

Industry Review Support Tables – 2011
New York Yacht Club
January 30, 2012
Distilled Spirits Council



U.S. Spirits Market 2011 , 9-Liter Cases by Price Category					
<i>9-Liter Cases (000)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,908	2,440		-	5,348
Bourbon & Tennessee	2,742	4,637	7,782	882	16,042
Canadian	8,761	2,535	96	4,305	15,698
Scotch - Blended	2,604	2,878	1,909	177	7,568
Scotch - Single Malt	-	137	892	375	1,404
Irish	-	-	1,623	92	1,715
Total Whiskey	17,015	12,627	12,301	5,831	47,774
Vodka	26,659	18,750	11,820	5,686	62,915
Rum	5,872	16,174	2,313	357	24,716
Tequila	2,827	6,374	994	1,737	11,932
Gin	7,571	954	2,110	80	10,716
Brandy & Cognac	7,270	399	2,451	844	10,963
Cordials	7,607	10,865	1,653	9	20,135
Cocktails	2,048	4,643	-	-	6,690
Total	76,868	70,786	33,643	14,544	195,841

U.S. Spirits Market 2011 , Y/Y Percentage Increase					
<i>Volume</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	1.4%	-3.6%			-0.9%
Bourbon & Tennessee	-1.3%	2.4%	5.6%	15.4%	3.9%
Canadian	1.3%	-4.4%	3.9%	-2.5%	-0.7%
Scotch - Blended	-4.5%	-4.1%	-1.5%	66.9%	-2.6%
Scotch - Single Malt		0.0%	8.2%	17.1%	9.5%
Irish			23.2%	31.0%	23.6%
Total Whiskey	0.0%	-1.8%	6.6%	2.7%	1.4%
Vodka	3.3%	11.3%	1.1%	12.7%	5.9%
Rum	-1.1%	-2.7%	9.0%	76.8%	-0.7%
Tequila	7.0%	-1.2%	9.1%	11.3%	3.2%
Gin	-3.7%	-6.6%	7.6%	23.8%	-1.7%
Brandy & Cognac	-2.0%	30.2%	1.3%	5.3%	0.2%
Cordials	2.4%	-3.0%	28.6%	20.0%	1.1%
Cocktails	-2.2%	20.0%			12.2%
Total	0.9%	2.4%	5.3%	8.9%	2.7%

U.S. Spirits Market 2011 , Supplier Gross Revenues					
<i>Includes FET (millions)</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 146	\$ 171	\$ -	\$ -	\$ 317
Bourbon & Tennessee	\$ 151	\$ 456	\$ 1,194	\$ 180	\$ 1,980
Canadian	\$ 471	\$ 263	\$ 13	\$ 776	\$ 1,523
Scotch - Blended	\$ 181	\$ 450	\$ 457	\$ 80	\$ 1,167
Scotch - Single Malt	\$ -	\$ 25	\$ 239	\$ 159	\$ 423
Irish	\$ -	\$ -	\$ 295	\$ 32	\$ 326
Total Whiskey	\$ 949	\$ 1,364	\$ 2,198	\$ 1,227	\$ 5,737
Vodka	\$ 1,092	\$ 1,428	\$ 1,383	\$ 1,164	\$ 5,068
Rum	\$ 289	\$ 1,557	\$ 281	\$ 91	\$ 2,217
Tequila	\$ 217	\$ 749	\$ 184	\$ 641	\$ 1,790
Gin	\$ 447	\$ 108	\$ 290	\$ 14	\$ 859
Brandy & Cognac	\$ 543	\$ 59	\$ 537	\$ 335	\$ 1,474
Cordials	\$ 453	\$ 1,562	\$ 380	\$ 3	\$ 2,398
Cocktails	\$ 101	\$ 274	\$ -	\$ -	\$ 375
Total	\$ 4,090	\$ 7,101	\$ 5,253	\$ 3,473	\$ 19,918

U.S. Spirits Market 2011 , Y/Y Percentage Increase					
<i>Supplier Gross Revenue</i>					
Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-3.9%	-2.2%			-0.5%
Bourbon & Tennessee	-0.7%	3.9%	3.5%	11.4%	3.9%
Canadian	1.3%	-0.5%	-1.0%	2.1%	1.4%
Scotch - Blended	-4.3%	-4.2%	-6.8%	63.6%	-2.5%
Scotch - Single Malt		0.6%	4.2%	13.7%	7.4%
Irish			26.6%	36.2%	27.5%
Total Whiskey	-0.1%	-0.6%	3.7%	8.2%	2.9%
Vodka	4.4%	11.8%	-5.4%	15.9%	5.8%
Rum	0.8%	-1.8%	9.3%	78.5%	1.7%
Tequila	6.7%	-1.5%	10.2%	10.5%	4.7%
Gin	-4.0%	-5.1%	8.5%	27.9%	0.1%
Brandy & Cognac	-1.0%	34.1%	0.9%	6.3%	2.4%
Cordials	2.4%	1.3%	28.0%	21.1%	5.0%
Cocktails	-0.6%	22.6%			15.4%
Total	1.2%	2.6%	3.0%	12.2%	4.0%

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%	17.0%
2011	\$ 29.17	\$ 19.92	\$ 10.15	\$ 59.24	49.2%	33.6%	17.1%
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	Tvarski, 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, 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 Saphire
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