



Irish Whiskey Global

Irish Whiskey International
Trade Report 2021



Irish Whiskey Association
Drinks Ireland



The Irish Whiskey Association is the representative voice within Drinks Ireland working to promote, protect and represent the Irish Whiskey category globally.

www.irishwhiskeyassociation.ie
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This report has been compiled by William Lavelle, Head of the Irish Whiskey Association, with support from the International Trade Committee.



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Foreword

Ireland may be a small island, but we make quite a lot of whiskey. Strikingly, 96% of all Irish whiskey sales are to markets outside of Ireland. In 2019, before the on-set of Covid-19, exports of Irish whiskey were worth €890 million to our shared economy across the island of Ireland. Despite a slight drop, sales in 2020 still managed to exceed expectations, with category performance holding up or increasing in many markets. Trends in 2020 also confirmed the recent acceleration in market diversification. Looking to the future, the Irish whiskey industry can confidently target more growth in more markets, across more sales channels and among more consumer segments. But now, more than ever, international trade policy will be critical to supporting growth and diversification.

Irish whiskey has benefited greatly from decades of both multi-lateral and bilateral developments in international trade which have resulted in the elimination of tariffs, the removal of non-tariff barriers to trade, and new and increased protections for the Irish whiskey geographic indication. However, a supportive global environment for international trade is not something we should take for granted.

Developments in international trade have been making the headlines recently. We have seen threats of new tariffs and some tariffs have actually been imposed as a result of trade disputes. At the same time, our all-island industry has had to face the new reality of trading out of two different customs territories, bringing both challenges and opportunities.

This context is the backdrop to the ongoing development of our association's International Trade and Market Access function. Over the past three years, the association has greatly expanded its monitoring, policy development and stakeholder engagement activities. There has been



Claire MacCarrick

increased interaction with Ministers, Commissioners and officials in Dublin, London, Belfast and Brussels, as well as in Washington and other international capitals. More recently, this work has been supported by the new International Trade Committee which I am honoured to chair.

This report seeks to capture and present both our recent work and ongoing priorities on the international trade front.

On behalf of the Irish Whiskey Association, I wish to thank the various Ministers, Commissioners, Ambassadors and officials of both Irish and UK Government departments and of the European Commission for their strong support for Irish whiskey in international trade policy. We look forward to working with our stakeholders to continue to enhance the international trading environment for Irish whiskey and to foster more growth in more markets.

Claire MacCarrick
Chair, International Trade Committee



Jameson Distillery, Midleton

Summary of policy objectives

The Irish Whiskey Association calls for:



Irish Whiskey Global Sales

Irish whiskey was officially the fastest growing spirits category in the world over the past decade, with 140% growth in sales from 2010 to 2020. In February 2020, just before the onset of the Covid-19 pandemic, the 12-month rolling total for Irish whiskey global sales broke 12 million cases. For the calendar year of 2020, 11.4 million cases were sold, a slight decrease on 2019, but still exceeding expectations for what was a challenging year. The decline in 2020 was primarily due to a collapse of Irish whiskey sales in global travel retail as a result of the Covid-19 pandemic.

Irish whiskey sales held-up or increased across some of our most important markets including in Ireland, United Kingdom, United States and Canada. Strong growth was recorded in a number of markets in the important Central/Eastern Europe region, including Germany, Poland and Ukraine. Steady growth was also recorded in the Nordics, led by impressive growth in Sweden. In contrast many markets in Southern European saw declines in sales as a result of restrictions and the collapse in tourism.

While North America and Europe continues to account for approximately 84% of all Irish whiskey sales, 2020 saw a continued rise in sales in emerging markets, particularly in Africa and the Asia-Pacific region. Nigeria proved to be the fastest-growing market for Irish whiskey in 2020 with sales more than doubling over the course of the year. Australia, India, Japan, New Zealand and Zambia all recorded strong growth.



