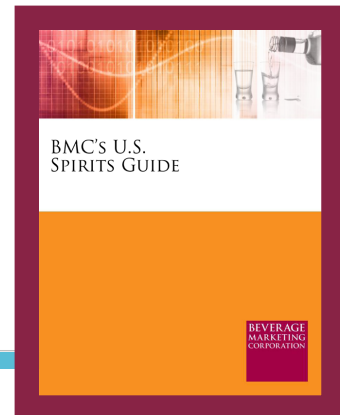


BMC's U.S. SPIRITS GUIDE

2020 EDITION (To be published December 2020. Data through 2019. Market projections through 2024.) PowerPoint presentation features more than 120 slides, with extensive analysis, graphs, charts and tables + over 200 Excel exhibits offering even greater detail!



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HAVE QUESTIONS?

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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.

Data was provided for the following companies and brands in the 2019 report. Coverage may differ slightly in the 2020 edition:

- | | | |
|------------------------|-------------------------------------|-------------------------|
| • Diageo | • Remy Cointreau USA | • Lucas Bols USA |
| • Luxco | • William Grant & Sons USA | • Edrington USA |
| • Beam Suntory | • Shaw-Ross International Importers | • MS Walker Inc |
| • Frank-Lin Distillers | • Fifth Generation | • Charles Jacquinet Cie |
| • McCormick Distilling | • Star Industries | • Phillips Distilling |
| • Bacardi USA | • Hood River Distillers | • Moet Hennessy USA |
| • Brown-Forman | • Sazerac | • Heaven Hill Brands |
| • Laird & Co. | • Patron Spirits Company | • Kobrand |
| • Constellation Brands | | • Montebello Brands |
| • E & J Gallo | | • Winebow |
| • Infinium Spirits | | • Proximo Spirits |
| • Campari America | | |

- Pernod Ricard USA
- Mast Jagermeister U.S.
- Hennessy
- E & J Brandy
- Paul Masson Brandy
- Christian Brothers
- Remy Martin
- Courvoisier
- Korbel Brandy
- Martell
- D'ussé
- Salignac
- St. Remy
- Coronet Brandy
- Presidente Brandy
- Mr. Boston Brandy
- J. Bavet
- Raynal
- Ansac
- Aristocrat Brandy
- Meukow
- Cardenal Mendoza
- Jacques Bonet
- Laird's AppleJack
- Pisco Capel
- Alize Cognac
- Pisco Porton
- BarSol
- Landy
- Hartley Brandy
- Phillips Brandy
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- Stock 84
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- Milenario
- Chocoviac
- Conjure
- Banker's Club
- Deau Artisan
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- McCormick Brandy
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- Kessler
- Kentucky Deluxe
- McCormick Blend
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- Beam's 8 Star
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- Pendleton
- Northern Light
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- Crystal Palace Vodka
- Phillips Vodka
- Wolfschmidt
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- Potter's Vodka
- Fris Vodka
- Vladimir
- Finlandia



BMC's U.S. Spirits Guide

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NOTE: The 2020 edition of this report has not yet been published. The dates on tables of contents/exhibits and sample data reflect information from last year's edition of this report.

The 2020 edition you receive will have updated data through 2019 and projections through 2024 where applicable.

BMC's U.S. Spirits Guide 2019

May 2019



RESEARCH • DATA • CONSULTING

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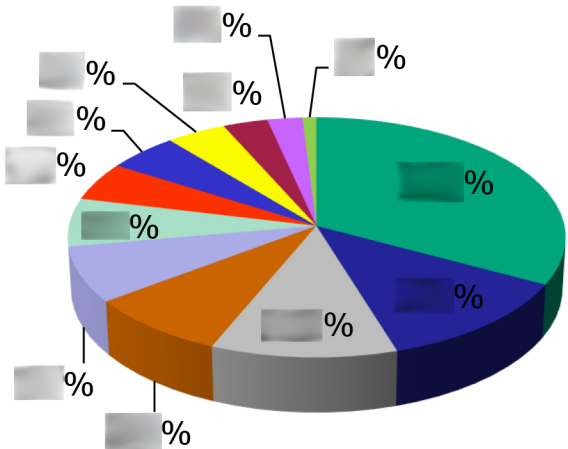
**U.S. SPIRITS MARKET
SHARE OF RETAIL SALES BY CATEGORY
2012 – 2018**

| 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 | 6% | 6% | 6% | 6% | 6% | 6% | 6% |
| Total Distilled Spirits | 28% | 28% | 28% | 28% | 28% | 28% | 28% |

