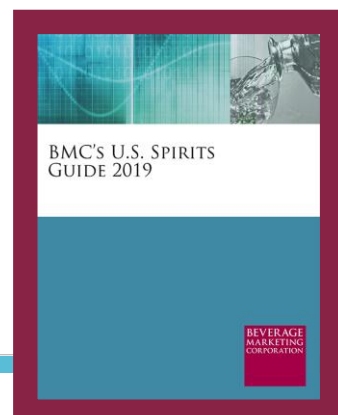


BMC's U.S. SPIRITS GUIDE

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**HAVE
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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 continuing?
- How do imported brands stack up against domestics? In which categories does it matter most?
- 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. **New for 2019: More brand breakouts than ever before. Plus, enhanced craft spirit coverage!**

Data provided for the following companies and brands:

- | | | |
|------------------------|------------------------|-------------------------|
| • Diageo | • Constellation Brands | • Shaw-Ross |
| • Luxco | • E & J Gallo | • International |
| • Beam Suntory | • Infinium Spirits | • Importers |
| • Frank-Lin Distillers | • Campari America | • Fifth Generation |
| • McCormick Distilling | • Remy Cointreau USA | • Star Industries |
| • Bacardi USA | • William Grant & Sons | • Hood River Distillers |
| • Brown-Forman | • USA | • Sazerac |
| • Laird & Co. | | |

- Patron Spirits Company
- Lucas Bols USA
- Edrington USA
- MS Walker Inc
- Charles Jacquin et Cie
- Phillips Distilling
- Moet Hennessy USA
- Heaven Hill Brands
- Kobrand
- Montebello Brands
- Winebow
- Proximo Spirits
- Pernod Ricard USA
- Mast Jagermeister U.S.
- Hennessy
- E & J Brandy
- Paul Masson Brandy
- Christian Brothers
- Remy Martin
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- Presidente Brandy
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- J. Bavet
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- Finlandia



BMC's U.S. SPIRITS GUIDE 2019

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BMC's U.S. Spirits Guide 2019

May 2019



RESEARCH • DATA • CONSULTING

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Exhibit 3.2

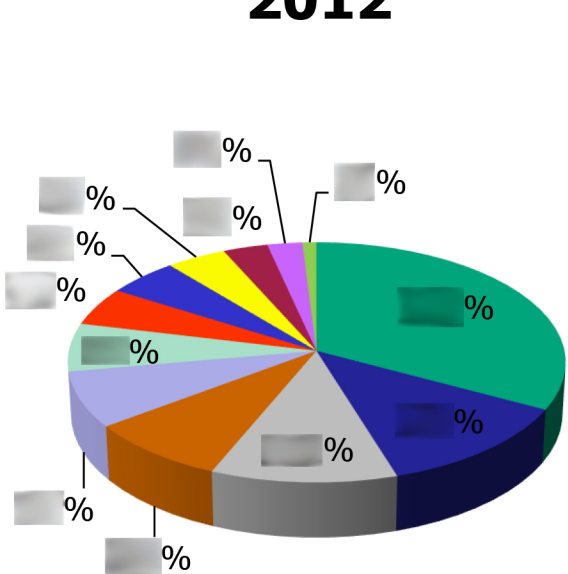
U.S. SPIRITS MARKET
SHARE OF RETAIL SALES BY CATEGORY
2012 – 2018

Category	2012	2013	2014	2015	2016	2017	2018
American Straight Whiskey	18%	18%	18%	18%	18%	18%	18%
Blended American Whiskey	1%	1%	1%	1%	1%	1%	1%
Total American Whiskey	19%	19%	19%	19%	19%	19%	19%
Canadian Whisky	1%	1%	1%	1%	1%	1%	1%
Scotch Whisky	1%	1%	1%	1%	1%	1%	1%
Irish Whiskey	1%	1%	1%	1%	1%	1%	1%
Total Imported Whisk(e)y	3%	3%	3%	3%	3%	3%	3%
Total Whisk(e)y	22%	22%	22%	22%	22%	22%	22%
Gin	1%	1%	1%	1%	1%	1%	1%
Vodka	1%	1%	1%	1%	1%	1%	1%
Rum/Cachaca	1%	1%	1%	1%	1%	1%	1%
Tequila/Mezcal	1%	1%	1%	1%	1%	1%	1%
Brandy & Cognac	1%	1%	1%	1%	1%	1%	1%
Cordials & Liqueurs	1%	1%	1%	1%	1%	1%	1%
Prepared Cocktails	1%	1%	1%	1%	1%	1%	1%
Total Non-Whiskey	7%	7%	7%	7%	7%	7%	7%
Total Distilled Spirits	29%	29%	29%	29%	29%	29%	29%

