>8.5%</b>	<b>9.3%</b>	<b>2.9%</b>

<b>U.S. Spirits Market 2011 , Supplier Gross Revenues</b>					
<i>Includes FET (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 144	\$ 174	\$ -	\$ -	318
Bourbon & Tennessee	\$ 150	\$ 456	\$ 1,272	\$ 194	2,071
Canadian	\$ 464	\$ 273	\$ 14	\$ 802	1,554
Scotch - Blended	\$ 174	\$ 465	\$ 521	\$ 83	1,243
Scotch - Single Malt	\$ -	\$ 25	\$ 253	\$ 165	442
Irish	\$ -	\$ -	\$ 304	\$ 32	335
<b>Total Whiskey</b>	<b>931</b>	<b>1,393</b>	<b>2,363</b>	<b>1,276</b>	<b>5,963</b>
Vodka	\$ 1,070	\$ 1,428	\$ 1,540	\$ 1,164	5,202
Rum	\$ 284	\$ 1,557	\$ 341	\$ 91	2,273
Tequila	\$ 217	\$ 749	\$ 193	\$ 641	1,800
Gin	\$ 438	\$ 108	\$ 290	\$ 14	850
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Brandy & Cognac	\$ 543	\$ 44	\$ 537	\$ 335	1,459
Cordials	\$ 438	\$ 1,620	\$ 380	\$ 3	2,441
Cocktails	\$ 101	\$ 274	\$ -	\$ -	375
<b>Total</b>	<b>4,021</b>	<b>7,174</b>	<b>5,644</b>	<b>3,522</b>	<b>20,362</b>

<b>U.S. Spirits Market 2011 Percentag Revenue Growth</b>					
<i>Revenue</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-0.1%	-0.2%			-0.2%
Bourbon & Tennessee	-1.6%	3.9%	10.2%	20.2%	8.7%
Canadian	-0.2%	3.4%	6.4%	5.6%	3.4%
Scotch - Blended	-8.0%	-0.8%	6.3%	69.8%	3.9%
Scotch - Single Malt		0.6%	10.1%	17.8%	12.2%
Irish			30.5%	36.2%	31.0%
<b>Total Whiskey</b>	<b>-1.9%</b>	<b>1.6%</b>	<b>11.5%</b>	<b>12.6%</b>	<b>7.0%</b>
Vodka	2.3%	11.8%	5.3%	15.9%	8.6%
Rum	-0.9%	-1.8%	32.9%	78.5%	4.3%
Tequila	6.7%	-1.5%	15.8%	10.5%	5.2%
Gin	-5.9%	-5.1%	8.5%	27.9%	-0.9%
Brandy & Cognac	-1.0%	0.5%	0.9%	6.3%	1.3%
Cordials	-0.9%	5.0%	28.0%	21.1%	6.8%
Cocktails	-0.6%	22.6%			15.4%
<b>Total</b>	<b>-0.5%</b>	<b>3.7%</b>	<b>10.6%</b>	<b>13.8%</b>	<b>6.3%</b>

<b>Beverage Alcohol Market Share - Revenue Based</b>							
<b>Year</b>	<b>Supplier Gross Revenues (Billions)</b>				<b>Market Share</b>		
	<b>Beer</b>	<b>Spirits</b>	<b>Wine</b>	<b>Total</b>	<b>Beer</b>	<b>Spirits</b>	<b>Wine</b>
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%
Sources: 10k Reports, DISCUS Estimates & Adams/BIG Wine Handbook							
Distilled Spirits Council, Economic & Strategic Analysis Dept.							

## Distilled Spirits Pricing Categories

Canadians, Blends, Bourbons	Supplier Rev/ 9 Liters	Major Brands
Value	<\$65	Black Velvet, Lord Calvert, Early Times
Premium	\$65 to \$125	Jim Beam White, Seagrams VO Canadian Club, Seagram 7
High End Premium	\$125 to \$180	Jack Daniels, Makers Mark, Jim Beam Black
Super Premium	\$180+	Crown Royal, Woodford Reserve
Scotch	Supplier Rev/ 9 Liters	Major Brands
Value	<\$110	VAT 69, Passport
Premium	\$110 to \$160	Dewars White Label, Johnnie Walker Red
High End Premium	\$160 to \$260	Johnnie Walker Black, Chivas Regal, Dewars 12, Glenlivet 12
Super Premium	\$260+	Macallan 10, Chivas 18, Johnnie Walker Blue
Irish	Supplier Rev/ 9 Liters	Major Brands
Value		
Premium		
High End Premium	<\$200	John Jameson, Bushmills, Michael Collins
Super Premium	>\$200	Jameson 12, Blach Bush
Vodka	Supplier Rev/ 9 Liters	Major Brands
Value	<\$60	Tvaski, Popov, Kamchatka
Premium	\$60 to \$110	Smirnoff, Svedka
High End Premium	\$110 to \$170	Absolut, Effen, Pearl, Finlandia
Super Premium	\$170+	Grey Goose, Belvedere, Ciroc, Ultimat
Rum	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Castillo, Ronrico, Arrow
Premium	\$70 to \$130	Bacardi Superior, Capt. Morgan Original, Malibu
High End Premium	\$130 to \$175	Mount Gay Eclipse, Bacardi 8, Cruzan Single Barrel
Super Premium	\$175+	10 Cane, Mount Gay XO, Ron Zacapa XO, Pyrat XO

## Distilled Spirits Pricing Categories

Tequila	Supplier Rev/ 9 Liters	Major Brands
Value	>\$90	Juarez, Pepe Lopez, Matador
Premium	\$90 to \$140	Jose Cuervo Especial, Souza Blanco, Margaritaville
High End Premium	\$140 to \$200	Antiguo Blanco, El Jimador, Cazadores Blanco, Souza 100 Anos
Super Premium	\$200+	Patron, Herradora, Don Julio, Sauza Tres Generaciones,
Gin	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Gilby's, Gordon's Seagrams
Premium	\$75 to \$120	Beefeater, Bombay Original
High End Premium	\$120 to \$170	Tanqueray, Bombay Sapphire
Super Premium	\$170+	Plymouth, Tanqueray 10
Brandy & Cognac	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Paul Masson Grande Amber, Leroux Brandy, Dekyper Brandy, Jacques Cardin Brandy
Premium	\$75 to \$120	Paul Masson VSOP, St. Remy, Presidente
High End Premium	\$120 to \$240	Hennessey VS, Martell VS, Courvoisier VS, Jacques Cardin VSOP
Super Premium	\$240+	Remy Martin VSOP, Hennessey VSOP, most XO
Cordials	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Dekuyper, Arrow, Hiram Walker
Premium	\$70 to \$170	Jagermeister, Baileys, Kahula, Southern Comfort
High End Premium	\$170 to \$250	Grand Marnier, Cointreau, Drambuie, Chambord
Super Premium	\$250+	Grand Marnier Centenaire
Cocktails	Supplier Rev/ 9 Liters	Major Brands
Value	All except Premium	Arrow, Club, Fridays
Premium	If associated with a brand carrying a Premium or above designation	Kahula RTDs, Jack Daniels Country Coolers, Cuervo Margaritas, Skinny Girl