global drinks
intel.
FOR THE GLOBAL DRINKS EXECUTIVE | APRIL 2026



MARIE BRIZARD, when French savoir-faire meets the spritz ritual

PARTNER CONTENT

FREIXENET



TASTE THE SUN

global drinks
intel.
FOR THE GLOBAL DRINKS EXECUTIVE | APRIL 2026



Our ESG Awards return for their biggest year yet



COMMENT

Joe Bates

Wars are unpredictable things, but one thing is certain — the spiralling conflict in the Gulf is bound to bring profound change

There are still nearly four years left of this decade, yet the outbreak of war in the Middle East last month marks the third seismic shock of the 2020s to shake the beverage alcohol business.

The Covid-19 pandemic hammered the on-premise and led to long-lasting changes in consumer behaviour, the Ukraine war brought a crisis of ethics and grain, but the escalating conflict of the US–Israel war on Iran threatens to eclipse them both in its costly disruptiveness.

The now eerily quiet luxury terminals of the big Middle Eastern hub airports have proved one of the war's first corporate victims. Only last year, the UAE's Dubai Duty Free (DDF) was the single largest airport retail location on earth, posting a staggering US$2.38bn turnover. Selling more than 2m bottles of scotch whisky annually, DDF was a prime location for luxury spirits brand launches.

Today, DDF's status as a luxury shop window is in danger of shattering. The outlook for other regional travel retail players, such as Qatar Duty Free and Bahrain Duty Free, is similarly gloomy.

Since the Iraq war of 2003, the Middle East has become a super-connector for the aviation industry, accounting for nearly a quarter of global long-haul transit traffic, but the region's key role as the world's super-hub is now threatened.

Most drones and missiles may be landing in the Middle East, but, of course, the effects of the conflict are already being felt worldwide, from the scotch bottling halls of Glasgow to the vineyards of Bordeaux. The effective closure of the Strait of Hormuz, normally one of the world's busiest shipping lanes, has severed one of the drinks industry's key supply arteries.



Illustration: iStock.com/Supharat Khumsap

For multinationals like Diageo, Pernod Ricard and LVMH, the Middle East is a logistics lynchpin. Yet with ports in the region offline, the just-in-time distribution model of these industry giants has collapsed. Rerouting via the Cape of Good Hope means a lengthy delay and a *de facto* logistics tax that leaves billions in inventory floating at sea, while fuel surcharges erode the margins of every case of scotch or cognac shipped to Asia.

The industry must also face the grim maths underlying production costs. Glass manufacturing and aluminium conversion (for screwcaps) are among the most energy intensive processes on earth. With natural gas prices soaring following the disruption of Qatari LNG, the world's biggest supplier, the cost of a humble glass bottle is set to do likewise.

Simultaneously, the Middle East's role as a titan of fertiliser production threatens a disaster for this year's harvests. The longer the war drags on, industry concerns won't solely focus on soaring prices but more existential problems, such as whether there'll be the energy to fire the stills, or the fertiliser to sustain the soil.

Of course, the warring parties may de-escalate and normal service might resume in short order. Yet we might also be rapidly entering an era of forced on-shoring, just-in-case logistics and regional resilience. If that happens, the drinks industry map will change and the old routes, both physical and economic, will not come back. GDI



Deep dive into unlimited news, comment and analysis with Global Drinks Intel

drinks-intel.com/subscribe

EST. 2006

The BITTER TRUTH

THE OLDEST BARTENDER-OWNED SPIRITS BRAND



20 YEARS OF COCKTAIL INNOVATION

Our journey for extraordinary flavors goes beyond the lands of fascinating bitterness.

www.THE-BITTER-TRUTH.com

For Better Drinks

@thebittertruthcompany

@thebittertruthcompany/

- Golden Falernum
- Violet Liqueur
- Pimento Dram
- Apricot Liqueur
- Elderflower Liqueur

Contents

Global Drinks Intel Issue 72



Cover illustrations: iStock.com/Tetyana Rusanova/ Megane/Mariia Demchenko

Up Front

04 Joe Bates From logistics to GTR, the spiralling conflict in the Gulf is bound to bring profound change to the drinks industry

07 News Briefs

08 Partner Content Marie Brizard

10 Partner Content Stock Spirits Group

Market Intel

11 Aperitifs & Spritzes The aperitivo consumpton occasion is evolving. Welcome to 'the year of the spritz 2.0'

15 Aperitifs & Spritzes Roundup

Sustainability Matters

16 Q&A Champagne Telmont, plus ESG activation roundup from the IARD

17 Green Claims Are consumers getting tired of sustainability messaging?

18 GDI ESG Awards 2027 We've had a redesign. Chair of judges Rosie Davenport explains how it's made our ESG Awards programme more relevant than ever before

Market Intel

20 RTDs & Refreshers The lighter, sessionable ready-to-drinks that are taking share from hard seltzers

24 RTDs & Refreshers Roundup

25 Mixers Cost and staffing challenges are transforming on-premise operations. Will this open opportunities for premium mixers?

27 The Big Interview Australian Vintage Limited CEO Tom Dusseldorp

29 Scotch It's been another challenging year for the scotch whisky category, but are its problems cyclical or structural?

Route-to-Market

33 US Focus Shaken, stirred and selling. 'Lipstick economy' shapes US cocktail scene

35 US Focus Gen Z *is* going out, and they're spending up big, according to a new US study



36 My Story David Fudge, co-founder of US alcohol-free functional spirit Aplós

38 Country Analysis The UK beverage alcohol market is navigating a perfect storm of new regulations, changing habits and rising costs

42 Retail Online retailer Maharaja Drinks is breaking down preconceptions to bring Indian craft brands to a UK audience

44 View from the On-Premise: Charlie Mitchell A UK perspective on the balancing act of hospitality businesses reflects a globally resilient sector

45 Retail Roundup

46 NIQ Getting the recipe right to maximise the on-premise cocktail opportunity

48 m1nd-set Precision, planning and the pulse of the UK alcohol shopper

50 New Products

53 Partner Content OKI Europe

54 Marketing Trends: Chris Tyas Beverage brands are rediscovering the importance of being gateway products

55 On Our Radar Five marketing activations catching attention

56 Show Preview Bar Convent London

58 Five Minutes with... World Spirits Alliance CEO Helen Medina



Don't miss a thing! Follow GDI on LinkedIn

linkedin.com/company/global-drinks-intel

global drinks intel.

Editorial team

DIGITAL EDITOR
Olly Wehring
olly@drinks-intel.com

DEPUTY DIGITAL EDITOR
Jessica Broadbent
jessica@drinks-intel.com

RETAIL FEATURES
Joe Bates
joewbates@icloud.com

RETAIL NEWS
Kevin Rozario
kevin@drinks-intel.com

PRODUCTION, DESIGN & COMMISSIONING EDITOR
Kylie Martin
kylie@drinks-intel.com

COPY EDITOR
Thalia Fourie
thalia.fourie@gmail.com

CONTRIBUTORS
George Argyropoulos
Michael Barrett
Joe Bates
Jessica Broadbent
Eloise Feilden
Maia Gosselin
Charlie Mitchell
Kevin Rozario
Chris Tyas
Kate Wake-Walker
Olly Wehring
Richard Woodard

Commercial team

COMMERCIAL DIRECTOR
James Houlder
commercial@drinks-intel.com

BUSINESS DEVELOPMENT DIRECTOR
Marcus Clark
commercial@drinks-intel.com

BUSINESS DEVELOPMENT DIRECTOR
Felicity Phillips
commercial@drinks-intel.com

COMMERCIAL MANAGER — AWARDS
Mark Gander
commercial@drinks-intel.com

CHIEF MARKETING OFFICER
Kate Wake-Walker
kate@drinks-intel.com

SUBSCRIPTIONS
Alastair Smith
alastair@drinks-intel.com

Contact us

Global Drinks Intelligence, Ltd
11 Plimsoll Road, London, N4 2EW, England, UK
editorial@drinks-intel.com
www.drinks-intel.com

Publisher

GLOBAL DRINKS INTELLIGENCE

All details contained in this publication are believed to be correct at time of going to press. All rights reserved. Nothing may be reprinted or reproduced in whole or in part without the written permission of the publisher. Published by Global Drinks Intelligence, Ltd 2026 ©

ISSN 2632-7236 (print)

ISSN 2632-7244 (online)

Registration Number: 11672026 (England)

Printed in the UK by PurePrint.

News briefs

Catch up quickly on the global drinks stories that matter

COMPANY NEWS

Amber Beverage Group has been moved to provide more details around a loan default outlined in February, stating that its deferral of payment was neither "selective or voluntary". It said the "non-payment" was a direct consequence of "the significantly worsened financial situation at the group level".

Brown-Forman and **Pernod Ricard** confirmed they are in talks about a "merger of equals" that could create a "global spirits leader" with a market value of around US$30bn.

The owner of Ukrainian vodka brand **Nemiroff** has launched an RTD range under a "standalone sub-brand" called Pangaia. The 5% ABV range uses Nemiroff's namesake vodka as its base, with each variant being infused with botanicals and fruit.

Mast-Jägermeister has started producing some of the green bottles for its namesake herbal liqueur using hybrid-furnace technology. The technology combines electricity and natural gas in the glass-melting process in a bid to reduce carbon emissions.

Radico Khaitan head of international operations Sanjeev Banga told *Global Drinks Intel* that the Indian spirits giant does not expect to secure a scotch whisky distillery in the near term. In late January, Radico Khaitan set up a wholly owned division in Scotland through which it plans to buy a distillery.

A marked decline in sales in the three months to the end of December has dragged on **Viña Concha y Toro**'s accelerating performance in the earlier part of 2025. Having seen the first three-quarters of last year deliver varying levels of top-line growth — ranging from 1.4% in Q1 to Q3's 8.1% leap — the Chilean group's Q4 sales came in down by 4.4%.

M&A

Sazerac Co has added Dirty Shirley to its portfolio, spending an undisclosed sum on the US premix brand — which is influenced by the classic non-alcoholic shirley temple serve. Dirty Shirley joined the likes of BuzzBallz on Sazerac's books.



Iconic Nectars subsidiary Pagès-Vedrenne has bought the Mandarine Napoléon liqueur brand from De Kuyper Royal Distillers for an undisclosed sum. De Kuyper said the disposal would allow it to continue to "sharpen our focus" on cocktail liqueurs and premixes.

Molson Coors Beverage Co has come good on its CEO's pledge that M&A is a "potential solution" to the group's current challenges, agreeing the acquisition of Monaco RTD owner Atomic Brands.

The co-founder of AB InBev's Nütrl RTD brand has resurfaced in the drinks industry, buying into no/low-alcohol beer brand **Chilly Ones**. Paul Meehan — along with his partner and fellow entrepreneur Melissa — has become a "significant investor" in the business.

DISTRIBUTION MOVES

Southern Glazer's Wine & Spirits had a spate of distribution M&A — scooping "substantially all" of the assets held by Colorado's Eagle Rock Distributing Co and New Jersey's Clare Rose. The two deals were announced within a week of one another.

Netherlands-based **Lucas Bols Co** has appointed Paragon Brands to distribute three brands in the UK market, including its namesake line of liqueurs. Paragon is taking over from Maverick Drinks in the country.

Pernod Ricard's US division has updated on a "market-by-market approach" to its distribution arrangements in the country in light of recent troubles that have impacted Republic National Distributing Co.

Taiwanese single malt whisky producer **Kavalan** has appointed Marussia Beverages as UK distributor for its namesake brand. The UK division of Switzerland-headquartered Marussia will oversee "nationwide" distribution across the on and off-premise channels, as well as in e-commerce.

Bronco Wine Co has formed a "strategic alliance" in the US with two "boutique" brands — Brilliant



When She Was King (above) and Brilliant Mistake have partnered with Bronco Wine Co

Mistake and When She Was King — to help scale the pair in their home market. The partnership will see Bronco provide national and international sales, marketing and distribution services for "select" wines from the duo.

PEOPLE

Rémy Cointreau has appointed from global travel retail for its next channel head in the Asia-Pacific region. Annabelle Chung, formerly Lagardère Travel Retail executive VP of merchandising & commercial for Asia-Pacific, joined Rémy Cointreau as its MD of regional GTR operations.

Giancarlo Bianchi as been appointed new MD of **The Borders Distillery**. Bianchi joins the scotch whisky producer having spent the last two years as sales director at Edinburgh's Holyrood Distillery and just over 12 years at Welsh whisky distiller Penderyn.

Brown-Forman has hired industry outsider Jim Peters as its next CFO. Peters joins the Jack Daniel's and Diplomático Rum owner from US home-appliance business Whirlpool, where he was chief financial & administrative officer.

INDUSTRY NEWS

This year's **ProWein Düsseldorf** three-day trade show saw a marked slide in visitors on 2025. The number of attendees dropped 26% from last year's 42,000 down to 31,000. Organiser Messe Düsseldorf framed the performance as part of its "strategic development as an international trade fair for wine and spirits in a targeted manner".

Euromonitor International head of research for alcoholic drinks Spiros Malandrakis predicted that co-branded products — featuring marks owned by alcohol companies alongside those of soft drinks producers — have a part to play in the future of the RTD category. (See RTD report p20.)

Catch up on the latest industry news at ***www.drinks-intel.com***

Marie Brizard targets global spritz boom

The historic French liqueur producer — renowned for its citrus *savoir-faire* — has entered the growing spritz category with the launch of new **Aperitivo** and **Limoncello** expressions



Marie Brizard Aperitivo has been designed to prioritise balance and natural flavour extraction

The name 'Marie Brizard' has been synonymous with flavour expertise and craftsmanship for more than 270 years. Founded in Bordeaux in 1755 and now part of Marie Brizard Wine & Spirits (MBWS), the house's continuing success rests on its mastery of natural ingredients, distinctive flavour profiles and a willingness to target contemporary trends such as the hugely popular spritz serve.

The spritz phenomenon has had a sizeable impact on drinking habits over the past decade, expanding from its Italian roots to become a global cocktail staple. Worldwide, a substantial 41% of consumers say a spritz is their preferred drink for socialising, underscoring the serve's mainstream international appeal and its undeniable commercial potential.

For producers of liqueurs and aperitifs, the category offers both scale and relevance. It combines visual appeal, a relatively low alcohol strength that appeals to increasingly health-conscious consumers and a broad spectrum of flavour possibilities.
For MBWS, entering this space represents an exciting, strategic opportunity to extend the reach of the Marie Brizard brand.

Central to this strategy are two recent additions to the company's portfolio: Marie Brizard Aperitivo and Marie Brizard Limoncello. Designed specifically with spritz-style serves in mind, these two products spearhead the group's ambitions to establish a credible position in this crowded, yet still expanding, category.

Italian culture meets French savoir-faire

MBWS international brand director Caroline Alzieu says the group's push into a category so strongly associated with Italian culture was an extension of Marie Brizard's historical expertise rather than a departure from its French roots. "While our heritage is proudly French, our expertise as a *maître liquoriste* since 1755 truly transcends borders," she explains.

"Citrus craftsmanship has been at the heart of Marie Brizard's *savoir-faire* from the very beginning, forming a core pillar of our identity and product development," she adds. "We believe that a French touch can elevate and sublimate Italian aperitif tradition, bringing precision, balance and aromatic complexity."

That philosophy is reflected most clearly in last year's launch of Marie Brizard Aperitivo in selected domestic markets. Rather than competing purely on bitterness or intensity, the newest expression has been designed to prioritise balance and natural flavour extraction.

"At Marie Brizard, we believe complexity doesn't come from the quantity of ingredients, but from the quality of extraction," Alzieu insists. "For our Aperitivo, we rely on a precise selection of natural flavourings, including natural orange flavour and natural gentian flavour obtained through infusion. Rather than multiplying components, we focus on mastering balance."

This minimalist, quality-driven approach draws directly on the company's long-standing technical expertise as a liqueur house. Marie Brizard is not a new entrant experimenting with the category, but a proven specialist applying centuries of knowledge to a contemporary drinking occasion.

"The harmony between sweetness and bitterness is achieved through our ancestral *savoir-faire* as *maîtres liquoriste*s since 1755," Alzieu continues. "Thanks to carefully crafted natural infusions, we obtain a refined bitterness that enhances the palate without overwhelming it." »

» For operators and distributors, this balance has beneficial, practical implications when the liquid is used in cocktails. In the spritz format, where the liqueur must integrate seamlessly with prosecco and soda, maintaining brightness and drinkability is essential.

Natural colour and no artificial flavourings

Alongside the Aperitivo, Marie Brizard Limoncello plays a complementary role in the group's spritz strategy, capitalising on the growing popularity of limoncello-based spritzes, which saw category sales grow 31% between 2019 and 2023. Limoncello is no longer solely associated with after-dinner occasions, and Marie Brizard Limoncello is certainly versatile, capable of bridging both aperitif and cocktail moments.

From a technical perspective, the product also highlights the company's focus on natural ingredients and clean-label credentials, an increasingly important advantage in both the on and off-premise channels. Achieving the vivid colour expected from limoncello without using synthetic additives proved a significant challenge.

"Natural colour, unlike synthetic dyes, is much more sensitive to light and oxidation," Alzieu explains. "It required months of testing, but thanks to our R&D team, it was possible. A very precise selection of citrus extracts ensured that the colour remains stable and brilliant in the bottle without any artificial help."

For Marie Brizard, the decision to exclude artificial colours and flavourings was not simply a technical challenge, but a strategic one aligned with changing consumer expectations. "Today's consumers are more mindful than ever," Alzieu says. "By ditching artificial colours and flavours, we aren't just following a trend; we are returning to the essence of the fruit."

US recognition and potential

Industry recognition has helped raise the profile of the new range. For instance, Marie Brizard Aperitivo secured a Double Gold medal at the 2025 San Francisco World Spirits Competition last year — a result that has helped reinforce its credibility in key international markets, like the US.

In the United States in particular, MBWS sees spritz cocktails expanding beyond their traditional seasonal positioning. Rather than being confined to the late afternoon aperitivo hour, the serve is increasingly appearing in daytime occasions such as brunch, as well as in casual evening drinking moments.

"Spritzes are emerging as a more flavourful and sophisticated alternative to mimosas, creating strong opportunities for floral French aperitifs like Marie Brizard to stand out," Alzieu notes. "Beyond daytime moments, spritz also works perfectly for evening occasions. Consumers are looking for drinks that are both visually appealing and flavour-forward."

Market-by-market approach

Looking ahead to the rest of 2026, MBWS has outlined a market-specific strategy designed to accelerate the adoption of the spritz serves built around the two products. In its domestic French market, for instance, the focus will be on strengthening off-trade visibility and promoting the spritz as a simple, accessible cocktail occasion.



The Limoncello is an example of Marie Brizard's focus on natural ingredients and clean-label credentials

"In France, our focus is to further develop Marie Brizard Spritz in the off-trade through a co-branding with Perlino Prosecco, highlighting three key references of Marie Brizard: Elderflower, Limoncello and Aperitivo, while also increasing visibility through festivals and trade shows," Alzieu says.

Internationally, the emphasis shifts more heavily towards on-premise engagement and bartender advocacy. "In markets such as the Americas, Scandinavia, Eastern Europe and North Africa, Aperitivo and Limoncello have recently been launched in the on-trade, and we will continue to accelerate the development of spritz serves in these areas," Alzieu says. "Our objective is clear: to position Marie Brizard as a legitimate and strategic player in the spritz segment."

Recent corporate developments are also opening new distribution opportunities, particularly in Northern Europe. Following MBWS's acquisition of Danish distributor Interbrands last November, the group plans to introduce an 'Italian Corner' concept across Nordic markets to highlight its new Mediterranean-style aperitif products.

"With the Interbrands acquisition, our vision for the Italian Corner in the Nordics is to bring a curated Mediterranean aperitif offer to highly trend-driven markets," Alzieu explains. "Spritz culture is translating well, particularly in Denmark, which was among the first international markets to launch our Marie Brizard Limoncello in 2025. We see strong momentum for premium, lighter and convivial serves across the region."

While the spritz range currently focuses on Aperitivo and Limoncello, MBWS sees the wider citrus category as a significant long-term innovation platform. The company's flavour expertise and historical association with citrus liqueurs provide a foundation for possible future extensions as consumer interest in Mediterranean-style drinking occasions continues to grow.

"For now, our priority is to focus on Aperitivo and Limoncello, which are recent additions to our portfolio and still in their expansion phase," Alzieu says. "That said, the Mediterranean and citrus universe offers very strong potential, and it is part of our Marie Brizard DNA. Citrus expressions remain a vast and inspiring field for innovation, and we believe we have only just begun to explore its full possibilities." GDI

Discover more about Marie Brizard's wide range of bold, aromatically intense and complex liqueurs at ***mariebrizard.com***

Stock Spirits Group targets RTD growth with Limoncè expansion

After its successful launch into aperitifs, **Stock Spirits Group** is zeroing in on demand for low-ABV serves and adding to its **Limoncè** line-up with a bottled spritz



After the success of its Aperitivo, Limoncè Spritz RTD launches this month

Stock Spirits Group is expanding its award-winning Limoncè portfolio with the launch of ready-to-drink (RTD) Limoncè Spritz, a move designed to capitalise on consumer demand for low-ABV serves in on-the-go formats.

The Warsaw-headquartered group will roll out the spritz in Germany, Czechia, Slovakia and the Adriatic region this month, with other European markets following later in the year.

Made from 100% Femminello lemons, Limoncè Spritz RTD is presented in a 20cl glass bottle and available in a three-pack format. It can be served over ice with a lemon slice, or enjoyed straight from the bottle.

"Light at just 8% ABV and with a bright, citrus-forward character, Limoncè Spritz reflects the growing demand for refreshing, convenient spritz serves that can be enjoyed beyond the traditional bar setting," says Stock Spirits Group CMO Anne Martin.

Increased interest in citrus-based aperitifs is also a key driver, according to Martin. "The spritz category has evolved well beyond a single serve, with real variety now in how people are drinking it," she says. "We're seeing strong interest in citrus flavours that provide both freshness and naturalness."

The momentum behind lower-ABV aperitivo serves is being driven by younger consumers, who tend to favour drinks that are more approachable and flavour-led than traditional spirits, says Martin.

"Citrus, fruit and lighter botanical profiles make the category feel more accessible, particularly for those discovering aperitifs for the first time," she says. "Social media is amplifying this, shaping how people find and try new drinks. In the UK, research by Mintel shows that 54% of 18 to 24-year-olds and 55% of 25 to 34-year-olds who drink spirits have shared cocktail images on social media in the past six months, underlining how visual appeal has become a genuine driver of interest in the spritz and aperitif space.

"The spritz format naturally lends itself to lighter, easy-to-drink serves, which fits well with the rise of early evening drinking occasions. At the same time, we are seeing alcohol-free aperitivo-style drinks gaining popularity alongside botanical and gin-style alcohol-free alternatives."

Building on Aperitivo's success

Stock Spirits Group entered the aperitif category with the roll-out of Limoncè Aperitivo in seven European markets last year. Described as one of the group's "most significant launches", the aperitif has since won silver medals at several international competitions, including the Berlin International Spirits Competition.

The company says the accolades recognise the product's "distinctive quality and flavour, as well as the strength of the Limoncè brand's 35-year heritage in creating lemon-based spirits". Produced at the Franciacorta Distillery in Italy, the portfolio includes Limoncè Originale 25% ABV, the no.1-selling limoncello. Central to its appeal is the use of 100% Femminello lemons — Sicily's most historic citrus variety known for its aromatic intensity and high juice content.

Its latest innovation underlines Stock Spirits Group's ambition to stay ahead of consumer trends while furthering its aim of becoming a leading player in the mainstream spirits sector. With RTD volume growing at a CAGR of 9% between 2019 and 2024 (IWSR), a Limoncè RTD was a logical next step for the group, which last year launched a range of canned margaritas for its Sierra Tequila brand.

