

Industry Review Supplemental Tables – 2014  
New York Yacht Club  
February 3, 2015  
Distilled Spirits Council



<b>U.S. Spirits Market - 2014 Volumes</b>					
<i>9-Liter Cases (000s)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,832	5,874	-	-	8,706
Bourbon & Tennessee	3,149	5,493	9,244	1,471	19,357
Canadian	8,649	2,658	269	4,760	16,337
Scotch - Blended	2,018	2,844	2,338	353	7,554
Scotch - Single Malt	-	126	1,200	557	1,883
Irish	-	78	2,504	189	2,771
<b>Total Whiskey</b>	<b>16,649</b>	<b>17,073</b>	<b>15,555</b>	<b>7,330</b>	<b>56,607</b>
Vodka	26,503	20,395	13,636	6,409	66,943
Rum	5,693	15,852	3,190	447	25,182
Tequila	2,914	7,288	1,204	2,389	13,795
Gin	6,386	1,279	2,287	93	10,044
Brandy & Cognac	7,144	388	2,932	1,069	11,533
Cordials	7,777	10,266	2,356	13	20,411
Cocktails	1,957	3,728	-	-	5,685
<b>Total</b>	<b>75,023</b>	<b>76,268</b>	<b>41,160</b>	<b>17,750</b>	<b>210,200</b>

<b>2014 Y/Y Volume Growth</b>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	0.9%	76.8%			42.0%
Bourbon & Tennessee	4.7%	8.8%	5.7%	19.2%	7.4%
Canadian	-1.1%	0.1%	11.2%	-1.9%	-1.0%
Scotch - Blended	-5.4%	-6.3%	2.2%	5.4%	-3.0%
Scotch - Single Malt		-13.1%	8.0%	8.3%	6.4%
Irish		59.2%	8.3%	6.3%	9.1%
<b>Total Whiskey</b>	<b>-0.3%</b>	<b>19.8%</b>	<b>5.8%</b>	<b>3.0%</b>	<b>7.3%</b>
Vodka	0.4%	0.4%	5.4%	2.9%	1.6%
Rum	-1.8%	-2.4%	1.9%	9.9%	-1.5%
Tequila	1.7%	3.7%	3.7%	14.8%	5.0%
Gin	-6.8%	13.2%	1.2%	19.8%	-2.7%
Brandy & Cognac	-1.3%	27.5%	12.2%	10.1%	3.7%
Cordials	-2.3%	-2.9%	12.0%	8.2%	-1.1%
Cocktails	-10.0%	-10.6%			-10.4%
<b>Total</b>	<b>-1.3%</b>	<b>3.1%</b>	<b>5.8%</b>	<b>5.1%</b>	<b>2.2%</b>

<b>2014 Volume +/-</b>					
<i>9-Liter Cases</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	24	2,551	-	-	2,575
Bourbon & Tennessee	142	445	501	237	1,326
Canadian	(95)	3	27	(95)	(160)
Scotch - Blended	(115)	(191)	50	18	(238)
Scotch - Single Malt	-	(19)	89	43	113
Irish	-	29	192	11	232
<b>Total Whiskey</b>	<b>(43)</b>	<b>2,817</b>	<b>859</b>	<b>215</b>	<b>3,848</b>
Vodka	107	90	697	179	1,074
Rum	(105)	(386)	60	40	(391)
Tequila	48	262	43	309	661
Gin	(469)	150	27	15	(278)
Brandy & Cognac	(92)	84	319	98	409
Cordials	(179)	(308)	253	1	(233)
Cocktails	(218)	(442)	-	-	(659)
<b>Total</b>	<b>(952)</b>	<b>2,268</b>	<b>2,259</b>	<b>858</b>	<b>4,432</b>

