



# LEVY

*Beam* SUNTORY  
November 2022

- 2022 -

# MISSION STATEMENT

Our vision is to become the strategic partner of choice by providing **customer-centric**, differentiated, fact-based, and insight-driven solutions that help our customers achieve their category growth ambitions.

*Beam* **SUNTORY**



# THE EIGHT THINGS





**FASTEST GROWING  
SEGMENT – EXPECTED  
TO GROW +2 SHARE BY  
2023**



**HIGHEST BRAND  
AWARENESS IN SUPER  
PREMIUM WHISKIES**



**#1 BOURBON  
GLOBALLY**



**MOST AWARDED  
COGNAC HOUSE**

# REASONS TO BELIEVE



**BLENDED 23%  
GROWTH YOY**



**160% CATEGORY  
GROWTH**



**#2 SPIRIT CATEGORY**



**ULTRA PREMIUM GIN  
GAINED 20% NEW  
HAPPY HOURS EACH  
MONTH**

# INSIGHTS



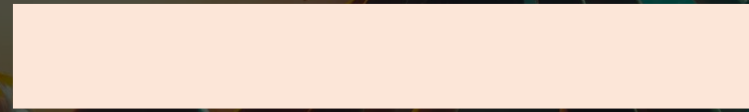
# PREMIUM BRANDS AT STADIUMS

Significantly more likely

Significantly less likely

Gen Z Millennials Gen X Boomers

I prefer to order top-shelf or premium branded drinks whenever I'm drinking



45%

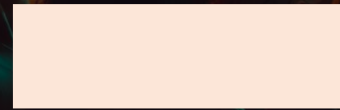
63%

44%

50%

28%

I only order top-shelf or premium branded drinks if I'm drinking it at an upscale place



20%

16%

23%

18%

13%

I only order top-shelf or premium branded drinks if I am celebrating something special



13%

16%

13%

13%

15%

I prefer not to order top-shelf or premium branded drinks; it's not worth the extra cost



21%

6%

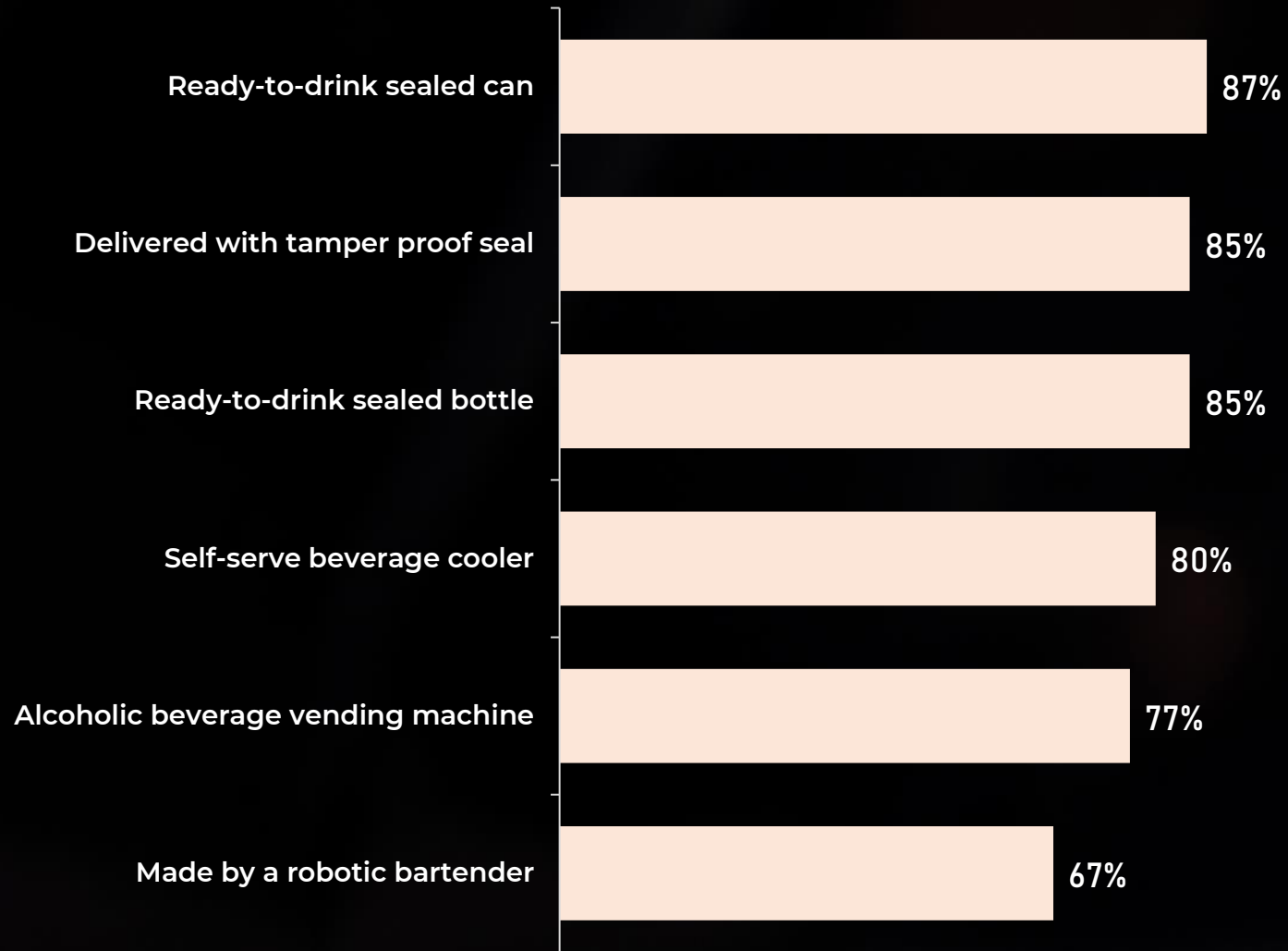
20%

19%

44%

Q: When visiting a stadium, how do you feel about ordering alcoholic beverages that are top-shelf or premium brands?