Across all major markets, 2020 saw a continuation in the trend towards premium-and-above Irish whiskey, with strong growth at higher price points expected in coming years. This has the potential to deliver substantial value-added to the category. The onset of the pandemic also saw a transformational pivot by consumers to online purchasing of spirits, with e-commerce here to stay as an important sales channel for Irish whiskey.

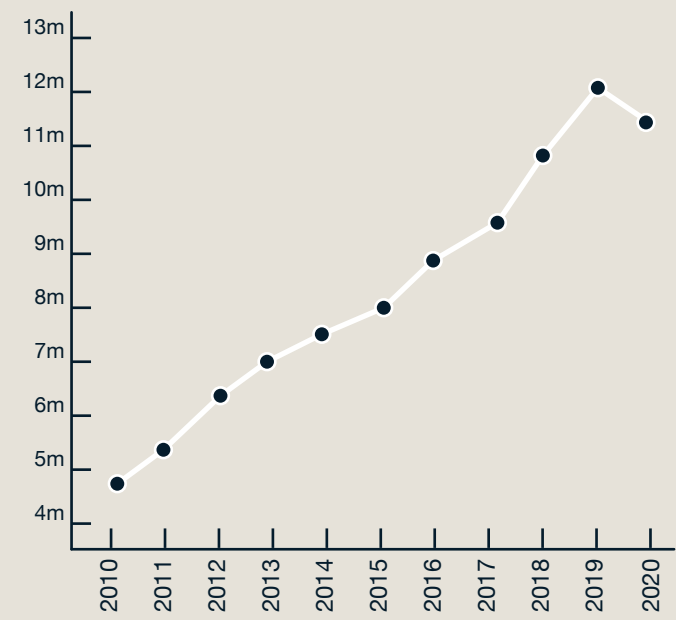
Looking forward, Irish whiskey can confidently target more growth, in more markets, across more sales channels and among more consumer segments. Having a supportive international trade policy will be critical to achieving this.

Top 20 Irish whiskey markets 2020

	Market	Cases Sold (1,000s)
1	United States	4,928.5
2	Ireland	591.0
3	Russia	534.3
4	United Kingdom	531.0
5	Germany	436.0
6	Poland	398.8
7	France	376.0
8	South Africa	347.0
9	Canada	337.7
10	Australia	247.3
11	Ukraine	168.0
12	Czech Republic	154.8
13	Bulgaria	152.6
14	Sweden	143.1
15	Nigeria	111.3
16	Denmark	102.5
17	Slovakia	91.1
18	Portugal	78.5
19	Netherlands	74.8
20	Latvia	70.5

Source: The IWSR

Global sales of Irish whiskey
(9 litre cases) 2010-2020



Source: The IWSR



Tariff-free trade with the United States

The United States remains the largest market for Irish whiskey, with approximately five million case sales in each of 2019 and 2020, accounting for 43% of all Irish whiskey sales. The current growth trajectory is expected to continue and will be further aided by the increasing availability to premium consumers of more aged Irish whiskey, as well as the rise in e-commerce.

Given the current importance and future potential of the US market, protecting tariff-free trade with the United States remains the No. 1 priority for Irish whiskey international trade policy. Regrettably, this ambition has been met with challenges in recent years with the spirits sector being targeted in number of transatlantic trade disputes focussed on unrelated sectors.

In 2018, the Trump administration imposed section 232 tariffs on imports of European steel and aluminium. In response, the European Union imposed a 25% tariff on a range of US imports, including US whiskeys. These tariffs impacted on a number of our association members who also have US whiskeys in their global portfolio. A proposed doubling of these tariffs by the EU on 1 July 2021 has been deferred until 1 December to allow for negotiations on resolving the broader dispute. The UK is currently holding a consultation on its future approach to this dispute.

