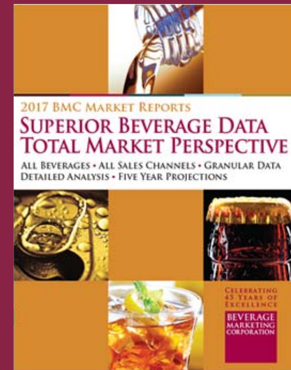
BMC's U.S. Spirits Guide

2017 Edition (Published April 2017. Data through 2016. Market projections through 2021.) More than 275 pages, with extensive text analysis, graphs, charts and tables



A bible for sales and marketing strategies, featuring granular brand detail, retail price tier sales, expanded classification within categories, coverage of export/import, advertising, and demographic data, plus extended projections.

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The answers you need

- To what degree are trends such as premiumization, product proliferation and appeals to the increasingly significant Millennial consumer driving the spirits industry today?

- How are categories and brand leaders being impacted? Is a return to the historical dominance of whiskey in the offing?

- How do imported brands stack up against domestics? In which categories does it matter?

- Can the impact of a strong cocktail culture be seen in the performance of individual brands and categories ?

- Is there any evidence of a resurgence in home entertaining in the on-off mix—or in brand/category performance?

- How important are the comparatively smaller incremental growth areas such as Tequila, Irish Whiskey, Cognac, Rye Whiskey, Craft Spirits to the overall health of the spirits market?

- How have advertising expenditures impacted overall brand performance?

This report features

BMC's U.S. Spirits Guide answers these questions with both expert analysis and the industry's most comprehensive compendium of reliable, hard data. The Guide features data on the overall market: volume and retail dollars, state rankings, top brands by volume and sales, fastest growing brands, leading suppliers by volume and share, and leading portfolios. Categories cover leading brands and brand share, leading suppliers and share, and sales by retail tier, plus imported and domestic share, import share by origin and details on leading flavored brands and flavor shares.

BMC's U.S. Spirits Guide 2017

April 2017

BEVERAGE MARKETING CORPORATION

RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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Exhibit 1.12

U.S. DISTILLED SPIRITS MARKET
SHARE OF ON-PREMISE AND OFF-PREMISE VOLUME
2012 – 2017(P)

Segment	2012	2013	2014	2015	2016	2017(P)
Off-Premise	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
On-Premise	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

(P) Projected

Source: Beverage Marketing Corporation

Source: Beverage Marketing Corporation

Rum itself has faced some challenge in the American market in recent times, but the flavored portion of the category has helped to buoy volume to some extent.

- Over the five-year span from 2011 to 2016, flavored rum's share of total rum volume increased by more than five percentage points, crossing over the [illegible]% line in 2012 and reaching [illegible]% by the end of the period.
- Both aged and unaged rums, as well as a wide range of flavors, have been key in keeping the spirit in a variety of cocktails with appeal to a wide range of consumers.
- The spirit's versatility lends itself particularly to tropical- or citrus fruit-style drinks.
- Tiki came back into vogue thanks in part to mixologists devising complex drinks that moved away from the exceedingly sweet concoctions of yesteryear.
- Rum isn't constrained by the strict rules governing bourbon distillers as long as it is made from sugar cane. Distillers now age rum in bourbon, port and sherry barrels to create distinctive flavor profiles.
- Although rum, together with cachaça, comprises a fairly small portion of the overall spirits market ([illegible]% as of 2016) compared to vodka or whiskey, and was surpassed in size and share by cordials/liqueurs in 2014, the category could claim both the second and third largest brands by volume in 2016 with Bacardi and Captain Morgan, respectively.