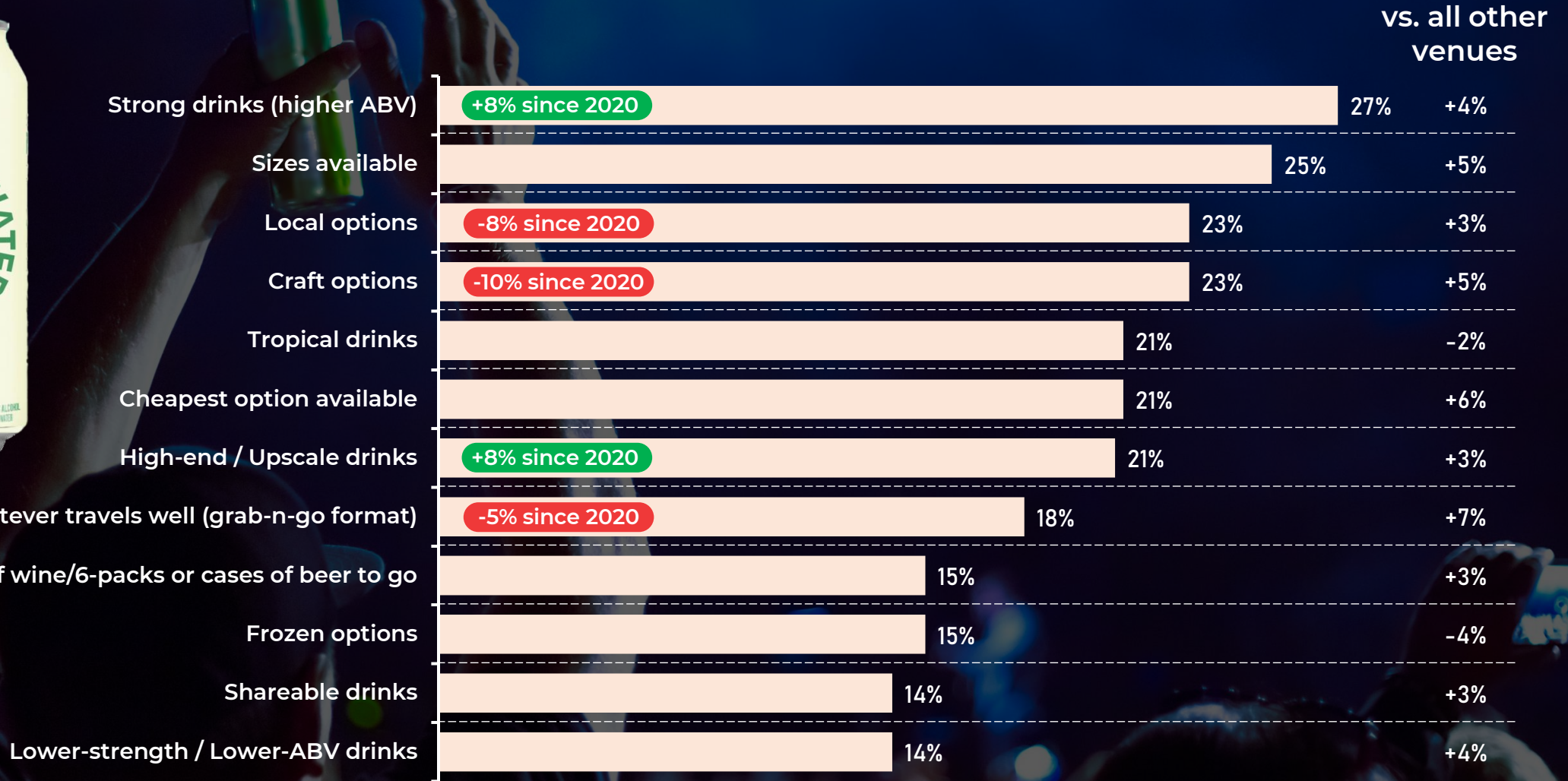
# FORMAT APPEAL AT STADIUMS



Q: How appealing do you find each of the following formats or containers for alcoholic beverages purchased at stadiums? (Top-2 box, "extremely appealing" or "very appealing")

# PREFERRED DRINK TYPES

which types of drinks do you typically consider when visiting a stadium?

