

Industry Review Support Tables – 2010  
New York Yacht Club  
January 24<sup>th</sup>, 2011  
Distilled Spirits Council



<b>U.S. Spirits Market 2010 , 9-Liter Cases by Price Category</b>					
<i>9-Liter Cases (000)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,866	2,532			5,398
Bourbon & Tennessee	2,778	4,529	7,372	764	15,443
Canadian	8,650	2,653	92	4,414	15,809
Scotch - Blended	2,727	3,002	1,939	106	7,774
Scotch - Single Malt		137	824	320	1,281
Irish			1,317	70	1,387
<b>Total Whiskey</b>	<b>17,020</b>	<b>12,853</b>	<b>11,544</b>	<b>5,675</b>	<b>47,093</b>
Vodka	25,804	16,849	11,692	5,046	59,391
Rum	5,938	16,618	2,122	202	24,880
Tequila	2,642	6,449	911	1,560	11,562
Gin	7,859	1,022	1,961	65	10,906
Brandy & Cognac	7,416	306	2,418	801	10,942
Cordials	7,427	11,196	1,285	8	19,916
Cocktails	2,093	3,868	-	-	5,961
<b>Total</b>	<b>76,200</b>	<b>69,160</b>	<b>31,934</b>	<b>13,357</b>	<b>190,651</b>

<b>U.S. Spirits Market 2010 , 9-Liter Cases by Price Category</b>					
<i>Percentage Change from 2009</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	0.2%	0.9%			0.5%
Bourbon & Tennessee	-1.1%	3.7%	1.9%	16.2%	2.5%
Canadian	-2.9%	0.1%	-11.9%	5.6%	-0.2%
Scotch - Blended	-2.6%	-5.0%	5.5%	26.3%	-1.4%
Scotch - Single Malt		-5.4%	13.2%	16.8%	11.7%
Irish			21.1%	28.9%	21.5%
<b>Total Whiskey</b>	<b>-2.0%</b>	<b>0.2%</b>	<b>5.0%</b>	<b>8.1%</b>	<b>1.4%</b>
Vodka	3.8%	8.9%	3.2%	17.7%	6.1%
Rum	1.3%	1.2%	3.1%	2.4%	1.4%
Tequila	2.9%	2.5%	17.0%	2.2%	3.6%
Gin	-3.0%	-2.8%	-1.4%	9.2%	-2.6%
Brandy & Cognac	0.5%	2.5%	-1.3%	6.8%	0.6%
Cordials	-2.8%	-2.2%	-1.4%	-13.0%	-2.4%
Cocktails	-4.6%	-6.7%			-6.0%
<b>Total</b>	<b>0.3%</b>	<b>1.8%</b>	<b>3.3%</b>	<b>10.6%</b>	<b>2.0%</b>

<b>U.S. Spirits Market 2010 , Supplier Gross Revenues</b>					
<i>Includes FET (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 144	\$ 175			\$ 318
Bourbon & Tennessee	\$ 152	\$ 439	\$ 1,154	\$ 161	\$ 1,906
Canadian	\$ 465	\$ 264	\$ 13	\$ 760	\$ 1,502
Scotch - Blended	\$ 189	\$ 469	\$ 490	\$ 49	\$ 1,197
Scotch - Single Malt	\$ -	\$ 25	\$ 230	\$ 140	\$ 394
Irish	\$ -	\$ -	\$ 233	\$ 23	\$ 256
<b>Total Whiskey</b>	<b>\$ 949</b>	<b>\$ 1,371</b>	<b>\$ 2,119</b>	<b>\$ 1,133</b>	<b>\$ 5,573</b>
Vodka	\$ 1,046	\$ 1,277	\$ 1,463	\$ 1,004	\$ 4,790
Rum	\$ 286	\$ 1,585	\$ 257	\$ 51	\$ 2,179
Tequila	\$ 204	\$ 760	\$ 167	\$ 580	\$ 1,710
Gin	\$ 466	\$ 114	\$ 267	\$ 11	\$ 857
Brandy & Cognac	\$ 548	\$ 44	\$ 533	\$ 315	\$ 1,440
Cordials	\$ 442	\$ 1,543	\$ 297	\$ 3	\$ 2,284
Cocktails	\$ 101	\$ 223	\$ -	\$ -	\$ 325
<b>Total</b>	<b>\$ 4,042</b>	<b>\$ 6,918</b>	<b>\$ 5,101</b>	<b>\$ 3,096</b>	<b>\$ 19,159</b>

<b>U.S. Spirits Market 2010 , Supplier Gross Revenues</b>					
<i>Includes FET (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-1.7%	0.4%			-0.6%
Bourbon & Tennessee	-0.5%	3.4%	3.5%	17.7%	4.2%
Canadian	-3.0%	0.1%	-12.7%	6.7%	2.2%
Scotch - Blended	-2.7%	-4.6%	6.1%	25.5%	0.8%
Scotch - Single Malt		-18.4%	22.9%	17.8%	17.4%
Irish			29.7%	30.0%	29.8%
<b>Total Whiskey</b>	<b>-2.4%</b>	<b>-0.9%</b>	<b>8.2%</b>	<b>10.6%</b>	<b>4.4%</b>
Vodka	2.5%	6.7%	0.2%	13.8%	5.0%
Rum	-2.8%	-0.6%	-1.1%	3.2%	-0.9%
Tequila	1.3%	0.0%	15.5%	7.4%	4.0%
Gin	-5.7%	-7.3%	-3.7%	12.0%	-5.1%
Brandy & Cognac	-4.6%	1.3%	-5.0%	9.6%	-1.8%
Cordials	-3.8%	1.4%	-1.1%		0.1%
Cocktails	-0.8%	-6.5%			-4.8%
<b>Total</b>	<b>-1.8%</b>	<b>0.8%</b>	<b>2.9%</b>	<b>10.9%</b>	<b>2.3%</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%	17.0%
Sources: 10k Reports, DISCUS Estimates & Adams 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 \$120	Jim Beam White, Seagrams VO Canadian Club, Seagram 7
High End Premium	\$120 to \$165	Jack Daniels, Makers Mark, Jim Beam Black
Super Premium	\$165+	Crown Royal, Woodford Reserve
Scotch	Supplier Rev/ 9 Liters	Major Brands
Value	<\$120	VAT 69, Passport
Premium	\$120 to \$160	Dewars White Label, Johnnie Walkder Red
High End Premium	\$160 to \$250	Johnnie Walker Black, Chivas Regal, Dewars 12, Glenlivet 12
Super Premium	\$250+	Macallan 10, Chivas 18, Johnnie Walker Blue
Irish	Supplier Rev/ 9 Liters	Major Brands
Value		
Premium		
High End Premium	<\$200	John Jameson, Bushmills
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, Sobieski
High End Premium	\$110 to \$170	Absolut, Pearl, Finlandia
Super Premium	\$170+	Grey Goose, Belevedere, Effen
Rum	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Admiral Nelson, Castillo, Ronrico
Premium	\$70 to \$130	Bacardi Superior, Capt. Morgan Original, Malibu
High End Premium	\$130 to \$170	Mount Gay Eclipse, Bacardi 8, Cruzan Single Barrel, Tommy Bahama
Super Premium	\$170+	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, 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
Premium	\$75 to \$120	Paul Masson VSOP, St. Remy, Presidente
High End Premium	\$120 to \$240	Hennessey VS, Martell VS, Courvoisier VS,
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	Kahula RTDs, Jack Daniels Country Coolers, Cuervo Margaritas