"RTD spritzes are one of the most dynamic parts of the aperitif category," says Martin. "In many European markets, they're outperforming the wider RTD segment. By bringing the spritz into a ready-to-drink format, they're expanding the aperitivo moment beyond bars into outdoor, on-the-go and at-home occasions while attracting new consumers through convenience and consistent quality."

With sales showing no signs of slowing, Martin sees plenty of room for growth. "While the spritz has traditionally been closely linked to the on-trade, we are also seeing the emergence of new scalable occasions such as festivals, summer rooftops and terrace activations."

For the second year, Limoncè is an official sponsor of the Infiorata di Noto festival in Sicily, which Martin says "attracts tens of thousands of local and international visitors each year, providing a natural platform to celebrate the brand's Sicilian heritage".

Although spritz consumption still peaks in spring and summer, she believes the serve is increasingly finding a place across more occasions. Martin adds: "Taken together, we see these dynamics as helping to push the spritz category forward, encouraging innovation, new occasions and continued growth." GDI

Aperitivo is evolving and expanding: Welcome to 'the year of the spritz 2.0'

Aperitifs and spritzes are gearing up for another bumper summer in the Northern Hemisphere, with new flavours, no/low and RTD releases set to drive renewed growth. **Richard Woodard** reports



A 'shift towards natural flavours rooted in Mediterranean ingredients' inspired Stock Spirits' Limoncè

Against a troubled backdrop for beverage alcohol, the aperitivo occasion — and the near-ubiquitous spritz serve — offer a beacon of hope, with consumers continuing to embrace earlier, lower-energy and more casual occasions and the drinks that go with them: refreshing, photogenic and easy to create.

But change is in the air. According to Luxardo export manager Matteo Luxardo, 2026 is "the year of the spritz 2.0" as the serve evolves from its classic origins (bitter orange plus prosecco and soda) to more elaborate combinations involving amari, vermouths, liqueurs, citrus cordials and botanical aperitifs, with saline or acid adjustments, and umami notes achieved with olive brine or herbal modifiers.

At the same time, however, there is an apparently contradictory appetite for simplicity. "Younger LDA consumers are actively seeking novelty and discovery, but they prefer flavours that feel accessible rather than challenging," Luxardo says.

"Instead of embracing intensely bitter, amaro-forward profiles, they gravitate towards bright citrus such as lemon, blood orange and grapefruit; gentle florals like elderflower, rose and hibiscus; and juicy fruit notes including peach, berry and tropical fruits. This reflects a desire for complexity without confrontation. They want drinks that feel elevated and interesting, but still easy to enjoy from the first sip."



Younger LDA consumers are gravitating toward 'bright citrus' profiles, according to Luxardo

New spins on the spritz

A similar dynamic is reported at Rossi d'Asiago Distillers. "The spritz serve today has expanded as consumers tend to experiment more and are willing to try different flavours," says international marketing manager Cinzia Tosato. "Fruity and citrusy notes are flying, with limoncello spritz leading the way as one of the biggest trends in the market when it comes to spritz and aperitivo, thanks to its bright appearance, zesty taste and flavourful profile."

Tosato adds that the limoncello spritz has become the "cornerstone" of the company's strategy for Rossi Limoncello, with the aperitivo occasion also central to its work with Kranebet Italian Botanical Gin via the KranebeTonic serve. In a more experimental vein, the on-premise is being targeted with new flavour combinations using Volare liqueurs, such as the lychee or passionfruit spritz.

Stock Spirits Group has noticed growing interest in "more aromatic and layered profiles", such as elderflower, mint and lavender, according to CMO Anne Martin, who describes the latter as "emerging as a rising star for the complexity and colour it brings to the glass".

She adds: "More broadly, there's a meaningful shift towards natural flavours rooted in Mediterranean ingredients and traditions, thinking that directly inspired our Limoncè innovation last year." (Stock Spirits' 14.8% ABV Aperitivo designed specifically for the spritz occasion launched in France, Germany, Poland, Italy, Czechia, the Balkans and Slovakia last March.)

Martin believes there's a geographic twist to these trends, however. "In Southern Europe, the spritz remains closely tied to established aperitivo culture, while markets like the UK and Northern Europe tend to see more experimentation with flavours, serves and occasions," she explains. "But the common thread is consistent: consumers everywhere are looking for drinks that combine great flavour, sociability and a strong visual presence." »

Portfolio approach

» This increasing diversity necessitates a portfolio approach to find success. Campari Group focuses strongly on category colossus Aperol, but its aperitivo stable also includes Campari itself, plus Cynar, Sarti Rosa and Crodino.

"The spritz ritual is becoming increasingly year-round, with consumers drawn to more experiential drinking moments where versatility, refreshment and storytelling play a central role," says Campari Group managing director house of aperitifs Andrea Neri.

Alongside flavour, aesthetic appeal also counts. "Spritzes are highly visual drinks, and that matters," says Luxardo. "Platforms like TikTok and Instagram reward light, pastel or vibrant colours, effervescence [demonstrated by] visible bubbles, elegant glassware, fresh garnishes — like citrus wheels, herbs and edible flowers — and aspirational lifestyle cues, such as terraces, sunsets and aperitivo moments. Flavour trends increasingly align with this visual language."

Beyond flavour and visual appeal, product innovation in the aperitivo/spritz space also encompasses ABV and format. "Wine-based aperitifs and vermouth-style profiles are benefitting from the broader shift towards lighter, more sessionable consumption," says Marie Brizard Wine & Spirits (MBWS) international brand director Caroline Alzieu.

"The no/low-alcohol segment is also growing as consumers seek variety in social drinking occasions. We also adapt to specific market needs by offering selected classics in lower-ABV versions, such as Triple Sec and Blue Curaçao at 18%."

It's a view echoed by a De Kuyper Royal Distillers spokesperson: "Younger LDA consumers, particularly Millennials and Gen Z, are reducing their alcohol intake while maintaining social participation. This highlights the necessity for non-alcoholic products.

"With the broad offering already in non-alc beers, and with the increasing popularity of non-alc cocktails, if spritzes want to remain relevant, they also need to come with their non-alcoholic equivalent."

'High potential' of non-alc

And brand owners are answering that call. Henkell Freixenet head of communications Vanessa Lehmann sees "high potential" in non-alcoholic aperitifs, including the company's Mionetto Aperitivo Alcohol Free and just-launched Mionetto Ready-to-Serve Alcohol Free, as well as the incoming Freixenet Solare alcohol-free variant. »

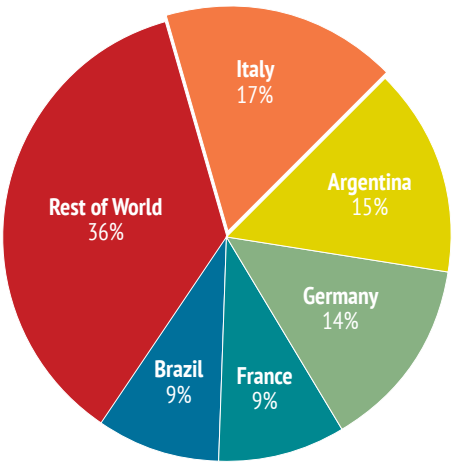


Campari Group revealed a new bottle design for market leader Aperol last month, reinterpreting the aperitif's classic appearance with a contemporary Italian look featuring rippled glass and a simplified label

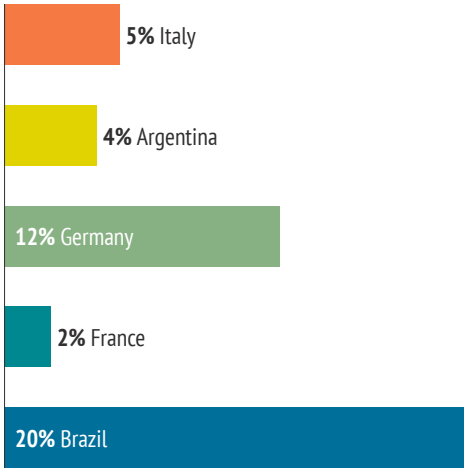
DATA DROP

Top 5 Countries for Spirits & Wine Aperitifs

Market Share (Volume) 2024



Volume Change 2023–24



Source: IWSR, the global leader in beverage alcohol data and insights. Figures rounded to the nearest whole number

KEY TAKEAWAYS

- The successful aperitif and spritz category is becoming more sophisticated, although younger consumers seek more accessible flavours.
- Key foundations for success include an understanding of local trends, a portfolio approach and a focus on the visual appeal of serves.
- Aperitifs and spritzes capitalise on consumers' desire for lighter and more sessionable drinks, with lower-ABV levels — or no alcohol at all.
- RTDs are another key growth area, opening up new consumption occasions, such as at-home entertaining and festivals.
- The success of the category has made it very competitive, but brand owners are optimistic that growth will continue.

MAKE it PEACHY



TRY THE NEW PEACHTREE SPRITZ

» Lehmann says of Gen Z consumers: "While they are not abandoning alcohol, they are reshaping drinking culture in ways that make alcohol-free options more relevant, more acceptable and more expected than ever before."

Bottega MD Sandro Bottega needs no convincing of the importance of no-alcohol, having launched Bottega 0 Rosé and Bottega 0 White four years ago. "Our portfolio also includes Elixir 0 Bottega, a non-alcoholic 'amaro', and Limoncino 0.0," he says. "We are also studying an alcohol-free version of our Lemon Spritz."

For Campari's Neri, non-alcoholic aperitifs such as Crodino have become "a fully integrated part of the category, offering the same ritual, quality and flavour credentials as alcoholic serves". He adds: "Consumers are no longer seeking substitutes, but genuinely satisfying aperitif experiences, whether alcoholic or alcohol-free."

RTDs as a recruitment tool

RTDs are another significant growth area, with different formats targeting different consumption occasions. Bottega introduced its premixed Lemon Spritz in 2023, available in 20cl bottles, 25cl cans and 75cl bottles, and Sandro Bottega says it is a "best seller" in the airline channel. Likewise, Lehmann says Henkell Freixenet's new Mionetto Aperitivo RTS — available in a 20cl bottle, with and without alcohol — is a response to consumers gravitating to smaller formats because of convenience.

Campari's Neri points out that ready-to-drink products are helping to expand consumption occasions. "RTD spritzes play a highly complementary role in expanding the aperitif universe by making the spritz ritual even more accessible," he says, highlighting the company's Aperol RTD and, in the on-premise, Aperol on Tap.

"They bring the experience into new occasions such as at-home socialising, outdoor moments, festivals and informal gatherings. From an occasion perspective, RTDs target spontaneous and convenience-led moments, recruiting new consumers and expanding usage occasions, rather than replacing the classic spritz serve." (For more on RTDs, see p20.)

Challenges and opportunities

The aperitif and spritz scene is dynamic and fast-paced, but — because of its success — also highly competitive. "The main challenges in the RTD and spritz market include increasing competition and market saturation as more brands enter the category," says Alzieu of MBWS. "In markets such as the UK, where the spritz has become extremely popular as a summer drink, everyone is jumping on the trend, making it even harder to stand out."

Other challenges highlighted by Alzieu include the impact on pricing and margins of the UK's new duty regime (see UK Market Analysis p38), potential consumer confusion in a cluttered marketplace and seasonality — aperitif and spritz consumption remain closely tied to summer sunshine, although Henkell Freixenet's Lehmann points to a notable sales spike in December in the UK.

De Kuyper Royal Distillers also pinpoints the impact of economic pressure and health/moderation concerns on the on-premise, which remains a key channel for trial and sampling, as being areas of concern.

But most in the industry remain optimistic that aperitif/spritz consumption is still some way short of its likely peak. "There are still opportunities to further develop the aperitivo ritual in some countries," says Stock Spirits' Martin.

"In places where the tradition is less established, consumers may benefit from clearer guidance on how to enjoy the serve and the different styles available. Retailers are also increasingly introducing dedicated spritz sections on shelf, helping shoppers navigate the growing range of brands more easily."

Henkell Freixenet's Lehmann sees a "behavioural shift" in consumption as aperitifs and spritzes — and sparkling wine in general — transcend fixed occasions and become more embedded in everyday life. "The spritz not only represents an easy-going lifestyle," she adds. "It's simple to prepare and marks the transition from work to leisure, inviting people to relax, unwind and enjoy time together."

Matteo Luxardo dismisses concerns about potential challenges such as competition and seasonality. "The spritz/aperitif category is not structurally weak — it's structurally competitive," he argues.

"The brands that will win are those that offer clarity on a crowded shelf, balance bitterness with accessibility, engineer around duty intelligently, own specific occasions, deliver credible no/low options and expand beyond summer. The challenge is not demand — it's differentiation, discipline and intelligent portfolio design." GDI



Henkell Freixenet's ready-to-serve, alcohol-free Mionetto Spritz is being rolled out in several markets including Germany, Austria, Poland, Czechia and the Baltics this month. The RTS also comes in a 5.9% ABV version



Marie Brizard Aperitivo uses vibrant visuals with a focus on French savoir-faire *to create standout*

Aperitifs & Spritzes

With new flavours, serves and formats, brand activity reflects the continuing evolution and diversification of spritz and aperitivo consumption



Henkell Freixenet's new Mediterranean aperitivo

Henkell Freixenet has launched Freixenet Solare, a Mediterranean aperitivo made using Spanish lemons, clementines, rosemary and botanicals, into 15 markets from March 2026, with an alcohol-free version due in June. Marketing invites consumers to "taste the sun", with a 3-2-1 signature serve combining Freixenet sparkling, Solare and sparkling water, plus a lemon garnish.



Campari targets fresh occasions

Aperol owner Campari Group is aiming to expand the aperitif ritual into new occasions by launching Aperol and Campari Spritz RTDs, as well as scaling Aperol on Tap in the on-trade following successful pilot programmes in 2025 — all part of an effort to deseasonalise demand beyond the summer months.



Bottega champions the melon spritz

Italian producer Bottega is promoting a new, melon-centred spritz variation, combining Bottega Meloncino liqueur with Bottega Prosecco, soda water and ice, garnished with a half-slice of melon and served in a long-stemmed wine glass. The serve aims to tap into the trend towards fruit-forward spritzes with bright flavours.



De Kuyper spotlights Peachtree spritz

De Kuyper Royal Distillers has revamped its Peachtree peach liqueur, moving from clear to peach-coloured liquid and promoting the Peachtree spritz hero serve via neckhangers, plus media and tasting activities, said to be "essential for consumer discovery". A canned Peachtree Spritz RTD is due to be launched this month.



Stock expands Limoncè franchise

Stock Spirits will add a Limoncè Spritz to its Limoncè limoncello range this month — a wine-based RTD spritz made with Sicilian Femminello lemons and bottled at 8% ABV. Limoncè will also sponsor the Infiorata di Noto festival in Sicily for the second year, using sampling, storytelling and immersive brand experiences to target tens of thousands of festival-goers.

Sustainability matters

Q&A with *Champagne Telmont CEO Ludovic du Plessis*

Champagne Telmont won Green Packaging Initiative of the Year at the Global Drinks Intel ESG Awards 2025 and Sustainable Wine Product in 2024. What recent ESG initiative or improvement are you most proud of? One milestone we are particularly proud of is becoming, in 2025, the first Champagne House to achieve Regenerative Organic Certified [ROC] certification on our organic certified vineyard.

ROC goes beyond organic farming: it requires the complete elimination of synthetic inputs while also promoting soil regeneration, biodiversity and fair conditions for the people who work the land. It reflects the philosophy we have been pursuing for years, that "the wine is good if the Earth is beautiful". Great wine can only come from living soils and a healthy ecosystem. This certification is an important step in our long-term ambition to convert 100% of our vineyards, and those of our partner growers, to organic and regenerative agriculture by 2031.



What is the biggest ESG challenge facing the drinks industry today? The speed of transformation. Climate change is already affecting vineyards around the world — over the last 30 years, the average temperature in the Champagne region has increased by about 1.1°C — and the drinks industry must accelerate the transition to more sustainable agricultural practices while drastically reducing its carbon footprint.

Telmont has the ambition of reaching net zero by 2050, which means reducing our emissions by around 90% across the entire value chain. This requires rethinking everything, from farming methods and packaging to logistics and energy use. The good news is that innovation is everywhere; the real challenge now is collective action and scaling these solutions across the industry.

What one piece of advice would you give companies looking to strengthen their ESG performance? If there is one message we would share, it is that you can be radical and still grow. Too often, sustainability is perceived as a constraint, or a cost. Our experience at Telmont shows the opposite: bold decisions — whether removing gift boxes, stopping air freight, or investing in organic and regenerative viticulture — can strengthen a brand and resonate deeply with consumers. When sustainability is authentic and embedded in the core of your strategy, it becomes a driver of trust, differentiation and, ultimately, growth.

How has winning an ESG Award influenced your approach? These recognitions are incredibly encouraging for our teams! They confirm that bold decisions — whether launching a 100% organic cuvée like Réserve de la Terre, awarded Sustainable Wine Product in 2024, or pioneering innovations such as the 800g champagne bottle, which received Green Packaging Initiative of the Year in 2025 — are meaningful achievements.

More than anything though, awards motivate us to go further and faster. Sustainability is a long journey, and recognition from the industry strengthens our conviction that change is possible when ambition and vision meet action, in the name of Mother Nature!

IARD roundup *Drinks industry ESG activations from the not-for-profit's brand-owner members*

ENVIRONMENT

Carlsberg launched its refreshed 'Brewing Tomorrow' ESG programme, raising its ambitions on emissions reduction while adapting its sustainability roadmap to account for its purchase of Britvic in 2024.

Moët Hennessy is to hold the third edition of its 'World Living Soils' forum at Luma Arles in **France** in June. This year, representatives from Pernod Ricard will be joining the forum's Advisory Board.

In **Japan**, **Suntory** will be participating in the International Horticultural Expo 2027 in Yokohama. GREEN×EXPO 2027's main theme will be 'Scenery of the Future for Happiness'.

SOCIAL

In **the US**, **AB InBev** visited Georgetown University's McDonough School of Business to discuss the results of its ten-year 'Global Smart Drinking Goals' programme with students and faculty. The business school recently published a case study evaluating the programme, providing AB InBev with an opportunity to examine how it can continue scaling evidence-based best practices.

Carlsberg's record for producing the world's smallest beer bottle in 2025 has been overturned by students from the KTH Royal Institute of Technology in **Sweden**, with a new bottle that is 4mm tall. The original 20mm bottle, unveiled by the brewer last year, was created to promote moderation.

In **the US**, **Molson Coors Beverage Co**'s Miller Lite brand fronted its latest 'Free Rides' initiative, offering safe bus journeys home all night long to St Patrick's Day revellers in Milwaukee and Minneapolis.

GOVERNANCE

In **Japan**, **Kirin** is continuing its partnership with the Japan Football Association (JFA) for its eighth annual walking football event in Chiba.

Moët Hennessy is launching an internal responsible drinking campaign, created by employees for employees. 'I Drink Respectfully' will promote a culture of moderation, respect and responsibility as part of its commitment to foster responsible drinking.

*Visit **www.drinks-intel.com** for a full roundup of IARD members' ESG efforts*

Are drinks consumers tiring of sustainability messaging?

As consumer fatigue and suspicion of corporate green claims increases, beverage alcohol brand owners must work harder to get their message through. **Jessica Broadbent** reports



Frugalpac CEO Malcolm Waugh: 'Sustainability has become extremely important to today's alcohol consumers, far more than it was even a few years ago'

Around 64% of consumers believe companies have a responsibility to solve environmental issues, according to Kantar. But for those not keeping up with the latest innovations, the task of shopping 'green' can be off-putting.

"Consumers have a lot on their plate at the moment," says Carlsberg's global head of sustainability & ESG, Simon Boas Hoffmeyer. "We know there is a fatigue around corporate green claims."

"There is fatigue and suspicion of claims that are hard to understand, not to mention the myriad certification landscape," adds sustainability consultant Anne Jones, who works with conference organiser Sustainability in Drinks.

You can't blame some frazzled shoppers for just wanting to grab a six-pack and go.

"I don't think people have stopped caring — especially not younger generations," says Frugalpac CEO Malcolm Waugh. "What we see is that consumers are more sceptical of greenwashing and empty claims. In tough times, they still value sustainability, but they appreciate when it comes with tangible benefits or at least no extra burden on them."

The 'say-do gap'

Despite continued interest in sustainability, there is a gap between what we'd like to do and what we do — the so-called 'say-do gap'.

"If someone said: 'Do you want to drink unsustainable wine?', you'd be mad to say no," says wine consultant Joe Fattorini. "Similarly, if someone says: 'Do you want to drink sustainable wine?', you feel you ought to say yes whether or not you know what that is."

Fattorini estimates that only a quarter of people are genuinely committed. The rest are split between the "say-do gappers" and those who actively don't engage.

A report by consultancy firm PwC claimed consumers were willing to spend 10% more on sustainably produced or sourced goods despite cost of living pressures.

"There's just a real danger of people in the business being misled by a headline [like that]," says Fattorini. "If you built your strategy around that you'd alienate 30% of shoppers who actively avoid 'eco' brands, and risk being perceived as either reducing quality or passing on costs by the 40% who are merely 'eco-considerers'."

Jones adds: "Consumers often say that they are willing to pay more for sustainable items, but we rarely see evidence of that in action. However, consumers will pay to buy into brands that align with their values, so the only real answer is the long, slow building of brand loyalty based on credible, repeated sustainability messaging that is backed by evidence. There is no shortcut!"

Messaging

Amid a lack of time, interest, or simply confusion, some shoppers put their faith in retailers to do the groundwork for them. "Wine is a challenging category to navigate from a sustainability perspective," says Jones. "Consumers often use their retailer as a 'proxy' to align with their values — for example, a local organic wine bar or a supermarket where they trust their environmental credentials in other categories."

But even getting listed in so-called 'sustainable' retailers is not a sure win for brand owners. Fattorini cites an Italian winery that took the prominent, green word 'organic' off its labels in Sweden's notoriously eco-conscious Systembolaget monopoly. "People believe that if you do a 'good' thing like this you must either have to charge them more, or compromise on quality, and it affected sales," he explains.

Boas Hoffmeyer says the relevant level of messaging and on-pack claims varies between products and geographies, but there will soon be an expectation that beverage companies are "doing their part". He adds: "We believe this will increasingly become a prerequisite, like their expectation that products are safe and of high quality."

Overcoming green fatigue

Asking how brand owners can overcome green fatigue, there was one consistent message: "Keep it relevant to people's lives".

Waugh explains: "If you can tie eco-friendly choices to quality, convenience or value — for example: 'this lighter bottle is easier to carry and won't break, plus it cuts CO_2' — you're addressing their daily concerns and the planet. Brands that are transparent, factual and creative in showcasing their sustainability efforts will cut through any fatigue and build trust." GDI



Carlsberg aims to source 50% of its raw materials from regenerative agricultural practices by 2032

Global Drinks Intel ESG Awards return, redesigned and ready to inspire action

We've listened to industry feedback and refreshed our ESG Awards to drive the kind of cross-industry innovation that raises the bar for everyone, writes GDI ESG Awards chair of judges **Rosie Davenport**



The 2027 GDI ESG Awards programme has four distinct categories to recognise environmental efforts

When we set out to redesign the Global Drinks Intel ESG Awards this year, the starting point was a simple question: do these awards reflect the drinks industry as it actually is now? The answer required some honest reflection.

The drinks industry operates at the sharp end of climate change. Harvests are being disrupted, water is becoming scarcer, and agricultural supply chains are under pressure that would have seemed extreme a decade ago.