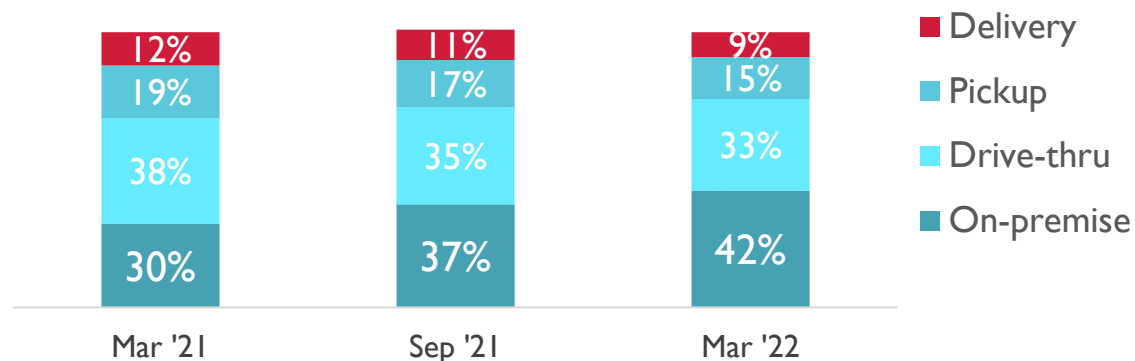


% incidence during last stadium alcohol occasion  
 'vs. all other venues' includes respondent data across all 12 venues tested

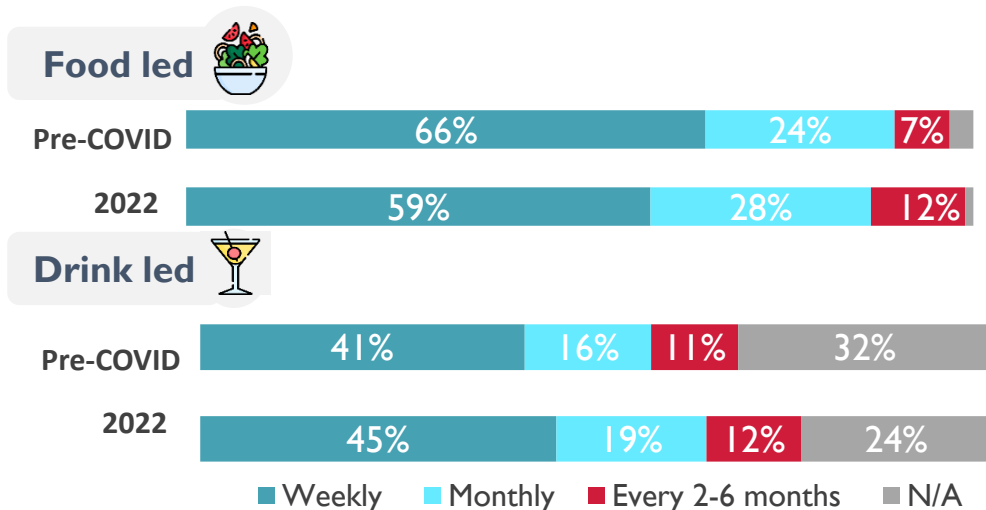


# STATE OF THE INDUSTRY- TOPLINE

**On-Premise Share is growing** consumer foot traffic and reaching pre-pandemic levels

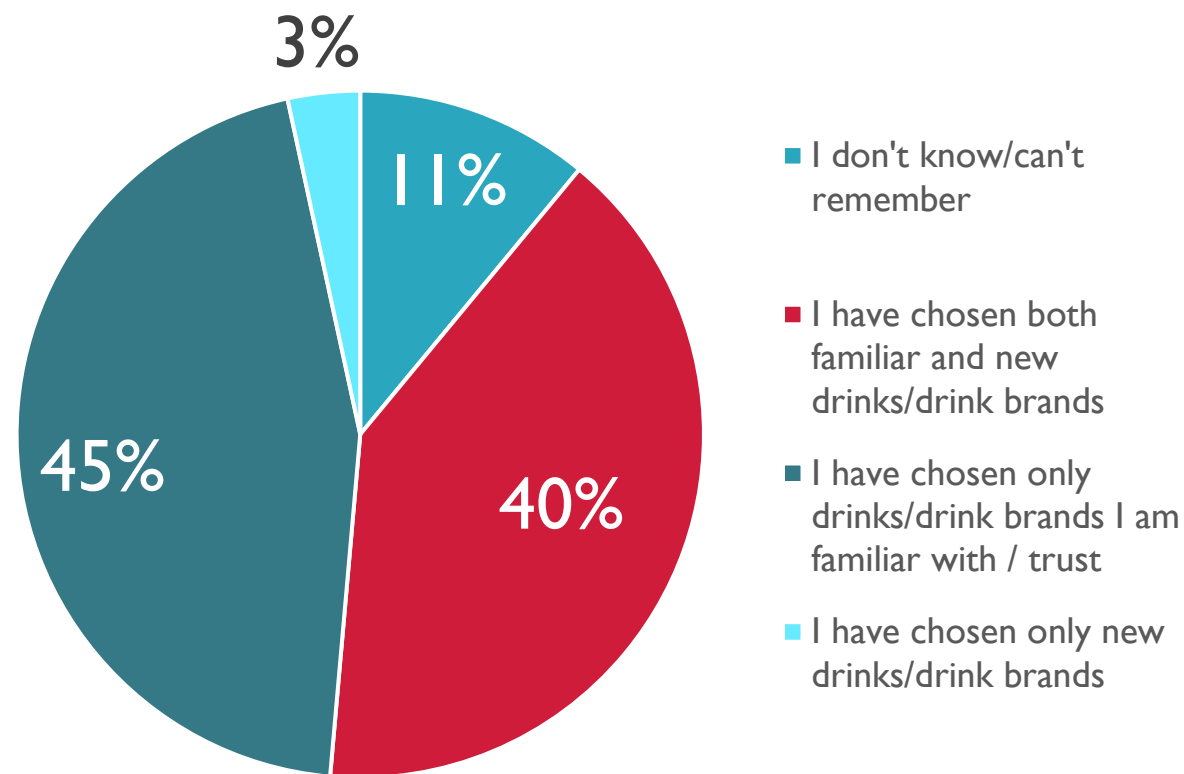


Across the U.S. we are broadly at **pre-COVID levels of visitation**, with an increase to drink led occasions



