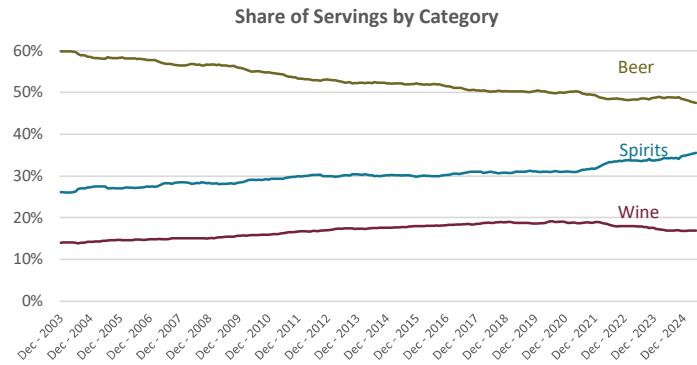
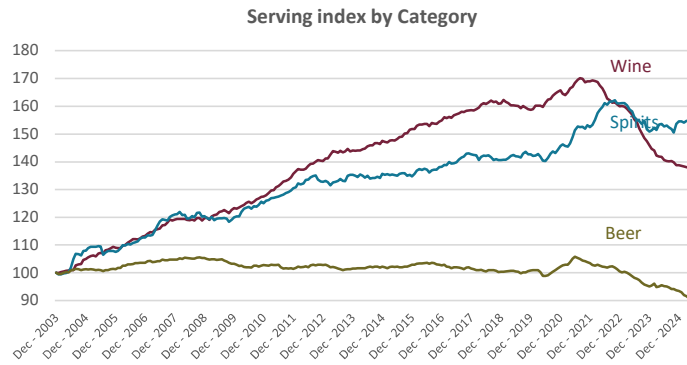
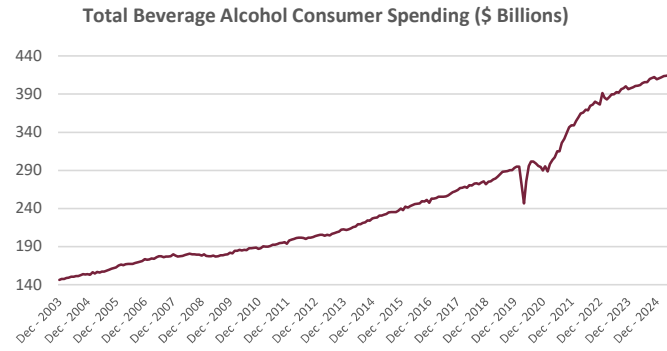
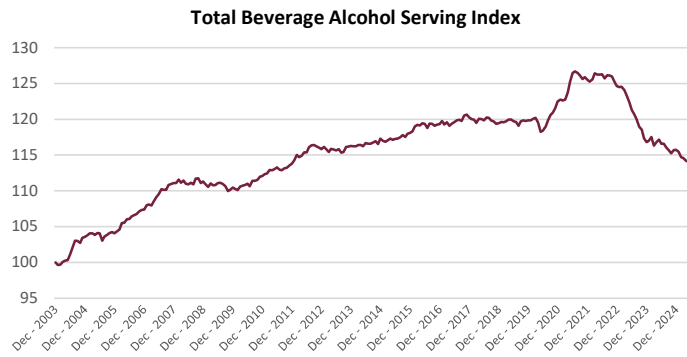




The Total Beverage Alcohol Overview - Advance

Period May 2025



About This Report

The Total Beverage Alcohol Overview is a monthly publication providing a complete view of Beer, Wine, and Spirits in the US Marketplace. The overview allows readers to put into context industry data from individual segments, such as scan data from retailers or control state sales, when compared to total market trends.

The data is assembled from several federal data sources, including The Alcohol and Tobacco Tax and Trade Bureau, The Bureau of Economic Analysis, US Customs, The Census Bureau, and The Bureau of Labor Statistics, as well as data provided by the California Board of Equalization. Subscribers to this report will receive two reports for each monthly period. The Advance edition is published approximately two weeks after the end of each month using proprietary algorithms to project data that has not yet been received. The Reported edition will be published approximately sixty to ninety days after the end of each monthly period, depending on the release of data from the various government agencies.

Volume is based on product entering the market which is primarily based on when federal taxes are paid on the various beverage types. Consumer spending is based on components of US Gross Domestic Product.

The cover of The Total Beverage Alcohol Overview graphically displays rolling twelve month industry trends since 2003. This highlights that beer has lost share to wine and spirits and that consumers are trading up with spending growing faster than consumption. The overview itself focuses on the last 24 months. Descriptions of the various data sets can be found at the end of this publication which we encourage users to read.

Generally speaking, the six-month or longer trends are more indicative of the overall market trends. Short-term volume trends can be highly volatile and are impacted by supplier fiscal years, market inventory adjustments, timing of production and shipments from domestic producers as well as logistical timing for imports.

