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FOR THE GLOBAL DRINKS EXECUTIVE | DEC 2025–JAN 2026



'Cuban rum is inseparable from our land, climate and people. At Havana Club, we honour this at every step'

SALOMÉ ALEMÁN

Havana Club Maestra del Ron Cubano

BRANDED CONTENT

Image: Mathieu Garçon

IT'S NOT JUST A VODKA



Gold Spirit Award
Monde Selection Quality Awards

Superior Taste Award
International Taste Institute

Switzerland Country Winner and World Best Finalist
World Vodka Awards

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Berlin Intl. Spirits Competition

Best of Show & Country Winner
Frankfurt Intl. Throphy

Best in Class and Platinum
San Francisco Intl. Wine & Spirits

Swiss Vodka of the Year
New York Intl. Spirits Competition

Europe Vodka of the Year
Asia Intl. Spirits Competition

Best Vodka Design
Yellow Line Design Awards

Best Premium Vodka Brand
APAC Insider

Best in Class and Best Vodka
Intl. Women's Spirits Competition

Best in Class and Best Vodka
Intl. Wine & Spirits Competition

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2026



THE NEW YEAR ISSUE

INSIDE

Alcohol-free spirits at a crossroads as big alc scents an opportunity

Scattered pockets of opportunity as beverage alcohol limps into an uncertain year

Interviews with Campari Group, Carlsberg, Molson Coors, Caleño & Penrhos Spirits

Spirits packaging leaves extravagance behind to connect with discerning drinkers


HONOUR
NATURE
WHITE
BIRCH
classic
PREMIUM VODKA
WHITE
BIRCH
BIRCH SAP FOR
SMOOTHNESS
Alc. 40% vol. 0,7 L
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BE SPIRITS HALL(2.2&2.3), BOOTH H098



COMMENT

Joe Bates

Amid the gloomy forecasts for global beverage alcohol, one category stands out — no/low alcohol is coming of age

The prospects for the global alcohol business remain grim as the all-too-transient cheer of the Christmas and festive period fades and the dawn of the New Year looms. The last quarter of 2025 witnessed a depressing string of stories of distilleries and breweries closing and panicked multinationals replacing their CEOs after dismal financial results.

Meanwhile, in November in southern France, angry winegrowers took to the streets to demand EU and government support, protesting falling sales and climate change-linked storms and hail that increasingly wreak havoc on vineyards. Their complaints would feel all too familiar to winemakers in other parts of the world. According to the International Organisation of Vine and Wine (OIV), 2025 marked the third consecutive year of below-average global wine production.

For a deeper dive into the multiple headwinds impacting the industry, look no further than Richard Woodard's expert end-of-year trends review **(p20)**. He succinctly outlines global alcohol's many challenges: scotch, cognac and bourbon are contending with oversupply, halted distillation and cooling demand, while luxury segments across multiple categories have lost momentum.

Amid all the turmoil, there are glimmers of hope: cheaper sparkling wine styles — most notably prosecco, English sparkling and crémant — are growing strongly. Agave spirits, still a "chronically imbalanced category", have plenty of headroom to grow outside North America, but the most propitiously positioned sector is arguably no/low alcohol — a category that enjoyed double-digit growth in ten major markets in 2024, according to IWSR.



If there is a unifying theme that links this issue's multiple features on no/low, it is that the category is coming of age. What began as a seasonal health-and-wellness, beer-dominated proposition has morphed into something more sophisticated, diverse and flavour-driven, increasingly shaped by Millennial and Gen Z consumers who want more than a simple alcohol replacement.

They want identity, craft and excitement, the latter a quality US consumers feel is still lacking in many no-alcohol beverages, according to Victoria Watters' timely report on stateside consumer attitudes to this growth category **(p45)**.

As the outlook for traditional drinks categories darkens, multinationals have moved in with scale, distribution muscle and marketing power, raising unsettling questions for the smaller innovators that pioneered the category. In his insightful report on the shifting alcohol-free category, Chris Losh quizzes a selection of these smaller players on how they can remain distinct, competitive and, above all, independent in what is becoming an increasingly crowded sector **(p28)**.

The volatility of the drinks market isn't just impacting craft innovators. It's forcing the multinationals to rethink their strategies, so don't miss our five-minute interview with Campari CEO Simon Hunt **(p44)**, who reveals his team are "working their backsides off" to get brands such as Aperol, Espolòn and Courvoisier firing on all cylinders amid a fiercely tough trading environment.

Hunt's bullish stance, supported by informed, strategic decision-making, is just what the wider drinks business needs as we head into what is shaping up to be another uncertain, volatile year.

This bumper issue, packed with informed features on everything from luxury rum **(p16)** and packaging trends **(p34)** to marketing **(p12)** and no-alcohol RTDs **(p50)**, is perfect for the industry executive looking to not just survive the headwinds but to find the scattered pockets of opportunity and fight for growth in the year ahead. GDI

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Cover illustration: iStock.com/ Olga Strelnikova

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DRINK RESPONSIBLY

News briefs

Catch up quickly on the global drinks stories that matter

FINANCIAL RESULTS

AB InBev posted a narrowing growth rate (+0.9%) from the most recent quarter as Michelob Ultra earned a namecheck for having performed particularly well in the US.

A particularly tough third quarter (-11.2%) reversed the **Boston Beer Co**'s sales growth in 2025 so far, with the company's year-to-date subsequently turning negative.

Campari Group built on the healthy sales rise reported in the Q2 with another mid-single-digit showing (+4.4%) in the three months to the end of September (see p44).

Carlsberg dipped back into the red in the third quarter of 2025 (-1.4%), describing the consumer environment across its regions as "challenging" but stable.

Diageo admitted that the US consumer environment was "weaker than expected" in its latest quarter, as total sales flatlined in fiscal Q1.

Heineken saw a slither of red hit its quarterly sales performances (-0.3%), with all eyes turning to the closing three months of 2025 to attain full-year top-line growth.

Marie Brizard Wine & Spirits posted a second consecutive quarter of double-digit sales declines as flagship scotch William Peel continues to struggle in France.

Molson Coors Beverage Co booked a fifth consecutive quarter of declining sales (-3.3%), although the Q3 figures were "aligned with our expectations".

Proximo Spirits posted its first quarter of rising sales (+0.9%) in the year so far. The performance followed a first half of 2025 in which sales declined by just under 6.7%.

Rémy Cointreau reported a return to negative sales (-11%) as subdued consumer demand and high inventories continued to weigh on performance across its key markets.

Chilean wine group **Viña Concha y Toro** booked another quarter of rising sales, hailing the ongoing success of its approach to premiumisation.

COMPANY NEWS

AB InBev is set to sponsor Uefa's men's club competitions, including the Uefa Champions League.

Asahi Group said 1.9m sets of personal information were compromised or potentially exposed in the ransomware attack that disrupted its systems two months ago.

The controlling shareholder of **Campari Group**, Luxembourg-based Lagfin, was hit with a precautionary share seizure worth in the region of EUR1.29bn (US$1.5bn) by Italy's financial police.

Diageo filed a motion to dismiss a US class action lawsuit alleging its Casamigos and Don Julio tequila brands are not sourced entirely from agave, calling the claims "implausible" and "lacking legal and logical merit".

Workers at **Diageo**'s brewery in Northern Ireland's capital voted to take strike action in a dispute over pay. The union claims the stoppages could affect production of Guinness 0.0, for which the Belfast facility is the company's largest global site.

Heineken revised its medium-term guidance, forecasting a mid-single-digit rate of sales increases as part of its 'EverGreen 2030' strategy.

Vinarchy CEO Danny Celoni said the group is reassessing a raft of marks that no longer fit its long-term strategy. The comments follow an *Australian Financial Review* report that the wine giant may consolidate its portfolio to about 100 brands over the next two years.

PEOPLE

Diageo completed what it has described as a "rigorous process" to replace Debra Crew as CEO on a permanent basis, appointing Sir Dave Lewis to take the helm from the start of next year.

Pernod Ricard appointed Florence Tresarrieu as CEO of its Canadian affiliate, Corby Spirit & Wine.

Robert 'Bob' Hendrickson, the interim CEO of US distributor **Republic National Distributing Co**, passed away at the age of 65.



BeatBox Beverages may soon be part of AB InBev

The current head of **William Grant & Sons** left the company, Søren Hagh, less than two years after assuming the position, *Global Drinks Intel* exclusively revealed.

MERGERS & ACQUISITIONS

AB InBev is reportedly in negotiations to buy US-based RTD brand BeatBox Beverages, estimated to be valued at around US$700m.

Carlsberg chose not to comment on reports claiming that discussions are underway with Japanese brewer and conglomerate Sapporo Holdings regarding the divestment of unspecified assets in Asia.