At the same time, the bar set by consumers, investors and retail partners has risen sharply. ESG is no longer a reputational nice-to-have; it is a commercial and operational imperative, and the scrutiny applied to it has intensified accordingly. Producers, retailers and brands are doing more sophisticated, more ambitious sustainability work than ever before, and they are being asked to prove it in ways that were not expected of them even three or four years ago.

The 2027 programme is the most comprehensive version of the GDI ESG Awards to date. The changes we have made are substantive, driven by feedback from across the industry and by a clear ambition: to inspire more action, share ideas and drive the kind of cross-industry innovation that raises the bar for everyone.



Rosie Davenport, GDI ESG Awards chair of judges

A wider stage

For the first time, the awards span the full breadth of the drinks sector. Spirits, wine, beer, cider, RTD and seltzer and no/low alcohol each have their own producer categories, with a meaningful split between large companies and smaller independents.

A craft cider producer that has been on its sustainability journey for 18 months is measured very differently from a multinational with a decade-long programme and a dedicated team. What we are assessing is the quality and measurable impact of the commitment relative to where a company started and the credibility of where it is going.

Retailers and hospitality operators now have their own section of the awards entirely. This reflects a reality that the industry has been slow to acknowledge: the buying decisions made by major grocers, pub groups and travel retail operators have as much influence on sustainability outcomes as anything happening in the distillery or vineyard.

What gets listed, what gets ranged, what packaging standards get set for suppliers — these are commercial levers with real environmental and social consequences, and they deserve proper recognition.

> *ESG is no longer a reputational nice-to-have; it is a commercial and operational imperative, and the scrutiny applied to it has intensified accordingly*

Going deeper on the environment

The 2027 GDI ESG Awards programme gives environmental action the space it deserves, with four distinct categories:

- Climate and carbon action
- Water stewardship
- Nature and biodiversity
- Waste and circular economy

Each category has its own clear criteria and will be assessed by judges with relevant expertise.

The drinks industry faces genuinely distinct environmental challenges across these areas, and the most compelling work deserves to be recognised on its own terms rather than in competition with initiatives addressing entirely different issues. »

What we are rewarding

» The judging framework of the GDI ESG Awards has been rebuilt from the ground up to reflect what we believe genuine sustainability leadership actually requires.

Every entry is assessed across five equal areas:

- Strategy and governance
- Environmental performance
- Social impact
- Progress and trajectory
- Innovation and ambition

The framework is designed to recognise companies that take a truly holistic view of sustainability and can demonstrate progress across every dimension of ESG.

That includes the 'S', which is too often overlooked in drinks despite the industry's deep dependencies on people, from vineyard workers and distillery communities to the consumers it serves.

An organisation that scores exceptionally on environmental performance but has little to say on social impact will find it difficult to be considered a true sustainability leader.

Social impact also has one of the most interesting categories in the initiative section this year, and I would particularly encourage entries from companies running employment programmes for people facing barriers to work, investing in the communities around their operations, or doing exceptional work with growers and agricultural supply chains.

This is where some of the most compelling, under-recognised work in drinks sustainability is happening.

An open invitation

One change worth highlighting specifically: brand owners, importers and distributors who do *not* own production are explicitly welcome in the initiative categories.

These categories recognise specific programmes and actions, not overall company performance. If your organisation has done something exceptional in one area — for example, dramatically reduced water use, developed an innovative packaging solution or run an outstanding community programme — there is a category for it here, regardless of where you are on your broader sustainability journey.

You do not need a comprehensive ESG programme to enter, just one genuinely trailblazing initiative.

Entries open 13 April 2026

The entry window opens this month, and winners will be announced December 2026.



Image: iStock.com/Domenec

Social impact is where some of the most compelling, under-recognised work in sustainability happens

Whether you are a large producer with a sophisticated programme, a smaller independent taking your first serious steps, a retailer using your commercial power to shift the needle, or a brand doing something genuinely new, there is a category for you.

The GDI ESG Awards exist to celebrate the companies and people making that happen, to shine a light on what good looks like, and to inspire others to go further. This is your opportunity to show the industry what genuine sustainability leadership looks like, and to inspire others to follow. GDI

Full details on the GDI ESG Awards 2027 & category information at ***gdiesgawards.com***

ENTRIES OPEN 13 APRIL 2026

global drinks intel ESG AWARDS 2027

WHY ENTER?

Recognition based on verified evidence, assessed by an independent panel of ESG and industry experts. Whether you're a global leader or a growing independent, gain credible validation that strengthens:

- Buyer conversations.
- Retailer listings.
- Consumer trust.
- Investor confidence.
- Internal morale & team pride.

WINNERS ANNOUNCED DECEMBER 2026

Impact Focus

Scan QR code to discover more, or visit gdiesgawards.com

On to the next: The ready-to-drinks taking share from hard seltzers

As demand for hard seltzers continues to soften, thirst for lighter, sessionable products and a growing premiumisation trend are keeping the ready-to-drink category in the green. **Eloise Feilden** reports



White Claw moved into the RTD cocktail subcategory with hard seltzer and cocktail hybrid ClawTails

Once touted as the poster child of the RTD category, hard seltzers have had a sharp fall from grace. IWSR data show that after strong growth in 2020 and 2021, global consumption has been in decline, with value down 8% and volume falling 10% from 2023 to 2024 alone.

"Hard seltzer consumption is concentrated in two key markets, the US and Canada, and has failed to gain significant traction in other RTD markets," says IWSR head of RTD insights Susie Goldspink.

The category is dominated by big brands which make up most of the market. White Claw remains one of the category leaders with an estimated 58% share of the market. Having expanded beyond the US in 2020, it has become a "significant player" in Canada, Australia and Ireland, according to Michael Dean, marketing director EMEA at parent company Mark Anthony Brands. In the UK, "we account for 98% of hard seltzer sales, making the White Claw name truly synonymous with the hard seltzer space there", Dean says.

Even so, White Claw has not been insulated from the drop in demand. Early last year, it responded to increasing demand for cocktails with cocktail-inspired malt beverage line ClawTails and its first spirits-based RTD range, Tequila Smash. Then in October, Mark Anthony Brands halted production at its Hillside facility in New Jersey, citing "recent alcohol industry slowdown" and axing 147 jobs.

Even in its biggest markets, hard seltzer is past its prime. Goldspink says: "In North America, hard seltzer consumption peaked during the pandemic, when it was embraced as a convenient, refreshing, flavourful single-serve option. Extremely high innovation rates followed, but these products offered little differentiation and the market became saturated. Recruitment of new consumers slowed and existing consumers became less engaged."

Competition from other RTD products has further depressed hard seltzer volumes, Goldspink says, with premium cocktails and hard teas taking market share.

Indeed, IWSR data shows that hard teas are seeing the biggest global growth of any subcategory, with volume up 27% year on year 2023–24. The category has grown at a rate of 26% CAGR over the five years to 2024.

AB InBev, Diageo bet big

More broadly, demand for the ready-to-drink category remains in good health. Volume for the category as a whole grew at a CAGR of 9% between 2019 and 2024, according to IWSR, with consumption rising in all the top five markets — the US, Japan, South Africa, Australia and Canada — over the same period.

Continued investment by global players signals that this growth will continue. AB InBev completed the acquisition of US RTD brand BeatBox in February, which joins its Beyond Beer portfolio alongside brands including Cutwater Cocktails, Nütrl, Brutal Fruit and Flying Fish.

AB InBev has reported revenue growth of 23% globally for Beyond Beer, which now represents 3% of total revenue for the world's largest brewer.



AB InBev acquired an 85% stake in RTD brand BeatBox for US$490m in February

"Our Beyond Beer portfolio continues to drive incremental growth and meet consumer demand, offering options for every taste and occasion, ranging from spirits-based RTDs and real cocktails in a can to malt-based RTDs and flavoured malt beverages, hard seltzers and spritzers," says AB InBev president of balanced choices & beyond Bruno Cosentino. »

Wood wonders

A customization where every layer tells a story.

Presenting Multilayer Effect



Tapi | UNIQUENESS ON TOP

+39 049 57 97 300

info@tapigroup.com

tapigroup.com

SHAKE-POUR-SERVE

READY TO SERVE COCKTAILS



@SHAK.R_COCKTAILS

SHAK·R COCKTAILS

PLEASE DRINK RESPONSIBLY // WWW.SHAKR-COCKTAILS.COM

» Diageo, too, continues to bet big on the category. After what was a tough 2025, Diageo is looking to save approximately US$625m over the next three years. In August, the drinks giant offloaded two Australian RTD brands to Vok Beverages, and interim CEO Nik Jhangiani has said the disposing of "non-core, non-strategic" brands is "moving at pace".

But more broadly, Diageo's confidence in the category remains strong. "We believe the opportunity in RTDs is significant for Diageo," says global convenience director Samori Gambrah. Indeed, the UK-based multinational is witnessing continued growth of the category in four out of five of its key regions globally, largely led by Smirnoff Ice, which turns 27 this year.



Non-alcoholic agave brand Parch believes drinkers want to 'drink better, less and differently'

Rise of no/low and refreshers

The fall of hard seltzers has coincided with rising demand for refreshers. Defined as light, flavoured, sessionable alcoholic beverages, refreshers have a lower ABV and have gained ground alongside growing popularity for no/low-alcohol drinks.

"Strength in performance by hard refreshers is likely driven by their sessionable and refreshing positioning," says IWSR's Goldspink. "Like consumers who prefer hard seltzers, hard refresher consumers can participate for longer in an occasion and enjoy products that are potentially more affordable than cocktails."

The moderation trend has also given rise to new opportunities for non-alcoholic RTDs, which grew 9% in volume year on year in 2024.

"Modern drinkers are looking for options to help them drink better, less and differently," says Ila Byrne, co-founder of alcohol-free agave brand Parch. The brand uses adaptogenic ingredients — including ashwagandha, L-theanine and American ginseng — in place of alcohol.

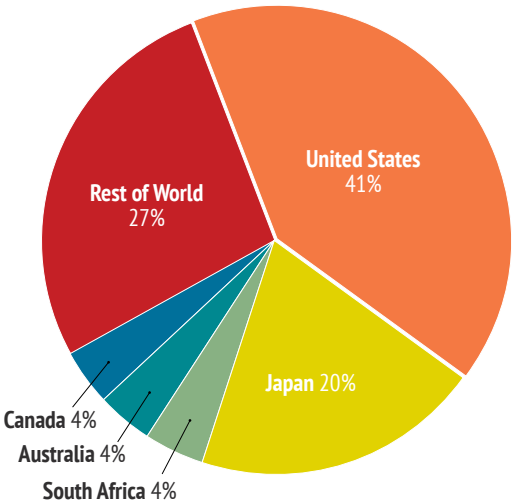
Byrne says Parch is tapping into "the sheer dominance of alcoholic agave beverages, the rapidly expanding alcoholic RTD category and the emergence of functional beverages" to offer something new to the market.

IWSR predicts that 'alcohol adjacents' — drinks made with mood-boosting and functional ingredients like CBD, adaptogens and nootropics — will experience a significant rise in the coming years, having posted 11% volume growth in 2025 alone.

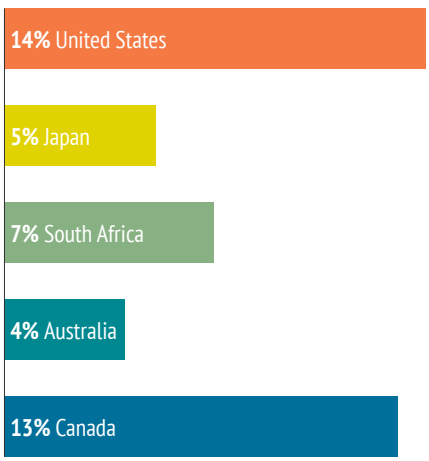
Parch is poised to engage with rising consumer demand in this space, "expanding rapidly" across its home market of the US, with sights set on Canada, Latin America, Asia, Australia and the Middle East. »

DATA DROP

Top 5 Countries for RTD Consumption
Market Share (Volume) 2024



Volume Change 2023–24



Source: IWSR, the global leader in beverage alcohol data and insights. Figures rounded to the nearest whole number

KEY TAKEAWAYS

- After strong growth in 2020 and 2021, global hard seltzer consumption has been in decline, with value down 8% and volume falling 10% from 2023 to 2024.
- Competition from other RTD products has further depressed hard seltzer volumes, with hard teas, canned cocktails and sessionable refreshers gaining ground.
- The moderation trend has also given rise to new opportunities for non-alcoholic RTDs, which grew 9% in volume year on year in 2024.
- New innovation in the on-trade suggests that the future of RTDs will tap into the need for convenience behind the bar and at home.

Cocktails at home and away

» Premiumisation and at-home cocktail culture is also driving success for canned cocktails and spirits-based RTDs, which are proving to be a bright spot for Suntory Global Spirits.

The company has expanded its vodka-based -196 brand in Australia and, in the US, has launched a collaboration between its On The Rocks premium cocktails and bourbon brand Jim Beam.

"From a topline perspective, RTD is driving a lot of the growth in the spirits category and it's where the consumer is going, with a move toward flavour and convenience," says Suntory Global Spirits president of global ready-to-drink Davin Nugent.

Dutch distiller De Kuyper has also witnessed solid growth of spirits-based RTDs, particularly premixed cocktails, and the company's latest innovation hints at the future potential for the RTD category.

Having debuted ready-to-serve 0.0% cocktails in late 2025, the distiller has now launched draught cocktails in 20L kegs designed specifically for "high-volume on-trade", says global marketing director Godelief van Erve.

"Both scale bar-quality cocktails amid rising demand and staff shortages," she says, suggesting that the convenience and flavour innovation offered by the category has potential behind the bar, as well as at home. GDI



Suntory Global Spirits' On The Rocks cocktail brand debuted its canned RTDs last May



De Kuyper is betting on draught cocktails specifically for the 'high-volume on-trade'

From mushroom to ube, RTD flavours of the future

With new products launching all the time, the global RTD market has become fairly saturated, and keeping up with constantly evolving consumer tastes is the only way to ensure survival in a highly competitive category.

Flavour is a "key purchase decision maker" for RTD consumers, according to Diageo global convenience director Samori Gambrah, so keeping on top of flavour trends is critical for RTD brands.

Consumers today are "explorers at heart" and eager to engage with drinks that tell a story and offer a sense of place, says Suntory Global Spirits president of global ready-to-drink Davin Nugent.

"The RTD category offers the opportunity for a lot of flavour exploration that is resonating with younger legal-drinking-age groups like Millennials or Gen Z, who are seeking approachable and adventurous flavours that fit into their social and lifestyle occasions," he says.

But products still need to strike a balance, finding flavours which are both intriguing and familiar.

Vok Beverages head of creative & senior brand manager Michael Newbold says: "It's not just about bold flavour — it's about getting the balance right. Consumers are looking for drinks that deliver great flavour but are still easy to drink and sessionable, with the right mix of sweetness and acidity".



Australia's Vok Beverages reports interest in non-citrus tropical and fruit-forward combinations

Lemon to lose dominance

So which flavours are on the rise, and which have peaked?

We are coming to the end of citrus flavours dominating, says Newbold. "Lemon will remain a huge part of RTD sales, but we're seeing growing interest in more tropical and fruit-forward combinations. Flavours like guava, passionfruit, mango and lime are gaining traction, especially when they're paired together to create something a bit more layered and interesting."

Asian-inspired flavours like matcha and ube also continue to find success, as are umami-forward combinations.

Coffee offers great diversity to RTDs, says Ila Byrne, the co-founder of adaptogenic non-alcoholic agave brand Parch. "Coffee is one of the most playful flavour spaces to watch as it blends nutty milk flavours with juicy sweet fruits and earthy ingredients like mushrooms, sesame and ube," she says.

'Green' flavours are also having a moment, Byrne adds, driven in part by the recent matcha boom which has brought grassy notes to the fore in both food and drink.

RTDs & Refreshers

The RTD category represents a vast range of product types. From canned highballs and sparkling meads to flavoured shots and premixed cocktails, here's what's new in the world of ready-to-drink

Image: Elizabeth Wiseman



Vital debuts electrolyte-infused hard seltzers

Tennessee-based hard seltzer brand Vital aims to be the category's next generation. Made with a sugarcane base spirit, Vital's new range is infused with electrolytes and carbonation is "dialed down". The result? "Welcome to hard seltzer 2.0," says co-founder Jimmy LaSarre.

SHAK.R gets new flavours

On-premise-focused RTD brand SHAK.R launched in 2025 with four classic cocktail flavours (Margarita, Espresso Martini, Pornstar Martini and Strawberry Daiquiri). Now, the brand, owned by French spirits company and distributor Spiribam, has added two new flavours to the line-up: Mango Colada and Peach Martini.





Cointreau offers a twist on canned cocktails

Maison Cointreau master distiller Carole Quinton has turned her hand to mixology for the launch of two new canned cocktails. The Rémy Cointreau-owned brand has developed an Original and Passionfruit-flavoured Margarita RTD, the first drinks released as part of its Cointreau Cocktail Twists range.

Image: Nick Hook Photography



Lyme Bay expands sparkling mead line

UK meadery Lyme Bay has expanded its portfolio of honey-based drinks with two new flavours. Both the Raspberry Lemonade and Strawberry & Elderflower sparkling meads have an ABV of 3.5%, which the Devon-based brand says is a response to "growing consumer demand for lighter, natural and flavour-driven alcoholic drinks".

Sazerac targets pre-drinks rituals with Baby Shots

US drinks giant Sazerac has tapped into British pre-drinks culture with Baby Shots, a range of premixed cocktail-flavoured shots which it claims translates "familiar behaviour into a ready-to-drink format". Launched in 5cl and 70cl formats, the 15% ABV shots are available in three flavours – Pornstar Martini, Strawberry Daiquiri and Mojito.



On the upside: Are troubling times pushing mixers to the top?

Can transformation in on-premise operations brought about by cost and staffing challenges prove fruitful for premium mixer brands? **Eloise Feilden** reports



Carlsberg Britvic, owner of The London Essence Co, reports that 'more people are looking for flavour-forward mixers that provide a sense of escapism and elevate classic serves'

It's no secret that hospitality venues are having a rough time of it. Fragile consumer spending has exacerbated the impact of sharp rises in ingredient and labour costs.

In Britain, the addition of a higher minimum wage and National Insurance contributions since last April's Budget has created a perfect storm, hurting profit margins and forcing businesses into difficult decisions on staffing levels and opening hours. (See UK Market Analysis p38).

The outlook is bleak both for operators and for the producers which rely on on-premise sales. However, for one category at least, a silver lining has formed around this dark cloud.

Britain's licensed hospitality sector was hit with 382 net closures in the final quarter of 2025, the equivalent of four sites closing per day, according to NIQ's Hospitality Market Monitor. Data from the Office for National Statistics showed that hospitality employed 8,784 fewer people in December 2025 compared with November 2025.

Despite these mass closures, the number of licensed premises stocking soft drinks in July 2025 was virtually unchanged year on year, at just over 95,000 across the UK, and the net result has been stability for the category, according to mixer producer Fentimans' *Premium Soft Drinks and Mixers Market Report 2026*.

The report, released in January in collaboration with NIQ, reveals that soft drinks and mixers outperformed the market in the UK on-premise in 2025. Their combined sales in the 12 months to mid-July 2025 reached GBP4.7bn (US$6.3bn), making soft drinks the third-largest category after beer and spirits, and more valuable than wine.

On-premise efficiency

Part of this success is down to tightening purse strings for operators, according to German mixer brand Thomas Henry. "For bars in particular, rising cost pressures and staff shortages mean efficiency behind the bar has become more important than ever," says director international business Benedikt Fimpel. "This is where premium mixers can make a real difference. With the right mixer, even complex flavour profiles can be delivered in a simple two or three-component highball, prepared in seconds."

As such, adaptability has become essential for mixer brands trying to win over bartenders.

Double Dutch co-founder Raissa de Haas explains: "In the on-trade, bartenders are looking for products that are versatile, reliable and easy to work with across multiple serves. With menus becoming more streamlined, that versatility becomes even more important — a mixer that can work in several drinks is far more valuable than one that only fits a single recipe."

KEY TAKEAWAYS

- Soft drinks and mixers outperformed the market in the UK on-trade in 2025 despite significant venue closures and a downturn in consumer spending.
- Rising cost pressures and staff shortages mean efficiency behind the bar is essential, making mixers an important bartending tool.
- The rise of tequila and mezcal has led to a shift in the flavour profile of the category, with diversity and versatility becoming key.
- Advances in flavour and quality allow mixers to compete with non-alc alternatives and be seen as drinks in their own right.



Already distributed in more than 50 countries, Thomas Henry launched in the US market last July

Beyond gin

The end of the gin boom also means a simple tonic is no longer going to cut it.

At Carlsberg Britvic, which owns mixer brand The London Essence Co, managing director of breakthrough brands Russell Goldman has observed "more and more people looking for flavour-forward mixers that provide a sense of escapism and elevate classic serves". »

» The London Essence Co recently released Riviera Tonic Water, made with rosemary extract (pictured inset), which Goldman says pairs "not only with premium gins, but vermouth and other aperitif-style spirits", offering the versatility now required by premium mixers.

The rise of tequila and mezcal in recent years has also influenced a shift in the flavour profile of the category.



Double Dutch's De Haas says tequila's prominence "has definitely broadened how mixers are used". She adds: "When gin and tonics dominated, tonic water naturally sat at the centre of the mixer category. But as drinks like palomas, margaritas and longer tequila serves have grown in popularity, there's been more demand for mixers that bring bright citrus, subtle bitterness or fresh herbal notes."

The same goes for UK-based Kazimo, a mixer brand which launched in October last year. "We love anything agave-based, and our products are designed to really complement tequila and mezcal, alongside a broader range of spirit pairings," says co-founder Marcis Dzelzainis.

When they set up Kazimo, Dzelzainis, a bartender by trade, and co-founder Andy Sweerts aimed to create a brand which met the demands of busy festival bars and high-volume service environments. Kazimo launched with four flavours — Passion Fruit, Rhubarb, Spicy Watermelon and Yuzu — but Dzelzainis has his sights set on more adventurous ingredients.

"I'm blown away by the variety and breadth of Chinese produce," he says when asked about upcoming flavour trends. "I love working with cherry blossom, I'm really interested in rice wines, and I'm obsessed with oolong tea at the moment."

But brands must be cautious in their approach to flavour innovation. De Haas warns against "just creating more flavours" for the sake of experimentation, at risk of flooding the market with niche products which don't deliver on the all-important versatility.

"Rather than one spirit driving one specific mixer, we're seeing the category move towards more flexible, flavour-driven mixers that bartenders can use across a wider range of drinks," she explains. "Citrus-forward profiles like grapefruit, as well as lightly herbal or botanical flavours, tend to work particularly well with agave spirits while still pairing with gin, vodka or lower-alcohol serves."



Kazimo mixers are designed to complement tequila and mezcal, alongside a broader range of spirits

Standalone success

Versatility has also enabled premium mixers to compete with no/low products. Drinks judge & presenter Ruchira Neotia argues that flavour innovation among brands means mixers are becoming "non-alcoholic drinks in their own right", competing with other categories in the alcohol-free space.

"Fever-Tree started this trend by showing how the overlooked mixer can elevate a drink, and now there are variants and brands with such delicious products that have made the actual alcohol optional," she says.

According to IWSR's *2025 No/Low-Alcohol Strategic Study*, non-alcoholic drinks achieved value (+6%) and volume (+4%) growth in 2024, and are projected to deliver a 9% volume rise in 2025. No-alcohol volumes are forecast to expand by 36% to 2029. This ongoing growth provides ample opportunity for flavour-forward brands to shift away from the mixer category and instead market themselves as non-alcoholic alternatives.

Not all brands are keen to make the leap, however. Thomas Henry's Fimpel believes that mixers play an important role in the no/low space, but as a component part rather than an alternative.