Further tariffs on a range of spirits categories followed as part of the separate, but similar, disputes over EU and

US support to each of Airbus and Boeing respectively. In 2019, the United States listed Irish whiskey for the possible imposition of tariffs in the Airbus dispute. The Irish Whiskey Association lobbied intensively to avoid tariffs, including in Washington. Our industry received substantial support from the Irish Embassy in Washington and from a number of key Irish-American political figures. Over 99.9% of Irish whiskey were excluded from tariffs. Regrettably a small number of Northern Irish single malts were tariffed. The association continued to lobby intensively for an end to these tariffs; and received support from the UK Government, particularly from Rt. Hon Greg Hands MP, Minister for International Trade Policy. In June 2021, the United States agreed new frameworks with each of the EU and UK to seek resolutions of the long-running aviation disputes. As part of this, all sides agreed to suspend tariffs for five years, until July 2026. We hope this welcome development will lead to a permanent end to transatlantic trade disputes.

While Irish whiskey was less impacted than many other spirits categories, the Irish Whiskey Association was active throughout the disputes in calling for de-escalation. In doing so, the association worked closely with colleagues at home in the Irish cream liqueur sector; and internationally with colleagues in spiritsEUROPE and the Distilled Spirits Council of the United States, including as part of the #ToastsNotTariffs coalition.



William Lavelle, Head of the Irish Whiskey Association, with colleagues from spiritsEUROPE and the Distilled Spirits Council of the United States at Capitol Hill in Washington, September 2019.

Northern Irish single malt producers welcome lifting of US tariffs

"We welcome suspension of tariffs on Bushmills' single malts in the United States, the largest single malt market globally, and hope for a positive long-term conclusion to the negotiations in due course"

Colum Egan,
Master Distillers, Bushmills

Policy Objective:

The Irish Whiskey Association calls for a permanent end to all transatlantic trade disputes, building on recent positive developments.



Bushmills Distillery

Post-Brexit Rules of Origin

The island of Ireland is the home of whiskey. Irish whiskey has always been an all-industry industry – the embodiment of our shared economy. Over 10% of Irish whiskey sold around the world last year was blended Irish whiskey containing component whiskey originating from distilleries on both sides of the border.

However, since the end of Brexit transition period on 31 December 2020, Irish whiskeys produced primarily in Ireland, but containing some level of Northern Irish inputs or processing, have lost their EU originating status under certain EU trade agreements with markets around the world. This results from the fact that the rules-of-origin in the relevant EU trade agreements do not recognise inputs or processing from outside of the European Union.

For example, the standard rules-of-origin for whiskey in EU trade agreements requires all the whiskey, or its original unmatured whiskey spirit, to originate from within the EU. This means Irish whiskey produced exclusively in this state can qualify for any zero or reduced tariff provided for by an EU trade agreement, but an Irish whiskey with component whiskey which was distilled in Northern Ireland will not. Furthermore, trade agreement rules on ‘territoriality’ means Irish whiskey produced in this state, but bottled in Northern Ireland, could also lose out on originating status in certain cases.

As a result, Irish whiskeys containing Northern Irish inputs



Powerscourt Distillery

or processing have now lost access to zero or reduced tariffs provided for by EU trade agreements with a range of markets including South Africa, Switzerland, Serbia, South Korea, Colombia, Vietnam and Botswana. The scale of tariff can be significant. For example, the tariff differential between Irish whiskeys which are deemed EU-originating and non-originating is zero versus 154 cents/litre in South Africa; and zero versus 20% in South Korea.

While the Protocol on Ireland/Northern Ireland protects cross-border supply chains on the island of Ireland from tariffs and checks at the border, the failure to act on rules of origin effectively makes many such cross-border supply chains problematic when it comes to exporting to certain markets. This very much works against the concept of a shared all-island economy.

The Irish Whiskey Association has asked the European Commission to consider new rules-of-origin which protect cross-border supply chains on the island of Ireland. We have proposed this should apply to all future EU trade deals beginning with the current Australia negotiations, as well in reviews of existing FTA as they arise.