Heineken agreed to transfer ownership of its brewery in Bukavu, in the eastern part of the embattled Democratic Republic of Congo, to a Mauritian company.

Japan's **Kirin Holdings** is reportedly looking to sell its Four Roses Bourbon Whiskey brand for around US$1bn.

Marie Brizard Wine & Spirits acquired a controlling stake in wine and spirits distributor Interbrands Denmark.

INDUSTRY NEWS

The **European Court of Justice** ruled that alcohol-free versions of juniper-led distilled spirit may not be marketed using the term 'gin'.

Forecasts for **global wine production** in 2025 were released, with output expected to recover slightly last year's historic low — although annual volumes remain "well below recent averages".

The **US craft spirits industry** recorded its second consecutive year of declining sales in 2024, as producers faced persistent economic and distribution challenges, according to data released by the American Craft Spirits Association in November.

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

Stateless steps up: Milestone unveils pioneering American Single Malt

The ambitious brand builder spied an underdeveloped opportunity in one of the most exciting US whiskey subcategories, according to its **managing director Joe Milner**



The American Single Malt Whiskey shows that 'Stateless can be both accessible and aspirational'

Milestone Beverages Hong Kong (HK) has expanded its award-winning Stateless Bourbon brand with the introduction of Stateless American Single Malt. It's a bold move upmarket that signals the independent brand builder's entry into one of the most hotly anticipated emerging whiskey categories.

For managing director Joe Milner, the launch represents both a natural evolution and a strategic repositioning of a bourbon brand he first unveiled in 2023. "One of the main reasons I wanted to launch a single malt was to put a halo effect on the whole Stateless portfolio," he explains. "I wanted to give a super-premium look and feel to the brand."

Milestone's original Stateless Bourbon line has gained traction in markets across Asia, the Indian subcontinent and Europe, thanks to its attractive pricing and accessible positioning. However, despite this success, Milner is keen the brand is not "pigeonholed" as either standard or value. "It's a great brand already with excellent marketing, but we want to elevate it further," he says.

Milner's rationale for the launch is twofold: firstly, the 'single malt' category already has a strong consumer pull in Asia. "It's definitely seen as more premium. I've seen huge success stories with single malts in Taiwan enjoying explosive growth from a standing start in just ten years," he explains. "Asian consumers clearly have a strong affiliation with single malts, but more education is needed."

Secondly, there is growing international appetite for single malts from other countries. "What I've noticed in the last five years is that a lot of international single malts have started to come into play, whether they're Indian, Irish or Taiwanese," says Milner. "The international single malt category has been growing fast."

The fledgling American single malt category, which only received official classification from the US Alcohol and Tobacco Tax and Trade Bureau last January, has particular overseas promise, Milner believes. "The excitement for us is to be one of the first movers in the international space for single malt. Forget the US; we're talking Japan, India, Western Europe, Australia — markets where there aren't a lot of options on the table right now."

Milner has carefully calibrated the pricing of Stateless Single Malt to hit a sweet spot. "It seems like the US$50 to $70 price point, whether in duty free or domestic retail, seems to be the sweet spot right now," he explains. "That's where we see a lot of growth in Japanese whisky and it's been validated by a lot of multinationals. The single malt will land around the $59 price point. We are going to go very aggressive."

Authentic Americana

The new line extension carries forward the Stateless name, but with a refreshed look inspired by Americana and circus heritage. "The fundamentals behind the brand are inspired by the circus — the nomads from the early 19th century who used to travel around different US states," Milner explains. "That's why they were 'stateless'.

"We wanted to find a balance between the premium, sleek design of traditional single malt packaging that resonates with consumers and something more playful and fun. So on the bottle you have a large circus tent, the ringmaster and strong American colours. It's authentic Americana through and through, with a strong sense of provenance."

Stateless American Single Malt began to roll out in mid-November last year, initially targeting key international markets. "We have a lot of markets in Eastern Europe that are almost committed and very interested," Milner confirms. "We're sending it to a couple of big retailers in Japan. I suspect Western Europe will also be a big market for us. Nobody's really playing in this space, and that region is always open to new, independent brands."

Milestone's existing business remains off-premise-oriented, but Milner is open to exploring new channels for this latest line extension. "Traditionally, we've been stronger in retail," he says. "If we had an opportunity to be on-premise, provided it makes sense commercially, I'm not going to say no. But I think retail is still where we're going to get the big returns."

For Milestone Beverages (HK), American Stateless Single Malt is more than just a line extension: it's a statement of intent. As Milner puts it: "We want to build products that have scale. This single malt gives us the chance to show that Stateless can be both accessible and aspirational." GDI

New products

Take stock with our roundup of the latest drinks launches



Togouchi Ayumi

Whiskies du Monde debuted this channel-exclusive addition to Togouchi's portfolio in Paris at the start of December.

- Japanese whisky, blended, produced at Sakurao Brewery & Distillery. Matured for "three to four years" in ex-bourbon before a finishing — for "a few months" — in ex-sake from its home distillery; 40% ABV.
- Launched as a global travel retail exclusive at Paris Charles de Gaulle Airport (CDG) ahead of wider availability through operators Lagardère Travel Retail and Heinemann in 2026.
- SRP of EUR49.90 (US$57.85) per 70cl.

Cù Bòcan Creation #7

Takara Shuzo International's experimental single malt brand has unveiled the seventh bottling in its Creation line, 19 months after its sixth.

- Scotch whisky, single malt, Highlands. No age statement; matured in a mix of ex-Pineau des Charentes Rouge and new American oak; 46% ABV.
- Released worldwide in limited quantities (3,000 units) in mid-November; available through specialist spirits operators in the off-premise channel as well as online.
- In the UK, SRP of GBP45 (US$58.90) per 70cl bottle.



Highgrove Evergreen

The packaging for Cotswold Distillery's new whisky features a painting, 'A View from the Wildflower Meadow', by King Charles III.

- English whisky, single malt, no age statement. Distilled from barley grown on the Highgrove Estate in the east of England; matured in ex-bourbon and shaved, toasted and re-charred ex-red wine barrels; 46% ABV.
- On sale online for domestic delivery in the UK since late November, and earmarked for "international markets, particularly the US," for 2026.
- SRP of GBP100 (US$132) per 70cl bottle; lined up as a permanent release.



Bird Dog Select Reserve

Bird Dog's 16-strong flavoured whiskey portfolio has been joined by what owner Western Spirits Beverage Co calls a "purebred" Kentucky straight bourbon.



- American whiskey, bourbon, Kentucky straight; 43% ABV.
- Went on sale in November "across most markets" in the US, and available online for domestic delivery.
- SRP of U$22.99 per 75cl bottle.



The Glenlivet Eternal Collection, Second Edition, 56yo

Pernod Ricard's second release in the The Glenlivet Eternal Collection Collection follows last year's 55yo iteration and was designed in partnership with studio Fredrikson Stallard.

- Scotch whisky, single malt, Speyside. Aged for 56 years, with the final three years in a "one-of-a kind sherry" cask; 42.6% ABV.
- Available online from the brand.
- SRP of EUR52,500 (US$56,000) per 70cl bottle; limited to 60 units.

Licor 43 Caramel Cookie/Speculoos



Zamora Co has introduced a caramelised biscuit flavour to its Licor 43 range. Continuing the brand's exploration of treats and dessert-inspired liqueurs, the new flavour follows the Chocolate (2021) and Crème Brûlée (2023) extensions.

- Liqueur; consists of original Licor 43 with caramel cookie flavours "inspired by the beloved speculoos cookie"; 16% ABV.
- The new flavour is available in the Netherlands, Germany and Belgium as Licor 43 Speculoos, and Mexico as Licor 43 Caramel Cookie. A later rollout is planned for the US and Brazilian markets.
- In the Netherlands, SRP of EUR22.99 (US$27) per 70cl bottle.

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MARKETING TRENDS

Chris Tyas

The danger of pursuing the 'when' at the cost of the 'why' — time to reevaluate demand space analysis

These days growth — the lack of it, where to find it, how to accelerate it — is causing marketers countless sleepless nights. Yet the extent to which over-focusing on when a product is consumed, an important component of demand space analysis, can hamper growth is something many drinks and FMCG brand marketers currently overlook.

To recap, 'demand spaces' in market research are specific contexts or occasions that reveal distinct consumer needs, preferences and behaviours. Billed as 'clear, simple and easy to use', they are a common business planning segmentation framework.

In essence, they show you where and when your product is being consumed. Corona, for example, 'owns' the sunset hour, as many of today's most valuable drinks brands do.

Knowing where your product is consumed, in turn, then shows you where it isn't — highlighting gaps in the market your brand could next fill, and signposting fewer, bigger, better opportunities to unlock growth. So far, so good.

