

Industry Review Support Tables – 2012
New York Yacht Club
February 6, 2013
Distilled Spirits Council



U.S. Spirits Market 2012 Volumes , 9-Liter Cases by Price Category					
<i>9-Liter Cases (000)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,891	2,471	-	-	5,362
Bourbon & Tennessee	2,796	4,984	8,079	1,019	16,879
Canadian	8,772	2,616	150	4,491	16,028
Scotch - Blended	2,297	2,923	2,193	227	7,640
Scotch - Single Malt	-	145	993	448	1,586
Irish	-	69	1,923	168	2,161
Total Whiskey	16,757	13,208	13,338	6,353	49,656
					-
Vodka	26,561	19,828	12,538	6,256	65,184
Rum	5,963	16,379	2,770	386	25,498
Tequila	2,878	6,436	1,117	1,895	12,326
Gin	7,360	1,137	2,153	79	10,728
					-
Brandy & Cognac	7,231	300	2,555	906	10,993
Cordials	8,080	11,314	1,831	11	21,236
Cocktails	2,054	4,207	-	-	6,261
Total	76,884	72,810	36,301	15,887	201,882

U.S. Spirits Market 2012 Brand Data Volumes , Percentage Growth by Price Category					
<i>Percent Change from 2011</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	1.2%	-0.8%			0.3%
Bourbon & Tennessee	2.9%	7.5%	3.8%	12.4%	5.2%
Canadian	1.6%	-0.7%	56.4%	3.7%	2.1%
Scotch - Blended	-8.3%	-1.8%	9.2%	27.9%	-0.4%
Scotch - Single Malt		5.4%	11.4%	19.6%	13.0%
Irish			15.0%	83.1%	22.5%
Total Whiskey					
Vodka	1.7%	5.7%	3.5%	10.0%	4.0%
Rum	3.3%	1.3%	-1.5%	8.1%	1.5%
Tequila	1.8%	1.0%	7.0%	9.1%	2.9%
Gin	-0.8%	19.2%	2.0%	-1.3%	1.5%
Brandy & Cognac	-0.5%	0.6%	4.2%	7.4%	1.2%
Cordials	9.8%	0.4%	10.7%	25.9%	4.7%
Cocktails	0.3%	-9.4%			-6.4%
Total	1.8%	2.1%	4.8%	8.9%	3.0%

U.S. Spirits Market 2012 , Supplier Gross Revenues					
<i>Includes FET (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 149	\$ 178	\$ -	\$ -	327
Bourbon & Tennessee	\$ 157	\$ 499	\$ 1,344	\$ 222	2,221
Canadian	\$ 462	\$ 267	\$ 22	\$ 850	1,602
Scotch - Blended	\$ 159	\$ 457	\$ 569	\$ 106	1,291
Scotch - Single Malt	\$ -	\$ 27	\$ 287	\$ 201	515
Irish	\$ -	\$ -	\$ 356	\$ 59	415
Total Whiskey	927	1,427	2,578	1,439	6,371
Vodka	\$ 1,085	\$ 1,506	\$ 1,601	\$ 1,274	5,466
Rum	\$ 292	\$ 1,593	\$ 333	\$ 98	2,315
Tequila	\$ 221	\$ 749	\$ 205	\$ 707	1,882
Gin	\$ 434	\$ 129	\$ 296	\$ 13	873
Brandy & Cognac	\$ 537	\$ 44	\$ 569	\$ 367	1,516
Cordials	\$ 481	\$ 1,610	\$ 421	\$ 4	2,516
Cocktails	\$ 101	\$ 248	\$ -	\$ -	348
Total	4,078	7,306	6,002	3,902	21,288

U.S. Spirits Market 2012 , Supplier Gross Revenues					
<i>Percent Change from 2011</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	3.7%	2.2%			2.9%
Bourbon & Tennessee	4.8%	9.4%	5.7%	14.4%	7.3%
Canadian	-0.5%	-2.2%	59.5%	6.0%	3.1%
Scotch - Blended	-8.3%	-1.8%	9.2%	27.9%	3.9%
Scotch - Single Malt		7.5%	13.6%	22.0%	16.4%
Irish			17.2%	86.6%	23.7%
Total Whiskey	-0.4%	2.4%	9.1%	12.8%	6.8%
Vodka	1.4%	5.4%	4.0%	9.5%	5.1%
Rum	2.9%	2.3%	-2.5%	8.1%	1.9%
Tequila	1.8%	0.0%	6.4%	10.3%	4.6%
Gin	-0.8%	19.2%	2.0%	-1.3%	2.7%
Brandy & Cognac	-1.1%	0.3%	5.8%	9.6%	3.9%
Cordials	9.8%	-0.6%	10.9%	28.4%	3.1%
Cocktails	0.1%	-9.7%			-7.0%
Total	1.4%	1.8%	6.3%	10.8%	4.5%

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%

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, Wild Turkey
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, Black Bush
Vodka	Supplier Rev/ 9 Liters	Major Brands
Value	<\$60	Arrow, Popov, Kamchatka
Premium	\$60 to \$110	Smirnoff, Svedka, Skyy, Pinnacle
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 Black, 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, Sauza Blanco, Margaritaville
High End Premium	\$140 to \$200	Antigua Blanco, El Jimador, Cazadores Blanco, Sauza 100 Anos
Super Premium	\$200+	Patron, Herradura, 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, Kahlua, 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	Kahlua RTDs, Jack Daniels Country Coolers, Cuervo Margaritas, Skinny Girl