

BMC's U.S. SPIRITS GUIDE

2018 EDITION (Published May 2018. Data through 2017. Market projections through 2022.) **New for 2018!** PowerPoint Presentation features more than 275 slides, with extensive analysis, graphs, charts and tables + over 200 Excel exhibits offering even greater detail!

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. *New for 2018:* Key trends now presented in a colorful PowerPoint presentation to make insights come alive. Plus, you get more than 200 Excel exhibits providing in-depth data for a deeper dive on aspects covered in the PowerPoint slides and much more.

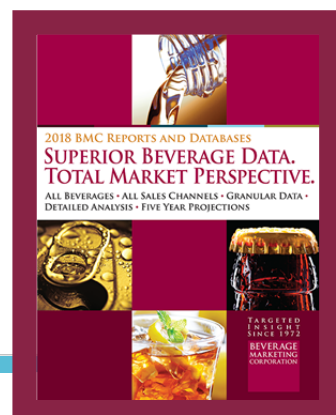
AVAILABLE FORMAT & PRICING



Direct
Download

\$995

*To learn more, to place an advance order or to inquire about additional user licenses **call:** Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com*



FOR A FULL
CATALOG OF
REPORTS AND
DATABASES,
GO TO
bmcreports.com

INSIDE:

REPORT OVERVIEW

A brief discussion of key features of this report. **2**

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. **5**

SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. **9**



**HAVE
QUESTIONS?**

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

**BEVERAGE
MARKETING
CORPORATION**

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

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 price tier, plus imported and domestic share, import share by origin and details on leading flavored brands and flavor shares. *New for 2018: More brand breakouts than ever before. Plus, enhanced craft spirit coverage!*

BMC's U.S. Spirits Guide 2018

May 2018



RESEARCH • DATA • CONSULTING

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

Copyright © 2018 Beverage Marketing Corporation of New York, 850 Third Avenue, New York, New York 10022, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

Contents

Table of Contents

BMC's U.S. Spirits Guide 2018
TABLE OF CONTENTS

TABLE OF CONTENTS	4
-------------------------	---

Section

Spirits Category Trends	5
Spirits Headlines	5
U.S. Distilled Spirits Market Millions of 9-Liter Cases 2012 – 2018p	6
Spirits Categories 2012 vs. 2017.....	7
Domestic Loses Share of Spirits Volume	8
U.S. Distilled Spirits Market Million of Dollars 2012 – 2017	9
Off-Premise Gains Spirits Volume Share	10
Total U.S. Spirits Per Capita Consumption	11
2017 Distilled Spirits Consumption by State.....	12
Top Ten Brands.....	13
Fastest Growing Spirits Brands 2017	14
Leading Spirits Suppliers.....	15
Blended Whiskey	16
Blended Whiskey Thousands of 9-Liter Cases 2012 – 2017	17
Blended Whiskey Thousands of Dollars 2012 – 2017	18
Share of Blended Whiskey Volume in 2017.....	19
Leading Blended Whiskey Suppliers Share	20
Volume Share by Price Tier	21
Brandy & Cognac	22
Brandy & Cognac Thousands of 9-Liter Cases 2012 – 2017	23
Brandy & Cognac Thousands of Retail Dollars 2012 – 2017	24
10 Leading Brands	25
Leading Brandy & Cognac Suppliers Share	26
Volume Share by Price Tier	27
Canadian Whisky	28
Canadian Whisky Thousands of 9-Liter Cases 2012 – 2017	29
Canadian Whisky Thousands of Retail Dollars 2012 – 2017	30
10 Leading Brands	31
Leading Canadian Whisky Suppliers Share	32
Volume Share by Price Tier	33

