

2023

ANNUAL ECONOMIC BRIEFING

SUPPORT TABLES
FEBRUARY 7, 2024



DISTILLED SPIRITS COUNCIL
OF THE UNITED STATES

U.S. Spirits Market - 2023 Volumes

9-Liter Cases (000s)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,354	8,904	653	97	12,008
American Whiskey	3,869	6,554	15,032	5,655	31,110
Canadian	6,992	2,661	442	7,424	17,519
Scotch - Blended	1,285	2,299	2,896	645	7,125
Scotch - Single Malt	-	66	1,037	954	2,056
Irish	-	-	4,205	569	4,773
Total Whiskey	14,500	20,483	24,265	15,344	74,591
Vodka	23,030	19,839	26,661	5,377	74,908
Rum	4,465	14,616	2,821	789	22,691
Tequila/Mezcal	3,853	13,646	6,103	7,959	31,561
Gin	4,275	1,244	2,752	706	8,977
Brandy & Cognac	7,099	457	3,065	1,919	12,540
Cordials	8,226	9,762	3,011	57	21,056
Cocktails/RTDs*	41,833	19,556	1,094	-	62,483
Total	107,282	99,602	69,772	32,152	308,807

* Pre-mixed Cocktails, including spirits-based RTDs.

U.S. Spirits Market - 2023 Case Growth

9-Liter Cases (000s)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	(149)	(82)	138	(8)	(101)
American Whiskey	(33)	(1,260)	947	220	(126)
Canadian	(349)	(1)	8	(765)	(1,106)
Scotch - Blended	(78)	(172)	221	(171)	(200)
Scotch - Single Malt	-	(24)	(251)	(138)	(413)
Irish	-	-	(1,087)	(258)	(1,344)
Total Whiskey	(609)	(1,538)	(22)	(1,121)	(3,291)
Vodka	-	-	-	-	-
Vodka	(427)	(966)	(811)	216	(1,989)
Rum	(123)	(932)	(233)	(77)	(1,364)
Tequila/Mezcal	9	759	1,024	(100)	1,692
Gin	(579)	(185)	(188)	98	(855)
Brandy & Cognac	74	(11)	(1,198)	(709)	(1,844)
Cordials	165	(1,070)	144	1	(761)
Cocktails/RTDs*	9,379	2,754	82	-	12,215
Total	7,889	(1,190)	(1,202)	(1,693)	3,804

* Pre-mixed Cocktails, including spirits-based RTDs.

2023 Y/Y Volume Growth

Percentage

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-6.0%	-0.9%	26.8%	-7.9%	-0.8%
American	-0.9%	-16.1%	6.7%	4.0%	-0.4%
Canadian	-4.7%	0.0%	1.9%	-9.3%	-5.9%
Scotch - Blended	-5.7%	-7.0%	8.3%	-21.0%	-2.7%
Scotch - Single Malt		-26.9%	-19.5%	-12.7%	-16.7%
Irish			-20.5%	-31.2%	-22.0%
Total Whiskey	-4.0%	-7.0%	-0.1%	-6.8%	-4.2%
Vodka	-1.8%	-4.6%	-3.0%	4.2%	-2.6%
Rum	-2.7%	-6.0%	-7.6%	-8.9%	-5.7%
Tequila/Mezcal	0.2%	5.9%	20.2%	-1.2%	5.7%
Gin	-11.9%	-13.0%	-6.4%	16.0%	-8.7%
Brandy & Cognac	1.1%	-2.3%	-28.1%	-27.0%	-12.8%
Cordials	2.0%	-9.9%	5.0%	1.4%	-3.5%
Cocktails/RTDs*	28.9%	16.4%	8.1%		24.3%
Total	7.9%	-1.2%	-1.7%	-5.0%	1.2%

* Pre-mixed Cocktails, including spirits-based RTDs.

