

Industry Review Supplemental Tables – 2015
New York Yacht Club
February 2, 2016
Distilled Spirits Council



U.S. Spirits Market - 2015 Volumes					
<i>9-Liter Cases (000s)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,828	6,643	-	-	9,471
Bourbon, Tenn, Rye & Other	3,301	5,351	9,872	1,843	20,367
Canadian	8,273	2,647	217	5,608	16,745
Scotch - Blended	1,936	2,858	2,271	392	7,457
Scotch - Single Malt	-	226	1,271	630	2,127
Irish	-	78	2,848	292	3,218
Total Whiskey	16,339	17,803	16,480	8,764	59,385
Vodka	26,815	20,633	15,150	5,562	68,160
Rum	5,782	15,485	3,066	460	24,793
Tequila	2,995	7,715	1,412	2,688	14,810
Gin	6,114	1,317	2,306	128	9,865
Brandy & Cognac	7,338	453	3,285	1,286	12,362
Cordials	7,623	9,990	2,399	15	20,027
Cocktails	2,086	3,632	-	-	5,718
Total	75,091	77,028	44,098	18,904	215,121

U.S. Spirits Market - 2015 Y/Y Volume Growth					
<i>% Increases</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-0.1%	13.1%			8.8%
Bourbon, Tenn, Rye & Other	4.8%	-2.6%	6.8%	25.2%	5.2%
Canadian	-4.3%	-0.4%	-19.5%	17.8%	2.5%
Scotch - Blended	-4.1%	0.5%	-2.9%	11.1%	-1.3%
Scotch - Single Malt		79.6%	6.0%	13.0%	13.0%
Irish		0.0%	13.8%	54.4%	16.1%
Total Whiskey	-1.9%	4.3%	5.9%	19.6%	4.9%
Vodka	1.2%	1.2%	11.1%	-13.2%	1.8%
Rum	1.6%	-2.3%	-3.9%	2.9%	-1.5%
Tequila	2.8%	5.9%	17.2%	12.5%	7.4%
Gin	-4.2%	3.0%	0.8%	37.8%	-1.8%
Brandy & Cognac	2.7%	16.7%	12.1%	20.3%	7.2%
Cordials	-2.0%	-2.7%	1.8%	14.6%	-1.9%
Cocktails	6.6%	-2.6%			0.6%
Total	0.1%	1.0%	7.1%	6.5%	2.3%

U.S. Spirits Market - 2015 Volume Growth					
<i>9-Liter Cases (000s)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	(4)	769	-	-	766
Bourbon, Tenn, Rye & Other	152	(142)	628	371	1,010
Canadian	(376)	(11)	(52)	848	408
Scotch - Blended	(83)	14	(67)	39	(96)
Scotch - Single Malt	-	100	72	73	244
Irish	-	-	345	103	447
Total Whiskey	(310)	730	925	1,434	2,779
Vodka	311	238	1,514	(846)	1,217
Rum	89	(367)	(124)	13	(389)
Tequila	81	427	208	299	1,014
Gin	(271)	38	19	35	(179)
Brandy & Cognac	193	65	354	217	829
Cordials	(154)	(275)	43	2	(384)
Cocktails	129	(96)	-	-	33
Total	68	760	2,938	1,154	4,920

U.S. Spirits Market - 2015 Supplier Gross Revenues					
<i>Includes FET (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 150	\$ 483	\$ -	\$ -	\$ 633
Bourbon, Tenn, Rye & Other	\$ 192	\$ 556	\$ 1,735	\$ 411	\$ 2,894
Canadian	\$ 439	\$ 274	\$ 32	\$ 1,106	\$ 1,852
Scotch - Blended	\$ 136	\$ 445	\$ 593	\$ 187	\$ 1,361
Scotch - Single Malt	\$ -	\$ 43	\$ 380	\$ 309	\$ 732
Irish	\$ -	\$ 12	\$ 543	\$ 108	\$ 664
Total Whiskey	\$ 917	\$ 1,813	\$ 3,283	\$ 2,122	\$ 8,135
Vodka	\$ 1,111	\$ 1,569	\$ 1,966	\$ 1,160	\$ 5,806
Rum	\$ 285	\$ 1,550	\$ 371	\$ 119	\$ 2,325
Tequila	\$ 231	\$ 853	\$ 258	\$ 968	\$ 2,311
Gin	\$ 359	\$ 154	\$ 322	\$ 22	\$ 857
Brandy & Cognac	\$ 560	\$ 68	\$ 719	\$ 567	\$ 1,914
Cordials	\$ 457	\$ 1,420	\$ 546	\$ 6	\$ 2,429
Cocktails	\$ 104	\$ 213	\$ -	\$ -	\$ 316
Total	\$ 4,024	\$ 7,640	\$ 7,465	\$ 4,964	\$ 24,093