Double Dutch launched its Med-influenced Sun & Sea Tonic at NRB 2026 in Manchester in March

"Rather than competing with alcohol-free spirits, mixers enable and elevate the category, helping bars create drinks that are easy to execute but still feel premium," he says. "The no/low-alcohol movement is one of the most dynamic developments in the drinks industry today and increasingly a serious source of business for bars.

"In many metropolitan markets, it's not unusual to see three out of ten drink orders being non-alcoholic, which raises an important question for operators: do you sell a US$4 diet soda, or create a non-alcoholic craft cocktail that can command $12–$15? This is where premium ingredients, and especially premium mixers, become essential."

Hospitality focus

NIQ data cited in Fentimans' report show that the mixer category saw volume and value drop in Britain's grocery channel in 2025, dipping 1% to GBP310m. A damp performance in the off-trade is likely to push brands to focus more heavily on hospitality, where sales remain strong.

Whether positioned as a non-alcoholic serve in their own right, or a fast and efficient flavour enhancer, one thing is clear: mixers still hold an important space on the back bar. GDI

Q&A with Australian Vintage CEO Tom Dusseldorp



Tom Dusseldorp: 'What Poco Vino is going to generate for the business is low volume, high value'

It seems good things really may come in small packages at Australian Vintage, where CEO Tom Dusseldorp is betting single-serve, premium wine brand Poco Vino will transform the company's fortunes. Interview: **Olly Wehring**

You started with Australian Vintage Limited (AVL) at the start of 2023 as CMO and became CEO almost exactly a year ago. What's your background? I worked for Pernod Ricard for about a decade, both in Australia and the UK. I worked across whisky and champagne; Pernod Ricard was my liquor education — a phenomenal business that's very innovative. I left Pernod in late 2014 and moved to food. I've also worked in private equity and service models, and I've created brands in different categories.

About three years ago, an opportunity came up at AVL to be the chief marketing officer, and I jumped at it. I'd never worked in wine — champagne is not wine, it's champagne — and I thought that wine really needed a fresh take.

There was a huge opportunity to change the standardisation that seems to happen in wine, so I dived in.

AVL wasn't in particularly good shape in 2023. I'd love to say that I went in very considered, but I didn't. When it comes to identifying opportunities in companies, one important thing to have is scale and market reach. AVL had these to the extent that most companies would give their left arm for. It also had capacity; if I got something right, AVL would be able to source a million cases of something. I've worked in businesses before where I've driven growth that we couldn't do because we couldn't raise the capital, for example, or install the equipment.

The bones of the business were so good that if we got something right, we could do something transformational.

What I didn't realise was the state of the business — the amount of inventory that we had on our books and the recent write-downs. There were things that happened out of my control. What I could control was the product to market for the consumer. That's what we're now delivering.

What was the first thing you did when you became CEO in May? I got straight into the operations. I went to the factories to find out how much wine we had and where. What was our intake? What were our grape contracts? How were we going to supply ourselves in the future? How did we manage cash flow?

I'd already spent two years building the top line, developing innovation, building market acumen and improving relationships with retailers. We'd been doing a really good job on our commercial business, but the actual focus I needed to get into was how we were going to support the business going forward, with operations that were the right size and fit for purpose.

> *'The bones of the business were so good that if we got something right, we could do something transformational. What I didn't realise was the state of the business…'*

Twelve months on, where do you feel you've got to? The classic CEO answer is: not near enough! I'm pleased we managed to strategically exit our contract with Millewa Vineyard [in July]. It was sad to see it go — we don't want to undo a lot of our history as a vertically integrated wine company, but a lot of companies have to do it. We had to get control of our supply while we grew the business. »

» We managed to sign an agreement where we bought the MadFish brand globally [in May], getting us into the GBP8 [US$10.50]-plus Australian wine segment with a famous operator out of Western Australia, and we've just signed a distribution deal in the UK with Graham Norton and Invivo [in December] — that's a hugely fast-growing and very unique wine proposition. All of this is outside of Poco Vino, which in seven months has achieved sales of AUD15m (US$10.5m).

We're ticking a lot of the boxes in terms of what we've told shareholders to build confidence back into our business. We're listed — we need to demonstrate that we have a future in this industry.

Ultimately, we'll measure the success of our growth and our back end through cash flow. The goal is to achieve neutral cash flow this year and positive cash next year. If we achieve that, then we've really turned the business around.

You released the "format-first, flavour-led, single-serve" Poco Vino brand last year. How's it doing? Before we sold a single case, I signed up to deals that would give you heart palpitations. Everyone was telling me I was crazy — I'm a little bit crazy, but you need someone who's the absolute champion of true innovation, who doesn't really care what rational people are saying. When we went into the project, I had this belief that it wasn't whether Poco Vino would sell, it was how much it would sell.

We started off with annual guidance to the market of around AUD8m (US$5.7m) in net sales revenue, which is pretty ambitious. As we started to get interest from retailers and we understood distribution points, we then upgraded that guidance to AUD15m. In around seven to eight months, we're pushing around 3.5m bottles sold.

Poco Vino sounds like it's a game-changer for AVL given the group's disappointing sales over the last five years. While sales have been flat over the last few years, our profitability has been going down. We've done a good job to stand still, but we now need to grow in margin-accretive categories. Poco Vino contributes nearly four times more margin per case than our standard business. There are 12 bottles in a 2.25L case and each bottle sells for AUD7. A case of McGuigan, meanwhile, contains six bottles that each sell for AUD6–AUD7.

Small format has saved so many categories — look at mini Coke or single Mentos in every meeting room in the world. What Poco Vino is going to generate for the business is low volume, high value.

Who do you see as the brand's competition? The retailers! The biggest challenge has been to convince them to take the jump to give us the space that's required for Poco Vino. Consumers are easy — once we're in place and executing right, consumers are coming in droves.

Among our competitive cohort, nobody else has a born-from-small brand. Other brands do small-format, but theirs is a totally different proposition to Poco Vino, which is about new wine occasions, new wine consumers and new wine opportunities. It's a totally different demographic.

What is Poco Vino's ideal consumer profile? We thought it would be Gen Z, but then we found that purchasing intent — and our sales data support this — was equal across Gen Z, Millennials and Gen X. Boomers, on the other hand, hated it — and continue to hate it. We're only seven months in, though, so we'll get much more data coming through as the brand evolves.



McGuigan Zero 'continues to fly' in the UK, where it launched in 2019 after two years of development

'We've done a good job to stand still, but we now need to grow in margin-accretive categories. Poco Vino contributes nearly four times more margin per case than our standard business'

Looking back on the brand's journey, what did you do wrong? We started with the assumption that Poco Vino was going to bring Australian wine to the world. That changed when we got close to launching in the UK [and asked]: why are we shipping Australian wine to Europe? The UK is generally agnostic on country of origin. They like Australian and they like European, so why don't we look at sourcing it closer to where the manufacturing is to insulate the opportunity, while also opening up more European markets that may not like Australian wine?

When we had that epiphany, the potential of the brand became infinitely bigger.

Is Poco Vino casting a shadow over the rest of AVL's portfolio? McGuigan pays my salary, so it's a really important brand that we haven't taken our eye off one iota. In the UK, McGuigan Zero continues to fly, and Black Label is still growing in its key markets. We also just invested in sponsorship for McGuigan of the Australian cricket team, so we're still massively focused on the brand.

I still believe Poco Vino will be bigger than McGuigan in the next three to five years. We're not there yet, so we need to maintain our core while we grow this very exciting new part of our business.

Are you enjoying yourself? I love it! Today, we're such a lean business, but we also have scale. Australian Vintage is big enough to do something big and small enough to do something fast. That to me is exciting. Don't put me in any other environment. GDI

The full interview is available to subscribers. Join them at ***www.drinks-intel.com/subscribe***

The problem with scotch: Are its troubles cyclical or structural?

Despite a stream of bad news, the scotch whisky industry is chugging away to keep the category evolving and relevant. Could its problems be more medium term than structural? **Jessica Broadbent** reports


Image: Nc'nean

Nc'nean Distillery CEO Annabel Thomas: 'If you create a scotch distillery, you're in it for the long term'

It's been a challenging year for scotch as inventories remain bloated, exports sluggish, and the macro environment trembles under ever-evolving pressures.

The Scotch Whisky Association's (SWA) summary of circumstances is sobering. "We're hearing from across the sector that it is under strain not felt for decades, with many companies cutting jobs, pausing production and pulling back on investment," says director of strategy & communications Graeme Littlejohn.

But producers remain both hopeful and pragmatic. "If you create a scotch distillery, you're in it for the long term," says Nc'nean Distillery CEO Annabel Thomas. "People have seen cycles come and go, and [we are] looking forward to a more positive cycle on the horizon."

Slipping exports & growth pockets

Having been on an upward trajectory in the years before the pandemic, the export trend has reversed in the past three years. In 2025, scotch export volumes declined 4.3% to 104m nine-litre cases compared with the 12 months prior. In value terms, sales dipped 0.6% to GBP5.36bn (US$7.32bn, see charts p30).

Key markets drooped last year, including the US (-9.2% in volume year on year, and -4% in value), France (-14% in volume, -3.6% in value) and Singapore (-11.6% in value). However, India — scotch's largest volume market — boomed by 15% in volume and value. Chinese exports remained flat in value terms (-0.3%), but a surge in volume (+14% year on year) indicates some depremiumisation going on.

The SWA suggests pre-pandemic figures, "when export conditions were relatively stable", are a more accurate baseline to compare against. Indeed, compared with 2019, exports rose by GBP400m in 2025.

Several trade arrangements are raising hopes of exporting distilleries, namely the "landmark" in-progress UK–India bilateral trade agreement; a deal with China in February that saw scotch import duty cut from 10% to 5%; and a free trade agreement (FTA) with South Korea finalised in December.

Bacardí cites "huge potential" in the Asia, Middle East and Africa (AMEA) region, particularly India — which is a "big priority" for blended scotch brand Dewar's.

"We see an exciting growth opportunity for the brand, as India is the largest whisky-drinking nation by volume, and we've seen an increase in premium cocktail culture in recent years," says Bacardí scotch whisky global VP Brian Cox. "This allows us more room for innovation and the ability to engage with customers in more culturally relevant ways."

Also in alignment with overall trends, Chivas Brothers reports "positive momentum in a number of key markets such as India (+10%) and Türkiye (+32%)" in the company's fiscal H1 (total scotch exports to Türkiye grew 43% in value and 13% in volume in 2025, according to the SWA).

"The ongoing efforts to advance the UK–India FTA are an encouraging development that could further support growth and investment in the years ahead," adds Nodjame Fouad, CEO of the Gold Brand Unit, aged spirits & champagne at Chivas's parent company Pernod Ricard.

As a smaller producer, Nc'nean's export strategy is to give more attention to fewer markets — focusing on France, Germany, the UK and the US. Thomas says political tensions between the UK and US are "definitely not helping, but it's maybe not quite as big a deal yet as some people think it is".

She warns: "What is going to make a bigger difference in the States is the state of the US consumer, rather than the tariffs specifically."

Oversupply realities

While there are natural cycles of stock within aged spirits, some of the big players have made more permanent-feeling moves to balance inventories and save costs.

In February, Suntory Global Spirits merged operations at its Bowmore and Laphroaig distilleries, citing the need to "align production with long-term demand". A year prior, Brown-Forman made a similar move with Speyside's Benriach Distillery and Glenglassaugh in the Highlands. There have also been redundancies at visitor centres and at historic maltings facilities. »

» At spirits powerhouse La Martiniquaise-Bardinet (LMB) international marketing manager Laure Habbouse says the scotch market "is proving remarkably resilient, even as it enters a period of structural adjustment" amid "cyclical geographical shifts and new consumption habits".

"A global oversupply, across all whisky categories, not only scotch, has increased available inventories and softened pricing pressures," Habbouse says. "In the short to medium term, this environment is likely to translate into more accessible price points for consumers, creating opportunities for drinkers to explore quality whiskies at relatively affordable levels."

While a bonus for cash-strapped consumers, she adds: "For producers and brand owners, however, this new context demands greater strategic discipline and differentiation. With more liquid in the market, success will increasingly depend on reinforcing whisky credibility and brand identity."

Nc'nean's Thomas says supply cycles are "normal" for the industry, but the biggest knock-on of oversupply has been the "significant discounting, either permanent or temporary" that has occurred. "That's a problem, because it impacts consumers' perception of what whisky should cost," she says. "And it means we have to fight harder again for every sale."

In terms of Nc'nean's own promotions, Thomas adds: "We try to stay clear of it,



Johnnie Walker Red Soul: Diageo seeks to expand its portfolio at an entry-level price point

partly because we're trying to create a premium brand, and partly because we don't have the deep pockets to be able to offer massive discounts."

From a bottler perspective, co-founder of Edinburgh-based Tailored Spirits Co (see box p31) Adam Harding says: "It definitely feels like more of a buyer's market at the moment. At the entry-level, new-make whisky, we're seeing a bit more from big-name distilleries that we didn't see before."

Meanwhile, "it's quite a different dynamic" for old and rare stock, Harding says. "We're still finding challenges sourcing the oldest and rarest."

He says prices have "adjusted back down" following price inflation during the pandemic boom of 2021–22. "There was a bit of a lag, again, at the top end. New-make whisky got cheaper much faster," says Harding. "More of it was available in the market, but the older stuff took a bit of a while to start to settle back down.

"The prices that we're seeing certainly feel very cheap compared with recent years. It seems like the prices have adjusted in the right direction for everybody. So if you are buying whisky in today's world, you're going to be getting a much better deal than you were two or three years ago, when the market was a bit hotter."

Lower-priced, accessible NPD

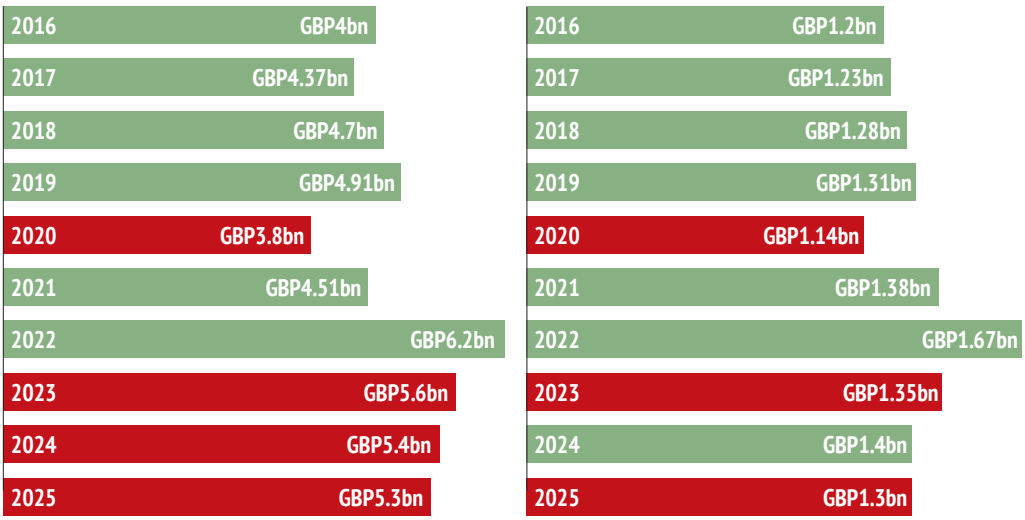
Discounting aside, big players are starting to invest in accessibly priced NPD, such as Diageo's Johnnie Walker Red Soul. The GBP25 (US$34/70cl) whisky launched last month and is described as "a more accessible scotch for non-whisky drinkers" who are "seeking sweeter flavours".

The drinks major's new CEO, Dave Lewis, has been open about his mission to expand Diageo's mass-market portfolio, calling the business "significantly underrepresented" in the segment.

Outlining first priorities in February, Lewis spoke in depth about the opportunity for repositioning existing brands in terms of price, hailing a recent reshuffling of Diageo's whisky portfolio in the UAE which saw "significant repositioning" of VAT 69, Black & White and J&B Rare "against a more value-based opportunity". »

DATA DROP

Scotch Whisky Association Scotch Whisky Export Data 2016–25



Source: Scotch Whisky Association

KEY TAKEAWAYS

- Oversupply continues to dog the scotch industry, but some are hopeful the end is in sight.
- Discounting is allowing for trial and helpful for consumers, but producers warn it could damage brand equity in the longer term.
- To appeal to wider audiences, brands are increasingly exploring lower-ABV expressions, cheaper and slightly sweeter scotch profiles, and whiskies designed specifically for mixing.
- Exports are declining in volume and value, but industry figures suggest this is a post-Covid-19 pandemic 'normalisation'.
- Domestic issues with duty continue, as does added financial pressure from employment taxes for businesses.

» At Bacardí, Cox seems on a similar page. "Due to economic cost of living concerns and tariffs, we do see momentum returning to standard and value scotch segments outside of the classic emerging-market clusters," he says. "This has a potential upside, as it's important for us to recruit into the category at the base in order to trade these drinkers up in the future."

However, he caveats: "Premiumisation remains 70% of category growth, [which is] down from 75%, but within the margin of error of tracking studies and forecast model estimates — and it is still the key growth engine for the category. It's important to remember that 'standard scotch' is a premium level for many other categories."



Image: Nc'nean

Nc'nean mini: a way to drive trial is through accessible pricing and smaller formats

Nc'nean's *raison d'être* is to help more people discover whisky. "That is why we exist," says Thomas. She feels a ramping up of cheaper NPD "could be a good thing" in this regard.

"Obviously, it needs to be executed well and take off. Because it's not the first time that scotch whiskies have tried to do it, and they haven't all been successful. If they succeed in getting new people in, great, because they hopefully come in there and then migrate over time to Nc'nean."

The west coast distillery has focused on creative ways to make its prices more accessible without lowering quality — like miniatures and gift sets. Last year, it produced a limited-edition vegan cream liqueur which has been requested as a permanent SKU in some markets. The flavour profile and cheaper price point proved a handy way of encouraging in-market trial with consumers wary to try a single malt. "Quite often, by the end, they've tried the whisky [as well] and they've liked it," Thomas says. »

'Something money can't buy': Scotch bottler taps into experiential demand

In one of the most exclusive corners of the scotch industry — private bottling — an Edinburgh-based startup is exploring new alleys opened by demand for personalised and "experience-led" releases.

Tailored Spirits Co began in 2024 as a service to help individuals bottle investment casks, but last year expanded to have more of a B2B focus. Its clients include hotels, hospitality venues and luxury resorts like Singapore's Marina Bay Sands.

But the bottler's USP is the end-to-end "journey", on a small scale, that the team offers clients. Tailored Spirits uses its network to source, age and finish liquid according to the customer's tastes. It arranges trips to visit casks in bonded warehouses — a rare opportunity — and barrel tastings, and creates labels and bespoke packaging. The Leith-based company also handles the bottling process and logistics.

Co-founder Adam Harding describes the business as a "sage — a guide to take you through all the stresses and headaches of what bottling can bring and make it a really enjoyable, white-glove experience".

At the end, clients are left with the sort of bottle that looks like it's been produced for a luxury brand.

"Bottling whisky is nothing new, but as a single-cask owner, your experience is very different to someone bottling 10,000 bottles in a week," Harding says. "They're almost different businesses in the scales that they operate at.

"The experience side of it is [about] actually understanding that if someone has bought a cask, whether it's a business or a personal indulgence, you care a hell of a lot more about that single cask."

While parts of the market have softened, Harding says interest in private-client bottlings remains strong as people crave personalised "experience-led" releases. Despite being a niche part of the market, he feels the wider sector can learn from the "green shoots" in this area.

"It's taking what is already there, our heritage and our strength, then doubling down on how you connect personally on that level, taking it beyond 'I collect whisky' to actually, 'I've commissioned my own from this distillery. I met the guy that distilled it. I selected the glassware'," he says.

"You can go on all these journeys. And it's that kind of connection that, I think, is where whisky needs to pivot a little bit. You can't just churn out limited editions and expect people to constantly absorb that."

He says personal connections that come from "pounding the streets" and "building relationships with customers" often "get forgotten" particularly with larger brands and "especially in the digital world, where you release a product, you shout about it online, it gets shared around in different arenas for sale, and that digital footprint peters away quite quickly".

He hails The Macallan's 'boutique' stores as "a cool way to build that strong connection". Brand owner Edrington has opened several of the dedicated stores in GTR and is set to cut the ribbon on a London shop in Harrods this year.

"There was a period of time where you could just release any whisky and people would buy it," he says.

"Now the automatic buying has slowed down. There's definitely space for continuing to grow back into that real personal connection — while it feels old school, it does work."

Tailored Spirits Co uses its network to source, age and finish liquid according to a customer's tastes



Image: Jacek Hubner



Premiumisation is a 'long-term focus' for Bacardí, which has expanded the Dewar's aged portfolio

» LMB's Habbouse says RTD and RTS formats are also "gaining relevance" due to portability and convenience. "They resonate particularly well with younger consumers seeking simplicity and versatility. RTDs can help broaden the category's reach without compromising quality," she explains.

LMB released a canned RTD for its Cutty Sark brand — Cutty Sark & Ginger Ale Highball — last May. Habbouse says "lower-ABV expressions, smoother and slightly sweeter scotch profiles, and whiskies designed specifically for mixing", such as LMB's flavoured whisky-based spirit Label 5 Original Citrus (right) can also "act as entry points" for non-whisky drinkers.



"In this evolving market, the winning strategy will likely balance heritage and innovation — protecting the integrity and standards that define scotch whisky while simultaneously expanding the category through accessible styles, new consumption occasions and formats that speak to a new generation of drinkers," says Habbouse.

Premium and aged expressions

Still a category tethered to tradition, producers are confident in the resilience of age statements and limited editions.

"Even in periods of softer volume growth, the premium and super-premium segments of scotch continue to perform well, because consumers increasingly view whisky as something to savour and explore rather than simply consume," says Bacardí's Cox.

Asked whether Bacardí was seeing any signs of depremiumisation, he is bullish on the opposite. "What one will see are variances in market between geographies and likely at individual brand levels. But overall, we see consumers becoming more intentional rather than trading down," Cox says. "People may drink slightly less frequently, but when they do choose a whisky, they want it to feel worthwhile."

He says premiumisation has been a "long-term focus" for Bacardí, "particularly through the continued expansion of the Dewar's aged portfolio". In 2023, it launched its Collector's Series with the Double Double 37yo expression, releasing a 38yo the following year.

Pernod Ricard's Fouad says: "Economic pressures have naturally prompted discussion around the potential for consumers to trade down in certain markets, but we haven't seen this develop into a sustained trend across our global footprint.

"Thanks to Chivas Brothers' diverse and strong portfolio across price tiers and broad geographic footprint, we remain well positioned to meet consumer trends amid current contrasting market conditions in different regions."

Chivas Brothers' diverse portfolio includes Chivas Regal Crystalgold, a clear spirit drink designed for mixing



Home turf

An annual spirits duty increase has been the cause of much consternation in the UK, where the SWA describes an "increasingly uncompetitive domestic tax and regulatory environment".

Duty rises, Nc'nean's Thomas says, are "very unhelpful" for two reasons: "The first is obviously that it is putting the cost of alcohol up in an environment where the consumer is not much minded to pay more. The other point is what an enormous amount of time it takes to put through duty changes on a portfolio of products."

But for Thomas, the bigger issue when it comes to domestic politics is the increasing cost of employment due to minimum wage and national insurance contribution hikes for employers (see UK market analysis p38).

"It's something the government both can and should solve, because it's genuinely making people think twice about employing people. For us, that increase was the equivalent of a full-time person — and we employ fewer than 20 people."

Amid all challenges, the trade remains admirably stoic.