Source: Beverage Marketing Corporation

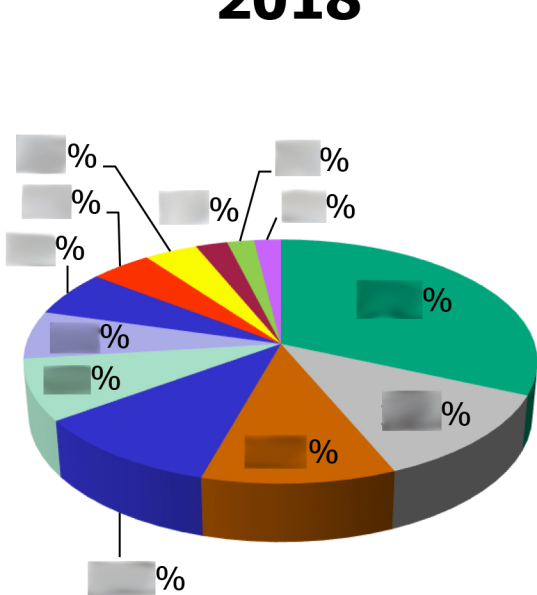
Vodka remains the largest spirits category despite losing █ share points over the 2012-to-2018 period, while straights, tequila and cordials gained █, █ and █ share points, respectively

2012



- Vodka
- Rum/Cachaca
- Cordials & Liqueurs
- Straight Whiskey
- Canadian Whisky
- Tequila/Mezcal
- Gin
- Brandy & Cognac
- Scotch Whisky
- Prepared Cocktails
- Blended Whiskey
- Irish Whiskey

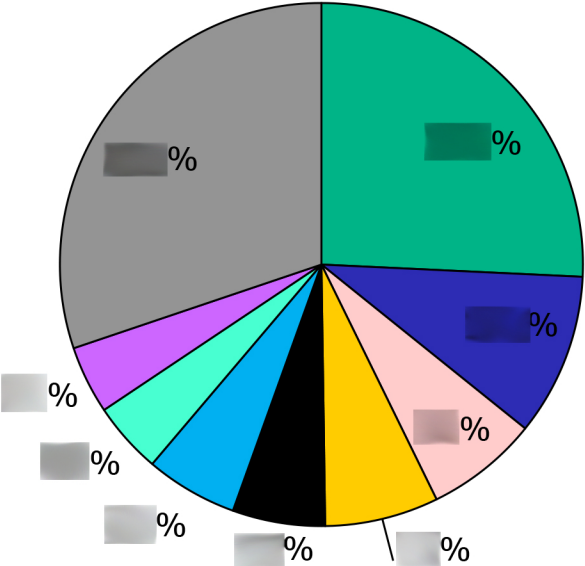
2018



- Vodka
- Cordials & Liqueurs
- Straight Whiskey
- Rum/Cachaca
- Tequila/Mezcal
- Canadian Whisky
- Brandy & Cognac
- Gin
- Scotch Whisky
- Prepared Cocktails
- Irish Whiskey
- Blended Whiskey

The story when looking at leading suppliers is Fifth Generation's % share in 2018, thanks to the performance of Tito's, while Diageo lost % share points since 2012 although some of that share loss was due to sale of brands to Sazerac

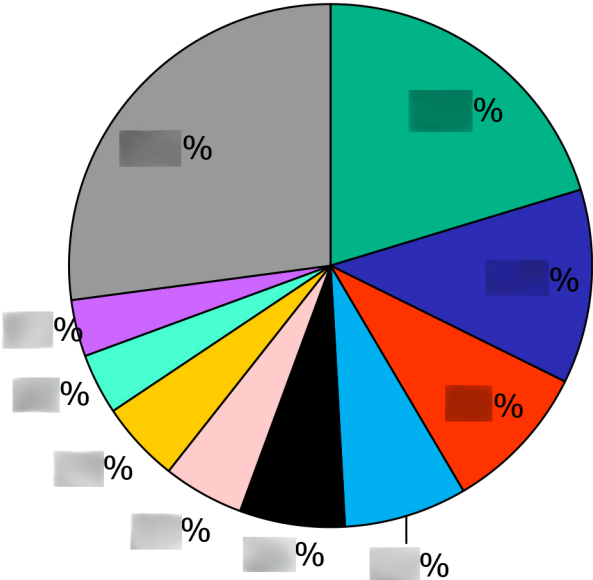
2012



- Diageo
- Sazerac
- Pernod Ricard USA
- Beam Suntory
- Constellation Brands
- Heaven Hill Brands
- Bacardi USA
- Campari America
- Others

Vodka
Suppliers Share

2018



- Diageo
- Sazerac
- Fifth Generation
- Heaven Hill Brands
- Constellation Brands
- Pernod Ricard USA
- Beam Suntory
- Bacardi USA
- Campari America
- Others