Here comes the 'but'.

At their best, a demand space is a broader strategic framework that combines consumer needs, motivations and occasions of use. Yet all too often, they resemble old-style, one-dimensional use and occasion studies light on underlying consumer motivation insight.

This is a problem. Because knowing when your brand is and isn't being consumed only takes you so far.

You also need to know the 'why' and lean into it. Because without this, a brand risks spreading itself too thinly across too many consumption occasions — something that the likes of Corona, for example, has resisted — diluting itself to become master of none.

Consider Dr Pepper, which is trying to play in multiple demand spaces without seemingly to have properly gotten to grips with motivation. Posters for its 'Try more weird' campaign declare the soft drink's 'ownership' of the weekend *and* Monday at the same time, with little, if any, evidence the brand understands the difference between its consumers' weekend and Monday needs.

At the same time, many brands seem to be buying into the management consultancy theory that, for the best growth, one big global brand dominating one category is better than many smaller new brands across many.

There is a danger in this because, in the real world, that's not always the case.

Such thinking assumes consumers behave in neat, uniform ways across markets. In reality, categories splinter, needs fragment, and cultural codes shift dramatically from place to place.

A single monolithic brand may appear efficient from a portfolio or operational standpoint, but it often struggles to flex meaningfully into all the nuanced motivations that shape real-world choice.

Chasing a universal 'macro demand space' can also push a brand to sand down the very edges that make it distinctive. The more a brand tries to stretch across divergent occasions and motivations, the more generic it risks becoming — and generic brands rarely command loyalty, pricing power or cultural relevance.

Finally, over-indexing on demand spaces diverts attention and resources from one of the most important reasons why people buy into a brand: the 'something' about that brand that the consumer feels represents or aligns with their identity.

To put it bluntly, all too often a focus on demand space arises because it seems to offer a simpler solution than grappling with the challenges, intricacies and nuances of brand affiliation and then effectively leveraging them to build brands that people love.

And building brands people love, let's not forget, is the essence of what marketing is, or *should* be, about.



Image: iStock.com/Pakorn Supajitsoontorn

So what should brands do? This isn't a call to abandon demand spaces entirely; they remain a valuable tool when used as *one* input, rather than the organising principle of a marketing strategy.

Instead, it's a call for a rebalancing: to fuse the clarity of occasion-based insight with a far deeper understanding of the motivations, identities and emotional territories a brand can authentically own.

Brands grow most powerfully when they are anchored in a sharp, motivating 'why', and then deploy tools like demand spaces to determine where that 'why' can travel, stretch or scale.

Put differently: demand spaces should illuminate opportunities, not define the brand.

The opportunity for marketers, therefore, is to return brand meaning, identity and emotional resonance to the centre of strategy.

When the 'why' leads and the 'when' follows, brands don't just find more occasions, they build the kind of love, loyalty and cultural momentum that occasions alone can never deliver. 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

Five drinks brands roll out big campaigns pushing connection and celebration as they find fresh ways to advertise this festive season





Teremana *Share the mana*

Teremana leans into connection with its holiday 'Share a Drink, Share the Mana' campaign, encouraging fans to pass good energy forward with cocktails, gifting and a cashback offer. Every redemption unlocks a US$1 donation — up to $100,000 — to charity Another Round Another Rally, reinforcing the brand's community ethos. A gift pack and seasonal serves round out the festive push.

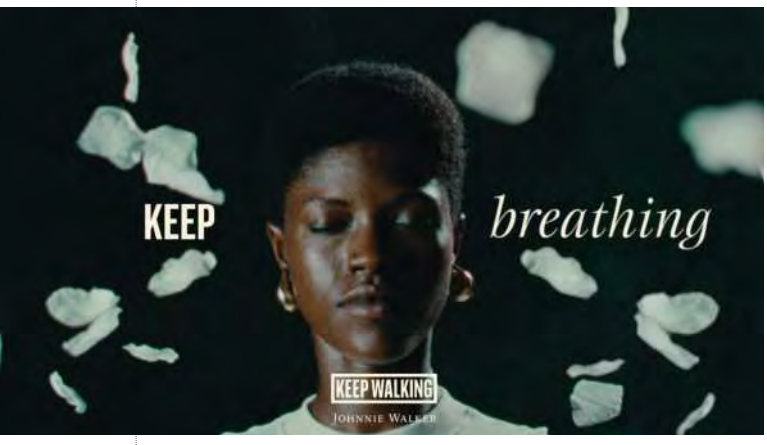
Aperol *Christmas spritz*

Aperol ushers in its first-ever 'Aperolidays', extending the aperitivo consumption occasion into winter with New York City takeovers, festive merch and limited-edition cocktail kits. Fronted by actress Nina Dobrev, the campaign reframes the Aperol spritz as a year-round connector, backed by immersive seasonal activations, curated hosting tools and a refreshed holiday merchandise line designed to spark togetherness.



Corona Cero *Low-and-snow*

AB InBev ramps up Corona Cero's presence as the first no-alcohol beer sponsor of the Winter Olympic Games, expanding its 'For Every Golden Moment' platform ahead of Milano Cortina 2026. With global takeovers, athlete-led creative and Olympic-themed bottles, the brand reframes moderation as celebration, positioning NA beer as a year-round choice for balanced, memorable moments.



Johnnie Walker *Keeping on*

Johnnie Walker refreshes its iconic 'Keep Walking' platform with a new global campaign rooted in the emotional power of 'keep' — drawn from analysing 97m social media conversations. A 30-second cinematic hero film, created by Grammy-nominated director Child and Grammy and MTV Award-winning director Melina Matsoukas, reframes progress as personal, not linear, aligning the brand with shifting cultural behaviours ahead of a global 2026 roll-out.

Smirnoff *Class is permanent*

Diageo doubles down on Smirnoff's timeless appeal with its global 'Why Change a Good Thing' campaign. Led by the playful 'Laugh' hero film and a 360° media roll-out, the push taps rising consumer demand for authenticity and consistency — framing Smirnoff's century-old recipe as a cultural constant that doesn't need reinventing.



Havana Club ensures each of its rums carry 'unmistakable Cuban DNA'

Salomé Alemán made history in 2016 when she became Cuba's first-ever *Maestra del Ron Cubano* — a title held by only a handful of experts in Cuba. Today, she embodies **Havana Club**'s heritage and craft, reflecting how authenticity and artistry continue to shape the essence of Cuban rum



Image: Mathieu Garçon

Maestra del Ron Cubano *Salomé Alemán: 'ensuring Cuban rum remains a global symbol of excellence is the greatest honour of my life'*

You're the first woman ever to hold the title of *Maestra del Ron Cubano*. How did that milestone feel personally, and how has it changed perceptions within Cuba's rum tradition? Receiving the title of *Maestra del Ron Cubano* in 2016 was both an honour and the beginning of a lifelong commitment. It marked a new stage in Cuban rum production with the inclusion of women in a long history previously dominated by men, demonstrating that expertise has no gender, only passion, dedication and respect for the craft.

It also shone a light on the Cuban women whose skill has always supported this craft — in distilling, bottling and the laboratories. For me, that is the most meaningful legacy of all. It honours where we come from, while making space for our evolution.

The *Maestros del Ron Cubano* system is famously rigorous. Could you walk us through what it takes to earn that title? To become a *maestra* — or *maestro* — requires years of learning under those who came before you. It isn't a science learned from books, but a craft passed from heart to heart, from Cuban to Cuban.

You begin as an *aspirante*, or 'aspiring master', absorbing the language of rum — its aromas, texture and rhythm in the barrels. All while mastering every stage of production — fermentation, distillation, ageing and the art of blending — always with humility and passion.

Over time, intuition develops along with the patience and discipline to listen to the rum as it evolves. Becoming a Cuban rum master is a lifelong calling, and you only truly earn the title when you guide the next generation. Carrying that legacy forward and ensuring Cuban rum remains a global symbol of excellence is the greatest honour of my life.

How would you define the DNA of Cuban rum? What technical or stylistic choices underpin that profile? The DNA of Cuban rum lies in balance, lightness and elegance. Its character is shaped by aguardiente — the aromatic spirit made from 100% Cuban molasses — and by natural conditions unique to our island, safeguarded through generations of *maestros*.

Within this national style, Havana Club has its own signature. We work with high-sugar molasses, a proprietary yeast and purpose-built distillation columns to create an aguardiente with a clearly defined, expressive profile rooted in Cuban cane. From there, every detail is deliberate: hand-selected white oak barrels, the blending of multiple bases and our natural ageing method, all of which give Havana Club its unmistakable aroma, depth and body.