## Tried and trusted brands are important

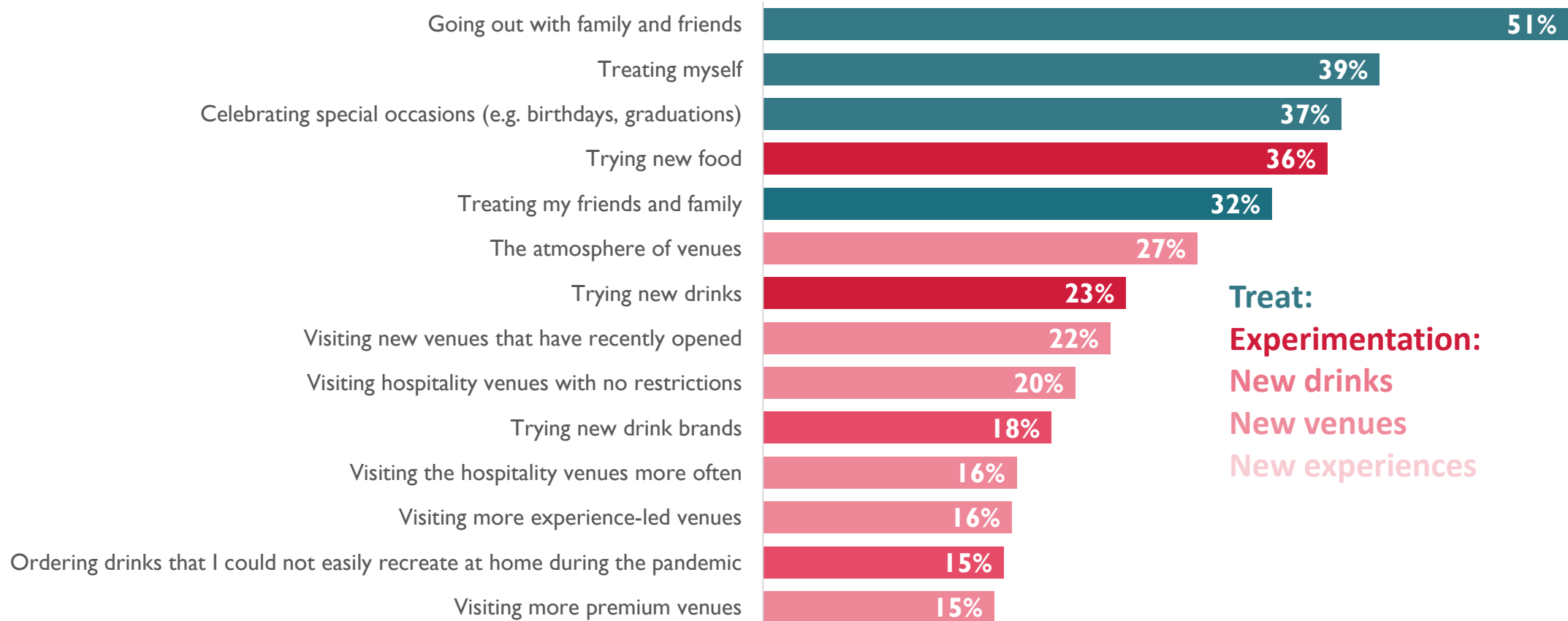
*% of consumers choosing which drinks brands to drink over the past 3 months*



# STATE OF THE INDUSTRY – NEED STATES

**As confidence levels have risen, the On-Premise market can offer a place for celebrations with friends/family and affordable luxury**

*Which of the below are you most looking forward to doing this year when eating and drinking out?*



# STATE OF THE INDUSTRY- BEHAVIORS

**High Quality Drinks and Well-Known Brands** most important when customers drinking out

*When choosing what to drink out, which, if any, of the following are important to you?*