U.S. Spirits Market - 2015 Supplier Revenues Y/Y Change					
<i>% Increase</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	0.0%	13.1%			9.7%
Bourbon, Tenn, Rye & Other	6.2%	-1.9%	7.7%	26.5%	7.8%
Canadian	-4.6%	-0.4%	-19.7%	18.0%	8.1%
Scotch - Blended	-4.2%	-0.2%	-2.4%	11.6%	-0.2%
Scotch - Single Malt		82.2%	6.9%	16.4%	13.5%
Irish		0.0%	15.0%	57.6%	19.9%
Total Whiskey	-1.7%	3.6%	6.4%	20.3%	8.0%
Vodka	0.6%	0.7%	10.9%	-13.4%	0.5%
Rum	1.2%	-2.7%	-3.1%	2.8%	-2.0%
Tequila	2.7%	5.8%	17.2%	12.6%	9.4%
Gin	-5.6%	3.6%	0.4%	38.5%	-1.0%
Brandy & Cognac	3.0%	16.9%	12.8%	20.7%	12.0%
Cordials	-1.8%	-2.5%	2.0%	14.9%	-1.4%
Cocktails	6.9%	-2.5%			0.4%
Total	-0.1%	0.7%	7.3%	8.6%	4.1%

U.S. Spirits Market 2015 , Supplier Gross Revenues +/-					
<i>Includes FET (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 0	\$ 56	\$ -	\$ -	\$ 56
Bourbon, Tenn, Rye & Other	\$ 11	\$ (11)	\$ 124	\$ 86	\$ 210
Canadian	\$ (21)	\$ (1)	\$ (8)	\$ 169	\$ 139
Scotch - Blended	\$ (6)	\$ (1)	\$ (15)	\$ 19	\$ (2)
Scotch - Single Malt	\$ -	\$ 19	\$ 24	\$ 44	\$ 87
Irish	\$ -	\$ -	\$ 71	\$ 39	\$ 110
Total Whiskey	\$ (16)	\$ 62	\$ 196	\$ 358	\$ 601
Vodka	\$ 7	\$ 11	\$ 192	\$ (179)	\$ 31
Rum	\$ 3	\$ (43)	\$ (12)	\$ 3	\$ (48)
Tequila	\$ 6	\$ 47	\$ 38	\$ 108	\$ 199
Gin	\$ (21)	\$ 5	\$ 1	\$ 6	\$ (9)
	\$ -	\$ -	\$ -	\$ -	\$ -
Brandy & Cognac	\$ 16	\$ 10	\$ 82	\$ 97	\$ 205
Cordials	\$ (8)	\$ (37)	\$ 11	\$ 1	\$ (34)
Cocktails	\$ 7	\$ (6)	\$ -	\$ -	\$ 1
Totals	\$ (6)	\$ 50	\$ 509	\$ 395	\$ 947

Distilled Spirits Pricing Categories

Canadians, Blends	Supplier Rev/ 9 Liters	Major Brands
Value	<\$65	Black Velvet, Lord Calvert, Kessler
Premium	\$65 to \$115	Seagrams VO, Canadian Club, Seagram 7
High End Premium	\$115 to \$170	Seagrams VO Gold, Canadian Club 12 Year
Super Premium	\$170+	Crown Royal
Bourbon, Tennessee, Rye, Corn	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Early Times, Old Crow, Bellows
Premium	\$75 to \$135	Jim Beam White, Ezra Brooks, Old Forrester, George Dickel
High End Premium	\$135 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	<\$60	Popov, Kamchatka, Wolfschmidt, Gilbey
Premium	\$60 to \$110	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 \$125	Beefeater, Bombay Original
High End Premium	\$125 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

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%
2013	\$ 30.96	\$ 22.22	\$ 10.89	\$ 64.07	48.3%	34.7%	17.0%
2014	\$ 31.45	\$ 23.15	\$ 11.22	\$ 65.82	47.8%	35.2%	17.0%
2015	\$ 32.30	\$ 24.09	\$ 11.57	\$ 67.96	47.5%	35.4%	17.0%

Sources: Industry financial reports, BIG Handbooks, DISCUS Estimates
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