Havana Club is built on deep heritage yet it's constantly innovating. How do you preserve authenticity while evolving to meet modern tastes and cocktail trends? Authenticity is always our compass. Innovation at Havana Club doesn't mean changing who we are — it means reinterpreting Cuba's singular creative energy for today's consumers.

We experiment with cask finishes, explore new rum bases, and inspire bartenders to create contemporary serves — from refined sipping experiences to elevated cocktail expressions, but always in the respect for the Cuban rum-making traditions.

There's been a global rise in premium and ultra-premium rum. From your perspective, how is Havana Club responding to this premiumisation movement? The rise of premium rum feels like a natural evolution. Consumers around the world want authenticity, provenance and craftsmanship — values that have long defined Cuban rum and especially Havana Club. »



Image: Rosie Harriet Ellis

The limited-edition Icónica Don Navarro has been Alemán's 'most emotional and demanding project'

» When Don José Navarro created Havana Club 7 Años in the 1970s, he didn't just craft a rum — he redefined what Cuban rum could be. By pioneering the continuous ageing method, he laid the foundation for the first extra-aged Cuban rum crafted at scale. This proved that rum could be complex, elegant and worthy of contemplation, opening the door for the extra-aged rums we see today.

That spirit endures in our Icónica Collection. Selección de Maestros, Gran Reserva 15 Años and Máximo Extra Añejo represent the pinnacle of our craft and demonstrate how Havana Club continues to lead premiumisation — not as a trend, but as a deeper recognition of the artistry and tradition behind Cuban rum.

How do climate, ageing conditions and raw material sourcing in Cuba influence the final flavour and structure of Havana Club rums? Everything begins with Cuba itself. Our island's terroir shapes every stage of rum making — from the naturally sweet sugarcane grown in fertile soils to the warm, humid climate that enables true natural ageing. Cuba's temperature, winds and humidity drive a unique 'angel's share', concentrating the rum and giving it its expressive, aromatic character.

Cuban rum can only be made in Cuba, and its identity is inseparable from our land, climate and people. At Havana Club, we honour this natural process at every step to ensure each rum carries this unmistakable Cuban DNA.

Transparency and provenance are increasingly important to trade buyers and consumers alike. How is Havana Club communicating its production standards and the Denominación de Origen Protegida (DOP) Ron de Cuba more clearly to the world? Transparency is the bridge between producer and drinker. Every bottle of Havana Club carries the DOP Cuba mark, guaranteeing it has been made entirely on the island under strict regulations. We have also introduced digital e-labels with QR codes that share each rum's story, ingredients, ageing and responsible drinking information.

In 2022, our craft was recognised by Unesco as World Intangible Cultural Heritage. It affirmed that we are more than rum-makers — we are caretakers of a cultural legacy. As the absolute leader of Cuban rum, our responsibility is to convey, through every bottle of Havana Club, the spirit of Cuba.

As *maestra*, where do you see the greatest opportunities for innovation in Cuban rum — whether in blending, cask selection or sustainability? Innovation must always be balanced with tradition. I believe that our future lies in safeguarding and perfecting the traditions of Cuban rum production without denying the advances of science and technology at any stage of the process, while maintaining extreme vigilance over the quality of our products. Through innovation and creativity, we must inspire the next generations while remaining faithful to our centuries-old heritage.

Do you see a new generation of women entering the craft? Yes, and it fills me with immense pride. Women have always been present in the rum-making process, and their presence has been growing. Today, there are more women involved in the exciting world of rum. There are now two *maestras* among the nine on the island, and three *aspirante-maestras* preparing for the title. Their presence alone changes the future.

My responsibility is to guide them, to share the wisdom that was once shared with me. The art of rum-making is a living chain — one link connecting to another. If I can help these women believe in their place in the craft, then my work has deeper meaning. The true legacy of a *maestra* lies not only in the rum she creates, but in those she inspires.

What's been the most challenging blend or project you've overseen? What did it teach you about creativity in rum-making? Every expression brings its own challenges, but the most emotional and demanding project for me was creating the prestige limited-edition Don Navarro. It was our way, as the current generation of *maestros*, to honour the *maestro* who shaped us. Paying tribute to such a legacy is both a privilege and a responsibility.

The process required true collaboration. Each *maestro* contributed rum bases that captured different facets of *Primer Maestro* Navarro's personality, and we had to bring those memories and teachings into harmony within a single expression worthy of his name. It taught us that creativity in rum-making often means restraint, intuition and allowing the rum to speak for itself.

When aroma, colour and taste finally came together, it felt like a conversation between generations — and that is the magic that makes every challenge worthwhile.

The cocktail renaissance has spotlighted Havana Club behind the bar. How does seeing your rum in that context influence how you think about future expressions? It is inspiring to see bartenders from around the world reinvent Cuban classics like the mojito and daiquiri with Havana Club. It encourages me to create rums that balance elegance with versatility.

A true Cuban rum should shine neat yet elevate a cocktail. That duality mirrors Cuba itself — sophistication and spontaneity. Bartenders' creativity and ability to strike a balance between rum and the other components of a cocktail keeps us connected to contemporary culture while preserving authenticity.

Finally, when you taste a Havana Club rum, what are the key markers that tell you it's truly 'Cuban' and ready to carry the Havana Club name? Cuban rum has unmistakable sensory characteristics: brightness, body, distinctive sweetness and a harmonious aftertaste that brings back the wonderful notes developed during ageing, the smooth vanilla of the oak, the sweetness of molasses expressed through the spirit, notes of spices and nuts, and the warmth characteristic of the Cuban sun and the Cuban people. True Cuban rum dances between strength and elegance; it never overwhelms, it invites.

When a rum achieves that balance and speaks with both history and heart, it is ready to bear the Havana Club name. For me, that moment is like hearing a familiar melody — you recognise it instantly, because it comes from home. GDI

Luxury rum finally finds its footing

Long overshadowed by whisky and cognac in the luxury spirits conversation, rum is now entering a period of clear, confident acceleration. **Henry Mathieu** reports



Havana Club's Añejo 7 Años is 'a key driver of the premiumisation trend' helping to recruit consumers

Rum is no longer the understudy of the luxury spirits world. After years of being treated primarily as a cocktail workhorse or a colourful Caribbean signifier, the category has entered a new stage — quieter, sharper and far more serious.

The conversation around luxury rum is evolving quickly, shaped by a generation of drinkers who value provenance, identity and compelling flavour over old hierarchies of scotch-first connoisseurship. And according to producers across key rum-making regions, this is not a flash in the pan but the start of rum's most cohesive, self-assured phase yet.

Premiumisation goes from trend to behaviour

Most producers describe the past five years as a decisive shift. Havana Club global marketing director Nathalie Parte notes that consumers are now "trading up as standard", a behaviour that has helped drive the category's value. Drinkers, she adds, increasingly want "an authentic experience rooted in history and provenance", signalling a deeper understanding of rum's geographic and stylistic distinctions.

For Havana Club, much of that momentum is anchored in its Añejo 7 Años, which Parte calls "a key driver of the premiumisation trend", helping introduce mainstream drinkers to what aged rum can offer. But the brand's real confidence lies further up its portfolio, notably in the Icónica collection, which she says "embodies the pinnacle of Cuban rum" and positions the house firmly in the ultra-premium space.



La Hechicera's Miguel Riascos says rum has been boosted by people 'drinking a bit less but better'

This elevation is mirrored across the category. Rum's upper tiers are no longer niche collector curiosities — they are a growing commercial priority for major producers.

A new kind of consumer

What's striking about luxury rum's rise is the profile of the drinker behind it. According to La Hechicera managing director Miguel Riascos, rum's growth has been powered by people "drinking a bit less but better", rejecting the old whisky–cognac pecking order and taking rum seriously as a sipping spirit.

Riascos describes today's core luxury rum drinker as an "affluent Millennial — curious and perfectly comfortable paying for discovery", especially when transparency and provenance are evident.

Geographically, Europe and the US remain crucial, but there is a growing sense of opportunity elsewhere. Parte highlights "accelerator markets such as Mexico, China and global travel retail" as places where premium spirits culture is maturing at speed.

Luxury rum finds its own codes

A defining characteristic of this new chapter is rum's increasing self-confidence. Comparisons with whisky and cognac feel less necessary than ever as producers focus on articulating what makes rum unique rather than positioning it as an alternative.

La Hechicera's Riascos frames luxury rum around authenticity and clarity: "Luxury is transparency, depth, honesty and scarcity working in unison." In his view, what sets luxury rum apart is when "place, technique and time come together in a way that feels authentic and irreplicable".

Planteray Rum master blender & owner Alexandre Gabriel offers a similar perspective from a different stylistic tradition. "Luxury, to me, is not about prestige or price, it's about authenticity and emotion," he says. "It's when a rum gives you an experience that feels unique, delicious and true." In his view, "real luxury starts with what's in the glass — its quality, its soul. It's about respect for tradition, for the terroir and for the craftsmanship that goes into every drop".