**POST-COVID CONSUMER HAS A LARGE LIST OF BRANDS THEY KNOW/TRUST AND WANT IN HIGH QUALITY DRINKS**

**10.6**

Drink brands in a customer's repertoire at any on time

**29%**

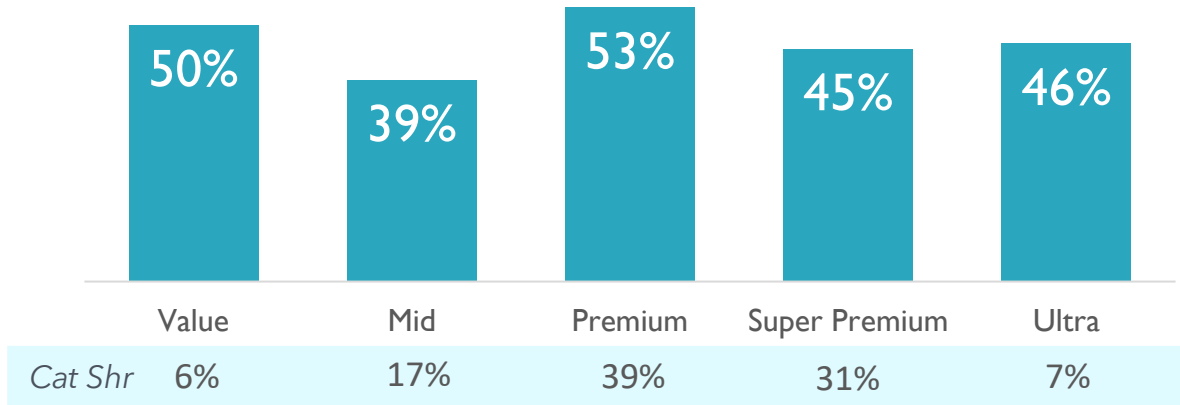
Churn Rate

ie 29% of brands stay in repertoire for more than 6 months

# AMERICAN WHISKEY

**Premium+ Brands are still fueling growth** with an uptick in Value Brands YTD with recent Inflation prices

Dollar % Chg by Price Tier



## TOP 5 WHISKEY COCKTAILS YTD 2022

Cocktail	Menu Penetration	4 Yr CAGR
Old Fashioned	29%	+16%
Manhattan	17%	-1%
Mule	8%	+9%
Irish Coffee	6%	-8%
Smash	6%	+2%

**TOP TRENDING WHISKEY COCKTAILS INCLUDE HIGBALL, OLD FASHIONED, PAPER PLANE, KENTUCKY MULE and BOULEVARDIER**

**#3**  
Category Leader  
Following Vodka and Tequila

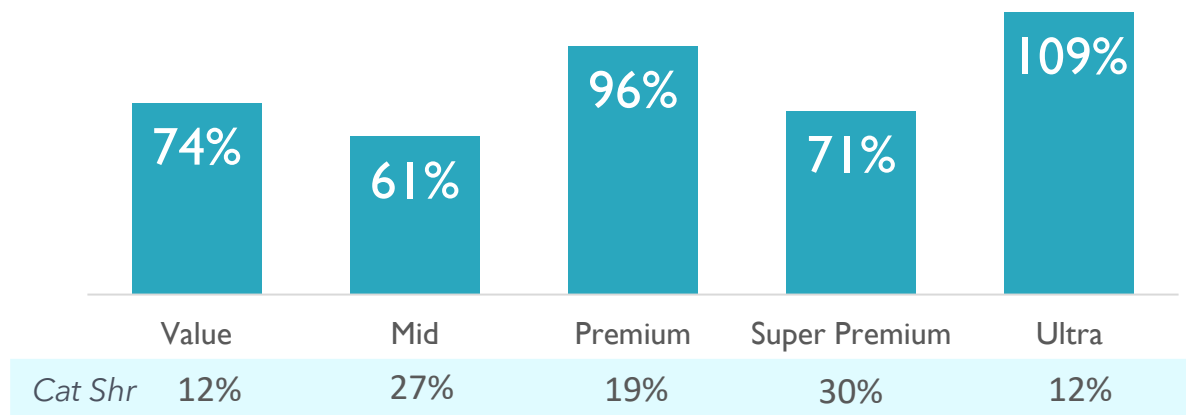
**+7.5%**  
CAGR 2022 to 2024  
Projected to Outpace Total Spirit Growth over next 2 Yrs

**TOP COCKTAIL FLAVORS**  
1.Honey 2.Rose 3.Vanilla 4. Maple 5. Chocolate

# TEQUILA

**Premium+ Brands are still fueling growth**, and all price tiers are gaining share from other Spirit Categories

Dollar % Chg by Price Tier



## TOP 5 TEQUILA COCKTAILS YTD 2022

Cocktail	Menu Penetration	4 Yr CAGR
Margarita	58%	+2%
Flavored Margarita	20%	+2%
Paloma	13%	+12%
Skinny Margarita	5%	+1%
Long Island Iced Tea	4%	-2%