"The market is challenging, however, at a total category level, many sources — including IWSR and SWA — suggest post-Covid excess stocks in blended scotch should finally clear by the end of the year," says Cox. "The situation with single malts is a little less clear, but that is decanting itself too."

Thomas is equally optimistic. "It's not as bad as people might be making out," she says. "A lot of people are reducing production, but that's not because there's a complete disaster in the industry. It's because we had this weird boom in Covid and now it's normalising. In key markets, the consumer is remaining remarkably resilient." GDI

Shaken, stirred and selling. 'Lipstick economy' shapes US cocktail scene

Oversized martinis, mini daiquiris and bourbon-spiked margarita mashups are setting the tone for a new era of cocktail culture across the United States. **Maia Gosselin** reports



Heaven Hill Brands global director of advocacy Elayne Duff: 'When a guest orders an Elijah Craig old fashioned or a Bluecoat negroni, they're not just choosing a flavour profile. They're choosing credibility'

It's a fun time to be in the mixology business in the US. Today's drinks trends blend old-school classics with creative, flavour-forward variations, offering guests options that are both comfortingly familiar and refreshing.

As consumers scale back on spending and consumption, beverage pros across the industry report a shift to affordable luxury — higher quality, selective choices and experiences that still feel like a treat.

Cocktail habits get a reset

Whether driven by nostalgia or budget, customers are shifting their habits when going out. Heaven Hill Brands global director of advocacy Elayne Duff says: "What I'm seeing is a convergence of two forces: the return of happy hour and a renewed focus on classic cocktails, executed with intention.

"Happy hour has become strategic again. Operators can't rely on the late-night rush the way they once did. Five o'clock is prime time. Guests are more value-conscious and they're choosing where to go based on what feels worth it. A well-priced martini paired with fries or a cocktail and small bite bundle is driving real traffic.

"At the same time, we're seeing a strong gravitation back to classics. The martini. The old fashioned. The negroni. Drinks people recognise and trust. For brands, this matters. When a guest orders an Elijah Craig old fashioned or a Bluecoat negroni, they're not just choosing a flavour profile. They're choosing credibility.

"The foundation of these cocktails is built on brands with a point of view and production story behind them. That trust allows operators to command premium pricing while still delivering perceived value."

It's a lipstick economy… and everyone's wearing Chanel

We're currently in what is termed a 'lipstick economy'. Since the Great Depression it has been documented that in times of economic stress, we instinctively seek out small, affordable indulgences as a means of comfort. In particular, sales of luxury brand lipsticks, from Chanel to Estée Lauder, often rise significantly during these periods. Consumers will hold off on a new car, but happily drop US$50 on swanky cosmetics. This trend extends to other affordable treats as well, such as an ultra-premium cocktail.

Row 34, a New England seafood restaurant and oyster bar with five locations throughout Massachusetts and New Hampshire, is tapping into this trend. "We have a section of cocktails called 'Treat Yo Self' [a nod to Donna and Tom from *Parks and Recreation*] which are made with finer spirits if someone wants to do exactly that: treat themselves," says beverage director Vannaluck Hongthong.

"Although value is always top of mind, it is important to have options for guests to celebrate however they wish to. Reaching for that ultra-premium tequila or whisky, some higher-end wines, etc. It's impossible to have everything for everyone, but we do our best to get close."

Including a complimentary treat with the elite cocktail has real allure. Duff says: "We are absolutely in a moment of affordable indulgence. Living in New York, I hear more people talking about the best happy hour they've discovered than the latest tasting menu. 'They have $12 martinis and fries.' 'This place does a cocktail and small bite for $15.' That's the buzz. Guests are comparing perks. They're choosing where to go based on what feels like a little treat that doesn't feel irresponsible. Bars that package that small luxury into a set price are driving traffic. It's aspirational but accessible. In many ways, it's a very American version of aperitivo culture. Structured. Social. Designed."

Martini madness

While the 'OG' gin or vodka martini never actually went away, it's certainly taken a back seat to other trendy cocktails for the past decade-plus (hello, margarita and espresso martini). Today, they're back in a big (or small) way with plenty of variation: oversized, inverted, extra dirty, with a twist or a dash of onion brine… So what are people choosing?

"All of the above!" says Ryan Lotz, beverage director for Traveler Street Hospitality's family of bars and restaurants throughout greater Boston, Massachusetts. "Maybe with the exception of the inverted. I'd love to see folks starting to get more excited about a heavy vermouth pour, but we're not seeing that trend just yet.

"Martinis with a sidecar of more martini are still popular; of course, the dirty; and the espresso trend can't be stopped. The tomato martini seems to be the newest trend this year. Everyone seemingly is working on a variation of this. And the freezer martini!" »

» Heaven Hill's Duff agrees: "Martinis are absolutely having a moment. Personally, I love a classic 4:1 Bluecoat Gin Martini, stirred, with a grapefruit twist and two onions. Bluecoat has that bright American gin profile that holds up beautifully in a traditional build. The grapefruit lifts it. The onion brings that savoury edge. It's clean, balanced and unapologetically classic.

"What's interesting right now isn't just gin versus vodka. It's the ritual. Tableside service. Multiple garnish options. A side of vermouth or olive brine, so the guest can adjust. When you allow guests to build their own martini moment, you justify the price. A $25 martini feels different when it's interactive and thoughtful."

At Row 34, martinis are a core and longtime menu staple. Hongthong notes: "Vodka is still very much paying the bills, as they say. For martinis, it's bone-dry first, followed by a dirty. Espresso martinis come in a close third. I am always surprised at how much vodka is consumed in our restaurants, a category that has a hold on consumers for decades and doesn't show any signs of slowing down."

Make mine a mini

While some are sipping their martinis from fishbowl-sized glasses, there's a growing trend at the opposite end of that spectrum: the 'mini'. Mini drinks have caught on both for those seeking to consume less and for patrons who want diversity, for example, in a flight. And, of course, they look great on Instagram.

Duff remarks: "I adore this trend for so many reasons. Mini cocktails have real traction. They're playful and social. A line-up of mini martinis or negronis instantly creates a moment on the table. But beyond the aesthetics, they solve a pricing challenge. With cocktail prices rising, a flight built around brands like Elijah Craig, Widow Jane, or a gin variation featuring Bluecoat gives guests exploration without full commitment. It feels like value because it is an experience.

"It also allows brands to tell a broader story," she adds. "A mini old fashioned flight showcasing different mashbills or ageing profiles. A negroni trio featuring a house twist. You're not just selling a drink. You're selling an adventure."

Traveler Street's Lotz adds, "I think people are sometimes hesitant to try new things and this lowers the barrier to entry. People have always loved flights. We try and mix it up with interesting twists like three different mini daiquiris. We've also done different rum old fashioneds, and we're working on one that highlights different sugars to use in drinks."

Return to retro

The classics are enjoying yet another heyday, particularly with newly minted 21-plus drinkers. "There's absolutely a return to retro," Duff says. "Drinks that felt dated not that long ago suddenly feel fresh again. I think part of it is curiosity. There's a generation discovering these classics for the first time. And part of it is fatigue.

"After years of hyper-complicated builds and over-the-top presentation, a clean, well-made collins or a properly balanced manhattan feels honest. It also ties back to everything we've been talking about. People want recognisable structure. They want to understand what they're drinking. A collins is bright and refreshing. A manhattan is spirit-forward and serious.

"There's no mystery. Cocktail culture moves in cycles, but the fundamentals never really leave. When the quality is there and the execution is tight, even the most 'retro' drink can feel completely right for right now."

Lotz observes: "I'm seeing people get excited about classics that, when I was coming up on the bar lots of people ordered, but now we run them as specials. Drinks like the jack rose or the penicillin inspire customers to try things new to them."

Modern twists on those classics are also popular. Row 34's Hongthong remarks: "I think of my oldest son who is 22 and what he and his pals drink when out — it's usually the new traditional cocktails like the paper plane, naked & famous and espresso martini."



'Classic reinvention': Boann Single Pot Still Irish Whiskey's madeira old fashioned



Traveler Street Hospitality's tomato vine martini, 'the newest trend this year'

The mashup

Another trend gaining traction is the mash-up, usually a classic cocktail reconfigured with a different spirit or two cocktails blended into one, such as a moscow mule margarita (tequila, orange liqueur, lime and ginger beer in a copper mug).

Duff enthuses: "To this day, one of my favorite riffs is a jalapeño-infused Tequila Ocho margarita with fresh watermelon juice, lime juice and agave. It's familiar, fresh and delicious. Served in a beautiful glass with a half Tajín rim, it feels special without being confusing. It honours the integrity of the tequila while still feeling current."

Whiskies, in particular, are playing a leading role in the mashup trend, infusing cocktails with their savoury, smokey notes, according to Minnesota-based importer and brand owner Prestige Beverage Group.

Vice-president marketing & trade Dave McNulty says: "Nostalgic, highbrow-lowbrow experiments, such as espresso margaritas and negroni twists, fuel classic reinvention. The rye-spiced notes of our 2XO [Two Times Oak Kentucky Straight Bourbon brand] shine in bold mashups like spicy bourbon margaritas. These twists keep menus fresh."

McNulty also highlights the company's Boann Single Pot Still Irish Whiskey — finished in marsala, madeira or PX casks — which he says works well in creative pours like a madeira old fashioned or PX cobbler.

Cocktail trends may come and go, but the programmes that succeed balance creativity with simplicity, giving guests drinks that feel both exciting and easy to order. The sweet spot isn't chasing every fad, but building menus that turn curiosity into repeat bar visits. GDI

Gen Z *is* going out, and they're spending up big

Headlines may scream that Gen Z is pulling back on nightlife, drinking less and threatening the future of bars and restaurants. But new US research suggests the opposite may be true



If Questex's data holds, Gen Z may not be the industry's challenge — it may be its comeback story

Gen Z — particularly those aged 21 to 28 — are not only going out more frequently than older consumers in the US, but also spending more when they do, according to a proprietary study by Questex's Hospitality Group in partnership with Datassential.

The *Questex On-Premise Consumer Habits Report* reveals that as the oldest members of Gen Z approach age 27, the cohort is emerging as a powerful force in on-premise dining and drinking. It also suggests their behaviour could signal a meaningful return to growth for the US on-premise industry.

Debunking the myth

"Interestingly, younger consumers have a significantly higher incidence of going out across all on-premise segments versus other age groups," says Questex vice-president of hospitality Brandy Rand. "Contrary to the headlines claiming Gen Z is a detriment to bars and restaurants, our data show they order more alcohol and better-quality drinks. They spend more on themselves than older consumers and don't see price as a barrier when choosing where to go out."

In other words, Gen Z aren't retreating from hospitality. They're redefining it — on their own terms.

Why consumers are still going out

Despite tighter discretionary spending across the board, dining and drinking away from home remains a priority, according to the report. The top reason consumers cite for going out? To treat themselves (53%). Socialising follows close behind at 45%.

Convenience is another powerful motivator — especially for younger consumers. Those aged 21 to 28 are the most likely to eat out, because it's faster and easier than cooking at home. For operators, that signals an opportunity: frictionless experiences matter.

Even in a cautious economy, splurging on F&B remains a cross-generational behaviour. Across genders, age groups and income levels, consumers are still carving out room in their budgets for small indulgences.

What drives venue choice

When deciding where to go, two factors dominate: quality and price. But 'price' doesn't necessarily mean 'cheapest'. Many consumers are evaluating value — what they receive relative to what they spend.

Younger consumers, in particular, are drawn to 'cool' experiences, says Questex. For them, F&B quality is deeply intertwined with entertainment. A great cocktail menu or thoughtfully curated beer selection can be as important as the ambiance or music.

Promotions also matter: 42% of consumers say deals influence their decision on where to dine or drink. Weekly specials, limited offers and bundled promotions can build value perception without eroding brand equity.

Service: the make-or-break factor

While menus and pricing draw guests in, service determines whether they return. In a competitive market, hospitality isn't just a differentiator; it's a baseline expectation.

Friendly greetings, prompt seating, knowledgeable servers and timely F&B delivery all contribute to a positive experience. And cleanliness is a non-negotiable, says Questex.

The beverage opportunity

Beverages remain central to the on-premise experience — and not just alcoholic ones. Younger LDA consumers are the biggest consumers of alcohol away from home, and they show strong interest in higher-quality drinks options. They're trading up, not down, says Questex. At the same time, even guests who order alcohol frequently add a non-alcoholic beverage to their tab.

For operators, that means a strong beverage menu should do double duty: showcase compelling beer, wine and cocktail selections while also offering creative, high-quality non-alcoholic options.

Pairing recommendations — alcoholic and alcohol-free — with popular menu items can further elevate perceptions of quality.

The digital influence

Word-of-mouth remains powerful, according to Questex. Recommendations from friends and family are the most likely drivers of trial, but digital presence runs a close second.

Consumers actively consult online reviews, social media and promotional posts when deciding where to go. Regularly updated profiles on platforms like Google, Facebook and Instagram — especially those highlighting limited specials or events — can meaningfully influence traffic.

Actionable insights for tough times

"As the industry looks for ways to increase frequency of visitation and grow cheque sizes against a tough economic backdrop, our report offers operators actionable insights they can implement right away," Rand says.

The message is clear: encourage indulgence and social connection, promote value without racing to the bottom on price, elevate food and beverage quality, deliver strong hospitality and stay visible online. GDI

For details on accessing Questex's full report, email Elliot Howell at ***ehowell@questex.com***

Adult beverages are going through a 'once-in-a-generation realignment'

David Fudge co-founded US-based Aplós, an alcohol-free functional spirit that encourages consumers to 'rethink the way you drink', five years ago. He speaks to **Olly Wehring**



Aplós co-founder David Fudge: 'We want Aplós to be a must-carry, just as Grey Goose or Don Julio are'

You don't have a drinks industry background. I've been a marketer for my whole career of over 20 years, but I've worked with startups for about 15 years. I was in media and fashion before and had the fortunate experience of working for two other founders in startups. That gave me an itch to start something myself.

I'd never been a big drinker and had always had that familiar internal debate anytime I was out with friends — do I want to participate, or do I want an unaffected night's sleep? I've always liked to wake up early and go to the gym, so even though I love the ritual of it, alcohol didn't really suit my lifestyle.

Working for another entrepreneur who didn't come from the industry that he was building a company in, I learned that it's an advantage that I don't come from the drinks industry — I have a beginner's mindset. Essentially, entrepreneurs try to build the world they want to live in; they want to change and disrupt things. To do that, you really need to think differently, so I view it as an advantage that I don't come from the industry.

I'm not so naive to think that I know everything, so I and my co-founder, Emily Onkey, have made a concerted effort to bring in industry experts. We have half a dozen drinks industry executives that are investors and two of our board members were successful executives at LVMH and Diageo.

We knew we needed people who aligned with our vision to build a next-generation drinks brand that will anchor the bar of the future globally.

How long has Aplós been going for? We launched in December 2020 — in the middle of Covid-19 — with one SKU in e-commerce. For the first year, we focused on e-commerce, then we introduced our second spirit in our second year. We've been slowly building since then, and in the last couple of years we've focused more on the traditional on and off-premise channels. We're just in the US now, but we'll expand into Europe when the timing is right.

> *'We knew we needed people who aligned with our vision to build a next-generation drinks brand that will anchor the bar of the future globally'*

Did you find a resistance to change from within the drinks industry? For sure! Anytime you enter an industry as a newcomer, there's a heavy level of scepticism, particularly in an industry like this, which is so relationship-driven. So many people have spent their entire careers in this industry.

We're currently going through a once-in-a-generation realignment of the adult beverage industry and as humans, we don't love change — there's always some resistance and I definitely felt that early on.

But the consumer is ahead of the industry: we spoke to hundreds of bartenders before we launched to understand what the consumer was asking for. It's only really been in the last year that we've seen the stakeholders in the US on-premise start to proactively reach out to us. Two years ago, when not everyone had a non-alc programme, it was a much more difficult sell.

Now, it's becoming a must and things are starting to open up. There's still a certain level of resistance of an old-school nature. That's natural, but it will continue to loosen up as the category grows significantly.

When you say that the consumer is ahead of the industry on no/low alcohol, what do you mean? The buyers in the on and off-premise have caught up, and beverage alcohol suppliers are aware of what's happening, as they see it in their own numbers. But I think a lot of them still have a 'wait and see' approach.

Many are in a period of optimising their current portfolios for where the industry is headed. They're focused on the across-the-board industry challenges, because of the shift in consumer behaviour.

We'll get out of that soon enough, but I understand they're triaging their businesses and optimising for the future, while also having a tonne of interest in what's happening now in the alcohol-alternative space. »

» **What's been the brand's route-to-market journey?** We launched direct-to-consumer through e-commerce, because that's what we knew. We also knew that through D2C, we could get customer feedback quickly and understand if we had product/market fit.

I was definitely naive to the traditional on and off-premise ecosystem and what it takes to be successful in those channels. You really can't outsource your story as a young brand, you have to have feet on the street, with people who are telling your story. It feels like pushing a boulder up a hill to start, then things start to snowball over time. That's where we are now: we laid the foundation in 2024, saw a tonne of momentum in 2025 and we're taking that into 2026.

A lot of brands in our category have focused on chain retail, primarily because they think it's easier to scale more quickly. We've taken a more diversified — some would say 'traditional' — approach. We believe you build a brand in the on-premise and you sell it in the off-premise. You can't have one without the other.

What's been your highest hurdle? It depends on what day of the week you ask! I mean, entrepreneurship is not for the faint of heart. There are days when you feel like you're being continuously punched in the face, then there are days when you feel like you're on top of the world.

The fragmented data infrastructure in the on and off-premise can be really challenging. Things aren't as directly attributable to an ROI. That sticks out as a big hurdle.

What's the size of Aplós today? Last year, we sold north of 100,000 cases. In 2026, we hope to double that and get close to 250,000 cases. We're available nationwide in the US through our seven distributor partners.

Aplós now appears on more than 1,000 menus in the US, including Michelin-starred restaurants



Presumably the area of the drinks industry that Aplós operates in has grown faster in the last few years than you expected it to. Even now, there's still a certain level of scepticism — with investors in particular — of how big the industry could be. A lot of them seem to look to the past to predict the future — that's just not the way the world works.

We're creating something new, so history rhymes, but it doesn't repeat itself. We're here to prove to them how big the industry is.

I don't think alcohol is going away. The narrative of pitting non-alc and alcohol alternatives against alcohol misses the point. Most consumers — and 90% of our consumers — still drink alcohol; they're just moderating their consumption in certain occasions.

When I say there's a realignment of the adult beverage industry, it's really a diversification. People want more options and what we're seeing is consumers have an Aplós cocktail and then an alcoholic cocktail.

The share of wallet is shifting to other brands, but the consumer still wants to enjoy cocktails in occasions where they're socialising, or out to dinner, or drinking because they're stressed, or want to have fun. It's just, do they want a cocktail with alcohol, or with other functional ingredients, or one that's not functional at all?

Do you see the wider trend with alcohol as being cyclical, or structural? There are some real structural changes happening, for sure. On the distribution side, for example, you're seeing some retailers want to go with bev-alc distributors and some want to go with more traditional food distributors. The retailers don't appear to have figured out how to optimise the industry. It's like there are shifting sands under us, and they relate to the distributor ecosystem.

Then there are the changes in consumer preferences. For most of our lives, alcohol has been the default for the way that we socialise, the way that we unwind and the way that we connect. That is no longer the case and it's loosening every day.

That's the systematic change that we're in the middle of right now. It's probably going to last another decade before there's a settling of how that diversification may continue and grow.

Who do you consider as the competition for Aplós? Obviously, there are a lot of other brands in the alcohol-alternative space, but we have a singular vision that we're focused on. This is a marathon, not a sprint, right? You don't run a race looking to your side and behind you — we're aware of what's happening, but the alternative space is bifurcated between imitators and innovators.



Aplós alcohol-free spirits and RTD cocktails include functional ingredients like lion's mane and hemp

There are brands that are trying to imitate traditional alcohol flavour profiles — we're not doing that. We're not creating a non-alc gin; we're creating Aplós.

We want to have the building blocks of what it takes to be a great lead spirit in a cocktail that is versatile and that mirrors how people consume a traditional spirit. We're not reinventing consumer behaviour here, but we sit squarely on the innovator's side in the sense of we're creating functional non-alc spirits that have ingredients that give you an effect that's mood-altering and that mirrors the effect you want in the occasion you're drinking.

We have two lanes of products: one for when you want to chill out and one for when you want to go out.

What's your exit strategy? We're focused on building a lasting brand that will anchor the bar of the future. We want Aplós to be a must-carry, just as Grey Goose or Don Julio are.

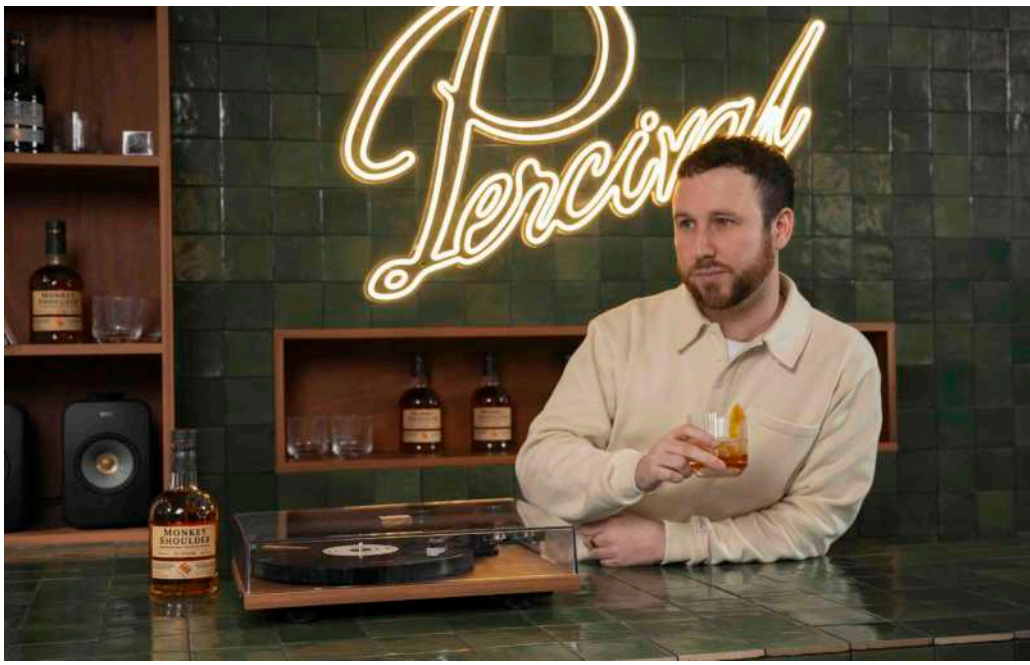
Ultimately, we can see a partnership, or acquisition, or majority buyout with a larger player who excels in distribution and supply chain. The business of building a brand is really messy and it's not in the skillset of these large global drinks companies. They tend to innovate on their current brands, not create new brands. So this is a very acquisitive industry.

They're really good at supply chain, distribution and scaling an established brand. We're in that phase of building a foundation for global scale with an eye towards a partner in the future that can help us realise that global scale with their expertise in supply chain and distribution. GDI

Subscribers get early access to our interviews. Join them at ***www.drinks-intel.com/subscribe***

UK market navigates perfect storm

New regulations, changing consumer habits and rising costs are just some of the many headwinds battering the UK's beverage alcohol market, reports **Joe Bates**



Monkey Shoulder created a vinyl listening bar inside the London store of menswear label Percival Soho

The beleaguered UK beverage alcohol market is being assailed on all sides. Aggressive taxation, new packaging regulations, rising operational costs and a looming nationwide deposit return scheme are nipping at the heels of a mature industry already battling a cost of living crisis which continues to drain the wallets of prospective customers.