Gabriel's philosophy is built around the belief that rum should "surprise you, transport you and leave a lasting impression".

For Planteray, that means championing terroir and heritage across its more specialist lines. The brand's "more complex expressions like the vintages and single casks reveal the character of their origin", Gabriel says, while releases such as the Jamaica 1984 "invite you on a journey, to discover the people, the places and the traditions that make rum such a living expression of culture".

That diversity — of terroirs, traditions and flavour profiles — is increasingly central to how luxury rum is marketed and understood. »

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Planteray master blender & owner Alexandre Gabriel believes rum should 'surprise you, transport you and leave a lasting impression'

Innovation with guardrails

» One of the most consistent themes across producers is the delicate balance between innovation and authenticity. The category has benefited from a wave of limited editions, cask-finish experiments and deeper storytelling, but the call for substance over gimmick is loud.

Havana Club *Maestro del Ron Cubano* Asbel Morales notes that innovation works when it is "rooted in true craft", adding that the brand aims to "push boundaries… while safeguarding the integrity and provenance that define *El Ron de Cuba*".

Brugal shares this philosophy. Its *Maestra Ronera*, Jassil Villanueva Quintana, says innovation and authenticity "are two parts of the same pursuit of excellence". She points to projects like Colección Visionaria — where casks are toasted using Dominican ingredients — as examples of experimentation that strengthens the brand's identity rather than distracting from it.

Planteray's Gabriel echoes this modern realism, describing innovation as a "dialogue between past and present" rather than a race toward novelty.

Supply pressure and the reality of long-aged rum

While the category's upward trajectory is clear, producers are candid about the pressures that could shape rum's future. Climate volatility is a shared concern — particularly for rhum agricole, which relies entirely on fresh cane juice.

La Martiniquaise-Bardinet international marketing manager Constance Descamps describes recent years as "particularly challenging", with both drought and heavy rainfall reducing juice yields. She emphasises the need for long-term planning as rhum houses allocate cane for short or long-aged stock under increasingly unpredictable conditions.

Tropical ageing, although one of rum's major strengths, introduces its own supply constraints. High evaporation rates mean stocks diminish quickly, and long-aged rum becomes inherently scarce. As Riascos points out, releasing a 20yo rum decades from now requires committing inventory — and capital — today. Not every producer has made those long-term bets, meaning availability at the top end could tighten.

Sustainability expectations add a further layer of responsibility. Villanueva notes that Brugal is investing heavily in carbon neutrality, responsible forestry and circular water usage, recognising that luxury in the modern era has ethical and environmental dimensions.

Rum's next phase

Looking ahead, producers see both clear opportunity and familiar risk. Education remains the biggest unlocked lever. Many consumers still underestimate the complexity and nuance of long-aged rum; once they experience it, perceptions shift quickly.

Riascos argues that understanding tropical maturation, in particular, is transformative. "When consumers taste well-aged rum and understand tropical maturation, their view of the category changes immediately," he says.

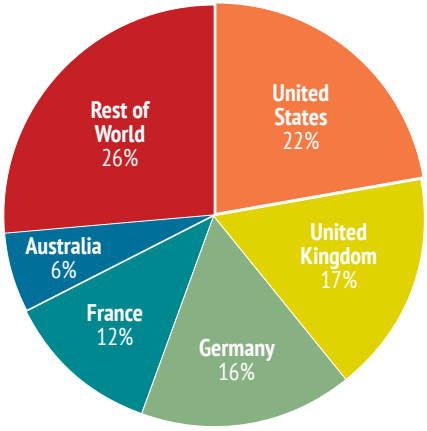
The greatest risk, producers agree, lies in over-premiumisation — using the cues of luxury without the substance to back them up. Riascos warns that this would "hurt the category", especially at a time when consumer scrutiny of premium claims is sharper than ever.

Yet, overall, confidence is high. If rum continues to focus on identity, origin and meaningful innovation, the next five years could mark the category's true coming of age. GDI

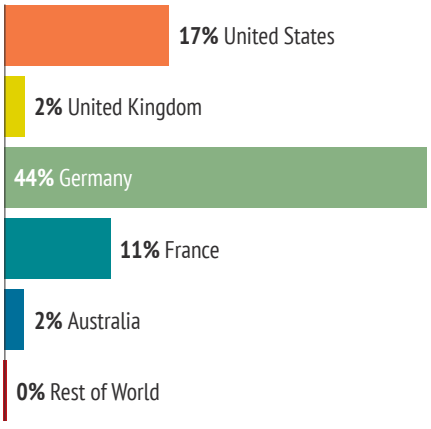
DATA DROP

Top 5 Global Markets for Premium Rum

Market Share (Vol) 2024



Market Share Chg (Vol) 2023–24



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

KEY TAKEAWAYS

- Producers report "a decisive shift" in the way consumers perceive the rum category.
- Consumers are "trading up as standard" and this is driving value growth.
- Rum is now seen as a serious sipping spirit alongside cognac and whisky.
- Europe and the US remain crucial markets, with Mexico, China and global travel retail among those highlighted as offering opportunities.
- The US is the top global market for rum, followed by the UK, Germany, France and Australia.
- Climate volatility is a pressing concern, particularly for rhum agricole-makers.
- The need for consumer education remains, especially about long-aged rum.

Q&A Spiribam puts a call out for 'authentic, terroir-driven' brands

The Martinique-based group is actively seeking acquisition targets and independent partner brands to diversify its spirits portfolio beyond rum, vodka and liqueur, reveals **Spiribam CEO Grégoire Gueden**

What's the history of Spiribam? Spiribam is the spirits division of Groupe Bernard Hayot (GBH), a diversified family company from Martinique. The family entered the spirits industry in 1986 with the acquisition of Rhum Clément, one of the island's most iconic brands. In 2003, GBH purchased Rhum J.M and created the Spiribam division.

Our first strategic focus was to strengthen these two assets so they were ready to expand internationally. We also developed the tourism side, opening our doors to the public. Leveraging Martinique's popularity as a destination helps build long-term brand loyalty. Today, across both Clément and J.M, we welcome nearly 320,000 visitors per year, many of whom become lifelong consumers.

The second focus has been to build routes-to-market. When I joined, our distribution was limited to Martinique and parts of France. We began by setting up our own distribution network in France to cover both the on and off-trade, then launched Spiribam USA. We now work with 80 independent distributors across 70 markets worldwide. More recently, we strengthened our UK presence by acquiring Mangrove, which became our third in-house distribution company.





Portfolio extentions: RTD brand SHAK.R (top) and French vodka brand Le Philtre



Grégoire Gueden: 'There's space for mid-sized, premium groups that meet consumer demand'

The third pillar of our strategy has been portfolio growth. Over the past decade, we acquired the only rum distillery on St Lucia, two rum brands in Mauritius and the Joseph Cartron liqueur house in Burgundy, France. More recently, we purchased the last remaining rum distillery in French Guiana and made a strategic move within the vibrant RTD segment through the acquisition of White Label Cocktails in the UK. This state-of-the-art factory currently produces 10m private label cocktails, as well as our own brand SHAK.R, launched six months ago. Two months ago, we also acquired a majority stake in Alcools de Luxe, owner of the Le Philtre Vodka brand in France.

Today, Spiribam's annual sales exceed EUR100m [US$115m].

You sound like you've been very busy recently. We are still in the middle of our journey. My roadmap from the family is clear: we aim to build a portfolio of brands we fully own across the major spirits categories. While we already operate in rum, liqueur and vodka, we'd like to expand into cognac, gin and whisky — either Irish, scotch, French or even bourbon.

At the same time, we've slightly adjusted our strategy. We've decided to open our route-to-market structures in France and the US to independent brands in these categories. Perhaps, over time, some of these partnerships could evolve into acquisitions. As I like to say, these fiancés could lead to weddings!

So you're shopping at the moment? Yes, I'm always looking for the right brands. Every month, I receive around a dozen proposals. My job is to identify those that truly fit with our vision. Many small and mid-sized brands suffer from limited distribution, scarce finances or a lack of long-term vision — that's exactly where Spiribam can add value.

We're not Diageo or Pernod Ricard, but I believe there's space for mid-sized, premium spirits groups that meet consumer demand for authentic, terroir-driven products.

How successful has Spiribam's growth strategy been so far? Over the past decade, we've experienced strong organic growth, driven by the strength of the rum category. The past two years have been more challenging on the organic side, but our new acquisitions have kept the company expanding. I expect organic growth to return by late 2026 or early 2027.

