

2025

ANNUAL ECONOMIC BRIEFING

SUPPORT TABLES
FEBRUARY 5, 2026



DISTILLED SPIRITS COUNCIL
OF THE UNITED STATES

U.S. Spirits Market - 2025 Volumes

9-Liter Cases (000s)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	2,184	8,369	608	81	11,242
American Whiskey	3,615	6,392	14,495	5,494	29,996
Canadian	6,429	2,498	746	7,168	16,841
Scotch - Blended	1,148	1,771	2,261	521	5,701
Scotch - Single Malt	-	48	825	773	1,645
Irish	-	-	3,977	569	4,545
Total Whiskey	13,376	19,079	22,911	14,606	69,971
Vodka	22,463	18,372	27,078	4,596	72,508
Rum	3,890	12,222	2,534	751	19,397
Tequila/Mezcal	4,562	13,991	6,093	7,460	32,106
Gin	3,666	1,111	2,601	655	8,034
Brandy & Cognac	6,367	439	2,864	1,279	10,949
Cordials	7,708	8,912	2,785	142	19,546
Cocktails/RTDs*	58,020	25,975	1,586	-	85,580
Total	120,051	100,101	68,453	29,487	318,091

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

U.S. Spirits Market - 2025 Case Growth

9-Liter Cases (000s)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	(79)	(331)	(4)	0	(414)
American Whiskey	(68)	(101)	(103)	(16)	(288)
Canadian	(216)	(19)	344	(606)	(498)
Scotch - Blended	(133)	(152)	(178)	6	(456)
Scotch - Single Malt	-	(5)	(30)	(31)	(65)
Irish	-	-	(272)	16	(256)
Total Whiskey	(497)	(608)	(243)	(630)	(1,977)
Vodka	-	-	-	-	-
Vodka	(165)	(757)	(672)	(16)	(1,611)
Rum	(211)	(1,061)	(29)	21	(1,281)
Tequila/Mezcal	278	386	(274)	(485)	(94)
Gin	(189)	(88)	25	(35)	(288)
Brandy & Cognac	-	-	-	-	-
Brandy & Cognac	(394)	(12)	(305)	(47)	(758)
Cordials	(237)	(263)	(112)	78	(533)
Cocktails/RTDs*	9,290	3,089	91	-	12,471
Total	7,876	686	(1,519)	(1,114)	5,930

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

2025 Y/Y Volume Growth

Percentage

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-3.5%	-3.8%	-0.6%	0.5%	-3.6%
American Whiskey	-1.8%	-1.6%	-0.7%	-0.3%	-1.0%
Canadian	-3.3%	-0.8%	85.4%	-7.8%	-2.9%
Scotch - Blended	-10.4%	-7.9%	-7.3%	1.2%	-7.4%
Scotch - Single Malt		-9.1%	-3.5%	-3.8%	-3.8%
Irish			-6.4%	2.9%	-5.3%
Total Whiskey	-3.6%	-3.1%	-1.0%	-4.1%	-2.7%
Vodka	-0.7%	-4.0%	-2.4%	-0.4%	-2.2%
Rum	-5.1%	-8.0%	-1.1%	2.9%	-6.2%
Tequila/Mezcal	6.5%	2.8%	-4.3%	-6.1%	-0.3%
Gin	-4.9%	-7.4%	1.0%	-5.1%	-3.5%
Brandy & Cognac	-5.8%	-2.7%	-9.6%	-3.5%	-6.5%
Cordials	-3.0%	-2.9%	-3.9%	123.4%	-2.7%
Cocktails/RTDs*	19.1%	13.5%	6.1%		17.1%
Total	7.0%	0.7%	-2.2%	-3.6%	1.9%

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

U.S. Spirits Market - 2025 Supplier Revenues

Gross Revenues - Includes FET (Millions)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ 119	\$ 675	\$ 106	\$ 29	\$ 930
American Whiskey	\$ 240	\$ 729	\$ 2,783	\$ 1,378	\$ 5,129
Canadian	\$ 340	\$ 258	\$ 114	\$ 1,500	\$ 2,212
Scotch - Blended	\$ 85	\$ 282	\$ 657	\$ 266	\$ 1,290
Scotch - Single Malt	\$ -	\$ 9	\$ 311	\$ 494	\$ 813
Irish	\$ -	\$ -	\$ 822	\$ 244	\$ 1,066
Total Whiskey	\$ 784	\$ 1,953	\$ 4,793	\$ 3,909	\$ 11,440
Vodka	\$ 950	\$ 1,411	\$ 3,728	\$ 920	\$ 7,009
Rum	\$ 201	\$ 1,319	\$ 349	\$ 215	\$ 2,084
Tequila/Mezcal	\$ 392	\$ 1,848	\$ 1,267	\$ 2,934	\$ 6,441
Gin	\$ 242	\$ 146	\$ 413	\$ 123	\$ 924
Brandy & Cognac	\$ 531	\$ 67	\$ 721	\$ 638	\$ 1,957
Cordials	\$ 503	\$ 1,415	\$ 732	\$ 69	\$ 2,718
Cocktails/RTDs*	\$ 2,120	\$ 1,587	\$ 132	\$ -	\$ 3,839
Total	\$ 5,723	\$ 9,746	\$ 12,136	\$ 8,807	\$ 36,412