U.S. Spirits Market - 2023 Supplier Revenues

Gross Revenues - Includes FET (Millions)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 127	\$ 711	\$ 106	\$ 33	\$ 978
American Whiskey	\$ 253	\$ 735	\$ 2,869	\$ 1,412	\$ 5,269
Canadian	\$ 368	\$ 271	\$ 69	\$ 1,576	\$ 2,285
Scotch - Blended	\$ 90	\$ 364	\$ 829	\$ 342	\$ 1,625
Scotch - Single Malt	\$ -	\$ 12	\$ 369	\$ 603	\$ 985
Irish	\$ -	\$ -	\$ 898	\$ 238	\$ 1,136
Total Whiskey	\$ 838	\$ 2,094	\$ 5,141	\$ 4,205	\$ 12,278
Vodka	\$ 961	\$ 1,508	\$ 3,653	\$ 1,105	\$ 7,227
Rum	\$ 223	\$ 1,571	\$ 387	\$ 220	\$ 2,400
Tequila/Mezcal	\$ 326	\$ 1,781	\$ 1,275	\$ 3,141	\$ 6,523
Gin	\$ 284	\$ 160	\$ 434	\$ 132	\$ 1,010
Brandy & Cognac	\$ 580	\$ 71	\$ 800	\$ 1,017	\$ 2,467
Cordials	\$ 545	\$ 1,554	\$ 788	\$ 28	\$ 2,915
Cocktails/RTDs*	\$ 1,545	\$ 1,192	\$ 94	\$ -	\$ 2,831
Total	\$ 5,301	\$ 9,931	\$ 12,572	\$ 9,846	\$ 37,650

* Pre-mixed Cocktails, including spirits-based RTDs.

U.S. Spirits Market - 2023 Revenue Growth

Gross Revenues - Includes FET (Millions)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ (8)	\$ 24	\$ 23	\$ (1)	\$ 38
American Whiskey	\$ (1)	\$ (129)	\$ 238	\$ 85	\$ 192
Canadian	\$ (18)	\$ 4	\$ 1	\$ (129)	\$ (143)
Scotch - Blended	\$ (5)	\$ (16)	\$ 88	\$ (65)	\$ 1
Scotch - Single Malt	\$ -	\$ (5)	\$ (54)	\$ (32)	\$ (90)
Irish	\$ -	\$ -	\$ (187)	\$ (87)	\$ (274)
Total Whiskey	\$ (33)	\$ (122)	\$ 108	\$ (229)	\$ (275)
Vodka	\$ (2)	\$ (40)	\$ (16)	\$ 44	\$ (14)
Rum	\$ (1)	\$ (41)	\$ (24)	\$ (16)	\$ (81)
Tequila/Mezcal	\$ (1)	\$ 172	\$ 264	\$ 41	\$ 476
Gin	\$ (17)	\$ (15)	\$ (14)	\$ 22	\$ (25)
Brandy & Cognac	\$ 24	\$ (2)	\$ (305)	\$ (311)	\$ (594)
Cordials	\$ 30	\$ (106)	\$ 62	\$ 1	\$ (13)
Cocktails/RTDs*	\$ 409	\$ 182	\$ 7	\$ -	\$ 599
Total	\$ 410	\$ 27	\$ 82	\$ (447)	\$ 73

* Pre-mixed Cocktails, including spirits-based RTDs.

2023 Y/Y Revenue Growth

Percentage

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-6.0%	3.5%	27.2%	-2.7%	4.1%
American Whiskey	-0.6%	-15.0%	9.0%	6.4%	3.8%
Canadian	-4.7%	1.4%	0.9%	-7.6%	-5.9%
Scotch - Blended	-5.4%	-4.2%	11.9%	-16.0%	0.1%
Scotch - Single Malt		-27.3%	-12.7%	-5.0%	-8.4%
Irish			-17.3%	-26.7%	-19.4%
Total Whiskey	-3.8%	-5.5%	2.2%	-5.2%	-2.2%
Vodka	-0.2%	-2.6%	-0.4%	4.2%	-0.2%
Rum	-0.3%	-2.5%	-5.9%	-6.7%	-3.3%
Tequila/Mezcal	-0.2%	10.7%	26.1%	1.3%	7.9%
Gin	-5.7%	-8.4%	-3.2%	19.6%	-2.4%
Brandy & Cognac	4.4%	-2.5%	-27.6%	-23.4%	-19.4%
Cordials	5.7%	-6.4%	8.6%	4.3%	-0.4%
Cocktails/RTDs*	36.1%	18.0%	8.3%		26.8%
Total	8.4%	0.3%	0.7%	-4.3%	0.2%

* Pre-mixed Cocktails, including spirits-based RTDs.

