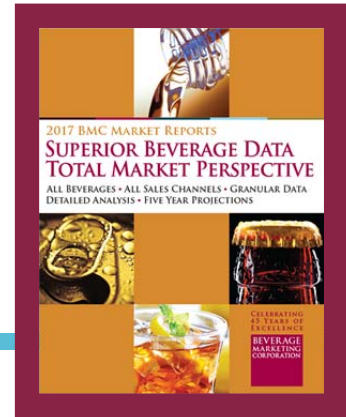


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- Does consumption data reveal anything useful about a product and brand focus versus a strategy of portfolio building?
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BMC's U.S. Spirits Guide 2017

April 2017



RESEARCH • DATA • CONSULTING

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**U.S. DISTILLED SPIRITS MARKET
SHARE OF ON-PREMISE AND OFF-PREMISE VOLUME
2011 – 2016(P)**

Segment	2011	2012	2013	2014	2015	2016(P)
Off-Premise	38.2%	38.2%	38.2%	38.2%	38.2%	38.2%
On-Premise	61.8%	61.8%	61.8%	61.8%	61.8%	61.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

(P) Projected
Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation

Moving forward, unflavored vodka will not only continue to account for the majority of volume; it will also be the primary source of category growth.

- Classic cocktails continue to retain their popularity, as do modified versions of them. While the traditional martini may call for gin, many consumers prefer iterations involving vodka.
- Pernod Ricard USA is attempting to lure these consumers to its Absolut via investments aimed at raising the brand's profile in on-premise accounts. Diageo aims to attract millennials through music-related partnerships with Live Nation and Spike TV.
- Brands like Beam Suntory's Pinnacle have been hurt by the waning popularity of flavored vodka, particularly confectionary flavors. While overall Pinnacle volume declined by █% in 2015, Pinnacle Whipped Cream's volume plummeted by █%. (The whipped cream flavor as a whole declined even more precipitously than the Pinnacle version of it.) Citric Apple had a positive launch but the brand was down in 2015 due a shift in Diageo's replenishment strategy.
- Peach ranked as the top type of flavored vodka, but, like most other flavored offerings, it saw volume contract in 2015. Indeed, only two of the 12 largest flavors by volume – pineapple and apple – registered growth during the year.

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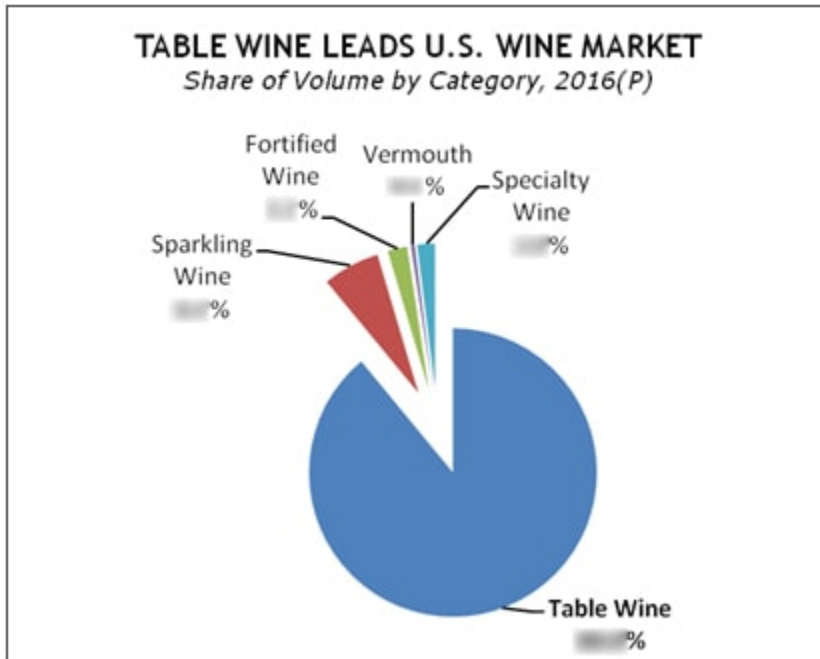
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(P) Projected
 Source: Beverage Marketing Corporation

Exhibit 1.6

U.S. WINE MARKET

CHANGE IN DOMESTIC AND IMPORTED VOLUME

2011 – 2016(P)

Category	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16(P)
Domestic	~100%	~100%	~100%	~100%	~100%	~100%
Imported	~10%	~10%	~10%	~10%	~10%	~10%
TOTAL	~110%	~110%	~110%	~110%	~110%	~110%

(P) Projected
 Source: Beverage Marketing Corporation

The largest wine suppliers in the United States have large brand portfolios encompassing multiple categories, though, as is to be expected given the category's stature, table wine accounts for the biggest brands by volume.