<b>U.S. Spirits Market 2014 , Supplier Gross Revenues</b>					
<i>Includes FET (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 150	\$ 427			\$ 577
Bourbon & Tennessee	\$ 181	\$ 566	\$ 1,611	\$ 325	\$ 2,683
Canadian	\$ 460	\$ 275	\$ 40	\$ 937	\$ 1,712
Scotch - Blended	\$ 142	\$ 446	\$ 608	\$ 167	\$ 1,363
Scotch - Single Malt		\$ 23	\$ 356	\$ 266	\$ 645
Irish		\$ 12	\$ 472	\$ 69	\$ 553
<b>Total Whiskey</b>	<b>\$ 933</b>	<b>\$ 1,751</b>	<b>\$ 3,087</b>	<b>\$ 1,764</b>	<b>\$ 7,534</b>
Vodka	\$ 1,103	\$ 1,558	\$ 1,774	\$ 1,340	\$ 5,775
Rum	\$ 282	\$ 1,593	\$ 383	\$ 115	\$ 2,374
Tequila	\$ 225	\$ 806	\$ 220	\$ 860	\$ 2,111
Gin	\$ 380	\$ 148	\$ 321	\$ 16	\$ 865
Brandy & Cognac	\$ 544	\$ 58	\$ 637	\$ 470	\$ 1,709
Cordials	\$ 465	\$ 1,457	\$ 535	\$ 6	\$ 2,463
Cocktails	\$ 97	\$ 218			\$ 315
<b>Totals</b>	<b>\$ 4,030</b>	<b>\$ 7,590</b>	<b>\$ 6,956</b>	<b>\$ 4,570</b>	<b>\$ 23,146</b>

<b>Supplier Gross Revenues Y/Y Change</b>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	3.3%	77.0%			49.3%
Bourbon & Tennessee	5.5%	10.1%	8.1%	19.2%	9.6%
Canadian	-0.8%	1.2%	10.9%	1.0%	0.8%
Scotch - Blended	-4.8%	-7.0%	0.9%	6.1%	-1.9%
Scotch - Single Malt		-13.4%	9.0%	12.1%	9.2%
Irish			8.4%	6.7%	10.7%
<b>Total Whiskey</b>	<b>0.4%</b>	<b>14.1%</b>	<b>6.8%</b>	<b>6.3%</b>	<b>7.4%</b>
Vodka	1.5%	0.3%	5.5%	5.8%	3.3%
Rum	-1.5%	-2.0%	1.5%	12.0%	-0.8%
Tequila	2.0%	-1.5%	3.6%	10.3%	4.0%
Gin	-6.8%	13.8%	1.9%	21.8%	-0.1%
Brandy & Cognac	-0.2%	28.7%	12.8%	19.3%	10.3%
Cordials	-2.5%	-2.4%	11.0%	17.8%	0.3%
Cocktails	-9.3%	-11.1%			-10.6%
<b>Totals</b>	<b>-0.8%</b>	<b>1.9%</b>	<b>6.6%</b>	<b>8.3%</b>	<b>4.0%</b>

<b>2014 Supplier Gross Revenues +/-</b>					
<i>Includes FET (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 5	\$ 186	\$ -	\$ -	\$ 190
Bourbon & Tennessee	\$ 9	\$ 52	\$ 121	\$ 52	\$ 234
Canadian	\$ (3)	\$ 3	\$ 4	\$ 10	\$ 13
Scotch - Blended	\$ (7)	\$ (33)	\$ 5	\$ 10	\$ (26)
Scotch - Single Malt	\$ -	\$ (4)	\$ 29	\$ 29	\$ 54
Irish	\$ -	\$ 12	\$ 37	\$ 4	\$ 53
<b>Total Whiskey</b>	<b>\$ 3</b>	<b>\$ 216</b>	<b>\$ 196</b>	<b>\$ 105</b>	<b>\$ 520</b>
Vodka	\$ 16	\$ 4	\$ 93	\$ 73	\$ 187
Rum	\$ (4)	\$ (32)	\$ 6	\$ 12	\$ (18)
Tequila	\$ 5	\$ (12)	\$ 8	\$ 81	\$ 81
Gin	\$ (28)	\$ 18	\$ 6	\$ 3	\$ (1)
Brandy & Cognac	\$ (1)	\$ 13	\$ 72	\$ 76	\$ 160
Cordials	\$ (12)	\$ (35)	\$ 53	\$ 1	\$ 7
Cocktails	\$ (10)	\$ (27)	\$ -	\$ -	\$ (37)
<b>Totals</b>	<b>\$ (31)</b>	<b>\$ 145</b>	<b>\$ 433</b>	<b>\$ 351</b>	<b>\$ 897</b>