**#1**

Growth Category

Grew +2.4 Share Points while Vodka declined -1.5 Pts

**+12.8%**

CAGR 2022 to 2024

Projected to more than double Total Spirits Growth Rates

**TOP TRENDING TEQUILA COCKTAILS INCLUDE RANCH WATER, OLD FASHIONED, SPICY MARG, PASSION FRUIT MARG AND PALOMA**

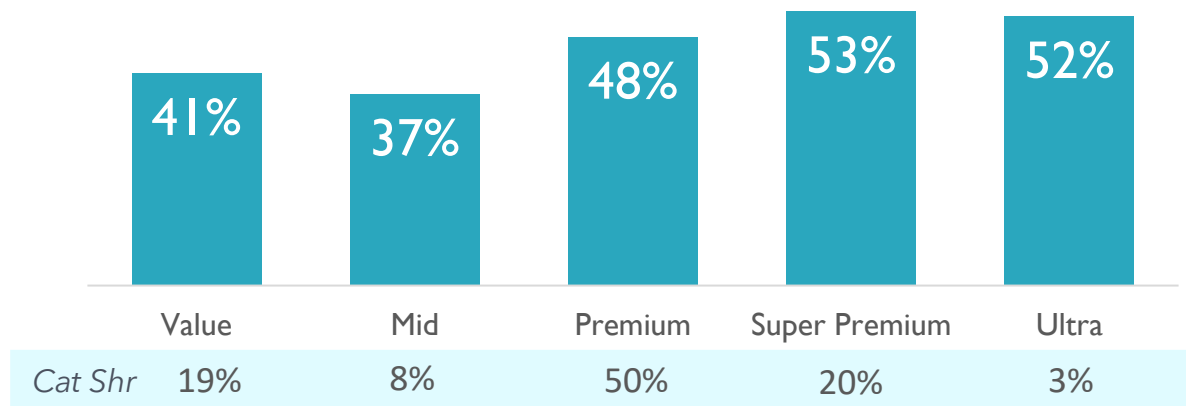
**TOP COCKTAIL FLAVORS**

1. Lime
2. Jalapeno Pepper
3. Blood Orange
4. Citrus

# GIN

Premium to Super Premium brands make up 70% of Sales ,  
with all Premium+ driving Category share growth

Dollar % Chg by Price Tier



## TOP 5 GIN COCKTAILS YTD 2022

Cocktail	Menu Penetration	4 Yr CAGR
Martini	15%	-2%
Negroni	14%	+4%
Gin & Tonic	7%	+10%
Long Island Iced Tea	6%	-9%
French 75	6%	+5%

**+6%**

Menu Growth

Projected over next 4 Yrs

**+3.3%**

CAGR 2022 to 2024

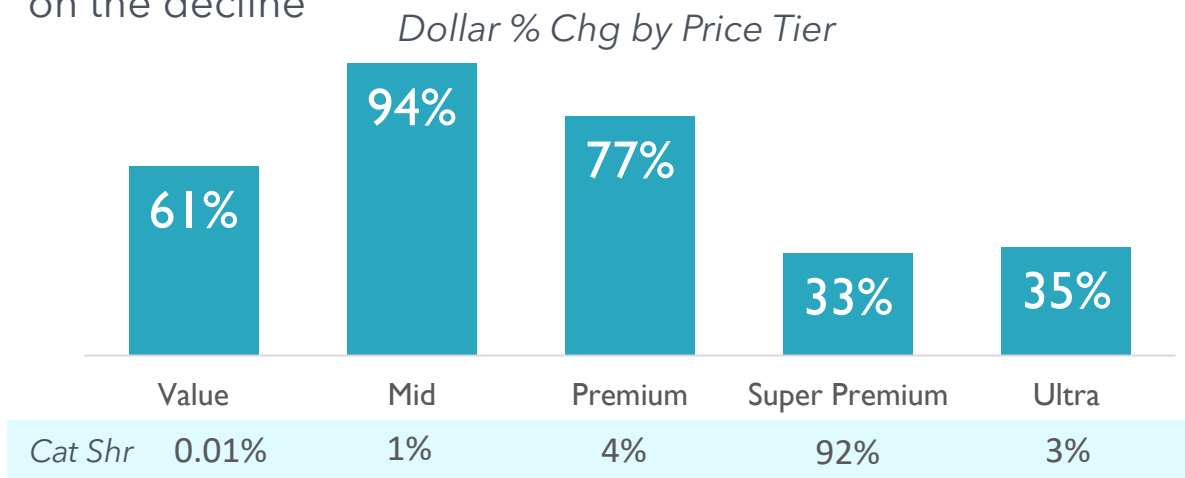
**TOP TRENDING GIN COCKTAILS  
INCLUDE SPRITZ, GIN & TONIC,  
LIMONCELLO, AVIATION COCKTAIL  
AND FRENCH 75**

**TOP  
COCKTAIL  
FLAVORS**

1. Mint
2. Honey
3. Rose
4. Creme
5. Citrus

# COGNAC

**Premium+ Cognac Brands dominate On-Premise Sales**, with Premium Brands growing share while Super Premium brands are on the decline



## TOP 5 COGNAC COCKTAILS YTD 2022

	<i>Menu Penetration</i>	<i>4 Yr CAGR</i>
Sidecar	7%	-2%
Vieux Carre	2%	-9%
Sangria	2%	+13%
Sazerac	2%	+18%
Margarita	1%	+4%

**TOP TRENDING COGNAC COCKTAILS INCLUDE SAZERAC, SANGRIA AND MARGARITA**

### TOP COCKTAIL FLAVORS

1. Cream
2. Citrus
3. Honey
4. Cocoa

**22%**

U.S. Menus Today

**+4.3%**

CAGR 2022 to 2024

# AMERICAN WHISKEY – REASONS TO BELIEVE



**#1**

Dollar Growth Super  
Premium Bourbon

9% of all American Whiskey Sales and  
growing faster than Bulleit

**1 in 3**

Menus in U.S. Today

**+36%**

\$ Sales YTD



**#1**

Selling Mid Tier Bourbon

8% of all American Whiskey Sales

**+40%**

Menu Growth

Last 10 Years

**+34%**

\$ Sales YTD



**#5**

Knob Creek, Selling Super  
Premium Bourbon

**+88%**

Knob Creek, Menu  
Growth

Last 10 Years

**+65%**

Basil Hayden, \$ Sales  
YTD, Driving Category  
Share Growth



# TEQUILA, COGNAC, GIN – REASONS TO BELIEVE



**#2**

Hornitos, #2 Selling Premium Tequila  
13% of all Tequila Sales, +72% \$ Sales YTD!