The drinking habits of those customers are changing too. Some health-conscious consumers are avoiding alcohol altogether; others are zebra striping between traditional full-strength alcoholic spirits and non-alcoholic alternatives. Many are drinking less but better, with pockets of premiumisation still on display.

Experiential alcohol tourism is also booming, with drinkers keen to spend big on meaningful, immersive experiences. William Grant & Sons-owned blended malt whisky Monkey Shoulder, for instance, recently partnered with London-based menswear brand Percival Soho to create an in-store vinyl listening bar where personal shopping appointments were welcomed with complimentary old fashioneds.

UK distilleries, such as single malt whisky maker Ardbeg, are moving toward deep-immersion storytelling. It opened Ardberg House, a boutique hotel on the Scottish island of Islay, just a short hop from its historic distillery, last September.

Far more than a whisky-themed hotel, Ardbeg House offers a narrative-driven experience that recently saw it named Best Place to Stay in the UK for 2026 by *The Times*. The distillery's DNA is woven through the hotel's interior, with copper wall art made from retired stills and buttons labelled 'press for smoke', which activate hidden whisky experiences. Guests can take part in private distillery tours and a special 'whisky hour' ritual at the bar each evening.

Rising costs and staying in

The mainstream on-premise continues to battle high business rates, hikes in national insurance (a mandatory tax on earnings designed to fund state benefits) for employees and, most recently, a 3.66% hike in alcohol duty linked to the Retail Prices Index (RPI, a UK measure of inflation) that came into force in February. An astonishing 366 UK pubs closed nationwide last year, according to tax firm Ryan, and nearly 2,000 have shut their doors in the past five.

The cost of living squeeze is driving more UK consumers to adopt a "big night in culture" rather than go out, according to port wine producer The Fladgate Partnership. "Consumers are choosing to recreate dining-out experiences and both formal and informal dinner parties at home," says CEO Adrian Bridge.

"The customer has become savvier and knows how much a good bottle of Taylor's Port is going to cost them in a supermarket or wine shop versus the same bottle in a casual or fine-dining setting," he adds. "So, as the consumer remains thrifty with their spend on a Friday and Saturday night and might only be going out once or twice a month, this does not mean that they are stopping to consume good-quality alcoholic drinks, they are simply changing their environment to the home."



Ardberg House was recently named Best Place to Stay in the UK for 2026

Heavier packaging, steeper fees

Another bugbear for the drinks industry is the Extended Producer Responsibility (EPR) scheme, a policy that makes producers accountable for the full net cost of managing the packaging they place on the UK market once it reaches the end of its life.

Critics claim EPR effectively penalises glass packaging due to its weight. The scheme began impacting businesses in late 2025, and this year further changes will see modulated fees based on a traffic-light system, with problematic packaging — such as prestige glass or bottles with non-washable adhesives and foil sleeves — facing higher fees. »

» Fladgate's Bridge admits the EPR scheme is a "key issue" for his company to address. "Taylor's Port must lead by example, and we have a major initiative to lightweight bottles due for unveiling during 2026."

Meanwhile, Lyme Bay Winery MD Wolf Sieg-Hogg has an upbeat take on EPR, arguing it is "driving innovation and change for the better", as the liquid inside must now "shout quality" without relying on heavy bottle weight to convey a premium message.

All the rage: single serves

As well as lighter glass bottles, aluminium cans and alternative packaging formats are gaining ground, with single-serve packaging proving particularly attractive among consumers seeking affordability and moderation, according to North South Wines, the UK distributor of Italian wine producer La Gioiosa, which offers 20cl bottles and cans.



Wolf Sieg-Hogg argues EPR is 'driving innovation and change for the better' in the drinks industry

"Single-serve formats are one of the key trends this year," says senior customer marketing manager Rachel Osborne. "Cans are outperforming mini bottles within the small-format sparkling category, driven by convenience, portability and occasions where glass is restricted, such as events, picnics and festivals."

Scotch faces multiple challenges

Scotch whisky continues to face numerous headwinds including: rising costs and domestic taxation, falling exports (-4.3% in value in 2025), 15% tariffs on the key US market (possibly rising to 35% for malts in July when a five-year suspension of a 25% single malt tariff caused by the Boeing–Airbus dispute elapses), and a post-Covid-19 pandemic inventory glut.

One in five Scottish distilleries is in financial distress, with a further 217 English, Welsh and Northern Irish distilleries reporting difficulties, according to a recent report from restructuring firm BTG.

These challenging trading conditions have prompted major scotch players to hit the pause button. Diageo closed its Speyside distillery Teaninich "temporarily" last year, while Brown-Forman "paused" production at Glenglassaugh Distillery, as part of the US firm's plan to recalibrate stock levels in response to a global slump in demand.

Smaller distilleries have been hit even harder, with Eden Mill and Perth independent small-batch bottler Chapter 7 both going bust last year, although St Andrews-based Eden Mill was later rescued by a private equity firm.

Times may be tough, but whisky's luxury players remain resilient and growth oriented. In March, The Macallan opened a boutique at London's Harrods department store, showcasing some of the Speyside distillery's rarest collectible expressions. In the same month, The Dalmore unveiled personalised, immersive tours at its distillery.

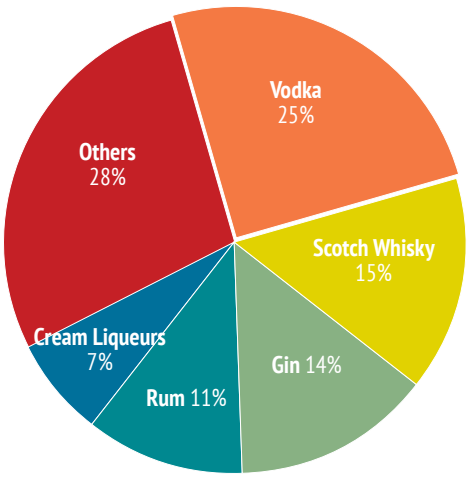
Gin: down but not out

Gin volumes fell 8% in the UK in 2024 (IWSR) and even though 2025 data is not yet out, it is clear that last year was another tough one for the category. The Spirit of Manchester Distillery was a notable victim of the category's decline, shuttering its city centre distillery and bar last August, while Pernod Ricard closed the visitor centre at its South London Beefeater Distillery in November.

The Whisky Exchange's commercial buying director Dawn Davies argues gin is experiencing a cyclical dip that many other categories have suffered at various points. "As with all industries, trends in the drinks sector come and go," says the online retailer's commercial buying director. "For the time being, gin has had its day, and other categories are coming to the fore, but this will eventually swing back." »

DATA DROP

Top 5 Beverage Alcohol Categories in the UK
Market Share (Volume) 2024



Volume Change 2023–24



Source: IWSR, the global leader in beverage alcohol data and insights. Figures rounded to the nearest whole number

KEY TAKEAWAYS

- The UK drinks market is navigating aggressive taxation, record pub closures (366 closed their doors in 2025) and new environmental packaging fees.
- Cost-savvy consumers are increasingly recreating premium bar experiences at home to save money without sacrificing quality.
- Scotch exports fell -4.3% in value in 2025 and gin volumes continued to fall, but categories like tequila (+14% 2019–24) and no/low alcohol are thriving.
- Brands are pivoting toward sustainable lightweight bottles and convenient single-serve cans.

» Unsurprisingly, international trade body The Gin Guild takes a more bullish view. In its latest annual report, it points to a modest 1% volume upturn in exports in H1 2025 and notes that, while the UK market is challenged, consumption is 40% above pre-boom levels and gin remains the nation's second most popular spirit after vodka.

The Gin Guild notes a consumer move back to juniper-based gin and classic serves such as the G&T and dry martini. It says flavoured gin, once the category's growth engine, continues to lose ground.

While flavoured gin is floundering, celebrity brands still have mileage. Renais Gin, co-founded by *Harry Potter* star Emma Watson and her brother Alex Watson in 2024, is now available in 11 countries and won several high-profile on and off-trade listings last year. They include 85 Fuller's pubs, the restaurant chain Evolv Group, online retailer Ocado and Waitrose supermarket.

Tequila gains ground

While the UK gin market stagnates, tequila is undoubtedly the country's spirit of the moment, with a marked consumer shift to 100% agave and additive-free styles. Tequila has successfully moved from being a shot of late-night regret to a sophisticated sipping category that is aggressively stealing market share from gin and vodka. According to the IWSR, tequila sales in the UK grew 14% between 2019 and 2024.

"We have taken the same approach to tequila and mezcal as we have to our other aged spirits," says The Whisky Exchange's Davies, noting how the spirit has come of age as a serious category. "We have flavour camps to guide consumers online. We hold a tequila and mezcal show both for the on-trade and consumers to show customers these are serious spirits in the same way that we do with rum, whisky and cognac."

The surging popularity of the margarita



La Borosa non-alc Mexican agave spirit aims to replicate the premium full-strength experience



Reality TV personality Spencer Matthews founded independent alcohol-free spirits brand CleanCo in 2019

— ranked the most popular cocktail in the UK's 50 best cocktail bars by *Class Magazine* — and high-profile celebrity brands such Dwayne Johnson's Teremana and George Clooney's Casamigos have undoubtedly helped build tequila's status among Brits.

Additive-free tequila Casa Malka, founded by health & fitness entrepreneur Malka Roth and her ex-husband Jay Winer, a US entrepreneur & artist, will join their ranks later this year when it launches in the UK.

No/low: all-year opportunity

The size and importance of the UK no/low-alcohol market — valued at GBP413m by Mintel last year — continues to grow.

A YouGov study published in January revealed that nearly a quarter (24%) of UK alcohol drinkers who'd tried no/low alternatives said they'd help reduce their alcohol consumption, while the British Beer & Pub Association says around 86% of pubs now serve a no/low beer option.

In this competitive and fragmented sector, non-alcoholic spirit brand CleanCo is one of the category's biggest independent players. Founded in 2019 by reality TV personality Spencer Matthews, CleanCo offers low-calorie, alcohol-free alternatives to gin, rum, tequila and whisky.

The brand is already listed by more than 1,200 UK venues and, in March, it signed Cask Liquid Marketing as its exclusive on-trade partner, with the aim of growing its footprint yet further. The focus will be on increasing CleanCo's presence behind the bar in premium hospitality groups, cocktail bars, hotels, members' clubs and leading pub operators.

For long-standing exporters to the UK, the no/low category is now a high priority. "No/low is now a consolidated, year-round consumer habit in the UK, and our strategy reflects this shift," says Sandro Bottega, the president of Italian wine and spirits group Bottega Spa. "Our Bottega Sparkling Zero [wine] and Limoncino 0.0 [lemon liqueur] continue to perform extremely well in the on-trade thanks to their versatility — they work both served by the glass and as high-quality bases for mixology, in cocktails with or without alcohol."

Not everybody holds the no/low category in high regard, however. "We are very picky about what no/lows we take on," says The Whisky Exchange's Davies, who argues the category needs more regulation. "Many are just water, potassium sorbate and essences, which for me is not value for money for the customer. We are looking for products that are producing good liquid and often those are not trying to replicate alcohol, but are creating a great drink."

"High-quality liquids" are an absolute must for any serious category, says Damian McKinney, the founder & CEO of UK-based non-alcoholic drinks company DioniLife. He says the company's La Borosa brand, a non-alcoholic blue agave spirit, aims to replicate the "premium experience of full-strength tequila". He explains: "La Borosa is crafted in small batches using traditional techniques. It starts with hand-chopped blue agave, which is cooked in brick ovens, before blending with the spirit of tequila, and gently marrying with oak. This gives La Borosa the layered, slightly smoky warmth and complexity that people associate with premium agave spirits."

The growth of the no/low and tequila categories are welcome bright spots in a market characterised by shifting consumer habits and falling volumes — IWSR expects the UK's total beverage alcohol market will see a volume CAGR of -1% through to 2028.

While regulatory pressure and a heavy tax burden act as long-term dampeners, the industry continues to demonstrate remarkable resilience. By adapting to evolving consumer habits and pursuing the distinct pockets of premiumisation that remain, producers are proving that even in a climate of moderation, there is still an appetite for quality. GDI

GET YOUR TICKET NOW & SAVE 20%

GDI_BCBL26



Maharaja Drinks champions Indian craft revolution

The premium Indian drinks scene has been transformed in recent years and online retailer Maharaja Drinks is breaking down preconceptions to bring Indian craft brands to a UK audience. **Joe Bates** reports



Maharaja Drinks launched Ayam, a 100% agave americana spirit produced on India's Deccan Plateau, in the UK in March last year

Indian alcoholic beverages have long struggled with a decidedly downmarket image in the UK. Attitudes shaped by colonial-era biases and restrictive trade definitions meant molasses-based IMFL (Indian-Made Foreign Liquor) spirits were written off as cheap imitations of scotch and French brandy, while mass-market Indian beers like Cobra and Kingfisher were belittled as 'curry house' lager.

The tide began to turn around 2010, when pioneering Indian single malt whiskies such as Amrut, Paul John and Rampur began to win plaudits by outperforming scotch in blind tastings and winning prestigious international awards. Where these whiskies trailblazed, other Indian alcoholic beverages hope to follow, and UK online retailer Maharaja Drinks is devoted to championing their cause.

Father-and-son team

Founded in 2003 by father-and-son team Ipe and Adam Jacob, Maharaja Drinks is committed to showcasing India's increasingly vibrant drinks culture while prioritising producers with genuine environmental and ethical credentials.

The Oxford-based firm's online drinks aisles offer more than 40 spirits, over 30 wines, 15 beers and ciders, as well as numerous RTDs, non-alcoholic kombucha, masala cola, teas and coffees.

Maharaja Drinks opened for business at exactly the right time, as Indian craft alcoholic beverages began to gain significant traction overseas for the first time, reflecting both improved quality and a growing consumer appetite for origin-driven drinks. This Indian export drive has been spearheaded by Indian single malt whisky, a market already valued at over US$2.6bn in 2025 by Data Insights Market and forecast to grow at a CAGR of 7.1% through to 2033.

The genesis of Maharaja Drinks began on the dusty roads of the Indian subcontinent rather than with growth projections on a spreadsheet. Its founders spent weeks criss-crossing India to curate their portfolio, visiting vineyards in Maharashtra, breweries in Goa and distilleries in Rajasthan and Bangalore.

Director Adam Jacob reveals he and his father were "blown away" by the modernity of these production facilities, which were far in advance of their "ignorant expectations". He adds: "We realised we had serious commercial prospects ahead. It was also apparent early on just how interested and willing to help the suppliers were."



Adam (left) and Ipe Jacob spent weeks touring India to compile Maharaja Drinks' portfolio

Diverse team brings advantages

Three years on from its inception and the retailer has assembled a small, close-knit team from a diverse range of backgrounds.

"The team brings together an unusual mix of skills that traditional drinks companies often lack," Jacob insists. "From a surgeon's precision to a brand guru's storytelling, a reformed hippy's creativity, an accountant's financial acumen and a sailing instructor's adaptability, we navigate the UK beverage market with rigour, innovation and unconventional insight, turning diverse experience into a genuine competitive advantage."

Despite changing domestic perceptions, consumer education remains a top priority for Maharaja Drinks. Convincing a British punter to spend triple figures on an Indian brandy such as Paul John XO requires a fundamental shift in consumer perception.

Despite this challenge and even though the UK continues to face a cost of living crisis, Jacob insists the company's decision to focus on premium-plus price tiers is the right one. »

» "The mass market is not for us," he says. "The late-night 'hottest-curry-on-the-menu, chips-and-three-lagers' section is well served by others; there is no room there for us. But as drinking trends here and elsewhere shift towards quality, and premium quality, we expect the mass market to move towards us."

No compromise on quality

Trading conditions in the UK are far from benign, with the government's decision to hike alcohol duty by a further 3.66% in February heaping more misery on the drinks sector, but Jacob remains sanguine.

"It's demonstrable in the consumer sector worldwide, and over decades, that premium-quality products weather the downdrafts of economic maelstroms better than products that compromise on quality when the going gets tough," he says.

While the Maharaja Drinks team initially expected the Indian diaspora to be its primary engine of growth, sales results have proved a surprise. It transpires that "culturally curious" Millennial and Gen Z drinkers in cities such as London and Manchester have become the retailer's most enthusiastic patrons.

"We focus on authenticity and storytelling, not gimmicks," says Jacob. "Our culturally curious Millennials and Gen Z audience want drinks with real heritage, bold and adventurous flavours, and meaning. They value transparency, sustainability and drinking with intention, so we highlight the origins, traditions and craft behind each product, letting the cultural depth speak for itself.

"At Maharaja Drinks, this means using organic certification, sustainable production methods and environmentally friendly manufacturing, packaging and transport. By staying true to the drinks' roots while presenting them in an approachable, contemporary way, they feel at home in a North London or Manchester bar scene without ever compromising authenticity."

The importance of giving back

While scaling the business remains a priority, Maharaja has not neglected its ESG commitments. It remains anchored by an ethical 'rule of one': 1% of sales goes to supplier charities and 1% is shared by staff. In a 2026 climate defined by RPI-linked duty increases and a cost of living squeeze, many would see this as a luxury they can't afford — Jacob sees it as a necessity.

"Sharing our success with those who help create it is simply part of our DNA," he notes. "Because we are entirely equity funded, we are not beholden to bankers or external investors whose financial constraints might interfere with our personal values."

Indian whisky is at the forefront of Maharaja's spirits assortment, but gin is well represented too, with the likes of Terai Indian Dry Gin from Rajasthan's The Indian Craft Spirit Co, John Disilleries' Malhar Citrus Gin and Amrut's Nilgiris Indian Dry Gin all making an appearance. Yet Jacob tips Ayam, the first Indian-crafted agave spirit to be distributed in the UK, will be one of the retailer's top sellers this year.

"It's not about copying Mexico or Scotland — it's about India staking its own claim on the global spirits stage," he says. "With Ayam, we've shown that traditional Indian craft and terroir can produce spirits that stand shoulder to shoulder with the best in the world. Desmond Nazareth, the founder of Ayam Agave, discovered that India's Deccan Plateau sits on the same latitudes as Mexico's agave regions, sharing a similar terroir — the perfect environment for agave to thrive."

Changing wine perceptions

In contrast to spirits, India's wine industry is still in its infancy, accounting for less than 1% of total alcohol consumption in the country. However, the business is rapidly developing from a niche curiosity into a viable category, garnering international attention.

"Indian wine is finally coming into its own on the global stage thanks to advances in both terroir understanding and winemaking technology," explains Jacob. "Regions like Nashik, Bangalore and the cooler slopes of the Deccan Plateau are producing grapes with exceptional balance and character.

"Many of the wineries behind the 30 wines we retail — including Grover Zampa, Fratelli, Reveilo and Rhythm Winery — are leading the way with modern viticulture techniques, from precision irrigation to temperature-controlled fermentation, allowing winemakers to craft wines with consistency, depth and expression."

KEY TAKEAWAYS

- Indian craft spirits are gaining global credibility, led by single malt whisky, and shifting perceptions of the category from low-cost IMFL to premium, terroir-driven products.
- Maharaja Drinks is doubling down on its premium-plus positioning, betting that the global premiumisation trend will continue.
- The retailer's core customers are not solely the Indian diaspora but "culturally curious" Millennials and Gen Z drawn to authentic, sustainable, story-driven drinks brands.
- India's drinks export push is broadening beyond whisky, with emerging categories such as Indian gin and locally produced agave spirits signalling a more diverse craft ecosystem.



Award-winning winemaker Grover Zampa has vineyards in Nashik valley and Nandi Hills

New CEO, new chapter

This year has already seen Maharaja Drinks enter a new chapter with former head of digital growth Annabel Jamieson becoming CEO in January. She has outlined the roadmap for 2027 very clearly: achieve cash-positivity, grow the company's 'Drinks Darbar' loyalty programme to 1,000 members and strengthen brand recognition.

Interestingly, despite the trend of digital brands moving into physical retail, Maharaja is doubling down on its e-commerce roots. When asked about a flagship boutique, Jacob is characteristically blunt: "We are certain, for the foreseeable future, that we don't need, or want, to incur the costs of bricks and mortar. That's old tech!"

While Maharaja remains committed to a digital-first strategy, it is increasingly carving out a physical presence within specialist hospitality, particularly among high-end Indian restaurants. The next major milestone arrives this April with the debut of the Heritage Collection. Billed as a landmark for Indian spirits in the UK, the range remains shrouded in secrecy, though the company promises it will bridge the gap by introducing centuries-old Indian distilling traditions to the contemporary UK market.

As Maharaja Drinks bridges the gap between ancient heritage and modern retail in a market increasingly hungry for authenticity, it is doing more than just moving boxes: it is dismantling decades of prejudice one premium bottle at a time. GDI



VIEW FROM THE ON-PREMISE

Charlie Mitchell

Walking the tightrope: A UK perspective on the balancing act of hospitality businesses reflects a globally resilient sector

Don't look down. One foot in front of the other. Deep breaths. Arms out. Wobble. Recalibrate. Don't look down. Small steps. Feel the tension underfoot. Align. Balance. Don't look down. And brace.

Running a hospitality business in 2026 feels very much like traversing the abyss, barely supported by the narrowest of tightly strung threads where one misplaced step could result in catastrophe.

Or at least that is the sense when running through NIQ's latest *UK Business Leaders Survey, an annual study of* hospitality operators, investigating the challenges, opportunities and priorities of those running venues in the sector.

At a top-line level, the story is one of competing challenges and opportunities, of simultaneous cost-cutting and investment and of optimism in the face of negativity. In short, maintaining equilibrium among contrasting forces has never been more difficult.

It is difficult to start anywhere but the challenges. They are significant, they are numerous and they are well documented. They are likely familiar to any hospitality business owner across the world and they are not getting easier — or fewer in number. In fact, the average hospitality business owner selected seven different 'very significant' challenges for 2026, while 5% selected *all* 15 challenges in the survey as significant to their success.

Chief among these is the myriad of increasing costs impacting the ability to operate. With mandatory increases in National Insurance contributions and living wages, businesses are struggling to maintain staffing levels, while crippling increases in product costs (compound food inflation rates are running at a whopping 53% from 2020), rent and business rates mean that balancing the books to remain profitable requires an artistry beyond the realms of even the most astute operator.

Yet, to solely focus on the challenges would be to neglect the continued



opportunities for growth in the sector. In fact, despite the increased headwinds, over one in three operators (37%) recorded 2025 profit in line with, or greater than in 2024, with a further 30% making profit to lesser extents than 2024.

Beneath these numbers lies a story of the haves and the have-nots. Performance is far greater among leaders of 5+ sites (50% recording greater profit than 2024) than of single-site operators (51% breaking even or at a loss), but the bigger differentiator is the ability to invest.

In what very well may be a self-fulfilling cycle, there is an evident pattern of investment leading to growth and enhanced guest experience allowing greater levels of reinvestment to drive further revenue.

In no area is this clearer than in the tension behind delivery of high-quality experiences through high-quality staff service. The No.1 issue identified by business leaders, staffing is an expensive business, with 60% stating that wage costs are a very significant challenge for the coming year.

Cost increases are so severe that 53% of leaders have eliminated head office roles, 43% have cut front of house roles and 45% have frozen hiring and recruitment. In fact, 50% agree that 'being understaffed is the new normal', with just 23% disagreeing.

Yet investigate the data further and see that those who are increasing investment in employee engagement are four times more likely to have increased profitability than those who haven't. In a sector in which experience is king (indeed, business leaders themselves identified 'quality of experience' as the most important driver of visits), investment in staffing to support depleted workforces will pay dividends.

