

IRISH UP CLOSE

STATS, FACTORS
& STYLES BEHIND
THE SURGE

These are the best of times for Irish whiskey, which represented 1.4% of the spirits overall U.S. spirits market in 2015. May not sound like much, but 10 years earlier that figure was 0.4%.

Of course, the Irish boom has been famously brand-driven, with Jameson not merely in the driver's seat, but essentially helping fill up the whole car, having deftly in recent years expanded the brand's expressions to include reserve bottlings and special finishes, most notably Jameson Select Reserve and Caskmates; and Jameson Black Barrel made a splash with its launch in 2016.

Meanwhile, Jameson parent company Pernod Ricard has flexed the category at the high end as well, with Redbreast and Green Spot

leading the super-premium tier, and Jameson 18 Year Old and The Midleton beckoning at the ultra-premium level.

Other top-selling Irish whiskey brands include Tullamore DEW (William Grant & Sons); Bushmills Original (Proximo Spirits); 2 Gingers (Beam Suntory); Paddy (Sazerac); Powers (Pernod Ricard); Black Bush (Diageo); and Clontarf Black Label (Castle Brands).

Success naturally invites players to the arena. New or updated brands include The Pogues, Teeling and Bushmills Black Bush. And never underestimate the power of Irish sentiment in branding; to wit, West Cork, Donegal Estates, Knappogue Castle, Claddagh and The Irishman all pack natural appeal for fans of the Emerald Isle.

IRISH WHISKEY GREW

131%

BY VOLUME GLOBALLY
OVER THE PAST DECADE

FASTER
THAN
BOURBON
(56%) OR
SCOTCH
(13%)

WITH AMERICA
LEADING THIS
SPIRIT

IN 2015, TOTAL
SALES VOLUME IN
THE U.S. TOPPED

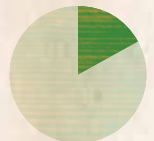


3 MILLION 9L CASES

SINCE 2005, THE CATEGORY:

ADDED
**2.5 MILLION
CASES**

ANNUAL GROWTH
RATE OF
17.7%



JAMESON SELLS



3 OUT OF EVERY **4**

BOTTLES OF IRISH WHISKEY
IN THE U.S

MORE
THAN

1/3

OF THE IRISH WHISKEY CONSUMED
IN AMERICA IS SOLD IN THE FIRST
THREE MONTHS OF THE YEAR.





DISTILLERY GROWTH

4

NUMBER OF
DISTILLERIES
OPERATING IN
IRELAND IN 2011

16

NUMBER OF
DISTILLERIES
BY 2016

{AND A DOZEN MORE IN PLANNING}

28

NUMBER OF
DISTILLERIES IN
IRELAND BACK 1887

{PROHIBITION RUINED THE VIBRANT U.S.
MARKET FOR IRISH WHISKEY, AND IT TOOK
DECADES TO RECOVER.}

MANHATTAN'S THE DEAD RABBIT FEATURES

180

DIFFERENT LABELS
OF IRISH WHISKEY
AT THE BAR.

AND

POURS MORE THAN

100 LITERS

OF IRISH PER WEEK.



TEELING WHISKEY

{WHICH OPENED IN 2015}

WAS THE FIRST NEW
DISTILLERY IN DUBLIN IN

125 YEARS

With a young and diverse base of enthusiasts, Irish is primed for continued growth. Women account for 35% of Irish sales; and the most avid age group is 25-34 year olds. Nearly half of Irish Whiskey enthusiasts are under 45.

GENDER

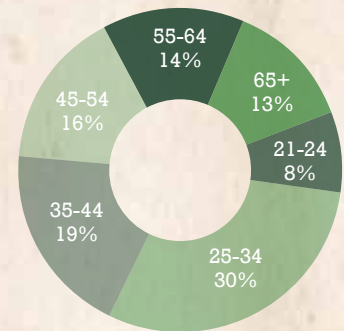


65%



35%

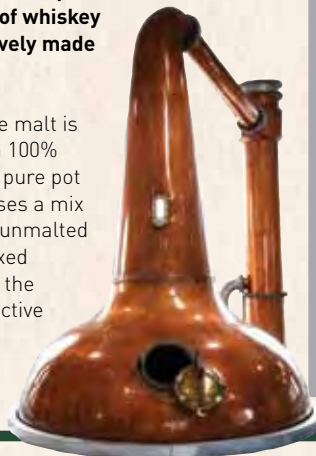
AGE



SINGLE POT STILL DISTINCTION

Single Pot Still whiskies championed by Pernod Ricard (Powers, Redbreast, Green Spot, Yellow Spot) **represent the only style of whiskey that is exclusively made in Ireland.**

Whereas single malt is produced from 100% malted barley, pure pot still whiskey uses a mix of malted and unmalted barley. The mixed mashbill gives the whisky a distinctive spiciness.



SELLING POINTS

- Because Irish whiskey is generally lighter and smoother than bourbon and Scotch, it makes a **great entry point** for whiskey newcomers.
- New expressions of Irish whiskey have great appeal for whiskey enthusiasts as suppliers are putting the best material and effort into **specialized bottlings.**
- Irish brands are relatively modest in number but have very direct **connections back to the Emerald Isle.** West Cork and Donegal Estates, for example both evoke beloved counties; Claddagh honors the traditional Irish ring design; and The Pogues is made in partnership with the ever-popular Irish band.