Beverage Alcohol Market Share - Revenue Based							
Year	Supplier Gross Revenues (Billions)				Market Share		
	Beer	Spirits	Wine	Total	Beer	Spirits	Wine
1999	\$ 21.20	\$ 10.66	\$ 6.00	\$ 37.86	56.0%	28.2%	15.8%
2000	\$ 22.60	\$ 11.70	\$ 6.41	\$ 40.71	55.5%	28.7%	15.7%
2001	\$ 23.80	\$ 12.22	\$ 6.63	\$ 42.65	55.8%	28.7%	15.5%
2002	\$ 24.10	\$ 13.17	\$ 7.04	\$ 44.31	54.4%	29.7%	15.9%
2003	\$ 24.87	\$ 13.87	\$ 7.50	\$ 46.24	53.8%	30.0%	16.2%
2004	\$ 25.62	\$ 15.12	\$ 7.90	\$ 48.64	52.7%	31.1%	16.2%
2005	\$ 25.62	\$ 16.00	\$ 8.30	\$ 49.92	51.3%	32.1%	16.6%
2006	\$ 26.34	\$ 17.20	\$ 8.62	\$ 52.15	50.5%	33.0%	16.5%
2007	\$ 27.49	\$ 18.20	\$ 9.24	\$ 54.93	50.1%	33.1%	16.8%
2008	\$ 28.46	\$ 18.72	\$ 9.38	\$ 56.56	50.3%	33.1%	16.6%
2009	\$ 28.82	\$ 18.74	\$ 9.48	\$ 57.04	50.5%	32.9%	16.6%
2010	\$ 28.64	\$ 19.16	\$ 9.76	\$ 57.56	49.8%	33.3%	16.9%
2011	\$ 29.24	\$ 20.36	\$ 10.19	\$ 59.79	48.9%	34.1%	17.0%
2012	\$ 30.32	\$ 21.29	\$ 10.53	\$ 62.13	48.8%	34.3%	16.9%
2013	\$ 30.96	\$ 22.22	\$ 10.89	\$ 64.07	48.3%	34.7%	17.0%
2014	\$ 31.45	\$ 23.15	\$ 11.22	\$ 65.82	47.8%	35.2%	17.0%
2015	\$ 32.30	\$ 24.09	\$ 11.57	\$ 67.96	47.5%	35.4%	17.0%
2016	\$ 33.04	\$ 25.19	\$ 12.03	\$ 70.26	47.0%	35.9%	17.1%
2017	\$ 33.07	\$ 26.22	\$ 12.40	\$ 71.69	46.1%	36.6%	17.3%
2018	\$ 33.66	\$ 27.55	\$ 12.71	\$ 73.92	45.5%	37.3%	17.2%
2019	\$ 34.66	\$ 29.02	\$ 13.03	\$ 76.71	45.2%	37.8%	17.0%
2020	\$ 35.15	\$ 31.93	\$ 13.48	\$ 80.56	43.6%	39.6%	16.7%
2021	\$ 36.80	\$ 35.76	\$ 13.96	\$ 86.52	42.5%	41.3%	16.1%
2022	\$ 37.46	\$ 37.58	\$ 14.31	\$ 89.35	41.9%	42.1%	16.0%
2023	\$ 37.31	\$ 37.65	\$ 14.33	\$ 89.30	41.8%	42.2%	16.1%

Sources: Distilled Spirits Council estimates, Industry financial reports, IWSR, and Beverage Information Group Handbooks

Price Segmentation by Spirits Category

Canadians, Blends	Supplier Rev/ 9 Liters	Major Brands
Value	<70	Beam 8 Star, Kessler
Premium	\$70 to \$115	Canadian Club 6Y, Seagram 7
High End Premium	\$115 to \$175	Canadian Club 12 Year, Ole Smoky Blended
Super Premium	\$175+	Crown Royal, High West American Prairie