Source: Beverage Marketing Corporation

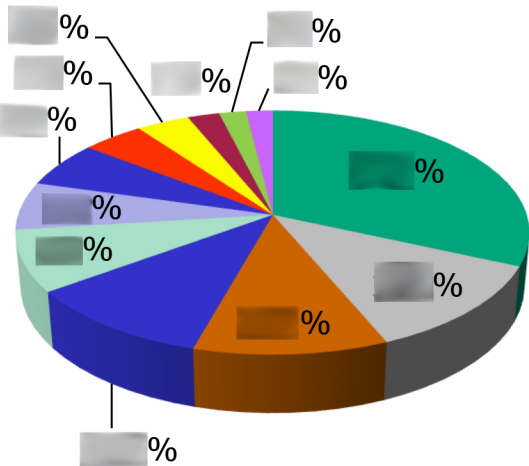
Vodka remains the largest spirits category despite losing [redacted] share points over the 2012-to-2018 period, while straights, tequila and cordials gained [redacted], [redacted] and [redacted] share points, respectively

2012



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

2018



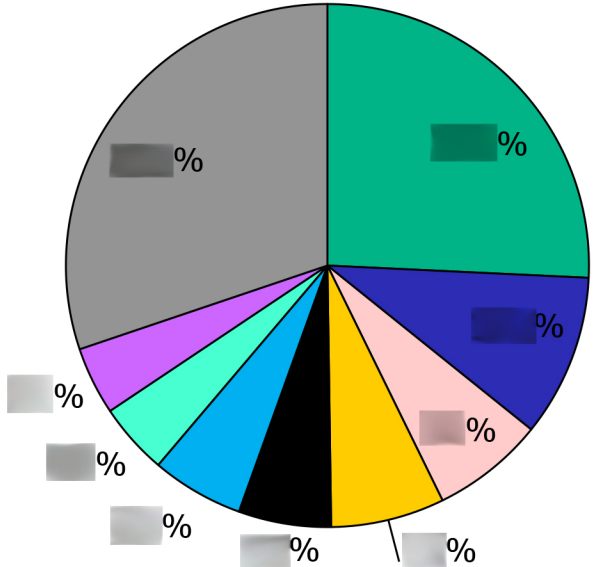
- Vodka
- Cordials & Liqueurs
- Straight Whiskey
- Rum/Cachaca
- Tequila/Mezcal
- Canadian Whisky
- Brandy & Cognac
- Gin
- Scotch Whisky
- Prepared Cocktails
- Irish Whiskey
- Blended Whiskey

Source: Beverage Marketing Corporation



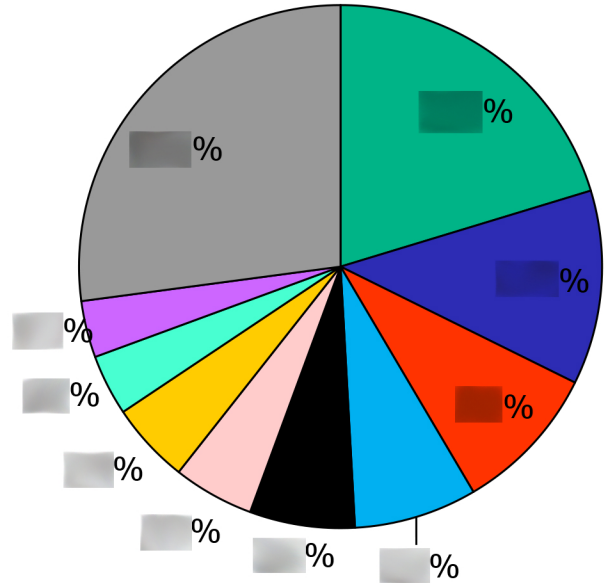
The story when looking at leading suppliers is Fifth Generation's [redacted] % share in 2018, thanks to the performance of Tito's, while Diageo lost [redacted] share points since 2012 although some of that share loss was due to sale of brands to Sazerac

2012



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

2018



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

Vodka Suppliers Share