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1 Total Beverage Alcohol

Beverage Alcohol Servings Indices (2003 = 100)

	L12 Mths TY	L12 Mths LY	% Chg.
Total Beverage Alcohol Index	114.05	117.19	-2.69%
Beer Index	90.51	95.58	-5.30%
Wine Index	137.81	141.69	-2.74%
Spirits index	155.22	153.58	1.07%

Legal Drinking Age Population (Millions) (Index: 2003 = 100)

	This Year	Last Year	% Chg.	TY Index
LDA Population	255.0	253.8	0.47%	126.3
Age 21 to 30	46.0	46.0	-0.07%	117.5
Age 31 to 40	47.5	47.1	0.71%	111.4
Age 41 to 50	41.8	41.4	0.79%	94.8
Age 51 to 60	41.0	41.3	-0.77%	122.0
Age 61 to 70	40.2	40.0	0.56%	194.6
Age 71 to 80	26.5	26.0	1.64%	175.9
Age 80 Plus	12.1	11.8	2.05%	177.2
Serving Index per LDA	90.3	93.3	-3.14%	

Share of Beverage Servings

	L12 Mths TY	L12 Mths LY	% Chg.
Beer	47.50%	48.81%	-2.69%
Wine	16.94%	16.95%	-0.06%
Spirits	35.55%	34.23%	3.86%

Consumer Expenditures on Beverage Alcohol (USD Millions)

	L12 Mths TY	L12 Mths LY	% Chg.
Total Beverage Alcohol	414,740	401,821	3.22%

This report has modified a number of the methodologies to deal with the COVID-19 crisis. The methodologies have been modified further to adjust for the exit from the Pandemic. The Servings Indices demonstrate the change in equivalent servings entering the market year on year. One serving is 12 ounces of Beer, 5 ounces of Wine or 1 1/2 ounces of Spirits. (Wine Coolers, Spirits Cordials and Spirits Cocktails are calculated slightly differently) December 2003 is the base 12 month period. The legal drinking age population is taken from Census Bureau estimates. The Serving Index indicates per capita consumption change since 2003. The share of beverage servings is the share of servings for each Beverage category. Total Beverage Alcohol spending is the cumulative consumer spend in the Off-Premise and the On-Premise.

Consumer Off Premise Expenditures (USD Millions)

	L12 Mths TY	L12 Mths LY	% Chg.
Off Premise Food & Beverage	1,490,990	1,455,464	2.44%
Off Premise Beverage Alcohol	249,395	242,054	3.03%
Beverage Alcohol as % of All Food & Bev	16.73%	16.63%	
Off Premise Beer	104,538	101,880	2.61%
Off Premise Wine	74,891	72,416	3.42%
Off Premise Spirits	69,966	67,758	3.26%

Price Indices for Consumer Expenditures Off Premise (2012 = 100)

	L12 Mths TY	L12 Mths LY	% Chg.
Total Non-Durable Goods	120.27	119.95	0.27%
Total All Food & Beverage Off Premise	128.78	126.53	1.78%
Total Beverage Alcohol	116.68	115.17	1.31%
Total Beer	126.63	123.46	2.56%
Total Wine	109.31	109.07	0.23%
Total Spirits	109.00	108.56	0.41%

Average Price for Off Premise Consumption

	L12 Mths TY	L12 Mths LY	% Chg.
Beer - Case of 24 - 12 Ounce	50.54	46.65	8.35%
Wine - 750 ml	19.50	18.45	5.66%
Spirits - 750 ml	23.33	23.19	0.60%

Off Premise spending comes from a compilation of Census Business Surveys, Bureau of Economic Analysis Reports, DISCUS data and Winery DTC data. The price indices come from Bureau of Economic Analysis reports. The average price for Off-Premise consumption is the total Off-Premise consumer Spending divided by total volume calculated to be brought into the market for Off-Premise sales. The methodologies for this analysis has been modified over time to address market impacts from the Great Recession and the Pandemic,.

Consumer On Premise Expenditures (USD Millions)

	L12 Mths TY	L12 Mths LY	% Chg.
Total at Eating & Drinking Places	639,819	611,362	4.65%
Total Beverage Alcohol	165,346	159,767	3.49%
Beverage Alcohol as % of Total Spent	25.84%	26.13%	

Price Indices for Consumer Expenditure On Premise (2012 = 100)

	L12 Mths TY	L12 Mths LY	% Chg.
Eating & Drinking Places	140.28	134.86	4.01%
On Premise Beverage Alcohol	128.16	124.21	3.19%

Calculated On Premise Beverage Alcohol Percent Cost and Mark Up

	L12 Mths TY	L12 Mths LY	% Chg.
Percent Cost	21.24%	21.34%	0.47%
Mark Up Multiple	4.71	4.69	0.47%

Total Equivalent Wholesale Value (USD Millions)