**+66%**

Tres Gen, \$ Sales YTD, Outpacing Category Growth

**+42%**

El Tesoro, \$ Sales YTD, Driving Category Share Growth



**#3**

Courvoisier, #3 Selling Cognac

**+81%**

Courvoisier, \$ Sales YTD

**1 in 5**

Courvoisier, Fine Dining Menus Today



**#3**

Fastest Dollar Growth Category  
Behind American Whiskey & Tequila

**+122%**

Sipsmith, \$ Sales YTD Last 10 Years

**+10 bps**

Sipsmith, Grew Category Share and +10 Basis Points YTD

# JAPANESE SPIRITS & RTD – REASONS TO BELIEVE



## #4

Japanese Whiskey, largest dollar growth category  
Outpacing Canadian Whiskey and Vodka

## #1

Toki, Japanese Whiskey  
Growing +85% \$ YTD, +225% on Menus over last 4 Years

## +162%

Roku, \$ Sales YTD  
Among the fastest growing Ultra Premium Gin Brands



## #1

RTDs, Fastest Growing Category in the Off-Premise

## #4

Largest Ready To Drink Cocktail Brand in U.S.

## #2

Largest **Premium** Ready To Drink Cocktail Brand in U.S.

*Beam* SUNTORY

# PRODUCTS



# Day Game Farmer's Market

Fresh Bottled Juice, organic tequila, farmers market garnishes.



Cucumber  
Apple  
Celery  
Spinach  
Lime  
Mint  
Bok Choy  
Collard  
Greens  
Green Chard

Apple  
Ginger  
Lemon  
Cayenne

Apple  
Lemon  
Ginger  
Beet

Grapefruit  
Aloe Vera  
Mint

Mango  
Lemon  
Monk Fruit  
Turmeric



## Un-beet-able

1 ½ oz Tres Generaciones Plata  
3 oz Pressed fresh juice  
1 oz Margarita Mix  
(suggested Fresh Victor)

METHOD: Build

GLASSWARE: 16 oz

GARNISH: Assorted fruits & veggies

Property of Beam Suntory. Do not reproduce without permission.

# Perfect Pitch

This whiskey sour is spiked with Campari, elderflower and strawberry.



## RECIPE:

- 1 ½ oz Maker's Mark
- ¾ oz St Germain Elderflower Liqueur
- ¾ oz Lemon Juice
- ½ oz Campari
- ½ oz Re'al Strawberry Puree

METHOD: Shake and strain over baseball ice.

GLASSWARE: Rocks

GARNISH: Mint sprig, lemon twist

### Sugg Partial Batching Instructions

1 750 Maker's Mark

12 ½ oz St Germain

8 ½ oz Campari

Combine Maker's Mark, St Germain and Campari in large vessel. Stir to combine. Pour into glass bottles and label. When ready to prepare, combine 2 ¾ oz batch with ¾ oz lemon and ½ oz strawberry puree. Shake and strain into glass over fresh ice.

# Hey, Batter Batter

Cracker Jacks. Bourbon. All American classics.



Ice Contact: Fat Ice  
Available in Chicago, Texas, Las Vegas  
Fatice.com

## RECIPE:

- 1 oz Knob Creek Bourbon
- 1 oz Peanut Butter Whiskey
- ¼ oz Rich Simple Syrup
- 2 dash Angostura Bitters

METHOD: Stir and strain over specialty ice.

GLASSWARE: Rocks

GARNISH: Cracker Jacks



# BBQ Old Fashioned aka SMOKING BARREL

This Maker's Mark hickory smoked Old Fashioned is infused with BBQ dry rub flavors and sweetened with a touch of honey.



## RECIPE:

2 oz Maker's Mark Bourbon

½ oz Honey Syrup (2 parts honey : 1 part water)

2 dash Bitter End Memphis BBQ Bitters

1 Orange zest

**METHOD:** Add liquid ingredients to mixing glass.

Express the oils from orange peel over mixture and drop into glass.

Top with ice and stir. Strain into glass over large ice cube.

Top with smoke top, fill with hickory chip and light. Leave top on to infuse drink with smoke aromatics and remove tableside.

**GLASSWARE:** Rocks

**GARNISH:** Bruleed orange or orange zest & cherry



[https://middletonmixology.com/collections/all/products/smoketop?gclid=EAlaQobChMIgcHc7JcX-wlVNQCtBh3wyw-qEAAYAiAAEgK1d\\_D\\_BwE](https://middletonmixology.com/collections/all/products/smoketop?gclid=EAlaQobChMIgcHc7JcX-wlVNQCtBh3wyw-qEAAYAiAAEgK1d_D_BwE)

# Old Fashioned Highball & Peanuts

This Highball version of an Old Fashioned has the full flavor character of the classic while being light and refreshing. – peanut helmet, board, carrier,



## RECIPE:

- 1 ½ oz Knob Creek Bourbon
- 4 oz Fever Tree Spiced Orange Soda
- 2 dash Angostura Bitters

METHOD: Add Knob Creek and ginger ale to glass and top with ice.

Finish with two dashes of Angostura bitters.