Bourbon, Tennessee, Rye, Corn	Supplier Rev/ 9 Liters	Major Brands
Value	<\$90	Ten High, Old Crow 3Y
Premium	\$90 to \$145	Jim Beam White, Old Forester
High End Premium	\$145 to \$215	Jack Daniels, Makers Mark, Jim Beam Black, Wild Turkey, Bulleit,
Super Premium	\$215+	Woodford Reserve, Knob Creek, Jack Daniels Single Barrel, Bullet 10 Yr., Angels Envy Rye

Scotch	Supplier Rev/ 9 Liters	Major Brands
Value	<\$110	Clan Macgregor, Teachers, Vat 69
Premium	\$110 to \$165	Dewar's White Label, Johnnie Walker Red, Famous Grouse
High End Premium	\$165 to \$315	Johnnie Walker Black, Chivas Regal 12, Dewar's 12
Super Premium	\$315+	Glenlivet, Johnnie Walker Blue, Glenfiddich, Macallan, Glenmorangie, Ardbeg

Irish	Supplier Rev/ 9 Liters	Major Brands
Value		
Premium		
High End Premium	<\$210	Jameson, Tullamore, Kilbeggan
Super Premium	>\$210	Jameson Black, Redbreast, Teeling

Price Segmentation by Spirits Category

Vodka	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Kamchatka, Gilbey's
Premium	\$70 to \$120	Smirnoff, Svedka, Skyy, Pinnacle, New Amsterdam
High End Premium	\$120 to \$170	Absolut, Effen, Ketel One
Super Premium	\$170+	Grey Goose, Ciroc, Belvedere

Rum	Supplier Rev/ 9 Liters	Major Brands
Value	<\$70	Castillo, Ronrico, Ron Rio
Premium	\$70 to \$130	Bacardi Superior, Capt. Morgan Original, Malibu, Cruzan
High End Premium	\$130 to \$175	Mount Gay Eclipse, Wray & Nephew, Brugal
Super Premium	\$175+	Ron Zacapa XO, Bacardi Reserva Ocho, Brugal 1888, Mount Gay Black, Flor De Cana, Appleton

Tequila	Supplier Rev/ 9 Liters	Major Brands
Value	<\$100	Pepe Lopez, Sauza Giro
Premium	\$100 to \$175	Sauza Blanco, El Jimador Silver, Olmeca Altos
High End Premium	\$175 to \$255	Cazadores, Teremana, Espolon, Milagro, Sauza Hornitos Black,
Super Premium	\$255+	Patron, Casamigos, Don Julio, Herradura, Sauza Tres Generaciones, Avion, Casa Noble

Gin	Supplier Rev/ 9 Liters	Major Brands
Value	<\$80	Seagram's, Gordon's, Gilby's
Premium	\$80 to \$135	Beefeater, Bombay Original
High End Premium	\$135 to \$205	Tanqueray, Bombay Sapphire, Malfy
Super Premium	\$205+	Hendrick's, The Botanist, Tanqueray 10, Roku, Monkey 47

Price Segmentation by Spirits Category

Brandy & Cognac	Supplier Rev/ 9 Liters	Major Brands
Value	<\$75	Dekuyper, Hiram Walker
Premium	\$75 to \$180	Korbel, Salignac VS, St. Remy, E&J VSOP
High End Premium	\$180 to \$295	Hennessey VS, Courvoisier VS, Martell VS,
Super Premium	\$295+	Remy Martin VSOP, D'usse VSOP, Hennessey VSOP, Most XOs

Cordials	Supplier Rev/ 9 Liters	Major Brands
Value	<\$85	Dekuyper, Hiram Walker
Premium	\$85 to \$185	Jagermeister, Baileys, Kahlua, Rumchata, Tequila Rose
High End Premium	\$185 to \$290	Chambord, Godiva, St. Germain
Super Premium	\$290+	Grand Marnier

Cocktails	Supplier Rev/ 9 Liters	Major Brands
Value	All except Premium	
Premium	If associated with a brand carrying a Premium or above designation	Jack Daniels, Crown Royal, Bacardi, Absolut, Captain Morgan, Sauza, Kahlua, Skinny Girl, Malibu, Cazadores, Svedka, Tanqueray

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