	L12 Mths TY	L12 Mths LY	% Chg.
Total Beverage Alcohol	201,364	195,445	3.03%
Beer	84,982	82,821	2.61%
Wine	59,156	57,204	3.41%
Spirits	57,226	55,420	3.26%
TBA Off Premise	166,247	161,353	3.03%
TBA On Premise	35,117	34,092	3.01%

On Premise spending comes from a compilation of Census Business Surveys, Bureau of Economic Analysis Reports, and DISCUS data. The price indices come from Bureau of Economic Analysis reports. The On-Premise Mark Up is calculated from calculated wholesale prices across Beer, Wine, and Spirits versus the Consumer On-Premise spending. Equivalent wholesale value is based on an assumption that all products move through the Three-Tier system. This is not the case for control states of winery sales direct to consumer. The percent change will give a better indication of likely supplier change rather than the Total change in consumer spending.

2 Business Activity - Retail and Food Service

Supermarkets and Grocery Stores (USD Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	865,248	649,764	434,260	218,370	73,995
Last Year	847,347	634,071	421,905	211,238	72,882
% Change	2.11%	2.47%	2.93%	3.38%	1.53%

Beer, Wine, and Liquor Stores (USD Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	72,170	53,556	35,458	17,512	6,273
Last Year	72,099	53,779	35,744	17,568	6,264
% Change	0.10%	-0.41%	-0.80%	-0.32%	0.15%

Warehouse Clubs and Supercenters (USD Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	773,778	581,519	391,002	199,269	73,874
Last Year	684,478	523,130	362,830	186,642	64,427
% Change	13.05%	11.16%	7.76%	6.77%	14.66%

Full Service Restaurants & Drinking Places (USD Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	566,124	426,823	287,913	152,398	52,598
Last Year	546,028	408,952	273,272	140,727	48,146
% Change	3.68%	4.37%	5.36%	8.29%	9.25%

Limited Service Eating Places

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	513,962	380,784	255,328	135,916	46,319
Last Year	500,651	372,356	250,659	131,238	45,004
% Change	2.66%	2.26%	1.86%	3.56%	2.92%

The Retail and Food Service sales are derived from Census surveys of US Businesses on a monthly basis. The data is correlated with the five year Census of Us Businesses to provide the most robust measure of Total consumer sales in various channels.

2 Business Activity - On Premise Employment

Total On Premise Employees (Thousands)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	12,574	12,574	12,574	12,574	12,574
Last Year	12,465	12,426	12,426	12,426	12,426
% Change	0.88%	1.19%	1.19%	1.19%	1.19%

Total On Premise Employee Earnings (USD Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	281,374	209,836	140,517	72,740	25,101
Last Year	269,056	200,137	133,623	69,082	23,887
% Change	4.58%	4.85%	5.16%	5.30%	5.08%

Full Service Restaurants Employee Earnings (USD Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	159,601	118,695	79,569	41,150	14,286
Last Year	154,858	115,044	76,772	39,697	13,805
% Change	3.06%	3.17%	3.64%	3.66%	3.49%

Drinking Places Employee Earnings (USD Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	10,725	8,055	5,382	2,821	973
Last Year	9,998	7,372	4,895	2,558	879
% Change	7.27%	9.27%	9.96%	10.27%	10.71%

Limited Service Restaurants Employee Earnings (USD Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	111,047	83,086	55,566	28,769	9,842
Last Year	104,200	77,721	51,957	26,827	9,204
% Change	6.57%	6.90%	6.95%	7.24%	6.94%

To gain a better understanding of On-Premise trends the TBA Overview tracks On-Premise employment and earnings. Covid-19 has impacted the On-Premise significantly. The reversal of the 2020 impacts can now be seen in the numbers. The employment trends show much stronger recovery in Limited Service Restaurants versus Full Service Restaurants that the Beverage Alcohol industry rely on, although short term trends are improving.

3 Beer Entering Distribution in US

Total Beer Entering Distribution (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	182,921,172	131,012,476	88,102,224	46,706,030	16,609,509
Last Year	193,317,970	139,653,642	94,788,963	49,895,614	17,579,631
% Change	-5.38%	-6.19%	-7.05%	-6.39%	-5.52%

Domestic Beer Total (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	141,889,387	101,826,034	68,021,569	35,945,792	12,515,075
Last Year	151,776,917	109,130,733	73,894,807	38,475,155	13,547,517
% Change	-6.51%	-6.69%	-7.95%	-6.57%	-7.62%

Domestic Packaged Beer (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	126,543,980	90,377,281	60,158,525	32,078,670	11,532,674
Last Year	135,813,053	97,442,918	66,127,406	34,418,729	12,499,755
% Change	-6.82%	-7.25%	-9.03%	-6.80%	-7.74%

Domestic Beer in Kegs (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	15,345,407	11,448,753	7,863,044	3,867,122	982,401
Last Year	15,963,864	11,687,815	7,767,401	4,056,426	1,047,762
% Change	-3.87%	-2.05%	1.23%	-4.67%	-6.24%

Keg Share	10.82%	11.24%	11.56%	10.76%
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Total Beer is a summary of Tax Paid Beer shipments from US Producers plus Imports of Beer. Domestic packaged and keg Beer is derived from Tax Paid volume data. The keg volumes include Beer consumed on Brewery Premises.