Regrettably, the responses to date have been disappointing. The association has also conducted extensive engagement on this matter with the Irish Government and with members of both the European Parliament and Oireachtas. In June 2021, the association joined with both Dairy Industry Ireland and the Northern Irish Dairy Council in making a joint presentation to the Seanad Éireann Special Select Committee on the Withdrawal of the United Kingdom from the European Union.

In their continuity trade agreements, the United Kingdom have agreed that EU inputs shall continue to have UK originating status. The agreement-in-principle between the UK and Australia for a new FTA includes welcome provisions on the reform of rules-of-origin. The association has had substantial engagement on this matter with the Department of International trade and with DEFRA.



Tullamore Distillery

Policy Objective:

The Irish Whiskey Association calls for:

- Continued implementation in full of the Protocol on Ireland/Northern Ireland.
- Reform of the rules-of-origin for whiskey and territoriality rules in all EU & UK trade agreements to protect and facilitate the Irish whiskey industry's cross-border supply chains on the island of Ireland.

Ratifying and implementing trade agreements with Canada

In recent years, Canada has emerged as an increasingly important market for Irish whiskey. In the four years from 2017 to 2020, sales of Irish whiskey in Canada increased by 66%, to over four million bottles.

A major contributor to this growth has been the reform of levies, known as the cost-of-service-differential, which are imposed by provincial liquor retail monopolies in Ontario and Quebec, the two most populous provinces in Canada. These reforms flowed from the Comprehensive Economic and Trade Agreement (CETA) between the European Union and Canada, which came into ‘provisional effect’ in 2017.

In 2018, initial reforms were implemented under Annex 30(b) of CETA which saw the cost-of-service-differential (COSD) levies in Ontario and Quebec being reformed from an ad-valorem basis to a flat per-volume fee. These changes greatly benefited sales of premium Irish whiskey.

In 2021, further reforms saw the Liquor Control Board of Ontario reduce their levies on EU and UK spirits by 42%, while Société des alcools du Québec reduced their levies on imported spirits by 16.4%. These latest reductions came

on foot of audits carried out at the request of the EU under the terms of the CETA agreement. The reductions were warmly welcomed by our association members who have often cited the very tight margins on Irish whiskey sales in Canadian provinces. Members reported their intentions to reinvest savings in increased A&P activity in Canada.

However, there remains a number of outstanding cases of discriminatory levies and mark-ups on Irish whiskey in Canadian provinces. For example, the mark-up on imported spirits on sale in Nova Scotia is an excessive 160%, compared to the 50% mark-up on domestic spirits sales.

The Irish Whiskey Association has worked closely with spiritsEUROPE, the French Federation of Wine and Spirits Exporters and Comité Européen des Entreprises Vins to press the European Commission to seek action under Annex 30(c) of the CETA agreement to address these outstanding discriminatory levies and mark-ups.

While CETA offers the best way forward to addressing these matters, the Irish whiskey industry’s capacity to press for action is being held-up by the failure to date of Ireland to ratify the CETA agreement. Dáil Éireann is expected to vote on ratification of the agreement later this year and the Irish Whiskey Association will continue to campaign for a positive vote for ratification.

The United Kingdom has put in place an interim continuity trade agreement with Canada ahead of negotiations on a new free trade agreement. The Irish Whiskey Association will continue to engage with UK Ministers and officials on this proposed agreement, with a particular focus on seeking action on outstanding discriminatory levies and mark-ups.

Irish whiskey brands are benefiting from CETA

Jameson is the largest-selling brand of Irish whiskey across Canada.