- All of the top 10 brands in the United States in 2015 were table wines, and nine of them were domestic. Indeed, it was not until the 18th ranked brand (Arbor Mist, a fruit-flavored wine from Constellation Brands' wine division) that something other than a conventional table wine appeared on the list of the leading 100 brands.
- The Wine Group claimed the number-one brand in 2015 with Franzia Winetaps, which had volume of █ million cases and close to a █% share of the volume held by the leading brands (a portion of the total market it had exceeded in previous years).
- No supplier had more brands among the top 10 in 2015 than E. & J. Gallo Winery, which had four of them, including numbers two and three (Barefoot Cellars and Carlo Rossi). Barefoot Cellars and Carlo Rossi snared the number-one and -two positions when the brands were measured with respect to retail sales.
- Deutsch Family Wine & Spirits had the leading imported table wine in Australia's Yellow Tail, which ranked seventh overall among brands by volume in the U.S. market in 2015.
- Bronco Wine Company rounded out the top 10 in 2015 with its Charles Shaw trademark.
- Treasure Wine Estates had the fastest growing brand (of at least █ cases in volume) in its 19 Crimes, a table wine which saw its volume grow by nearly █% in 2015.

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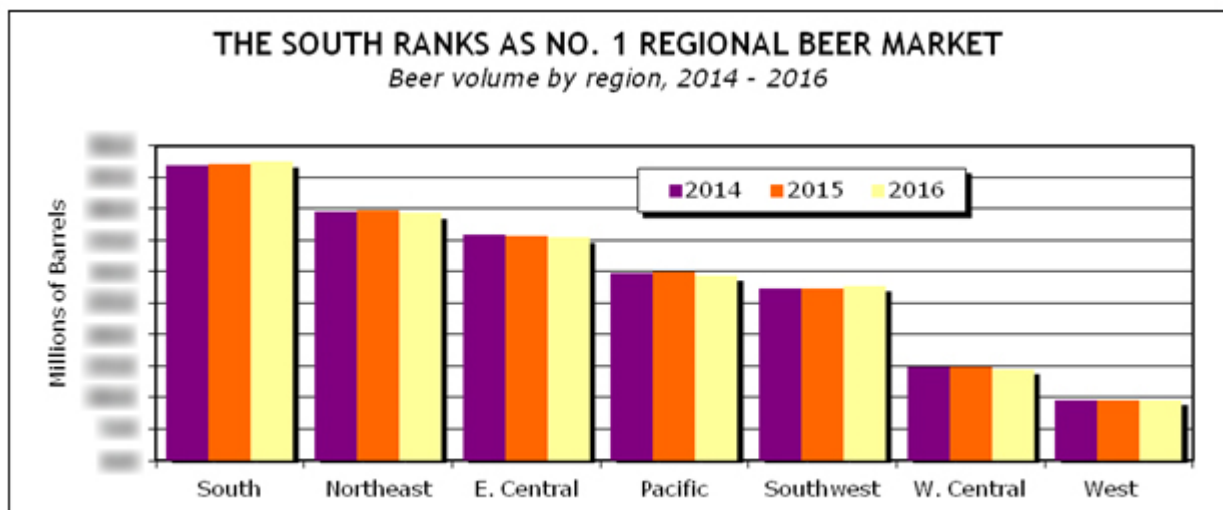
**U.S. BEER MARKET
CHANGE IN VOLUME BY REGION
2012 – 2021(P)**

Region	CAGR					
	2011/12	2012/13	2013/14	2014/15	2015/16	2016/21(P)
South	%	%	%	%	%	%
Northeast	%	%	%	%	%	%
East Central	%	%	%	%	%	%
Pacific	%	%	%	%	%	%
Southwest	%	%	%	%	%	%
West Central	%	%	%	%	%	%
West	%	%	%	%	%	%
TOTAL	%	%	%	%	%	%

(P) Projected

CAGR: Compound annual growth rate

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation

In terms of defining qualities (regardless of price), light beers dominate the American beer scene.

- Lower in calories (and, often, alcohol) than their regular counterparts, light beers have proven to be attractive across the entire price spectrum and with a multitude of different types of drinkers. Specialty brewers have entered the segment, and high-profile imported lights entered the market during the 2000s.
- In the second decade of the 21st century, however, light beer (or, more precisely, domestic light beer) tended to decline, resulting in a share loss. By 2016, its share, which had exceeded █% as recently as 2012, had receded to █%. While that was several points lower than its historical high, it was still █ points larger than the number-two beer category, imports (and some of that imported volume consisted of light beers like Corona Light and Heineken Light).
- Brewers may brew popular non-light beers, but large-scale success typically requires having at least one light beer in their portfolios.
- For the major brewers active in the United States, their primary light brands also stand as their biggest brands overall, and they all have multiple other light beer brands as well.