Total Imported Beer (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	41,031,785	29,186,442	20,080,654	10,760,237	4,094,434
Last Year	41,541,053	30,522,909	20,894,156	11,420,459	4,032,114
% Change	-1.23%	-4.38%	-3.89%	-5.78%	1.55%

Import data is derived from Customs reports on monthly imports.

Imported Packaged Beer (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	38,808,028	27,562,507	18,936,069	10,183,520	3,882,808
Last Year	39,405,781	28,873,657	19,847,260	10,876,151	3,829,334
% Change	-1.52%	-4.54%	-4.59%	-6.37%	1.40%

Imported Beer in Kegs (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	2,223,757	1,623,935	1,144,586	576,717	211,626
Last Year	2,135,272	1,649,253	1,046,897	544,308	202,781
% Change	4.14%	-1.54%	9.33%	5.95%	4.36%

Keg Share	5.42%	5.56%	5.70%	5.36%
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Beer Off Premise Versus On Premise

Off Premise Shipment Volumes (Barrels - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	150.1	107.6	72.4	38.4
Last Year	158.5	114.5	77.7	40.9
% Change	-5.30%	-6.08%	-6.90%	-6.09%

On Premise Shipment Volumes (Barrels - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	33.0	23.6	15.9	8.4
Last Year	34.8	25.1	17.1	9.0
% Change	-5.30%	-6.08%	-6.90%	-6.09%

Off Premise Consumer Spending (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	104,538	73,643	50,002	26,932
Last Year	101,880	74,002	50,397	26,716
% Change	2.61%	-0.49%	-0.78%	0.81%

On Premise Consumer Spending (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	72,106	51,167	34,711	18,643
Last Year	69,939	51,166	34,816	18,404
% Change	3.10%	0.00%	-0.30%	1.29%

Total Consumer Spending (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	176,645	124,810	84,714	45,575
Last Year	171,819	125,168	85,213	45,121
% Change	2.81%	-0.29%	-0.59%	1.01%

Equivalent Wholesale Value (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	84,982	59,866	40,648	21,894
Last Year	82,821	60,158	40,969	21,719
% Change	2.61%	-0.49%	-0.78%	0.81%

The Total Beverage Alcohol report uses proprietary algorithms to project volume and value split between Off-Premise channels and On-Premise channels. Equivalent wholesale revenues for nine months are indicative of overall supplier revenue trends.

Major Beer Sources

AB Inbev (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	64,862,657	46,527,469	31,005,659	16,132,341	5,505,913
Last Year	67,293,215	48,565,567	32,875,711	16,684,997	5,681,827
% Change	-3.61%	-4.20%	-5.69%	-3.31%	-3.10%

Molson Coors (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	42,247,318	30,697,519	20,466,490	10,664,319	3,818,588
Last Year	47,114,062	33,461,168	22,025,287	11,335,315	4,023,552
% Change	-10.33%	-8.26%	-7.08%	-5.92%	-5.09%

Imports from Mexico (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	34,067,105	24,207,235	16,712,532	8,901,238	3,441,251
Last Year	34,177,287	25,097,182	17,237,404	9,509,051	3,355,564
% Change	-0.32%	-3.55%	-3.04%	-6.39%	2.55%

Imports from The Netherlands (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	3,473,176	2,438,179	1,787,131	1,022,194	339,909
Last Year	3,573,820	2,643,475	1,864,216	1,030,081	344,550
% Change	-2.82%	-7.77%	-4.13%	-0.77%	-1.35%

All Other Sources (Barrels)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	38,415,196	27,286,355	18,274,694	10,130,219	3,609,723
Last Year	41,159,588	29,886,253	20,786,346	11,336,169	4,174,139
% Change	-6.67%	-8.70%	-12.08%	-10.64%	-13.52%
% Share TY	20.98%	20.80%	20.71%	21.62%	21.60%

The TBA overview includes volumes for AB Inbev, Miller Coors, Imports from Mexico, Imports from The Netherlands and all other sources. Proprietary algorithms are used to estimate volumes from periods that have not been reported in order to publish the Advance reports. All other sources are derived from total Beer entering the market less ABInbev and Molson Coors volumes plus Mexican and Netherland Imports.