“Sales of Jameson Irish Whiskey in Canada grew in value by 34% from 2017 to 2020, While there are several factors that have contributed to this success, we believe that open trade and levy reductions between Ireland and Canada has greatly supported the success of Irish whiskey there in recent years”

Simon Fay,
Business Acceleration Director,
Irish Distillers

One of the Irish whiskey brands to benefit from CETA has been Writer’s Tears from Walsh Whiskey. Sales of Writer’s Tears in Canada increased by 84% from 2017 to 2020.

“Canada has long been one of our most promising markets, but the application of CETA since 2017 has seen provincial levies reduced and this has greatly helped us in achieving our potential. Our sales have practically doubled and Writers’ Tears has become the top-selling super-premium Irish whiskey in Ontario, Canada’s largest province.”

Bernard Walsh,
Managing-Director,
Walsh Whiskey



Policy Objectives:

The Irish Whiskey Association calls on:

- The EU Commission and UK Government to insist on the elimination of outstanding discriminatory levies and mark-ups in accordance with Annex 30(c) of the CETA agreement.
- Dáil Eireann to ratify the CETA agreement.

Definitions of Whiskey

Over the past year, the Irish Whiskey Association has actively monitored and commented on proposals to introduce new or update existing definitions of whiskey in markets including Brazil, China and Russia, as well as proposals to introduce definitions of whiskey in Australia linked to the new UK FTA.

Defining whiskey in national market rules can have benefits, such as requiring all whiskeys to have undergone a minimum of three years maturation in wooden barrels, thereby protecting the quality character of whiskey and avoiding unfair competition from immature spirit products.

However, defining whiskey can also pose challenges, particularly if the definition is too narrowly crafted, possibly with reference to the most popular whiskey categories in that market. The Irish Whiskey Association has identified a number of recent examples whereby proposed new definitions of whiskey may be supportive of production and labelling practices of Scotch whisky, but not of Irish whiskey.

The two most common issues which arise relate to

- Limiting the maturation of whiskey to taking place in oak casks, as Scotch rules requires, thereby prohibiting maturation or finishing in casks of other wood types e.g. chestnut, cherry, acacia, etc which is permitted by Irish whiskey rules;
- Strictly defining blended whiskey as a blend

of malt and grain whiskey, as is the norm in Scotch; but potentially posing difficulties for blended Irish whiskey which contains pot still whiskey and which may not contain either malt or grain.

Policy Objective:

The Irish Whiskey Association calls for the recognition and protection of Irish whiskey production and labelling practices in all international definitions of whiskey.



Protecting Irish Whiskey

Bilateral trade agreements have played an important role in delivering protection to the Irish whiskey geographical indication (GI) in new markets, in valuable addition to the work of our association in directly applying for such protection. As of June 2021, 89% of global sales of Irish whiskey sales are subject to some form of legal protection.

In recent years, bilateral agreements have delivered Irish whiskey GI protection in markets including China, Japan, Singapore, South Korea and Vietnam. Future protection is on offer from the proposed agreements with New Zealand and from the draft EU agreement with Mercosur bloc, including Brazil and Argentina.

Irish whiskey is protected in the United States via the 1994 Exchange of Letters on the mutual recognition of certain distilled spirits/spirit drinks. However, the level of protection afforded to Irish whiskey under US Alcohol and Tobacco Tax and Trade Bureau (TTB) rules is currently inferior to that afforded to Scotch whisky. The Irish Whiskey Association continues to press for enhanced protection for Irish whiskey in TTB rules to provide that “the words “Irish”, “Ireland”, “Eire”, and similar words and symbols connotating, indicating or commonly associated with Ireland, may only be used to designate distilled spirits wholly manufactured in Ireland.

Russia remains the largest export market in which Irish whiskey does not have protection. All opportunities to secure protection will continue to be pursued.

Policy Objective:

The Irish Whiskey Association calls for:

- Inclusion of GI protection in all future trade agreement negotiations.
- Enhanced protection for Irish whiskey in US TTB rules similar to that currently afford to Scotch.
- Protection for Irish whiskey in Russia.