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

U.S. Spirits Market - 2025 Revenue Growth

Gross Revenues - Includes FET (Millions)

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	\$ (4)	\$ (29)	\$ 0	\$ (1)	\$ (33)
American Whiskey	\$ (4)	\$ (5)	\$ (29)	\$ (8)	\$ (46)
Canadian	\$ (16)	\$ (5)	\$ 50	\$ (147)	\$ (118)
Scotch - Blended	\$ (7)	\$ (27)	\$ (53)	\$ (5)	\$ (92)
Scotch - Single Malt	\$ -	\$ (1)	\$ (0)	\$ (31)	\$ (33)
Irish	\$ -	\$ -	\$ (80)	\$ (11)	\$ (91)
Total Whiskey	\$ (30)	\$ (67)	\$ (113)	\$ (204)	\$ (414)
	\$ -	\$ -	\$ -	\$ -	\$ -
Vodka	\$ (11)	\$ (65)	\$ (126)	\$ (17)	\$ (218)
Rum	\$ (9)	\$ (138)	\$ (8)	\$ 8	\$ (147)
Tequila/Mezcal	\$ 29	\$ 46	\$ (97)	\$ (252)	\$ (275)
Gin	\$ (16)	\$ (10)	\$ 0	\$ (7)	\$ (33)
	\$ -	\$ -	\$ -	\$ -	\$ -
Brandy & Cognac	\$ (30)	\$ (3)	\$ (89)	\$ (55)	\$ (176)
Cordials	\$ (25)	\$ (63)	\$ (40)	\$ 37	\$ (91)
Cocktails/RTDs*	\$ 329	\$ 203	\$ 9	\$ -	\$ 540
Total	\$ 236	\$ (99)	\$ (463)	\$ (489)	\$ (814)

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

2025 Y/Y Revenue Growth

Percentage

Category	Value	Premium	High End Premium	Super Premium	Total
Blended Whiskey	-3.0%	-4.1%	0.5%	-4.0%	-3.4%
American Whiskey	-1.6%	-0.6%	-1.0%	-0.6%	-0.9%
Canadian	-4.4%	-1.9%	76.7%	-8.9%	-5.1%
Scotch - Blended	-7.4%	-8.9%	-7.5%	-1.8%	-6.7%
Scotch - Single Malt		-12.8%	-0.1%	-6.0%	-3.9%
Irish			-8.9%	-4.4%	-7.9%
Total Whiskey	-3.7%	-3.3%	-2.3%	-5.0%	-3.5%
Vodka	-1.2%	-4.4%	-3.3%	-1.8%	-3.0%
Rum	-4.3%	-9.5%	-2.2%	3.9%	-6.6%
Tequila/Mezcal	7.9%	2.5%	-7.1%	-7.9%	-4.1%
Gin	-6.2%	-6.6%	0.1%	-5.1%	-3.4%
Brandy & Cognac	-5.3%	-4.5%	-10.9%	-7.9%	-8.3%
Cordials	-4.7%	-4.3%	-5.2%	118.7%	-3.2%
Cocktails/RTDs*	18.3%	14.6%	7.2%		16.4%
Total	4.3%	-1.0%	-3.7%	-5.3%	-2.2%

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

Beverage Alcohol Market Share - Revenue Based							
	Supplier Gross Revenues (Billions)				Market Share		
Year	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%
2024	\$ 37.07	\$ 37.23	\$ 13.98	\$ 88.28	42.0%	42.2%	15.8%
2025	\$ 35.90	\$ 36.41	\$ 13.48	\$ 85.78	41.8%	42.4%	15.7%

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 \$120	Canadian Club 6Y, Seagram 7
High End Premium	\$120 to \$180	Canadian Club 12 Year, Ole Smoky Blended
Super Premium	\$180+	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 \$170	Dewar's White Label, Johnnie Walker Red, Famous Grouse
High End Premium	\$170 to \$320	Johnnie Walker Black, Chivas Regal 12, Dewar's 12
Super Premium	\$320+	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 \$180	Sauza Blanco, El Jimador Silver, Olmeca Altos
High End Premium	\$180 to \$260	Cazadores, Teremana, Espolon, Milagro, Sauza Hornitos Black,
Super Premium	\$260+	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 \$190	Jagermeister, Baileys, Kahlua, Rumchata, Tequila Rose
High End Premium	\$190 to \$295	Chambord, Godiva, St. Germain
Super Premium	\$295+	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