What's your focus right now? I'm spending a lot of my time telling the industry we're looking for brands to acquire. We're also seeking independent brands that need a better home for their distribution.

If you feel your brand is lost in your distributor's huge portfolio, perhaps you'll find a better home with us, either as a shareholder or as a long-term partner.

How can you be contacted? Ours is an industry where, when you want to reach someone, you usually can — very easily [spiribam.com]. GDI



Image: iStock/marog-pixels

India offers brightest hope as beverage alcohol limps into an uncertain year

Amid rising geopolitical rifts, trade tensions and surging global economic uncertainty, the beverage alcohol industry offers scattered pockets of potential. But competition will no doubt be fierce. **Richard Woodard** reports

The beverage alcohol industry is without doubt facing up to more challenges than opportunities as 2026 beckons.

The macroeconomic and geopolitical backdrops continue to be largely unhelpful, with world trade looking fragile as the Trump administration in the US continues its aggressively protectionist tariff policy.

A glance at the recent results of the industry's big hitters, from Diageo to Pernod Ricard and beyond, confirms that the negative mood music is rooted in reality.

Both the US and China are characterised by cautious consumers who need convincing to part with their cash for premium products, either trading down or reducing their frequency of consumption.

Meanwhile, China's luxury market — baijiu especially, but also cognac and high-end scotch — has been impacted by a renewed crackdown on conspicuous consumption.

Other markets are not immune to this. Moderation — inspired both by health and wellness concerns and economic factors — has taken hold on every continent. Suddenly an industry that was once confident that its difficulties were merely cyclical is beginning to wonder if something deeper, more structural and longer lasting is taking grip.

Amid all of this, there are still opportunities: RTDs and no/low are still growing and maturing as they expand beyond niche status; agave has challenges in the US, but other markets look promising; and the move towards early evening, aperitivo/spritz consumption has obvious potential for a number of liqueur and sparkling wine brands, with prosecco to the fore.

And then there is India. This vast, complex, whisky-mad but increasingly cosmopolitan country is the brightest hope for the future — although it should be said that other territories in South East Asia, Latin America and Africa offer opportunities too.

As 2026 dawns, competition for these scattered pockets of potential will undoubtedly be fierce.

From agave spirits to aperitifs: our pick of the categories to watch on the following pages »



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Agave spirits
Time to globalise

From the slowdown to the luxury tequila market in the US to uncertainty over tariffs, agave spirits have had a difficult year after such a long period of sustained — sometimes spectacular — growth.

For all the success of the category, it remains chronically imbalanced in terms of geographical spread. The US still accounts for about 80% of export volumes, and no other international market — the next-largest are Spain and Germany — can muster a share figure above 2%.

Will the end of the US agave boom change this? It's clear that consumers there are no longer persuaded of the need to pay big for luxury tequila, or of the importance of the attachment of a celebrity name to the franchise. Many are seeking something more meaningful or looking for value in the reposado segment.

The big question is whether the US playbook of margaritas, 100% agave, cristalino and luxury will translate to high-potential markets across Europe, Asia and Latin America, where tequila is still playing catch-up from its days as a shot consumption staple.

Some believe flavoured tequilas are a good recruitment tool, while others argue that they reduce the category's authenticity, backing 100% agave products and a spread of modern cocktails — the paloma, the margarita, plus twisted negronis and martinis.



No/low *A more complex picture*

No/low-alcohol products have been the biggest beneficiaries of the increasingly prevalent moderation trend, with non-alcoholic beer names such as Heineken 0.0 (above) now huge brands in their own right.

The double-digit volume gains recorded across the world's top 10 markets (IWSR data) in 2024, and the predicted robust gains in the years ahead, are largely driven by zero ABV beer and by the US market, where IWSR research suggests that 37m consumers were recruited into no-alcohol between 2022 and 2024 alone.

But this is changing: participation in no/low beer is now at a standstill, and other categories across the no/low spectrum are making solid gains, from RTDs to spirits and wine (see related stories p50 and p56). Consumers are increasingly looking for something more than health and moderation from these products, prioritising flavour, brand attributes and increased availability in retail and the on-premise.

Older consumers — Boomers and Gen X — may be embedded in the NA beer segment simply because there wasn't much else available when they entered the category, but Millennials and Gen Zers are more likely to explore and experiment — not looking for a simple replacement for alcohol, but for something more meaningful and engaging (see p45). »



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RTDs *Growing up fast*

» After the bursting of the hard seltzer bubble, RTDs have steadied into a more moderate and less volatile growth pattern, capitalising on the category's key consumer-friendly traits of convenience, moderation and exploration — particularly among younger (Millennial and Gen Z) drinkers.

According to IWSR data, RTD volumes in the world's leading ten markets increased by 2% in 2024. Against a backdrop of TBA (total beverage alcohol) declines, that's a solid performance, with some markets, such as South Africa and Brazil, recording double-digit gains.

RTDs' growing maturity may limit future opportunities, with IWSR predicting that volume expansion will be concentrated in four markets: the US, Japan, Brazil and South Africa. As recruitment slows, growth is being driven by increased frequency of consumption. Gains could come from increased penetration of the on-premise, where only about one in eight RTD products is sold, although share numbers are much higher in Brazil and South Africa.

Meanwhile, the growing number of RTD extensions of marquee spirits brands — kickstarted by Jack Daniel's Coca-Cola tie-in — raises an intriguing question for companies: while the presence of a familiar name may persuade consumers to enter the category, is there a risk that a presence in RTDs might tarnish the image of premium brands?





Houses such as Camus, whose Voyages Extraordinaires L'Île Cognac (above) takes inspiration from Jules Verne adventure novels, work hard to share cognac's heritage, authenticity and provenance

Cognac *Where to now?*

It may be overstating things to suggest that cognac is undergoing an existential crisis at the moment, but the category has arguably been the biggest loser amid the post-pandemic lull in demand for beverage alcohol.

All luxury spirits have been impacted, as IWSR's analysis of status spirits (those priced above US$100 a bottle) illustrates: total value down 8% in 2024, which equates to a loss of almost US$1bn. But, using the same measure, high-end cognac plummeted by 14% last year, largely thanks to China, where it was hit by a toxic mix of an anti-dumping investigation, the closure of the local duty-free channel and a renewed crackdown on 'extravagance' among public officials.

In 2019, according to IWSR, cognac accounted for more than half of global status spirits' value; by last year that had slipped to 36%, placing it behind scotch at 38%. Throw in the continued softness of the US market and the global picture is dismal.

Where does cognac go from here? A more diverse market mix would help — the industry can possibly afford a downturn in either the US or China, but not both — and a renewed focus on innovation and NPD simply to get the category back on drinkers' radar would also assist.

Many companies in the region are doing great work at communicating cognac's heritage, authenticity and provenance — names such as Delamain, Frapin, Hine, Camus and Ferrand spring to mind, and there are more — but it's hard to escape the feeling that the biggest brands have only recently awoken from a complacent torpor, realising rather late that you can't just rely on traditional lines of VS, VSOP, XO and XXO to survive and thrive in today's drinks market.

Whisky *Shaking up the status quo*

One episode from last April might be said to sum up the complex nature of today's whisky market: as Pernod Ricard-owned Irish Distillers unveiled the sixth and final chapter in the Midleton Very Rare Silent Distillery Collection — a EUR60,000 (US$69,600), 50yo single pot still whiskey — the many stills at the 'new' Midleton plant were silent as production was paused in tune with a fall-off in demand.

Nor was Midleton alone. Brown-Forman's revived Glenglassaugh malt distillery is silent once more; Diageo has paused distillation in the US and malting barley production at Roseisle in Scotland; the newly consolidated InchDairnie Whisky in Fife is mulling redundancies; and Eden Mill down the road has recently been rescued from administration.

If there's a common factor at play, it's the slowdown in the US, by far the largest market for scotch, Irish and home-grown American whiskey, although other markets — most notably China — also have their difficulties.

Scotch is pinning a lot of its hopes on the huge promise of India, where duties are set to be slashed by the UK–India free trade agreement, but it will face stiff competition there from all quarters. Indian single malt — increasingly present and focused on quality — already outsells scotch malt in the market, and Jameson is the country's biggest BIO (bottled in origin) spirits brand.

In other words, opportunities exist — but it will take resources and ingenuity to fully exploit them. »



Stills fell silent alongside the final release in the Midleton Very Rare Silent Distillery Collection

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Champagne and sparkling wine *Luxury democratised*

» At a difficult time for the global wine industry, sparkling wine offers a much-needed bright spot. Once confined to celebrations and special occasions, the category is now increasingly democratised, with younger consumers seeing it as an everyday treat, reinforced by its centrality to the booming spritz serve.

Challenges remain — sparkling wine must endure the same tough market conditions as everyone else — but it continues to outperform the languishing still wine category, which appears to be mired in long-term structural decline.