Supporting market diversification

International trade policy continues to play a significant role in supporting the ongoing market diversification of Irish whiskey. The elimination of tariffs has proven highly effective in aiding the more competitive pricing of Irish whiskey in emerging markets. This is particularly so in markets with a high level of price elasticity where small reductions in prices can lead to greatly increased sales; and vice versa.

Over recent years, trade agreements have led to the elimination or phasing-out of tariffs across the Southern African Development Community and in other markers including Colombia, South Korea and Vietnam. The recently-announced UK FTA with Australia will see elimination of the 5% tariff on whiskey; and it is hoped this will be matched in the planned EU FTA with Australia.

Looking to the future, two sets of agreements offer prospects for substantial tariff reductions in key emerging markets. Firstly, the draft EU agreement with the Mercosur bloc proposes the phasing-out over four years of tariffs on spirits in Brazil and Argentina, both of which offer strong prospects for the future growth for Irish whiskey. Secondly, both the EU and UK have agreed to commence new trade negotiations with India, potentially offering the prospect for reductions to the current 150% duty on imported whiskey

in what is the world’s largest whiskey market. Beyond these agreements, Northern Irish whiskey could stand to benefit from the UK’s proposed accession to CPTTP comprising 11 Asia-Pacific markets.

The Irish Whiskey Association has identified Thailand as a further Asian market where we would encourage both the EU and UK to seek free trade agreements. In terms of Africa, the association supports proposals for an African Continental Free Trade Agreement which would facilitate tariff-free trade. In term of specific African regions, the association has identified both the Eastern African Community (EAC) and Eastern and Southern Africa (ESA) bloc as specific priorities in terms of lobbying for future tariff reductions, building on existing agreements.

In addition to tariff elimination, the Irish Whiskey Association lobbies on a range of other market access issues in emerging markets. For example, over the past year the Association has lobbied on the use of bonded warehouses in Kenya, illicit trade in Jordan; and excise-related matters in Hong Kong, Nigeria and Turkey.

Outside of market-based priorities, the association will work with spiritsEUROPE to press for facilitation of spirits e-commerce in future trade policy developments.



Irish whiskey brands are benefiting from tariff reductions:

“A concerted effort to remove tariff and non-tariff barriers to the global trade in Irish Whiskey, particularly in emerging markets, will support future growth as the industry emerges from the Covid-19 pandemic. For example, the reduction in tariffs in Colombia is a very welcome development and opens up great possibilities for the category in a market which already has an established taste for whiskey, given the size of the Scotch business.”

John Quinn,
Chairman of the Irish Whiskey Association
Global Brand Ambassador, Tullamore D.E.W.

Teeling Whiskey recorded 125% export growth to Vietnam market in 2020 while also recently securing a new listing in GS25, one of Korea’s largest retailers with +13,000 stores nationally.

Policy Objective:

The Irish Whiskey Association calls for:

- **Conclusion and ratification of the EU-Mercosur trade agreement**
- **Inclusion of tariff reductions in both EU and UK trade negotiations with India**
- **Progression of trade agreement negotiations with Thailand**
- **Expansion of tariff-free trade to more African markets, particularly markets in both the Eastern African Community (EAC) and Eastern and Southern Africa (ESA) bloc**
- **Inclusion of measures to facilitate spirits e-commerce in future trade agreements**
- **Conclusion of an EU trade agreement with Australia, including tariff elimination.**

Promoting Irish whiskey in international markets

#DiscoverIrishWhiskey

In 2021, the Irish Whiskey Association launched the #DiscoverIrishWhiskey campaign featuring a range of member-developed online content, including a new narrative and booklet on the depth and diversity of Irish whiskey, content on ‘Ireland: Home of Whiskey’ and recipes and a booklet to promote Irish whiskey cocktails. Work is continuing to develop content on Irish whiskey and food, to support the on-trade and to spotlight Northern Irish brands (in conjunction with NI/UK agencies). To date the campaign has featured significant social media activity including sharing of video content. The #DiscoverIrishWhiskey will be used to support future domestic and international promotion activity.