GLASSWARE: Collins

GARNISH: Orange half wheel, premium cherry



Serve idea- Souvenir Hat Bowl



# Field of Dreams

Americana. Or could be team colors. Specialty flavored frozen ice melts slowly into a classic margarita.



## RECIPE:

1 ½ oz Hornitos Plata

2 oz Margarita Mix (suggested Fresh Victor)

½ oz Cointreau

METHOD: Shake and strain over flavored ice cube.

GLASSWARE: Rocks

GARNISH: Kosher salt rim

### \*Red, White & Blue Ice

#### Red Ice

1 part Grenadine : 3 part water

#### White Ice

Lemonade

#### Blue Ice

1 part Dekuyper Blue Curacao : 3 part water

*\*Using large silicone ice cube molds, freeze liquid in stages, allowing each layer to partially freeze before topping with next layer. Appx 2 hrs between layers.*

# ¡Fiesta!

Palomas, Margs, Tacos, Party.



Possibly Logo'd Cantarito



## Prickly Pear Paloma

### RECIPE:

1 ½ oz Hornitos Plata Tequila

½ oz Re'al Prickly Pear Syrup

½ oz Fresh Lime Juice

Top with Fever Tree Grapefruit Soda

**METHOD:** Add tequila, prickly pear and lime to mixing tin and top with ice. Shake and strain into glass over fresh ice. Top with grapefruit soda.

**GLASSWARE:** Collins

**GARNISH:** Dehydrated lime

# Frozen Favorites

## 50/50

A variation on a boozy Arnold Palmer, spiked with Jim Beam and frozen with flavors of ginger and mint.



### SINGLE RECIPE:

1 ½ oz Jim Beam Bourbon  
¾ oz Kelvin Slush Citrus Slush  
¾ oz Kelvin Tea Slush  
½ oz Reál Ginger Syrup  
Top with 2 dash Angostura

**METHOD:** Blend ingredients with 2 cups ice. Pour into glass and top with two dashes Angostura bitters.  
**GLASSWARE:** Pint  
**GARNISH:** Mint sprig, lemon wheel

### BATCH RECIPE

1 ½ Ltr oz Jim Beam Bourbon  
24 oz Kelvin Slush Citrus Slush  
24 oz Kelvin Tea Slush  
16 oz Reál Ginger Syrup  
2 gallon Water  
\*Top with 2 dash Angostura

**METHOD:** Combine ingredients (except bitters) in frozen drink machine and freeze.

## ICEBERG!

A frozen cocktail over a beer? What could be better! Long and refreshing with endless flavor combinations.



### BATCH RECIPE:

1 part Tres Generaciones  
1 part Margarita Mix  
3 part Strawberry Puree  
Light Lager or Pilsner

**METHOD:** Blend ingredients with ice and pour on top of beer.  
**GLASSWARE:** Half Yard  
**GARNISH:** Lemon wheel

# Bourbon Bomber

This customizable serve is filled with a variation on a whiskey buck with Maker's Mark, Aperol, wild berry and ginger beer.



## RECIPE:

1 ½ oz Maker's Mark

¾ oz Aperol

¾ oz Lemon Juice

¾ oz Monin Wild Berry Puree

Top with Fever Tree Ginger Beer

METHOD: Shake and strain into cup. Top with ice and ginger beer.

GLASSWARE: Custom ball cup

GARNISH: Mint sprig

# Whipped Strawberry Lemonade

One of this summer's most trendy cocktails is a blended drink featuring lemonade and whipped cream. Here's an adaptation on this new classic featuring Jim Beam with a twist using fresh lemon and strawberry puree. What resulted is a light, airy summery concoction with a nod of nostalgia. The whipped cream garnish is optional, but we highly recommend serving with sunshine, friends and good times.



## RECIPE:

- 2 oz Jim Beam Bourbon
- 1 cup Whipped Cream (plus more for topping)
- 2 oz Sweetened Condensed Milk
- 2 oz Fresh Lemon Juice
- 1 oz Strawberry Puree

**METHOD:** Add all ingredients to blender and blend until smooth and creamy. Top with whipped cream, if desired.

**GLASSWARE:** 16 oz

**GARNISH:** Whipped cream, strawberry

# APPENDIX





# BSI SPORTS SPONSORSHIPS

2023

*Beam* SUNTORY

# SPORTS SPONSORSHIP LANDSCAPE



13



2



2



2
















2










# BASEBALL



Team		Effen	Hornitos	Jim Beam	Maker's Mark	Expiration
Atlanta				x		Oct 2023
Boston			x	x		Oct 2023
Chicago		x	x	x	x	Oct 2027
Cleveland				x		Oct 2023
Detroit				x		Oct 2023
Houston		x	x	x		Oct 2023
Los Angeles				x		Oct 2024
Milwaukee				x		Oct 2023
New York			x	x		Oct 2022
New York			x	x		Oct 2025
Philadelphia				x		Oct 2023
Pittsburgh				x		Oct 2023
San Francisco			x	x		Oct 2024

# BASKETBALL, FOOTBALL, HOCKEY



Team	Hornitos	Jim Beam	Maker's Mark	On the Rocks	CV	Expiration
Phoenix 	X	X				June 2025
New York 			X			June 2024
Dallas 	X	X	X			Dec 2026
Kansas City 		X	X			Dec 2024
Seattle 		X				Dec 2023
Minneapolis 		X				June 2023
Tampa Bay 	X					June 2023