4 Wine Entering Distribution in US

Total All Wine (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	379,314,177	284,640,610	191,170,959	96,937,949	32,684,159
Last Year	387,553,544	289,302,516	192,595,949	97,526,857	32,273,921
% Change	-2.13%	-1.61%	-0.74%	-0.60%	1.27%

Total All Still Wine (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	304,575,316	228,293,618	153,496,503	76,868,652	25,821,390
Last Year	318,132,809	237,546,884	158,481,362	79,353,326	26,092,401
% Change	-4.26%	-3.90%	-3.15%	-3.13%	-1.04%

Total All Sparkling Wine (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	32,679,448	24,916,351	15,899,514	8,274,762	2,806,231
Last Year	30,369,549	22,650,573	14,200,351	7,274,431	2,596,371
% Change	7.61%	10.00%	11.97%	13.75%	8.08%

Total All Sangria, Coolers, and Others (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	25,560,018	19,530,475	13,936,478	7,931,327	2,707,876
Last Year	21,459,439	16,169,936	11,459,498	6,666,709	2,204,945
% Change	19.11%	20.78%	21.62%	18.97%	22.81%

Total All Ciders (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	16,499,395	11,900,166	7,838,464	3,863,208	1,348,662
Last Year	17,591,746	12,935,124	8,454,738	4,232,391	1,380,205
% Change	-6.21%	-8.00%	-7.29%	-8.72%	-2.29%

Overall Wine trends are derived from tax paid shipments by domestic producers plus customs data on imported wines. Bulk Wine Imports use an algorithm to calculate timing that these wines are bottled and enter the market.

Total Domestic Wine (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	237,274,799	178,014,683	116,767,118	56,119,890	18,187,106
Last Year	252,659,220	189,035,134	123,648,028	58,921,170	19,056,238
% Change	-6.09%	-5.83%	-5.56%	-4.75%	-4.56%

Domestic Wine data is derived from tax paid shipments of US producers.

Domestic Still Wine (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	206,213,193	155,015,991	101,884,582	48,679,317	15,803,692
Last Year	219,716,958	164,534,771	108,087,259	51,212,481	16,576,163
% Change	-6.15%	-5.79%	-5.74%	-4.95%	-4.66%

Domestic Sparkling Wine (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	10,477,855	7,832,710	4,702,522	2,203,369	693,544
Last Year	11,775,896	8,786,963	5,182,088	2,466,497	776,502
% Change	-11.02%	-10.86%	-9.25%	-10.67%	-10.68%

Domestic Sangria, Coolers, and Others (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	6,010,660	4,573,528	3,287,988	1,945,788	581,467
Last Year	4,849,801	3,688,013	2,648,772	1,570,726	469,284
% Change	23.94%	24.01%	24.13%	23.88%	23.91%

Domestic Ciders (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	14,573,092	10,592,454	6,892,026	3,291,417	1,108,403
Last Year	16,316,565	12,025,388	7,729,909	3,671,467	1,234,290
% Change	-10.69%	-11.92%	-10.84%	-10.35%	-10.20%

Total Imported Packaged Wine (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	126,255,044	95,054,992	65,461,090	35,382,134	12,554,991
Last Year	114,509,748	85,387,797	58,170,668	32,797,607	11,267,679
% Change	10.26%	11.32%	12.53%	7.88%	11.42%

**Imported Packaged Wines Imported
Packaged Wine data is derived from
Customs data.**

Imported Packaged Still Wine (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	82,577,789	61,706,692	42,669,171	22,753,410	8,075,636
Last Year	78,031,276	58,132,528	39,616,851	22,332,765	7,566,234
% Change	5.83%	6.15%	7.70%	1.88%	6.73%

Imported Packaged Sparkling Wine (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	22,201,593	17,083,641	11,196,992	6,071,394	2,112,687
Last Year	18,593,653	13,863,610	9,018,263	4,807,934	1,819,869
% Change	19.40%	23.23%	24.16%	26.28%	16.09%

Imported Packaged Sangria, Coolers, and Others(9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	19,549,358	14,956,947	10,648,490	5,985,539	2,126,409
Last Year	16,609,639	12,481,923	8,810,726	5,095,983	1,735,661
% Change	17.70%	19.83%	20.86%	17.46%	22.51%

Imported Packaged Ciders (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	1,926,303	1,307,712	946,438	571,792	240,259
Last Year	1,275,180	909,736	724,829	560,925	145,915
% Change	51.06%	43.75%	30.57%	1.94%	64.66%

Imported Bulk Still Wine Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	15,784,334	11,570,935	8,942,751	5,435,925	1,942,062
Last Year	20,384,576	14,879,585	10,777,253	5,808,080	1,950,004
% Change	-22.57%	-22.24%	-17.02%	-6.41%	-0.41%

Note: Excludes bulk imports over 14% ABV from Canada as these are used in Spirits products that qualify for the 5010 tax credit.