Prosecco has been the big success story of the past decade. It continues to see robust growth in key markets, such as the US and France, but appears to have peaked in the UK. Alternatives — crémant in the UK and France, English sparkling in the UK, flavoured sparkling in the US — are emerging to slake the thirst for exploration among younger Millennial and Gen Z consumers.

The democratisation of what was previously an affordable luxury, coupled with macroeconomic difficulties, has been bad news for champagne. Losses across key markets — especially France, still by far the category's largest destination — have persisted as consumers resist the sharp price rises of the past few years. This reinforces the belief that champagne's future should be moored to value, not volume.

Aperitifs *Hitting the sweet spot*

Light, refreshing and informal, suited to low-energy, early evening consumption occasions, aperitifs — spearheaded by the near-ubiquitous spritz — seem to be satisfying the demands of modern consumers more than any other beverage alcohol category right now.

In its modern guise, the aperitivo moment was kickstarted by two Italian icons: prosecco and Aperol. Ten years ago, 75% of the latter's sales were confined to Italy and Germany; today, that same share is spread across Italy, Germany, Austria, France, the US and the UK, with the US now the third-largest destination.

That kind of success is bound to breed copycats. As the spritz has spread geographically, it has also diversified and morphed into many different forms, incorporating everything from limoncello to amari, bitters and soft drinks — even a high-end clear 'whisky', Crystalgold, from Pernod Ricard-owned Chivas Brothers. Some businesses, such as Spain's Zamora Co, have set up dedicated spritz teams to exploit the opportunity.



High-end clear 'whisky' Crystalgold is just the beginning of aperitif-driven diversification

The occasion is also increasingly vital to the fortunes of sparkling wine businesses, and prosecco brand owners in particular. Expect more diversification during 2026, and the continued growth of RTS/RTD and no/low products at the intersection of three hugely influential trends. GDI



Freixenet Cordon Negro 0.0% is de-alcoholised at low temperatures to retain its unique characteristics

From premium to alcohol-free, Henkell Freixenet sets the pace in sparkling wine

As the pioneering producer continues to establish standards in the sector, **CEO Dr Andreas Brokemper** outlines how it is responding to the growing demand for alternatives to alcoholic drinks

What are the main trends driving growth in the sparkling wine sector? Globally, the prosecco category continued its growth trajectory in 2024, recording a 4% increase in volume [IWSR 2025]. The latest figures from the Prosecco Consortium for the first half of the year further underline the expectation that the positive trend will persist, with growth continuing at the same rate as last year. With Mionetto, we are actively outperforming this development.

Crémant continues to stand out for its premium quality at a more accessible price point. This combination has fuelled its appeal among consumers seeking an elevated sparkling experience. Our prestige brand Gratien & Meyer has outpaced overall category growth and established itself as the world's leading international crémant brand [IWSR].

Another strong growth driver is the aperitivo trend, which has created a new consumption habit, with many consumers now starting their evening with a spritz. With our broad portfolio, and especially Mionetto Aperitivo, we are ideally positioned to serve the growing demand for no/low-alcohol options. We see particularly high potential for our non-alcoholic variants, such as Mionetto 0.0% and Mionetto Aperitivo Alcohol Free, which offer a true non-alcoholic spritz experience.

Lastly, the alcohol-free category has experienced dynamic growth within the sparkling wine segment [+13%, IWSR 2024], even though it is still at a relatively small volume level. No/low-alcohol products are very much in vogue and continue to gain popularity, especially among Gen Z, opening new opportunities.



Andreas Brokemper: 'Gratien & Meyer has established itself as the world's leading international crémant brand'

How are you evolving the no/low portfolio? Henkell Freixenet can already look back on more than 30 years of experience in the production of non-alcoholic products. Many of our brands — whether global icons such as Freixenet, Mionetto or Henkell, or our locally strong offerings — have one or more non-alcoholic variants, and eight Henkell Freixenet brands are among the global top 20 non-alcohol sparkling wine rankings.

We continue to seize opportunities in the alcohol-free category by introducing innovative products such as the new Mionetto Aperitivo Alcohol Free, further expanding our portfolio to meet evolving consumer preferences.

How do you predict consumption occasions to evolve in line with no/low drinking trends? Sparkling wine remains an essential part of celebrations, with formal occasions such as birthdays and family gatherings continuing to be very important. At the same time, it is increasingly embraced in informal and mixed settings, where it is often chosen to start the evening with a spritz in combination with an aperitivo, or enjoyed as a ready-to-drink option for on-the-go consumption.

We draw inspiration from consumers' lifestyles and consumption habits: they actively seek quality and moments of enjoyment. Consumers of non-alcoholic sparkling wines are often conscious sparkling wine fans who want to give up alcohol, but do not want to give up enjoyment and taste. It is therefore very welcome to have a product category available for them.

What innovation is in the pipeline? This year we had a full launch calendar with exciting introductions such as the Freixenet Diamond Alcohol Free range, Mionetto 0.0% and Cordon Negro 0.0%.

Now for Fürst von Metternich, the market leader in the German premium sparkling wine segment, we are launching Fürst von Metternich Riesling Alcohol Free — a stylish alternative for non-alcoholic sparkling enjoyment, available exclusively in Germany. This innovation uses riesling grapes as its base and is crafted through a modern process that combines classic vacuum distillation with targeted aroma recovery. The result is a gently de-alcoholised sparkling wine that retains the characteristic taste profile of riesling, bringing fresh momentum to the non-alcoholic category in the German market.

We are preparing all our final launches for 2026, and I invite visitors to our booth at Wine Paris, where we will present our new products in the non-alcoholic sector. GDI

Alcohol-free spirits at a crossroads as big alc scents an opportunity

Alcohol-free spirits have come a long way in a short time. But does the growing presence of big alc in the space represent an opportunity or a threat to alcohol-free specialists? **Chris Losh** reports



Image: Angus Brennar

The Virgin Mary Collective founder Vaughan Yates: 'Big brands will spend time getting their recipes right, then they will use their distribution power to push everybody else off the shelf'

The world of alcohol-free (AF) spirits has moved fast since the appearance of Seedlip ten years ago, with hundreds of brands appearing (and sometimes disappearing), particularly since Covid-19.

Many of the first-generation spirits — often featuring artificial flavourings and a clumsy use of chilli to (badly) replicate alcohol burn — have been left trailing in the dust of the new arrivals.

Indeed, IWSR head of no/low alcohol Susie Goldspink believes that the low growth rate of AF spirits in France is largely explained by "the presence of legacy brands which are lower in price and quality".

By contrast, the US, which sees non-alcoholic spirits launching on a seemingly weekly basis, has seen 20% growth in the category over the last year, according to IWSR. And as ambitions and technical skills have increased, so have questions about some of the early category stars.



Pentire Drinks founder Alistair Frost: 'UK consumers like to buy from authentic brands.'

Several importers spoken to for this article suggested that Ceder's had been 'quiet closed' by Pernod Ricard. Though the brand is still on its website, it has no links to information and the team in Paris didn't respond to requests for comment.

Meanwhile, Diageo's purchase last year of the Ritual Zero Proof range, success with Tanqueray 0.0% and addition of Captain Morgan Spiced 0.0% suggests it could be moving on from Seedlip.

With IWSR predicting a CAGR of 8% for the category, it would seem logical to expect further mother-brand extensions into the AF spirits space.

"Big brands will spend time getting their recipes right, then they will use their distribution power to push everybody else off the shelf," says Vaughan Yates, founder of Irish alcohol-free bar & consultancy group The Virgin Mary Collective.

The distribution point is well-made. Retail space for alcohol-free might be growing, but it remains limited — particularly for spirits, which are expensive. Most brands currently sell D2C or use third-party providers, such as Amazon.

Once fees for picking, packing and postage are taken into account, margins in the latter can be incredibly slim, though as the founder of UK non-alc aperitif brand Everleaf, Paul Mathew, admits, it's still an "important place to be seen, tell our story and connect directly with people".

Yates adds: "You'll get growth by going D2C. Healthy drinks with a functional element — it has to be where things are going."

The growing interest from big alc might sound like the death knell for booze-free specialists, but most AF specialist producers see it as a good way to raise all ships rather than sink smaller ones.

"It's great to see the big alcohol brand players expand their portfolios through non-alcoholic expressions of their name brands," says Lyre's Non-Alcoholic head of global marketing Marc Romanin.

"It proves there is value within the category and that the trend of alcohol moderation isn't a fad."

At Pentire Drinks, which has several years' head start on the zero expressions of Tanqueray and Captain Morgan Spiced, founder Alistair Frost believes that a strong and consistent active, natural, outdoor image continues to give it the edge over big brands.