BMC's U.S. Spirits Guide 2018
TABLE OF CONTENTS

Section

Cordials/Liqueurs -----	34
Cordials & Liqueurs Thousands of 9-Liter Cases 2012 – 2017-----	35
Cordials & Liqueurs Thousands of Retail Dollars 2012 – 2017-----	36
Cordial & Liqueur Classification Share -----	37
10 Leading Brands -----	38
Leading Cordial & Liqueur Suppliers Share -----	39
Volume Share by Price Tier -----	40
Gin -----	41
Gin Thousands of 9-Liter Cases 2012 – 2017 -----	42
Gin Thousands of Retail Dollars 2012 – 2017 -----	43
10 Leading Brands -----	44
Gin Suppliers Share -----	45
Volume Share by Price Tier -----	46
Irish Whiskey -----	47
Irish Whiskey Thousands of 9-Liter Cases 2012 – 2017 -----	48
Irish Whiskey Thousands of Retail Dollars 2012 – 2017 -----	49
10 Leading Brands -----	50
Irish Whiskey Suppliers Share-----	51
Volume Share by Price Tier -----	52
Prepared Cocktails -----	53
Prepared Cocktails Thousands of 9-Liter Cases 2012 – 2017-----	54
Prepared Cocktails Thousands of Retail Dollars 2012 – 2017 -----	55
10 Leading Brands -----	56
Prepared Cocktails Suppliers Share -----	57
Rum/Cachaca -----	58
Rum/Cachaca Thousands of 9-Liter Cases 2012 – 2017 -----	59
Rum/Cachaca Thousands of Retail Dollars 2012 – 2017 -----	60
Cachaca Share of Category Volume -----	61
Flavored vs. Unflavored Rum Share 2012 – 2017-----	62
Leading Flavored Rum Brands -----	63
10 Leading Brands -----	64
Rum/CachacaSuppliers Share -----	65
Volume Share by Price Tier -----	66

BMC's U.S. Spirits Guide 2018
TABLE OF CONTENTS

Section

Scotch Whisky -----	67
Scotch Whisky Thousands of 9-Liter Cases 2012 – 2017 -----	68
Scotch Whisky Thousands of Retail Dollars 2012 – 2017 -----	69
Single Malt Share of Category Volume-----	70
10 Leading Brands -----	71
Scotch Whisky Suppliers Share-----	72
Volume Share by Price Tier -----	73
Straight Whiskey -----	74
Straight Whiskey Thousands of 9-Liter Cases 2012 – 2017 -----	75
Straight Whiskey Thousands of Retail Dollars 2012 – 2017 -----	76
Rye & Corn Whiskey Share of Category Volume -----	77
10 Leading Brands -----	78
Straight Whiskey Suppliers Share-----	79
Volume Share by Price Tier -----	80
Tequila / Mezcal -----	81
Tequila/Mezcal Thousands of 9-Liter Cases 2012 – 2017 -----	82
Tequila/Mezcal Thousands of Retail Dollars 2012 – 2017-----	83
Mezcal Share of Category Volume-----	84
10 Leading Brands -----	85
Tequila/Mezcal Suppliers Share -----	86
Volume Share by Price Tier -----	87
Vodka -----	88
Vodka Thousands of 9-Liter Cases 2012 – 2017 -----	89
Vodka Thousands of Retail Dollars 2012 – 2017 -----	90
Imported Vodka Volume Share by Country-----	91
Flavored vs. Unflavored Vodka Share 2012 – 2017 -----	92
Flavored Vodka Volume by Flavor-----	93
Leading Flavored Vodka Brands -----	94
10 Leading Brands -----	95
Vodka Suppliers Share -----	96
Volume Share by Price Tier -----	97

BMC's U.S. Spirits Guide 2018
TABLE OF CONTENTS

Section

Economics / Imports / Exports	98
Beverage Alcohol Share By Category	99
Federal Beverage Alcohol Tax Collections Share of Dollars by Category	100
Taxable Withdrawals of Distilled Spirits	101
Distilled Spirits Volume Bottled for Domestic Use Share by Category	102
Employees by Sector 2002 – 2017	103
U.S. Imported Spirits Market 1989 – 2017	104
U.S. Imported Spirits Market Volume Share by Category	105
U.S. Imported Spirits Market Dollar Share by Category	106
U.S. Exported Spirits Market Volume Share by Category	107
Advertising / Demographics	108
U.S. Spirits Advertising 1989 – 2017	109
U.S. Spirits Advertising Dollar Share by Category	110
10 Leading Brands	111
Ad Spending by Supplier	112
U.S. Spirits Advertising Dollar Share by Medium	113
Demographics of Blended or Rye Whiskey Consumer	114
Demographics of Bourbon Whiskey Consumer	115
Demographics of Gin Consumer	116
Demographics of Rum Consumer	117
Demographics of Scotch Whisky Consumer	118
Demographics of Tequila Consumer	119
Demographics of Vodka Consumer	120
Projections	121
U.S. Distilled Spirits Market Millions of 9-Liter Cases 2017 - 2022P	122
The Projected U.S. Spirits Market Volume and Growth by Category 2017 – 2022(P)	123
Category Share Projections	124
Beverage Marketing Corporation	125