Imported Bulk Wines entering the market are based on the customs bulk imports and algorithms to calculate the timing of bottling and entrance to the market. The Bulk imports exclude fortified bulk wines from Canada which are used in Spirits Products

Wine Off Premise Versus On Premise (Includes Cider)

Off Premise Shipment Volumes (9L - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	320.1	240.2	161.3	81.8
Last Year	327.0	244.1	162.5	82.3
% Change	-2.12%	-1.60%	-0.73%	-0.59%

On Premise Shipment Volumes (9L - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	59.2	44.4	29.8	15.1
Last Year	60.5	45.2	30.1	15.2
% Change	-2.16%	-1.66%	-0.79%	-0.66%

Off Premise Consumer Spending (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	74,891	55,673	37,481	19,045
Last Year	72,416	52,575	35,408	18,111
% Change	3.42%	5.89%	5.85%	5.16%

On Premise Consumer Spending (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	37,709	28,440	19,126	9,687
Last Year	36,329	26,748	17,993	9,174
% Change	3.80%	6.33%	6.30%	5.59%

Total Consumer Spending (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	112,600	84,113	56,607	28,732
Last Year	108,745	79,323	53,401	27,285
% Change	3.54%	6.04%	6.00%	5.30%

Equivalent Wholesale Value (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	59,156	43,973	29,604	15,042
Last Year	57,204	41,530	27,969	14,306
% Change	3.41%	5.88%	5.85%	5.15%

The Total Beverage Alcohol report uses proprietary algorithms to project volume and value split between Off-Premise channels and On-Premise channels. Equivalent wholesale revenues for nine months are indicative of overall supplier revenue trends.

5 Spirits Entering Distribution in US

Total All Spirits (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	306,601,670	232,064,959	158,378,179	86,679,651	29,508,921
Last Year	298,707,468	224,537,091	154,160,659	82,259,474	28,465,793
% Change	2.64%	3.35%	2.74%	5.37%	3.66%

Total All Whisky (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	46,786,040	35,661,835	23,824,113	12,347,725	4,020,204
Last Year	51,357,299	38,649,093	25,545,176	13,155,078	4,356,410
% Change	-8.90%	-7.73%	-6.74%	-6.14%	-7.72%

Total All Vodka (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	63,338,190	47,420,198	31,860,035	18,182,689	6,348,808
Last Year	62,838,196	45,424,081	32,148,961	17,712,319	6,197,233
% Change	0.80%	4.39%	-0.90%	2.66%	2.45%

Total All Gin (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	7,042,621	5,267,452	3,504,699	1,891,296	704,611
Last Year	6,772,468	4,975,101	3,425,303	1,816,527	688,947
% Change	3.99%	5.88%	2.32%	4.12%	2.27%

Total All Rum (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	17,086,082	13,343,631	9,610,757	5,393,944	1,740,948
Last Year	17,244,693	13,396,975	8,766,746	5,164,061	1,756,795
% Change	-0.92%	-0.40%	9.63%	4.45%	-0.90%

Overall Spirits trends are derived from Tax Paid data of US spirits Operations, which includes bulk spirits bottled in the US and Customs reports on Spirits imports.

Total Tequila & Mescal (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	35,980,572	27,242,229	17,951,600	9,134,204	3,582,814
Last Year	32,700,597	24,459,434	15,775,042	8,860,964	3,243,849
% Change	10.03%	11.38%	13.80%	3.08%	10.45%

Total Spirits Continued**Total All Brandy (9LEs)**

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	6,884,903	5,236,632	3,373,921	1,702,431	467,586
Last Year	6,255,232	4,701,412	3,181,000	1,550,031	441,528
% Change	10.07%	11.38%	6.06%	9.83%	5.90%

Total All Cordials & Liqueurs (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	51,063,546	38,954,528	24,520,252	12,013,864	3,685,454
Last Year	49,024,989	36,778,317	23,080,146	11,249,546	3,622,640
% Change	4.16%	5.92%	6.24%	6.79%	1.73%

Total All Cocktails (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	76,843,253	57,785,028	42,895,594	25,547,939	8,785,634
Last Year	70,824,705	54,820,115	41,266,753	22,304,319	7,985,453
% Change	8.50%	5.41%	3.95%	14.54%	10.02%

Total All Other Spirits (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	1,576,463	1,153,425	837,208	465,558	172,861
Last Year	1,689,289	1,332,564	971,532	446,628	172,936
% Change	-6.68%	-13.44%	-13.83%	4.24%	-0.04%

Total Spirits Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	221,633,866	167,177,315	115,357,229	64,836,536	22,178,130
Last Year	217,848,188	163,411,745	114,456,132	61,675,715	21,420,263
% Change	1.74%	2.30%	0.79%	5.12%	3.54%

Spirits packaged in the US include both domestically produced products and bulk imports bottled in the US.