## Distilled Spirits Pricing Categories

Canadians, Blends	Supplier Rev/ 9 Liters	Major Brands
Value	<\$65	Black Velvet, Lord Calvert, Kessler
Premium	\$65 to \$125	Seagrams VO, Canadian Club, Seagram 7
High End Premium	\$125 to \$180	Seagrams VO Gold, Canadian Club 12 Year
Super Premium	\$180+	Crown Royal
Bourbon, Tennessee, Rye, Corn	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Early Times, Old Crow, Bellows
Premium	\$75 to \$130	Jim Beam White, Ezra Brooks, Old Forrester, George Dickel
High End Premium	\$130 to \$200	Jack Daniels, Makers Mark, Jim Beam Black, Wild Turkey
Super Premium	\$200+	Woodford Reserve, Knob Creek, Jack Daniels Single Barrel
Scotch	Supplier Rev/ 9 Liters	Major Brands
Value	<\$110	Scorsby, Passport, Bellows
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+	Glenlivet, Glenmorangie, Macallan, Johnnie Walker Blue

## Distilled Spirits Pricing Categories

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	<\$65	Popov, Kamchatka, Wolfschmidt, Gilbey
Premium	\$65 to \$120	Smirnoff, Svedka, Skyy, Pinnacle, Pearl
High End Premium	\$110 to \$170	Absolut, Effen, American Harvest, Finlandia
Super Premium	\$170+	Grey Goose, Belvedere, Ciroc
Rum	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Castillo, Ronrico, Arrow, James Harbor
Premium	\$70 to \$130	Bacardi Superior, Capt. Morgan Original, Malibu
High End Premium	\$130 to \$175	Mount Gay Black, Bacardi 8, Cruzan Single Barrel, 10 Cane
Super Premium	\$175+	Mount Gay XO, Ron Zacapa XO, Pyrat XO
Tequila	Supplier Rev/ 9 Liters	Major Brands
Value	>\$90	Juarez, Sauza Giro, Pepe Lopez, Gomez
Premium	\$90 to \$160	Sauza Blanco, El Jimador Blanco
High End Premium	\$160 to \$240	El Jimador, Cazadores Blanco, Sauza Horintos, El Mayor Anejo
Super Premium	\$240+	Patron, Herradura, Don Julio, Sauza Tres Generaciones, Cabo Wabo

## Distilled Spirits Pricing Categories

Gin	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Gilby's, Gordon's, Seagrams, Dimitri
Premium	\$75 to \$120	Beefeater, Bombay Original
High End Premium	\$120 to \$170	Tanqueray, Bombay Sapphire, Beefeater 24
Super Premium	\$170+	Plymouth, Tanqueray 10, Oxley
Brandy & Cognac	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Paul Masson Grande Amber 3Y, Jacques Cardin Brandy
Premium	\$75 to \$120	Paul Masson Grande Amber 5Y, Salignac VS, 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 Xos
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	Club, Salvadors
Premium	If associated with a brand carrying a Premium or above designation	Kahlua RTDs, Jack Daniels Country Coolers, Skinny Girl, Malibu Cocktails, Bacardi Cocktails, Smirnoff Cocktails



<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%
2012	\$ 30.32	\$ 21.29	\$ 10.53	\$ 62.13	48.8%	34.3%	16.9%
2013	\$ 30.96	\$ 22.22	\$ 10.89	\$ 64.07	48.3%	34.7%	17.0%
2014	\$ 31.45	\$ 23.15	\$ 11.22	\$ 65.81	47.8%	35.2%	17.0%
Sources: Industry financial reports, BIG Handbooks, DISCUS Estimates							
Distilled Spirits Council, Economic & Strategic Analysis Dept.							