Exhibit 2.2

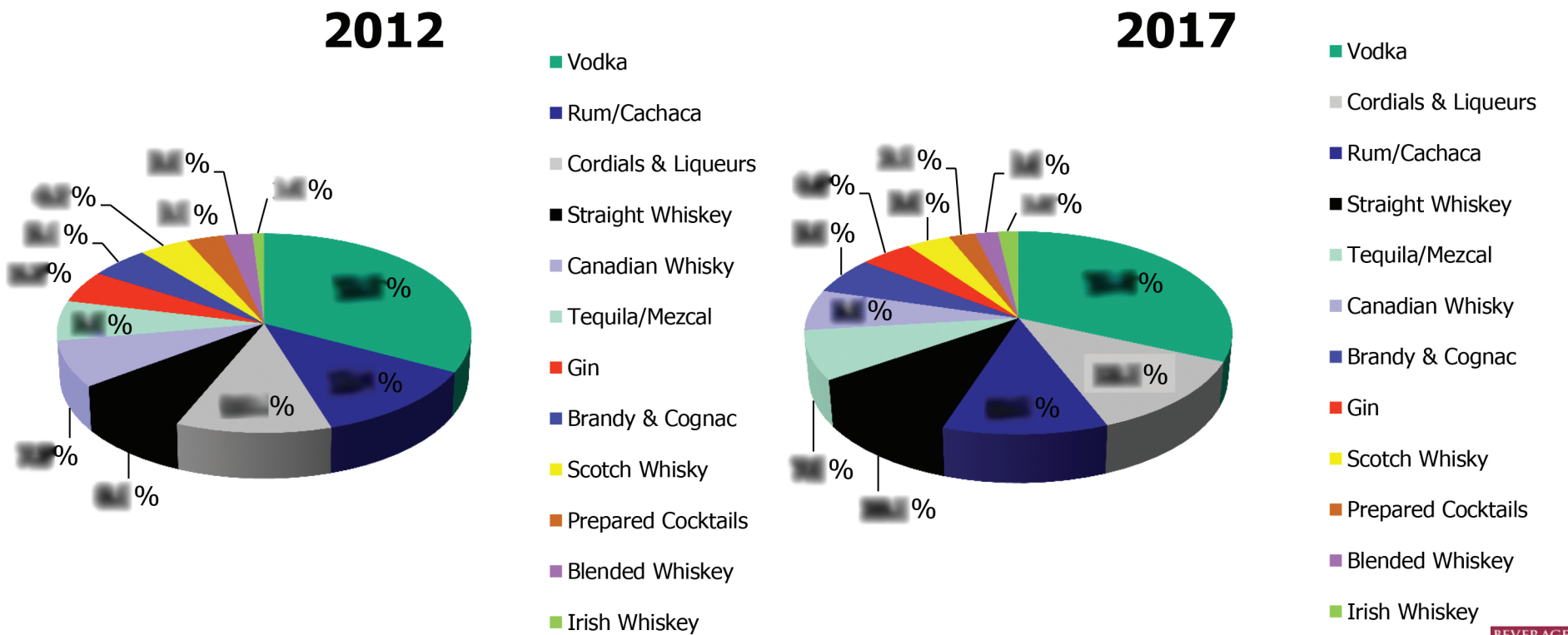
**U.S. SPIRITS MARKET
SHARE OF DOMESTIC AND IMPORTED VOLUME
2012 - 2018(P)**

Category	2012	2013	2014	2015	2016	2017	2018(P)
Domestic	85%	85%	85%	85%	85%	85%	85%
Imported	15%	15%	15%	15%	15%	15%	15%
TOTAL	100%	100%	100%	100%	100%	100%	100%

(P) Projected

Source: Beverage Marketing Corporation

Vodka remains the largest spirits category despite losing 1.1 share points over the 2012-to-2017 period, while straights, tequila and cordials gained 1.1, 0.8 and 0.7 share points, respectively



Source: Beverage Marketing Corporation



Total U.S. spirits per capita consumption increased from █ gallons per legal drinking-age adult (LDA) consumer in 2012 to █ gallons per capita in 2017