Whisky Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	31,931,913	24,125,241	16,098,162	8,561,583	2,810,641
Last Year	34,644,655	25,863,847	17,141,963	9,100,239	2,992,403
% Change	-7.83%	-6.72%	-6.09%	-5.92%	-6.07%

Vodka Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	51,193,817	38,362,477	25,990,144	15,007,041	5,276,413
Last Year	50,734,038	36,160,874	26,113,480	14,394,906	5,127,445
% Change	0.91%	6.09%	-0.47%	4.25%	2.91%

Gin Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	3,217,070	2,372,683	1,632,583	818,998	340,936
Last Year	2,714,346	1,967,406	1,462,685	732,762	298,306
% Change	18.52%	20.60%	11.62%	11.77%	14.29%

Rum Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	14,525,887	11,436,115	8,123,950	4,614,074	1,569,569
Last Year	15,083,013	11,775,388	7,867,484	4,727,787	1,596,222
% Change	-3.69%	-2.88%	3.26%	-2.41%	-1.67%

Tequila Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	5,217,455	3,992,244	2,418,699	1,438,118	475,415
Last Year	5,482,063	4,168,752	2,564,246	1,508,092	499,078
% Change	-4.83%	-4.23%	-5.68%	-4.64%	-4.74%

**Spirits packaged in the US
continued**

Brandy Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	1,310,817	1,041,903	614,791	260,661	91,686
Last Year	1,307,399	996,512	626,384	288,903	98,738
% Change	0.26%	4.55%	-1.85%	-9.78%	-7.14%

Cordials / Liqueurs Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	35,944,122	27,000,121	16,811,176	8,150,689	2,667,529
Last Year	35,493,764	26,416,471	16,500,753	8,199,492	2,661,782
% Change	1.27%	2.21%	1.88%	-0.60%	0.22%

Cocktails Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	76,843,253	57,785,028	42,895,594	25,547,939	8,785,634
Last Year	70,824,705	54,820,115	41,266,753	22,304,319	7,985,453
% Change	8.50%	5.41%	3.95%	14.54%	10.02%

Other Spirits Packaged in US (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	1,449,531	1,061,503	772,129	437,434	160,307
Last Year	1,564,204	1,242,380	912,385	419,214	160,836
% Change	-7.33%	-14.56%	-15.37%	4.35%	-0.33%

Total Imported Packaged Spirits (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	84,967,804	64,887,644	43,020,950	21,843,114	7,330,790
Last Year	80,859,280	61,125,346	39,704,527	20,583,759	7,045,529
% Change	5.08%	6.16%	8.35%	6.12%	4.05%

Imported packaged Spirits derived from Customs reports.

Imported Packaged Whisky (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	14,854,127	11,536,594	7,725,951	3,786,142	1,209,563
Last Year	16,712,644	12,785,246	8,403,214	4,054,840	1,364,007
% Change	-11.12%	-9.77%	-8.06%	-6.63%	-11.32%

Imported Packaged Vodka (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	12,144,373	9,057,721	5,869,891	3,175,648	1,072,396
Last Year	12,104,159	9,263,207	6,035,481	3,317,413	1,069,788
% Change	0.33%	-2.22%	-2.74%	-4.27%	0.24%

Imported Packaged Gin (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	3,825,551	2,894,769	1,872,117	1,072,298	363,675
Last Year	4,058,121	3,007,695	1,962,618	1,083,765	390,642
% Change	-5.73%	-3.75%	-4.61%	-1.06%	-6.90%

Imported Packaged Rum (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	2,560,195	1,907,517	1,486,807	779,870	171,378
Last Year	2,161,680	1,621,588	899,261	436,274	160,573
% Change	18.44%	17.63%	65.34%	78.76%	6.73%

Imported Packaged Tequila & Mescal (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	30,763,117	23,249,986	15,532,901	7,696,086	3,107,398
Last Year	27,218,533	20,290,681	13,210,797	7,352,872	2,744,771
% Change	13.02%	14.58%	17.58%	4.67%	13.21%

**Imported Packaged Spirits
continued.****Imported Packaged Brandy (9LEs)**

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	5,574,086	4,194,729	2,759,129	1,441,770	375,901
Last Year	4,947,833	3,704,900	2,554,616	1,261,128	342,790
% Change	12.66%	13.22%	8.01%	14.32%	9.66%

Imported Packaged Cordials / Liqueurs (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	15,119,424	11,954,407	7,709,076	3,863,175	1,017,925
Last Year	13,531,225	10,361,846	6,579,393	3,050,054	960,858
% Change	11.74%	15.37%	17.17%	26.66%	5.94%

Imported Packaged Other Spirits (9LEs)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths	L01 Mth
This Year	126,932	91,922	65,079	28,124	12,554
Last Year	125,085	90,184	59,147	27,414	12,100
% Change	1.48%	1.93%	10.03%	2.59%	3.75%

Spirits Off Premise Versus On Premise

Off Premise Shipment Volumes (9L - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	249.9	189.1	129.1	70.6
Last Year	243.4	183.0	125.6	67.0
% Change	2.64%	3.35%	2.74%	5.37%

On Premise Shipment Volumes (9L - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	56.7	42.9	29.3	16.0
Last Year	55.3	41.5	28.5	15.2
% Change	2.64%	3.35%	2.74%	5.37%