Activating international media

The Irish Whiskey Association has developed a strong record of successfully engaging with international media. In 2019, the association partnered with the Distilled Spirits Council of the United States (DISCUS) on a St. Patrick’s Day media event in New York, hosted by Ireland’s Consul-General. Later in 2019, the association hosted a DISCUS media trip featuring 10 leading US spirits writers. Following the onset of Covid-19, the association innovated a new model for online media tastings. To date, seven events have been held, five as part of the #DiscoverIrishWhiskey

campaign. In total over 30 top spirits writers and bloggers from the US and Canada have participated with a large number of member companies having been given the opportunity to showcase their brands. We have partnered with DISCUS and Tourism Ireland in planning these events and we have been honoured to have been joined at different events by all four of the Irish and UK Ambassadors to the US and Canada. A further webinar was hosted by the Irish Embassy in Mexico to mark World Whiskey Day 2021.

Engaging with control states

Since 2017, the association has hosted visits to Ireland by senior spirits buyers from the liquor control boards in British Colombia, Ontario and Pennsylvania. The association has also hosted or co-hosted follow-up events in each of Pittsburgh, Philadelphia and Toronto. This engagement has proven valuable in securing expanded listings and increased sales of Irish whiskey. Further engagements are planned with more control states.

Offering market insights

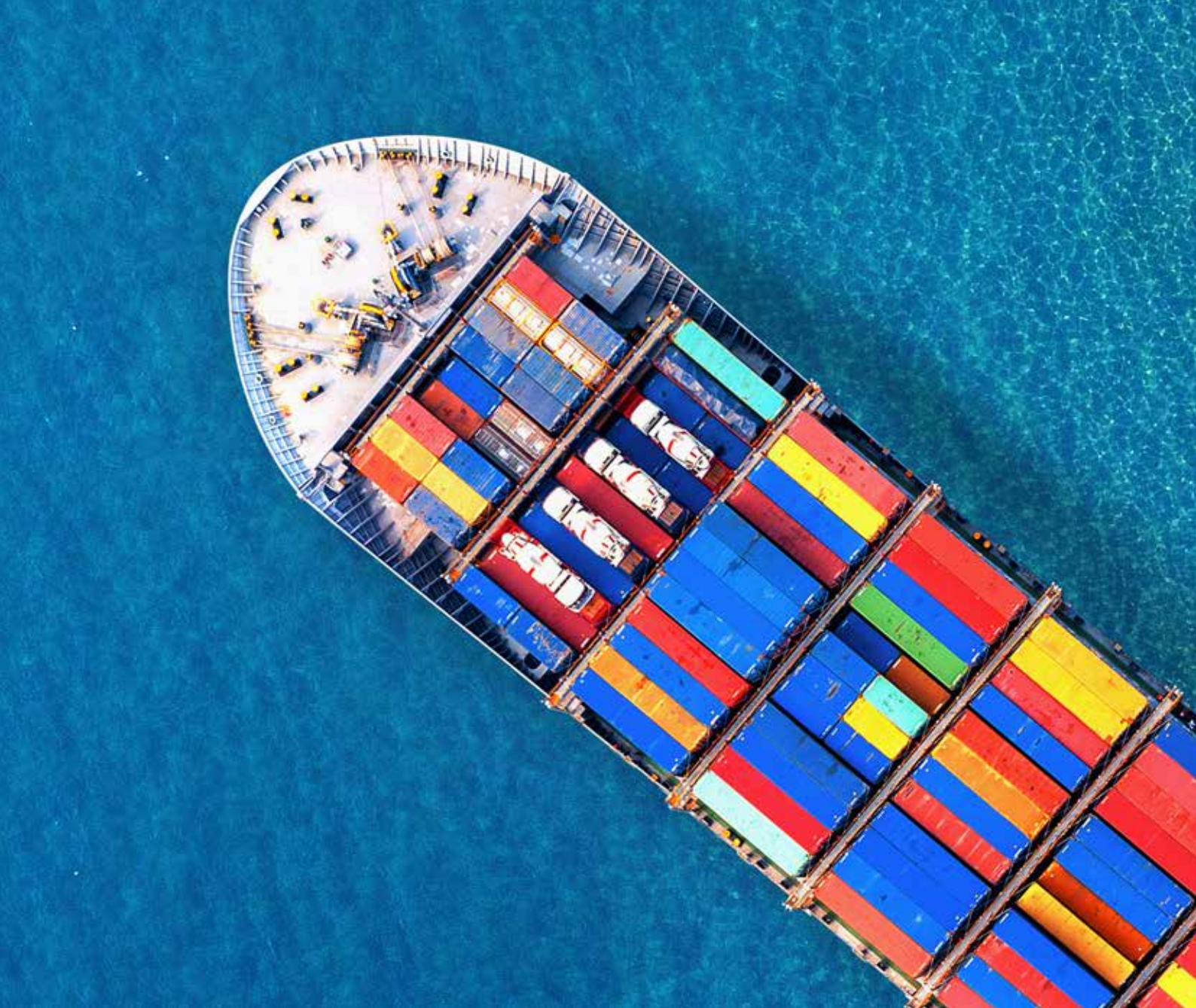
In 2020, the association delivered a webinar series on developing e-commerce opportunities featuring a range of international companies and speakers. In 2021, the association launched a new Market Insights series with webinars held to date on ‘The Future of Global Travel Retail’, ‘An Introduction to East Africa Markets’ and ‘Growing Irish Whiskey Sales in China and Hong Kong.’ These webinars have proven successful in offering cutting-edge and expert insights to our member companies.