Further challenges manifest in changing consumer appetites towards F&B, in the face of GLP-1 drugs and, for alcoholic drinks, the moderation movement. These are obstacles to navigate with precision and balance. Business leaders rank 'small plates' as the top trending food item for the year and 'no/low-alcohol options' for drinks. Yet just one in seven rate themselves as 'market leading' on the provision of these products — a clear sign of opportunity.

There is a further tension between value, quality and the ability to drive spend per head. When asked to prioritise efforts over the coming year, 'increasing spend per customer' ranked below 'managing costs', yet when given the choice, consumers consistently state that they would opt for higher costs over lower quality (just 13% would choose decreased quality at maintained prices, compared to 35% preferring the converse).

Of course, managing costs and increasing guest spend are far from mutually exclusive, again pointing to the swathe of competing factors on which successful hospitality businesses are balancing.

Despite all the competing challenges, there is an underlying resilience in the UK on-premise. Optimism among leaders is at a two-year high and there is a clear can-do attitude. An attitude that keeps the sector vibrant, alive and kicking, that keeps businesses balanced. Just don't look down. GDI

Charlie Mitchell is global head of insight & consumer research at NIQ, powered by CGA. His columns provide perspective from the on-premise, based on the most up-to-date and definitive data. Email him at ***charlie.mitchell@nielseniq.com***

Illustration: iStock.com/doit

Pimentae enters Sainsbury's in largest retail launch to date

Canned tequila cocktail brand Pimentae has expanded its UK retail reach through a tie-up with supermarket chain Sainsbury's at 152 of its stores nationwide. The listing comes as the brand celebrates five years since launch this spring and follows previous listings in Waitrose, The Co-operative and Ocado.

The rapid growth of the brand has led founders Alice Parmiter and Wynter Karo to be recognised on the *Forbes 30 Under 30 Europe* list in 2025. Their ambition to make bar-quality margaritas more accessible has created a business crafted with premium tequila from family-run distillery Casa Maestri in Jalisco, Mexico, packaged in a ready-to-drink format.

Sainsbury's is taking the 12.5cl cans in two flavours: Spicy and Grapefruit. The launch also marks the beginning of a major summer for Pimentae which will bring its signature 'Pocket of Paradise' slogan to life through festivals, pop-ups and experiential events across the UK. The founders have used immersive events and activities from the time the brand launched as a marketing tool to reach its target audience.

Last year, Pimentae secured GBP1.5m (US$2m) in investment, enabling the brand to accelerate its retail expansion by growing its portfolio across bottles, kegs and cans.

Avolta: Per-head alcohol spend shrinks for third year

When the world's biggest airport retailer revealed its full-year 2025 results in March — a healthy 5.5% rise to CHF13.7bn (US$15.2bn) — it wasn't good news for the alcohol component of the business.

Across Avolta's core categories (see chart right) alcohol stood out as the only segment to show a consistent flat-to-contracting spend per passenger (SPP) over the past three years (2023–25).

Due to its size, Avolta is a bellwether for the travel retail channel, which was worth US$74.1bn in 2024, according to management consultant Kearney. This figure was still 13% below 2019 levels.

With alcohol in the doldrums, Avolta has expanded its no/low-alcohol ranges across both its duty-free and F&B outlets, "reflecting growing demand for mindful consumption".

While SPP on wine and spirits has been consistently falling, the segment has held firm at around 10% of Avolta's total revenue since 2023, due to the rising number of global passengers offsetting the per-head declines.

As a core category in travel retail, Avolta has created specialised retail spaces for alcohol to drive up SPP. As well as its long-standing World of Whiskies stores housing premium lines, newer formats have included large rum and tequila showcases at relevant locations like Caribbean and Mexican airports.

Last year, the retailer also launched the Whisky Social Club which allows members of its Club Avolta loyalty programme to enjoy exclusive experiences, such as masterclasses, aimed at lifting average transaction values.

Avolta Spend By Category 2023–25

SPP vs LY	2023	2024	2025
Alcohol	↘	↘	↘
Confectionery & Food	↑	↗	↗
Perfume & Cosmetics	↑	↗	↗
Textile & Leather	↑	↑	↗
Tobacco	↑	↑	↑
Watches & Jewellery	↗	↓	↘
F&B *(ATV)*	↗	↗	↗

↑ >5% ↗ 0%–5% ↘ 0%–-5% ↓ <-5%

SPP = Spend Per Passenger. LY = Last Year.
ATV = Average Transaction Value
Source: Avolta 2025 Full-Year Results

Altamura expands to 25 US states, adds 33 Total Wine & More locations

Southern Italian vodka brand Altamura Distilleries is scaling rapidly in the US with distribution expanding to 25 states and a new retail roll-out across 33 Total Wine & More retail locations from this month.

This marks the brand's most significant American push to date, with new distribution partners secured across Texas, Illinois, Massachusetts, New Hampshire and Rhode Island, alongside continued expansion in major markets such as New York, New Jersey, Florida and Texas. On the back of 200% unit sales growth in 2025, due to greater traction across both the on and off-premise, Altamura now claims to be among the fastest-growing premium imported vodkas in the US.

Part of its success is down to strong bartender collaboration and storytelling: the product is made from 100% Altamura durum wheat, the same grain used in Pane di Altamura, the world's only bread with Protected Designation of Origin status.

Co-founder & managing director Frank Grillo commented: "Our goal was to create a vodka that could *only* come from Puglia. Seeing Altamura reach drinkers at some of the best retail and on-premise accounts in 25 states is an incredibly proud moment."

Altamura recently expanded its US team to include Leah Miller, formerly of Campari America, as director of sales for New York, and hired brand ambassadors Rio Azmee (East Coast) and Rustyn Vaughn Lee (West Coast).

NOT JUST MEDALS.
SCORES. FEEDBACK.
TRANSPARENCY

Every entrant receives their judges' scores and anonymised written feedback — win or lose

GLOBAL DRINKS AWARDS

intel NEW PRODUCT AWARDS

OKI

Global Drinks Awards 2027
Deadline: 14 September | Enter now
www.globaldrinksawards.com

Getting the recipe right to maximise the on-premise cocktail opportunity

The cocktail category continues to show resilience across multiple markets worldwide. NIQ's **George Argyropoulos** explores how businesses can unlock its full potential using audience-specific market analysis



Image: iStock.com/CandyRetriever

More than half of consumers are willing to pay more for cocktails featuring clearly named, branded spirits

While the on-premise is undeniably facing challenging trading conditions, there are pockets of growth that are helping businesses across the sector navigate the current economic climate more successfully.

Cocktails, in particular, are demonstrating notable resilience in the face of these headwinds, supporting venue revenues and enabling spirits brands to retain — and in some cases even grow — market share.

In France, NIQ's tracking of consumption patterns indicates that the cocktail market has reached a steady state, with one in three consumers now ordering them when out.

There are also encouraging signs of further growth, with nearly 25% of French on-premise users increasing their cocktail consumption. Importantly, these tend to be loyal consumers: one in two orders a cocktail "every time", or "almost every time", they go out. This demonstrates that once a brand or venue wins them over, this audience is highly likely to represent valuable repeat business.

There is a similar trend in Britain, where cocktail drinkers are a highly valuable group to target, particularly the younger cohort whose frequency of consumption is rising sharply. Among 18 to 34-year-olds, one in three engages with the category once or twice a week, up 9 percentage points (pp) from last year, 18% are enjoying cocktails up to five times a week (+11pp), and a striking 4% have cocktails daily (+4pp).

The picture is even more positive in the US, where 38% of younger and middle-aged consumers choose cocktails and, notably, one in four of those aged 55 and over.

Cocktail's perception

The popularity of the category doesn't mean that cocktails sell themselves. The financial pressures which have characterised the past few years continue to influence consumer behaviour, making it crucial to genuinely meet their needs to succeed.

DATA **DROP**

- A **third** of 18 to 34-year-olds buy cocktails once or twice a week in **Britain**'s on-premise, where the **Aperol spritz** is the top serve.
- **38%** of younger and middle-aged drinkers choose cocktails in the **US** on-premise, where the **margarita** and **mimosa** are the most popular serves.
- In **France**, **25%** of on-premise users are drinking more cocktails, with half purchasing one on most visits. The **Aperol spritz** and **kir royale** are top serves.

In France, where the category has gained penetration over 2025 and is being consumed across more dayparts, on-premise users order cocktails due to their aesthetic appeal and because they are a treat. However, quality and price-conscious consumers say cocktails need to boost their "value for money" and innovative features to keep them coming back for more.

In Britain, the emphasis on quality is similar, with consumers judging cocktails based on the calibre of ingredients — from spirits and mixers to garnishes — as well as presentation. Instagrammability also plays an important role, but what's truly critical is execution: a poorly made cocktail can put off more than one in three from returning to a venue, and two in five from the category as a whole.

Meanwhile, in the US market, quality perception remains an important factor for around half of consumers when choosing a drink. Yet branded ingredients play a more central role in purchasing decisions: 53% of users are willing to pay a premium for a cocktail that features clearly named, branded spirits.

Classic serves…

To capture consumers' attention and keep them engaged, businesses need to pay close attention to the specific drinks that people seek out. The Aperol spritz is the undisputed favourite in Britain, chosen by nearly 14% of on-premise users. It is also a popular choice in France, alongside the kir royale. It's perhaps unsurprising that two sparkling wine-based drinks feature in the top ten in the homeland of champagne: this signals a clear opportunity for sparkling wine brands.

The Aperol spritz is less dominant in the US, but the mimosa ranks as the second most popular cocktail there, so fizzy wine still has significant potential within the North American on-premise.

The undisputed king of cocktails in the US is, however, the margarita, loved not only by younger consumers (44%), but also by »

» those aged 35–54 (48%) and 55+ (57%). This popularity is likely linked to the broader appeal of tequila, which 45% of on-premise users cite as their favourite cocktail base.

Rum, by contrast, is chosen as a base by only one in four, yet its presence in trendy cocktails remains strong: the daiquiri, piña colada and mojito all feature among the top five favourites.

This may seem contradictory, but it's not that surprising: we shouldn't assume that consumers always know exactly what goes into their cocktails (in France, nearly one in five admit they don't). While they may have a preferred spirit if asked, on-premise users are often more attached to specific recipes, regardless of the ingredients.

…or signature drinks?

Businesses shouldn't rely solely on these well-known services. Data from France show that even the top choices are gradually losing ground, reflecting a broader evolution in consumer preferences observed across other markets as well.

Younger users, in particular, are increasingly drawn to flavour experimentation and are more willing to try new and innovative cocktails. Signature serves present an excellent opportunity to attract younger British consumers, for instance, as more than half of this group favour exclusive creations over standard offerings.

For this strategy to succeed, brands and operators need to collaborate closely on recipe design, combining popular base spirits with trending flavours or flavour profiles. Citrus, for instance, ranks among the top three preferred cocktail flavours in France, so bars there can bet on the likes of lime, lemon and yuzu to develop successful recipes.

That said, simply identifying trending classic cocktails or popular flavour and taste profiles isn't enough to create an offering that truly engages consumers. Businesses and brands need to dig deeper into consumer preferences to understand precisely when and where people want these flavours and experiences.

In the US, 60% of on-premise consumers prefer fruity and sweet cocktails in the summer. Yet relying on the same drinks in winter might lead to lost revenue, as the appeal for that profile halves. During the colder months, operators are better off focusing on coffee-based cocktails (chosen by 47% of drinkers), hot cocktails (42%) and indulgent creamy creations (37%).

On-premise consumers in Britain are similarly influenced by seasonality. Overall, the split between those who adjust the type of cocktail they consume based on the time of year and those who don't is almost even (53% vs 47%).

Yet that 47% who do vary their choices might require some extra effort from brands and operators aiming to capture the widest audience: 48% of British consumers adjust the flavours they seek, 44% vary the type of serve, and an intriguing 32% even switch their preferred base spirit.

The how and when

Equally important to adjusting the type of offering is understanding what drives people to a venue in the first place, and when they are most likely to visit. In this regard, analysis of the French market provides valuable insight, as it shows how online information influences consumers' decisions on where to go.

For most French consumers, online activities like checking the menu, reviewing prices and looking at photos to gauge a venue's ambience are even more influential than recommendations from friends and family. This is particularly true for French cocktail consumers: 44% regularly consult reviews before visiting, 41% check the drinks menu, and one in three browse a venue's social media pages.

Meanwhile, looking at the 'when', analysis of the US market shows that Friday and Saturday are, overall, the most valuable occasions for cocktail consumption in the region (largely because higher volumes are sold on those days).

But that doesn't mean every cocktail performs best at the weekend peak. The mimosa — the country's second best-performing recipe — achieves its strongest results on Sunday, unlike most other leading cocktails, which over-index on Friday and Saturday. Similarly, the bloody mary and the paloma generate the highest average returns per outlet on a Sunday.

By contrast, the velocity of other drinks, such as sangria, tends to remain relatively consistent across the weekend. When properly promoted in-venue, these more stable performers can serve as a reliable lever for revenue forecasting and smoothing sales across the week.

Classic recipes, signature serves, trending flavours, seasonality, online presence: no single element alone defines a successful on-premise strategy. The real key lies in developing a holistic understanding of region, time and audience-specific trends, supported by granular data that uncovers the why, how, when and where behind consumer behaviour. GDI

George Argyropoulos is managing director EMEA for NIQ

THE **RESEARCH**

NIQ offers a comprehensive suite of tools to make informed decisions and drive success across the global on-premise. Providing insights into category, channel and occasions, aiding in sales and marketing strategy optimisation, offering valuable in-market insights and benchmarking for targeted consumer outreach. To learn more about capabilities, visit **www.niq.com** or email **george.argyropoulos@nielseniq.com**

JUDGED PROPERLY.
BALANCED PANELS.
MEASURED DIVERSITY

Panels are constructed deliberately — gender balanced, globally representative and professionally diverse

GLOBAL DRINKS AWARDS

intel NEW PRODUCT AWARDS

OKI

Global Drinks Awards 2027
www.globaldrinksawards.com

Precision, planning and the pulse of the UK alcohol shopper

UK alcohol shoppers are more likely to be influenced by duty-free activations and in-store promotions than global buyers, according to new analysis of shopper intent from travel retail research specialists m1nd-set. **Michael Barrett** reports

Global alcohol shoppers are becoming increasingly precise in planning duty-free purchases, according to an analysis of the evolving landscape of shopper intent by travel retail research specialists m1nd-set.

However, UK buyers are more susceptible to immediate inspiration on the shop floor, opening huge opportunities for travel retail suppliers and operators to influence shopper decisions in-store.

The rise of spontaneity

Across the total duty-free environment, shopping remains largely spontaneous. Just under a third (31%) of all buyers purchase completely on impulse, a significant spike from the 21% recorded during the pre-Covid-19 2017–20 period.

While 29% are "specific planners" who know exactly what brand or product they want, the largest segment remains the "undecided planners" (40%), although this group has declined considerably since before the pandemic.

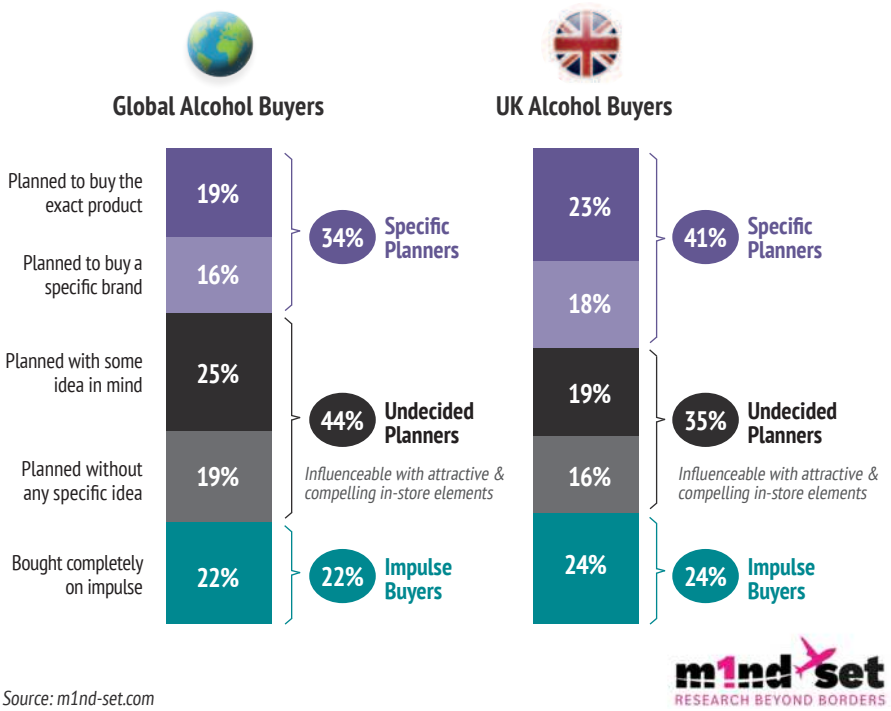
These shoppers enter the store with a vague idea, but are highly influenceable by attractive and compelling in-store elements. Despite this, the "moment of thought" takes place relatively early: 44% of total shoppers begin thinking about their purchase before even leaving for the airport.

Alcohol: a category of precision

Data from m1nd-set demonstrate that, when analysing alcohol buyers, a much more deliberate shopper profile emerges.

Alcohol purchases are far more considered, with more than one-third (34%) stating they are specific planners, 5% more than the average among all duty-free buyers. Only 22% of alcohol shoppers buy on impulse, considerably lower than the 31% across all categories.

Planning of Purchase in Duty Free Global Alcohol Buyers vs UK Alcohol Buyers



Source: m1nd-set.com

The trend toward precision is growing, highlighting the importance of pre-travel touchpoints for alcohol brands. Specific planning for alcohol has climbed from 24% in the pre-Covid era to 34% in 2025, while indecisive planning has fallen from 60% to 44% over the same period.

Decision-making also starts significantly earlier for this group, with 51% of alcohol buyers deciding on their purchase before leaving for the airport, compared with only 44% among all duty-free buyers.

UK buyers: heavy planning with a dash of impulsivity

The UK market presents a unique hybrid of these behaviours. In 2025, 76% of UK alcohol buyers planned their purchase to some degree, an increase from 70% in previous years.

However, the m1nd-set insights reveal significant differences between UK buyers and the global average among duty-free alcohol buyers.

UK alcohol buyers are marginally more impulsive (24%) than the global category average (22%). Furthermore, while global alcohol buyers tend to decide before leaving for the airport (51%), UK alcohol buyers are more prone to on-site influence. Only 42% decide before leaving home, while a substantial 22% make their final decision "in the store" after looking around, compared with 15% globally.

Behaviour also varies considerably across the ages in the UK. Millennials are the most impulsive (34%), while Boomers+ and Gen Z are the most likely to have planned their purchases before arriving at the airport, at 76% and 74%, respectively.

In-store influence: inspiring intent on the shop floor

The contrast is quite clear. While the UK alcohol shopper is a "specific planner" motivated by early intent (41%), a significant portion remains open to influence.

Given that 22% of UK buyers decide only after browsing the shelves, the effectiveness of in-store visibility and tactical price-led activations remain important triggers for conversion among UK shoppers. GDI

For a more detailed analysis of alcohol shopping behaviour, please contact m1nd-set directly at ***info@m1nd-set.com***


OKI
ENTER NOW
GLOBAL DRINKS AWARDS 2027
A NEW GLOBAL BENCHMARK FOR DRINKS EXCELLENCE
global drinks intel.
GLOBAL DRINKS AWARDS
intel NEW PRODUCT AWARDS
EARLY BIRD DISCOUNTS
VIEW CATEGORIES & DISCOVER MORE
WWW.GLOBALDRINKSAWARDS.COM

New products

Take stock with our roundup of the latest drinks launches

Aplós Dragon Fruit Martini RTD

Functional non-alcoholic spirits brand Aplós has added a fourth variant to its RTD line in the US.

- RTD. Uses non-alc spirit Aplós Arise, which contains adaptogens, including suntheanine, moringa and ginseng, as its base. Flavoured with dragon fruit; 0% ABV.
- Rolled out nationwide in the US last month through the off-premise channel and online for domestic delivery.
- SRP not immediately available.





Highclere Castle Gin Peach Rose

Highclere Castle Spirits, based on the Highclere estate in the south of England, has unveiled the first flavour extension of its namesake gin brand.

- Gin, flavoured. Botanical mix includes oil from the Lady Carnarvon rose and Italian white peaches; 40% ABV.
- Debuting in the US this month, rolling out to both the on and off-premise channels, as well as online for direct-to-consumer.
- SRP of US$31.99 per 75cl bottle.

Glen Moray Forbidden Fruit

La Martiniquaise-Bardinet has released a third iteration in Glen Moray's Xperience Collection line of bottlings, this time finished in ex-calvados casks.

- Scotch whisky, single malt, Speyside. No age statement. Matured in ex-bourbon and then finished for an unspecified period in ex-calvados; 40% ABV.
- Released in the UK this month through spirits specialists in the off-premise channel and retail multiple Morrisons in Scotland.
- SRP of GBP32 (US$43) per 70cl bottle.





Old Forester The 117 Series High Angels' Share Rye

The Brown-Forman brand launched The 117 Series in 2022, this latest iteration created by greedier angels.

- American whiskey, straight rye, Kentucky. Contains spirit that has been aged in barrels that have "yielded an elevated evaporative loss"; 55% ABV.
- On sale in the US from last month, in Kentucky's off-premise channel through selected outlets.
- SRP of US$64.99 per 37.5cl bottle, available in limited — albeit unspecified — quantities.



Indri Diwali Collector's Edition 2025 Marsala Cask

This addition to Indri's Diwali Collector's Edition line of bottlings from Piccadily Agro Industries arrived in the UK last month.

- Indian whisky, single malt, Haryana. No age statement. Matured in ex-marsala wine casks from Sicily; 58.5% ABV.
- On sale from spirits specialists in the UK's off-premise channel.
- SRP of GBP250 (US$333) per bottle; limited to 180 numbered units. »

A Decade of Data-Driven Discovery

For ten years, **B1S has transformed** how the travel retail industry sees its shoppers.

From raw data to refined intelligence, from insights to impact — our journey has been one of **continuous discovery.**

The next decade?
Even brighter.
Even bolder.



2026
Celebrating a decade of the most successful Travel Retail insights platform.

2025
70+ corporate **subscribers**

2024
200K+ **interviews** with TR shoppers

2023
50+ corporate **subscribers**

2022
150K+ **interviews** with TR shoppers

2021
Added **domestic, cruise & ferry** and **downtown** channels

2020
100K+ **interviews** with TR shoppers

2019
25+ corporate **subscribers**

2018
50K+ **interviews** with TR shoppers

2017
10+ corporate **subscribers**

2016
B1S **launched**

Celebrating
10 YEARS OF
B1S

Go **B1G** on Airport Traffic and Shopper Insights!

m1ndset
RESEARCH BEYOND BORDERS
SINCE 2007

Glenmorangie The Thirty

» The latest expression off the Moët Hennessy brand's production line is the oldest in Glenmorangie's core range.

- Scotch whisky, single malt, Highland, 30yo, aged in ex-bourbon. Two-thirds of the whisky has been finished for "more than" 15 years in ex-Burgundy red wine casks.
- Rolled out last month online and in the Glenmorangie-branded outlet at London Heathrow Airport. "Other markets launching throughout the year."
- SRP of EUR850 (US$979) per 75cl bottle.





Lillet Blanc 0%

Pernod Ricard has released the non-alc version of Lillet in time for what it calls "apéritif season".

- Aperitif. Comprises dealcoholised French wines with "fruit infusions and other key ingredients"; 0% ABV.
- Released this month in Austria and Germany.
- SRP of EUR15.99 (US$18.60) per 75cl bottle.

Oban Aged 15 Years Port Cask Finish

This second release in the Diageo-owned brand's 15yo cask-finished series follows May's Sherry Cask Finish expression.