Off Premise Consumer Spending (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	69,966	53,456	36,352	19,947
Last Year	67,758	52,026	35,532	18,867
% Change	3.26%	2.75%	2.31%	5.72%

On Premise Consumer Spending (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	55,530	42,998	29,212	15,985
Last Year	53,499	41,626	28,410	15,043
% Change	3.80%	3.29%	2.83%	6.26%

Total Consumer Spending (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	125,496	96,454	65,565	35,932
Last Year	121,257	93,652	63,942	33,911
% Change	3.50%	2.99%	2.54%	5.96%

Equivalent Wholesale Value (USD - Millions)

	L12 Mths	L09 Mths	L06 Mths	L03 Mths
This Year	57,226	43,723	29,733	16,315
Last Year	55,420	42,553	29,062	15,432
% Change	3.26%	2.75%	2.31%	5.72%

The Total Beverage Alcohol report uses proprietary algorithms to project volume and value split between Off-Premise channels and On-Premise channels. Equivalent wholesale revenues for nine months are indicative of overall supplier revenue trends.

Data Descriptions

Beverage Alcohol Serving Index

Uses 12 months ending December 2003 as the base period.

A beer serving is assumed to be 12 ounces.

A wine serving is assumed to be 5 ounces for traditional still and sparkling wines and 12 ounces for cider and wine based coolers.

A spirits serving is assumed to be 1 1/2 ounces.

This gives a way of measuring serving growth year on year as well as relative scale of how much the category has grown since 2003.

Share of Beverage Servings

Gives the trend of share of consumption across categories as well as the year on year trend.

Consumer Off Premise Expenditures

Sourced from components of GDP.

Shows share of beverage alcohol versus total food and beverage expenditures as well as consumer spending trends.

Price Indices For Consumer Expenditures Off Premise

Based on updated price indices that use 2009 as the base year.

Gives a perspective of how real prices have changed since 2009 as well as the year on year price increases across a category.

Using the price indices in combination with volume trends and dollar expenditure trends will give an indication of mix change (trade up).

For instance if dollars spent are up 4%, volume is up 1% and the price indices is up 1%, this would imply that mix is driving the other 2%.

Average Price for Off Premise Consumption

This is a directional calculation based on historical share of market for off premise which have historically been as noted below but have declined slightly over time 75% of all beer, 80% of all wine, and 70% of all spirits are sold off premise.

Consumer On Premise Expenditures

Sourced from components of GDP.

Total spent at eating and drinking places excludes consumer spending for meals in schools and limited service restaurants.

On Premise Beverage Alcohol Percent Cost and Mark Up

Directional calculation of the percent cost or mark up for beverage alcohol on premise.

This uses ancillary category share referenced under Average Price for Off Premise Consumption.

A declining Percent Cost or an increasing Mark Up Multiple indicates On Premise Operators attempting to increase their margins.

Data Descriptions

Total Equivalent Wholesale Value

A directional calculation of the wholesale value of all beverage alcohol in the US.

Some supply is not sold through wholesalers such as control state sales or some product sold direct to retailers.

Business Activity - Retail and Food Service

Utilizes monthly US Census data from the survey of business activity.

Provides revenue trends for off premise and on premise channels important to the Beer, Wine, and Spirits sectors.

Revenues are for all products sold within each channel, not just Beer, Wine, and Spirits.

On premise employment data is derived from Bureau of Labor Statistics reports.

Beer Entering Distribution in US

Only includes tax paid volume shipped to the US market and shows 12 month, 9 month, 6 month, 3 month, and 1 month trends.

All data is in Barrels which equates to 31 gallons or 13.04 9L cases.

Wine Entering Distribution in US

Only includes tax paid volume shipped to the US market and shows 12 month, 9 month, 6 month, 3 month, and 1 month trends.

The majority of bulk wine bottled in the US enters the market tax paid. The data uses an algorithm to flow this volume into the market.

Packaged Coolers includes wine based coolers, and wines packaged under 27 CFR 24.218 such as domestic fruit flavored wines.

Spirits Entering Distribution in US

Only includes tax paid volume shipped to the US market and shows 12 month, 9 month, 6 month, 3 month, and 1 month trends.

On vs. Off Premise Business Split

Estimated split of shipment volume to the trade and consumer expenditures between on and off premise.



Available Publications

The Total Beverage Alcohol Overview

Overview of Beer, Wine, and Spirits in the US Market

Beer - Imports and Exports Report

Monthly publication providing a complete view of imports and exports of Beer

Spirits - Imports and Exports Report

Monthly publication providing a complete view of imports and exports of Spirits

Wine - Imports and Exports Report

Monthly publication providing a complete view of imports and exports of Wine

Total Beverage Alcohol Annual Review

Category Specific versions also available: **Beer Annual Review**, **Spirits Annual Review**, and **Wine Annual Review**

Please visit the bw166.com website for more information