Fostering future collaboration

The association has commenced planning for new models of category-level promotional activity to be co-funded by interested brands. This offers significant scope for future promotion in international markets.

Our Members

- | | |
|--------------------------------------|-----------------------------------|
| 1. Altech Beverage Division Ireland | 32. Niche Drinks |
| 2. Beam Suntory | 33. O’Shaughnessy Distilling |
| 3. Blacks of Kinsale | 34. Powerscourt Distillery |
| 4. Blackwater Distillery | 35. Protégé International |
| 5. Boann Distillery | 36. Quintessential Brands Ireland |
| 6. Brown Forman | 37. Rademon Estate Distillery |
| 7. Bushmills | 38. Sazerac of Ireland |
| 8. Clonakilty Distillery | 39. The Shed Distillery |
| 9. Connacht Whiskey Co. | 40. Sliabh Liag Distillers |
| 10. Diageo | 41. Skellig Six 18 Distillery |
| 11. Dingle Distillery | 42. Teeling Whiskey Company |
| 12. Donohoe Drinks | 43. Terra Spirits & Liqueurs |
| 13. D.W.D. | 44. Walsh Whiskey |
| 14. Echlinville Distillery | 45. Wicklow Hills Whiskey |
| 15. Glendalough Distillery | 46. William Grant & Sons |
| 16. Gortinore Distillers | |
| 17. Grace O’Malley Spirits | |
| 18. Great Northern Distillery | |
| 19. Hinch Distillery | |
| 20. Illva Saronno | |
| 21. Intrepid Spirits | |
| 22. Irish Distillers | |
| 23. Killarney Brewing and Distilling | |
| 24. Kinsale Spirits | |
| 25. Lambay Irish Whiskey | |
| 26. Lough Gill Distillery | |
| 27. Lough Ree Distillery | |
| 28. McAllister Distillers | |
| 29. McConnell’s Irish Whiskey | |
| 30. Micil Distillery | |
| 31. Monasterevin Distillery | |



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