- Scotch whisky, single malt, Highlands, 15yo. Matured in American oak hogsheads, then finished for an unspecified period in American oak ex-port casks; 52.1% ABV.
- Debuted in the US last month, both through off-premise spirits specialists and online for domestic delivery.
- SRP of US$130 per 75cl bottle.



Cascadia Garryana Oak Barrel Finish Bourbon

This fourth release in the Bardstown Bourbon Co's Distillery Reserve collection showcases "experimental finishes, extended ageing and uncommon blending".

- Bourbon. Blend of three 9yo and 10yo bourbons, each featuring a different mashbill of corn, rye and malted barley. Finished for 10 months in Oregon white oak barrels; 53.75% ABV.
- Part of Bardstown Bourbon Co's Distillery Reserve range. Available in unspecified "extremely limited" quantities at the Louisville distillery.
- SRP of US$99.99 in the Distillery Reserve's "signature" 37.5cl format.





Kavalan Four-Cask Matured 15yo

Initially launched last year, this age-statemented expression — the King Car Group brand's first — arrived in the UK last month through new distribution partner Marussia Beverages.

- Whisky, single malt, Taiwan, 15yo; 43% ABV.
- Released in the UK last month.
- SRP of GBP149 (US$200) per 70cl bottle.

Maker's Mark Wood Finishing Series: The Stewards Release

This is the third release in the Suntory Global Spirits brand's Wood Finishing Series, which began with The Heart Release in 2024 and is set to conclude in 2028.

- American whiskey, bourbon, Kentucky. Finished using wood staving. Produced in two strengths: 59.4% ABV and 56.65% ABV.
- Available in the US from March.
- SRP of $74.99 per 75cl bottle.



Stay up to date with the latest NPD news at ***www.drinks-intel.com***

OKI Europe masters the art of in-house labelling

As drinks producers face increasing pressure from fragmented supply chains and rising SKU counts, **OKI Europe** is enabling wineries and distilleries to bring high-quality label production in-house



The OKI Pro1050 gives drinks makers creative freedom and supply chain independence

In today's ultra-competitive drinks business, the bottle has become more than a simple container. A bottle label is increasingly a crucial storytelling device, but the traditional label supply chain is struggling to keep pace.

Many small and medium-sized firms are dealing with a large number of SKUs, a busy NPD pipeline and regulatory changes, while grappling with the high minimum orders and long lead times dictated by third-party label suppliers.

This is where OKI Europe, a respected pioneer in digital LED printing technology for over 30 years, can help. By allowing wineries, breweries and distilleries to bring professional-grade labelling in-house with the OKI Pro1050 printer, they can now bring products to market in days rather than weeks while achieving the same quality finishes normally associated with high-volume, industrial presses.

Why white toner is a game-changer

The Pro1050 is a unique tabletop digital LED roll-to-roll printer, easy to set up and boasting a five-year product life, equivalent to 6 million printed pages. Unlike standard four-colour (CMYK) printers, it features a fifth colour station for white toner. In the drinks world, the ability to print white elements directly onto dark, coloured or transparent label film is a game-changer.

Companies can use white toner to print on dark or metallic effect substrates like gold or silver to create high-contrast, premium designs, which are difficult to achieve using other digital technologies. The Pro1050 allows users to:

- Print white text and graphics on black or coloured stocks.
- Lay down a white under-layer beneath CMYK to make colours stand out on metallic-effect or clear/transparent label films.
- Create premium, layered effects without resorting to complex pre-printed stock.

In practical terms, this means a craft gin distillery can run a clear label with opaque white branding, while a whisky distiller can overprint vintage details onto foiled labels. In the same vein, a wine estate can produce striking seasonal designs on dark media, all without committing to long production runs.

Liqueur producer Maurizio Russo chose the OKI Pro1050 printer for its versatility



Built-in versatility

Whether you are producing 5cl miniatures or an outsize 2-litre flagship bottle, the Pro1050 can handle a wide range of label formats, including transparent label stock/film for 'no-label look' applications. This inherent flexibility is what impressed Massimiliano Russo, the owner of Italian liqueur producer Maurizio Russo.

"We have a wide range of products involving a variety of label formats," Russo says. "The company had to order labels in various formats and keep a large stock until we chose OKI and its Pro1050 printer. The machine is very versatile and the quality is excellent."

For other companies, the Pro1050's value lies in its ability to overprint. Independent bottler and distiller Morrison Scotch Whisky Distillers and family-owned Veneto wine estate Azienda Agricola Guerrieri Rizzardi use the printer to add variable data — such as vintage years, ABV or QR codes — onto pre-foiled or pre-printed labels. This allows for mass customisation without the need for entirely new label runs for every SKU.

In the marketplace, drinks labels must survive the high-moisture environment of a refrigerator or an ice bucket. OKI's dry-toner technology produces labels that are BS5609 compliant, waterproof and resistant to oils, chemicals and UV fading. Whether it's a beer neck label or a back label for a boutique wine, the print remains crisp and professional.

Stefano Cederle, from family-owned Italian winery Casa Vinicola Natale Verga, notes that the printer is a lifesaver for small batches. "Our back labels are used mainly for foreign customers who come to us for small batches of 800–2,000 bottles," he explains. "The Pro1050 allows us to reduce prices and produce mock-ups to show customers exactly how the finished product will look."

An agile, sustainable future

By printing only what is needed, brands can significantly reduce waste. Marcello Novaia, owner of Azienda Agricola Novaia, an organic winery in Valpolicella, highlights this efficiency: "In terms of waste reduction, it is formidable. It allows us to practically optimise all labels without ever having to throw anything away."

With a compact footprint designed for the production floor and an easy-to-use driver, the OKI Pro1050 gives drinks companies creative freedom and supply chain independence. GDI

Discover more at ***www.oki.com***



MARKETING TRENDS

Chris Tyas

Beverage brands are rediscovering the importance of being gateway products and they are shaking up the status quo

Every category has a front door.

In alcohol, that door used to be predictable. Lager. Maybe cider. Something your older sibling drank. Something visible in the fridge, or at a barbecue that everyone else was drinking.

But walk down a beer aisle today and you're expected to know the difference between IPA, hazy IPA, double IPA, craft lager, hard tea. Spirits ask you to understand base, mixability, occasion. Wine remains its own language.

For someone early in their drinking life, that friction is quietly intimidating.

Brands are rediscovering the importance of being gateway products.

In many categories, now we are seeing market maturity or, often, decline. Total alcohol sales in the US down 3% in H1 2025 compared with H1 2024; global wine volume down 3.3%; global spirits volume forecast to have fallen 1.3% for 2025 versus 2024 — the list goes on. Every earnings call has a paragraph on moderation, health shifts, or younger consumers drinking less.

It's easy to assume that means we don't need to bring in new consumers, but the truth is very different.

Categories are rarely static in real terms. New consumers leave every day and new ones replace them. In categories that are flatlining or declining, winning those new consumers is the most critical thing.

In any mature category, people age out. Some stop drinking. Some trade down. Some just disengage. If you're not replacing them, you're shrinking, even if total penetration looks stable on a spreadsheet.

The pivot to heritage as strategy — while not *always* a bad strategy — often points to brands being more concerned with retaining consumers than winning new ones. This is because they assume that category flatline growth means nobody new is entering the category.

Today's gateway brands don't look like traditional alcohol. They look like something adjacent: energy drinks, tropical sodas, gaming culture, festival merch. They remove friction. They lower intimidation. And, crucially, they feel culturally familiar before you have even tried them.



Two sharp examples are Four Loko and Vamos by Mahou.

They're not premium. They're not heritage-led. They're not trying to be the final destination. They are recruitment tools. They recruit new drinkers in very different ways. But both function as category entry points.

Four Loko doesn't gently introduce you to alcohol. It throws you into it.

In February, it unveiled Remix, a high-ABV range of vodka-based RTDs in resealable Tetra Paks for the UK market.

Neon colours. Pixelated chaos. Graffiti-style type. Product names demanding immediate consumption — Peach Pulse and Berry Blitza. The 12% ABV sits there unapologetically. There's no craft story. No ageing process. No tasting notes.

For a first-time or early-stage drinker, traditional alcohol categories can feel coded and exclusionary. IPAs come with flavour literacy. Whisky comes with ritual. Wine comes with judgement. Four Loko bypasses all of that.

Instead, it borrows from energy drinks and gaming culture, worlds that younger LDA consumers already understand. The visual language says stimulation, hype and immediacy. Not sophistication and heritage.

Four Loko is becoming the brand that feels closer to Monster than merlot. Its job isn't lifelong loyalty. It's category recruitment. It gets you into flavoured, high-ABV RTDs.

Spanish brewer Mahou San Miguel launched non-alcoholic malt beverage Vamos by Mahou in the Middle East at the end of January.

Where Four Loko is adrenaline, Vamos is an invitation.

Bright turquoise branding. Palm silhouettes. Real fruit photography. Slim cans that look closer to flavoured sparkling water than beer.

The word *vamos* — let's go — is collective. It signals movement together, not individual excess.

That matters for new drinkers. Alcohol can carry social anxiety. 'Am I drinking the right thing?' 'Is this too strong?' 'Is this for me?' Vamos strips that away.

For someone unsure about beer bitterness or spirit strength, Vamos feels safe. It resembles soft drinks and RTDs already embedded in social occasions.

It's the drink you bring to a barbecue because it feels easy. The can you pick because you can imagine what it tastes like. Alcohol marketing still leans into heavy gender identity coding. Vamos avoids that trap. It feels occasion-led rather than gender-led. Barbecue. Beach. Daytime gathering.

Both Four Loko and Vamos are solving the same structural problem: how do you reduce the psychological and sensory barriers to entering a category?

Four Loko does it by reframing alcohol as energy culture. Vamos does it by reframing malt drinks as sunny soft drink culture.

Neither leads with heritage. Neither leads with connoisseurship. Neither demands knowledge. But both understand they are gateway drinks to their category. GDI

Chris Tyas is chief strategy officer at London and Buenos Aires-based independent consumer-centric creative agency Impero. ***www.weareimpero.com***

On our radar

From GTR campaigns and sports sponsorships to music tie-ins and tongue-in-cheek packaging, five new activations catching attention



Proximo Spirits *Bushmills stands tall*

Global travel retail is a key focus of Proximo Spirits' new 'Stand' campaign for Bushmills Single Malt Irish Whiskey. The campaign celebrates the distillery's 400-year heritage and enduring values with activations prepared for seven airports across Abu Dhabi, Copenhagen, Dublin, Frankfurt and Istanbul. Promotional activity, including high-profile podium placements, experiential tasting bars and enhanced brand storytelling, began on St Patrick's Day in Dublin.



Diageo *On stage with Johnnie Walker*

Diageo continued to build on its presence in the UK music industry by putting Johnnie Walker into the spotlight at The Brit Awards in Manchester, where the blended scotch was 'official whisky partner'. Brand ambassador & singer Sabrina Carpenter put her name to a themed cocktail for the event: the go go highball, a mix of Black Label, ginger ale and sour cherry juice.

Herita Marzotto Wine Estates *Tennis meets frozen rosé*

Forget strawberries at Wimbledon — Italian group Herita Marzotto Wine Estates continued its long-standing tie-in with the Miami US Open by zhuzhing up its court-side offering with a 'frosé' cocktail serve in a tennis ball-shaped glass. The Love All Santa Margherita Frosé cost US$22 a serve and aimed to "capture the unmistakable energy and celebration of Miami's most electric tournament".





Heineken *'Affectionate insults' for Foster's*

Heineken emblazoned a limited-edition run of cans of Foster's Lager with rude words such as 'd**khead' and 'w*nker' in a bid to reach more male drinkers in the UK. The 'Love You Cans' — which sold out immediately — aimed to "champion the love language of British men". Promoted predominantly across OOH, the campaign by Publicis London linked to a competition offering two mates a trip to Australia dubbed the 'Knob Holiday'.

Guinness *Putting football fans front and centre*

A new campaign for Guinness Foreign Extra Stout sponsorship highlights the extraordinary passion of fans who follow the Premier League from afar. Designed to deepen recognition of the brand's Premier League sponsorship across key markets, including Africa and Asia, the 'Guinness Extra' campaign launched with two documentary-style hero films set in Kenya and Indonesia that show fandom isn't limited by geography.





Professional development at heart of BCB London

BCB London will bring bartenders and brand owners together for a two-day event in the UK capital at Tobacco Dock from 11–12 May. A sister show to Bar Convent Berlin, organisers of the London edition say professional development 'sits at the heart' of this year's conference, which includes seminars, tastings, demonstrations and workshops. There will also be live flair sessions in partnership with the World Flair Association and the return of the popular pouring contest in association with cocktail bar Satan's Whiskers. Exhibitors range from established international spirits groups to smaller, independent producers, showcasing everything from spirits and liqueurs to non-alc. Here's our pick of the stands not to be missed.

Boutique Brands Stand LG-08

Boutique Brands will showcase Lazzaroni Liqueurs, Portofino Dry Gin, Altamura Distilleries Vodka, Etsu Japanese Gin and Yaguara Cachaça, alongside The Kurayoshi and The Matsui Japanese whiskies, Scrappy's Bitters, Ruta Maya Belizean Rum, Express Vermouth, Tassoni, Kiomyi Japanese Rum and Samurai Sake. The stand will host more than eight guest bartending sessions across the show, with brand owners also in attendance. Available to meet at the stand will be CEO Danilo Tersigni, national account & route-to-market manager Thomas Pedley, head of on-trade prestige Valerio D'Addio and head of logistics & online Tommy Harrigan.



Campari Group Stand QS3-03

Courvoisier will lead Campari Group's line-up, alongside its flagship Aperol and Campari brands, non-alc aperitif Crodino, and Sarti and Mondoro Elderflower aperitifs. Visitors can register for the Courvoisier Connoisseur UK cocktail competition, offering a GBP10,000 (US$13,370) first prize, and sample the Mondoro hugo spritz ahead of the aperitif's UK on-trade roll-out this spring. The team aims to engage directly with London's bartenders and hospitality professionals, with account managers and brand advocacy representatives available at the stand.



Cantina Mexico Stand LG-04

Agave-spirit collective Cantina Mexico will bring together a group of independent, established producers to showcase tequila, mezcal and raicilla. Brands to be featured include Tequila Fortaleza, Tequila Arette, Tequila Don Fulano, Tequila Calle 23, La Venenosa Raicilla, Mezcal La Escondida and El Tequileño Tequila. Industry experts and producers representing each company will be on hand to talk about their products, explain their brand stories and detail their artisanal production methods.



Defiant Ones UK Limited Stand QS1-08

The company behind Still G.I.N. By Dre and Snoop, Defiant Ones UK Limited, will be at stand QS1-08. The gin brand was launched by Dr Dre and Snoop Dogg in 2024 and was the second product release from the pair, who also have RTD cocktail range Gin & Juice By Dre and Snoop. Still G.I.N. is made using vacuum distillation, which Defiant says gives it "a crisper, fresher taste". It is unlikely the megastars will be at the stand, but it may be worth swinging by just in case.



Disaronno International UK Stand GG-71



Disaronno International UK will exhibit a broad selection from its portfolio including Disaronno Originale and Velvet, Tia Maria, Engine Gin, Isolabella Limoncello, Sagamore Spirit, The Busker Irish Whiskey, Three Sixty Vodka, Cotswolds Distillery gin and whiskies, Barceló Rum and Minoki Rum. The company will introduce a new "modular stand concept designed to flex across events". Disaronno brand ambassadors Rory O'Sullivan and Daryl Beare, Three Sixty Vodka's global brand ambassador Ilias Kousis and members of the wider Disaronno International UK on-trade commercial team will be in attendance. »



Double Dutch Drinks
Stand GG-44

» Double Dutch Drinks will showcase its full range of mixers, including tonic waters, ginger beer/ale and soda waters. The team will also mix up cocktails, offer guided tastings, perfect-serve suggestions and "a chance to explore how our flavour-led approach elevates mixed drinks". The UK company's range of soft drinks are made using natural ingredients with no artificial flavouring, colours or preservatives. Available to meet at the stand will be co-founder Raissa de Haas and senior national account manager Natalie Peacock.



La Cepa Wine & Spirits
Stand LG-03

La Cepa Wine & Spirits will present a range of artisanal mezcals from its flagship brand, Mezcal Sentir. Mezcal Sentir's portfolio spans more than 20 expressions across joven, reposado, añejo and ancestral styles, as well as fruit-distilled variants. Alongside its core range, the company will showcase Citruse by Sentir — a four-strong range of espadín mezcals which come in Orange, Lemongrass, Tamarind and Mandarin-infused variants. La Cepa Wine & Spirits' focus at this year's event is on introducing the portfolio to trade buyers and building recognition in international markets.



La Martiniquaise-Bardinet UK
Stand GG-48

LMB UK's line-up will be led by Marie Brizard's liqueur and syrup range, alongside spirits including Sobieski Vodka, Glen Moray and Cutty Sark. Warner's Gin will also be a focus this year, following its recent addition to the portfolio. LMB says: "We'll be having some fun with the flavours of Marie Brizard liqueurs and syrups, giving guests a chance to play around and try new flavour combinations." National account controller David McLauchlan, brand specialist & key account manager Phil Huckle, key account manager Ross Walpole and brand activation manager Jerri Alexander will all be there.

Legendario Stand GG-27



Legendario will present its range of Cuban rums, including the Añejo, Blanco and slightly lower-ABV Elixir de Cuba. The range is distilled in column stills and aged in American oak barrels in Havana. The 80-year-old company's portfolio is positioned around its Cuban heritage, with distribution already established in more than 25 countries across both on and off-trade channels. "Our portfolio combines authentic Cuban identity, consistent quality and strong international distribution, making our brands a reliable and attractive choice for partners seeking genuine rum with character and history," Legendario says.



The Lost Explorer Mezcal Co
Stand GG-40

Visitors to The Lost Explorer stand will be some of the first to try the brand's new Reposado tequila, which launches in May. As well mezcal and tequila, the stand will showcase a tequila-RTD collaboration with Lockdown Liquor & Co: Spicy Picante. The Lost Explorer Mezcal Co produces its agave spirits in Valles Centrales, Oaxaca, using Espadín, Tobalá and Salmiana agave plants. The company's portfolio is sold in Mexico, the US, the UK and mainland Europe. Trade marketing manager James Pattison will be available to meet.



Speciality Brands Stand EM2-05

Speciality Brands will welcome visitors with guided tastings across its portfolio, served neat and in a series of cocktails. The UK-focused distributor represents a range of spirits and no/low options, working closely with the on-trade and specialist retail. Brands on show will include Black Tot Caribbean Rum, Boatyard Gin — including the refill pouch packaging format — Cocchi Vermouth, Michter's Small-Batch Kentucky Straight Bourbon, Nikka Japanese Whisky, Seasn 0.0%-ABV Cocktail Bitters (from the creators of Seedlip), Seychelles rum Takamaka and Tapatio Tequila.



The Spirit of Italy Stand LG-14

The Spirit of Italy Council was created in 2011 "to promote the culture of premium Italian liqueurs", and is formed of ten spirits producers: Cocchi, Lucano, Luxardo, Meletti, Moccia, Nardini, Pallini, Strega, Toschi and Varnelli. Visitors to the stand will be able to meet distillers and sample products including Liquore Strega, Amaro Lucano, Anisetta Meletti, Toschi Nocello, Varnelli Anice Secco, Nardini Grappa Bianca, Pallini Limoncello, Zabov Moccia, Luxardo Maraschino and Cocchi Storico Vermouth di Torino. Representatives from each company will be available for interviews with press and trade professionals at the stand. GDI

World Spirits Alliance CEO Helen Medina

'If you want to change something, you have to do it together,' says the CEO of trade association the World Spirits Alliance, Helen Medina. Interview by *Global Drinks Intel* digital editor **Olly Wehring**

What's the history of the World Spirits Alliance [WSA]? The organisation's been around as a loose alliance for around 20 years, after the distilling community agreed it should meet up annually to exchange ideas.

In about 2019, the arrangement was formalised as a trade association that was run through SpiritsEurope, which coordinated the national trade associations and the member companies involved.

I was hired to be the WSA's first formal CEO in 2024. One of my first tasks was to make the WSA a Geneva-based organisation. Today, the WSA has around 34 members.

Which policymakers are your main focus? In Geneva, it's the World Health Organization [WHO], while in New York it's the United Nations. Among the issues we engage over are market access, illicit trade in alcohol and alcohol-related health.

Is the WSA a lobbying organisation? We're advocates for our industry.

What's the difference? It's around education, such as sharing with government officials what our members are doing to reduce the harmful use of alcohol, or the reasons why we believe the illicit trade of alcohol should be tackled, or highlighting that if the tax levels on alcohol are set too high then that invites crime.

Does the WSA have the commensurate membership of its industry to speak on behalf of the industry? I think so. The spirits industry's very consolidated at the big, globally trading companies — we're very much representative of those organisations. When it comes to the national trade associations, they're very important in their respective regions. We don't talk about the things the Distilled Spirits Council of the US [Discus] or SpiritsEurope have a lead on, for example.



Helen Medina: 'Our industry is a legitimate actor in tackling the harmful use of alcohol'

What kind of conversations are you having at the moment and with whom? We're busy making sure we understand what the WHO is thinking, now that the US has pulled out. What are their priorities when it comes to alcohol policy?

For example, there's a conversation in the WHO right now about there being no safe level of drinking alcohol. We're following that, but more immediate is a conversation within the WHO about the commercial determinants of health.

There are some that believe there are commercial factors that can determine an individual's health in a negative way, which can sideline the private sector. We're really concerned about this, because our industry is a legitimate actor in tackling the harmful use of alcohol. We do a lot in this space; we're the ones talking to consumers. It's not the health authorities that have that connection with consumers.

Yet, above everything else, the brand owners' MO is to grow the company. Yes, but not to cause harm, or to make their brands look bad. That's just bad business. They all want to their brands to be drunk carefully, considerately and mindfully. They don't want their brands to be tarnished.

If you want to change something, you have to do it together. If I were on the other side, I would want to work with these guys and see if I could do even more with them, rather than shun them and have a whole part of the business community that I won't work with. It just doesn't work.

The illicit trade in alcohol isn't an area that the industry seems to be happy to talk about. I don't know about that. There's a lot to be said about it at least in the policy-making space, because it's a problem.

From our side, we're working with the Transnational Alliance to Combat Illicit Trade and we'll be sharing a report from them into the illicit trade in alcohol soon.

We want governments to understand that this practice invites crime and that they're not getting tax from it.

What's surprised you — both positively and negatively — about the spirits industry? Let me start with the positives! It's an amazing industry that's very well coordinated. They are really good with their messaging and it's a fun industry.

I suppose the only thing that's disappointed me is that they didn't set up the WSA as a formal trade association before I started. They should have done this a long time ago. The issues they're facing have been around for a while, right?

Women appear to be represented quite poorly in spirits at senior executive levels. There are women in the industry doing interesting things, like master distillers. But, speaking personally, I do want to cover this issue more broadly. It's an important thing to highlight, as a woman.

It's not my main remit, but I'm a brown, short woman: I'm a minority. It's pretty impressive that I'm here, right? I would say so.

What's your message to the spirits industry? Just continue to work together. Make sure you're working hard on your networks and band together with others in the industry. GDI

The full interview is available to subscribers. Join them at ***www.drinks-intel.com/subscribe***

PALLINI



AMORE AL LIMONE.
BOTTLED.


LIMONCELLO LUXARDO.
IT'S LIP LICKING GOOD.
LUXARDO
luxardo.it
LUXARDO
LIOMONCELLO SPRITZ
2 shots Luxardo Limoncello
1 part white wine
Half a part lemon juice
Top with soda of your choice