"In the major retailers, where we're sold alongside them, we outsell all the major brands from a value rate-of-sale perspective," he says. "UK consumers like to buy from authentic brands." »

'Massive acceleration' in US

» Non-alc spirits' growth is currently dominated by four markets: the US, the UK, France and Germany. All bar France are seeing solid growth, according to IWSR, though the US (a couple of years behind Europe) is booming, with a CAGR of over 40% (see chart below). Moreover, there's plenty of room for further growth.

Romanin says Australian brand Lyre's has "seen massive acceleration of the brand, as well as the category" within North America in the past 12 months. "The size of the US landscape and population means that there are a lot more retailers and hospitality venues to continuously grow the Lyre's brand and footprint," he adds.

Although the off-trade in the US is still significantly behind Europe when it comes to non-alc spirits, according to Ed Carino, the co-founder of New York-based AF spirits importer ProofNoMore.

"[In Europe,] pretty much every major grocery chain has a good selection of non-alc beers, wines and spirits," he says. "You're still not finding that in the US."

Carino suggests that multinationals like Diageo, for one, might be waiting for the category to be more mainstream before coming in all guns blazing. For the moment, much of the US market is either specialist retail, D2C or on-trade, where he sees a definite split in what bars are looking for.

Elite bars, he says, look for "interesting, unique and complex products" with which they can get creative. Tier-two and three bars tend to gravitate more to alcohol-replacements, such as AF gin or rum, to make non-alc versions of classic cocktails.



Lyre's reports 'massive acceleration of the brand, as well as the category' within North America

The on-trade is where an AF spirits brand needs to build, Carino adds. "How many people do alcoholic mixology in the US?" he asks. "Two per cent? How many do non-alcoholic mixology? Maybe 1%, if that. [The] on-trade is where a brand needs to start."

There's a similar split in demand in Dubai, though for different reasons. The Gulf is an understandably enticing market to non-alc drinks producers, though it needs careful navigation and also patience.

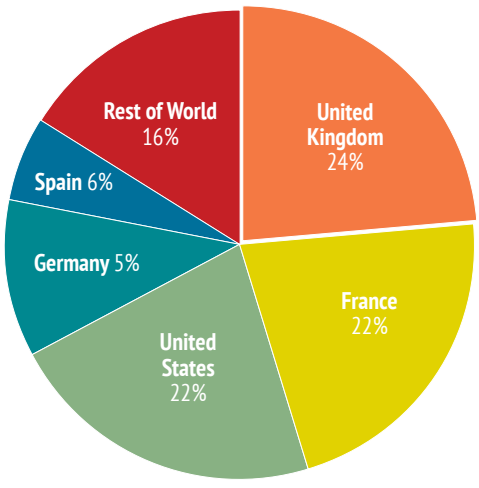
Erika Blazeviciute Doyle, whose Drink Dry import/distribution business has gone on to be the leading light in the region, says spirits take longer to seed into the market — six months, rather than half that for AF beer — but their higher price makes them very attractive.

"[Spirits] takes the longest time to see results, but it's the one category that we always keep a focus on, because value-wise, it really helps us," she says. »

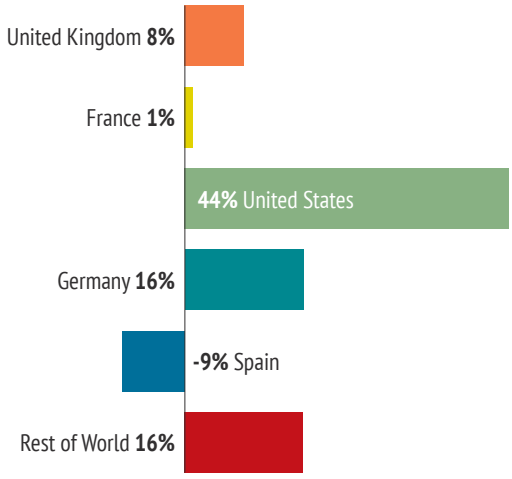
DATA DROP

Non-Alcoholic Spirits: Top 5 Global Markets

Market Share (Vol) 2024



Market Share Chg (Vol) 2023–24



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

KEY TAKEAWAYS

- Artificial flavours and chilli-driven 'alcohol burn' have given way to far more crafted, ambitious alcohol-free (AF) spirits products.
- The steady growth in quality from AF specialists coupled with a growing number of zero-proof brand extensions from alcoholic spirits are putting some of the early big names under pressure.
- Distribution remains a challenge for non-alcoholic spirits specialists, but global growth — particularly in the US — is causing optimism.
- Most AF spirits brands sell direct-to-consumer or use third-party providers, such as Amazon.
- Botanical spirits are falling, but line extensions (often into dark spirits), RTDs and a growing number of functional drinks are all likely.

» According to Drink Dry's Blazeviciute Doyle, Dubai's on-premise splits into the Licensed Trade (1,800 venues that also serve alcohol) and the Unlicensed Trade (2,600 dry venues). While the latter are a good selling ground for original drinks that don't mimic alcohol, the former look mostly for replacements for alcoholic brands.

"In Dubai, non-alc is not just a replacement for alcohol, it's a replacement and upgrade for soft drinks," she points out.

Diageo's decision to open a Dubai office to ensure a more consistent supply and stronger executions on the ground could be significant in the latter for the likes of Tanqueray 0.0%.



UK brand Sentia Spirits has just released its first 'feels like, tastes like and looks like' product — whisky alternative Cask (above). New Zealand's Free AF uses a patented botanical extract called Afterglow

AF gin loses out to aperitifs

In terms of trends, non-alc spirits generally follow those seen in alcohol, so it's perhaps no surprise that gin-type drinks are in decline, while there's been a big surge in Aperol wannabes. Lyre's says that sales of its margarita are up, while its espresso martini are down.

"Innovation in spirits is diversifying away from botanical spirits and gin substitutes," says IWSR's Goldspink. "Many darker and aged spirits now have no-alcohol alternatives."

Though Dry Drink's Blazeviciute Doyle warns that, however good they are, AF dark spirits should be wary of focusing on neat consumption.

"It's really hard to sip non-alcohol," she says. "The reason you sip a negroni is because it's pure alcohol. Non-alc you don't, so you drink it too quickly. We always go for longer versions — something that's really sessionable."

This summer Dutch drinks group De Kuyper launched a range of five batched alcohol-free cocktails for bars, backed up by a ready-to-serve parallel range of 50cl bottles for retail. Thus far, all the drinks are established classic cocktails, but global marketing director Godelief van Erve says they are "closely monitoring cocktail trends to identify popular flavours that are also relevant in an alcohol-free context".

A growing number of spirits producers are creating alcohol-free RTDs. More affordable, they act as a useful recruitment tool for the base spirit, though small runs are expensive and large runs are a gamble, since the shelf life of non-alc spirits is shorter than for alcoholic RTDs.

Rise of functionals

The shift from replicating existing alcoholic drinks to creating something more unique is one of the most interesting developments within alcohol-free spirits. Another is the rise of functional drinks.

Functionals are drinks that have a physical or mental impact on the consumer. They could be nootropic (which work on the brain, often to help sharpen cognition) or adaptogenic (to help with general well-being and stress). Some nootropic drinks claim to have some of the social relaxant element of alcohol.

New Zealand RTD brand Free AF uses a patented botanical extract called Afterglow, while Sentia Spirits has a "Gaba (gamma-aminobutyric acid) enhancing blend" that relaxes brain activity to cause feelings of calmness. After initially concentrating on uniquely flavoured stand-alone products, the UK company is moving on to what CEO David Orren describes as "feels like, tastes like and looks like" beverages.



Sentia's new whisky-like drink, Cask, for instance, should be more easily understandable than the original Sentia Gaba Red.

"We want to make functional alternatives more price accessible and believe we can do that. Watch this space!" says Orren.

Functionals have the advantage of being a drink 'with' something (ie added benefits) rather than a drink without something (ie alcohol). And they're a fast-growing category in the US.

The disadvantage is that they're complex for the uninitiated and, while the effects of alcohol are quick and obvious, those from adaptogenic and nootropic drinks are often a slow burn.

That said, this is a space that the big alcohol producers are not yet active in, so specialists have a clear run.

Alcohol-free spirits have come a long way fast. And with strong medium-term growth predicted, that looks set to continue. GDI



De Kuyper's Batched 0.0% line-up features NA versions of well-known cocktails, but the group has not ruled out NPD 'relevant in an alcohol-free context'

Alcohol-free spirits roundup

As co-founder of the World Alcohol-Free Awards, Chris Losh has sampled more non-alcoholic spirits than most. Here's his pick of five alcohol-free spirits leading the way in taking the category mainstream



Two originals *Everleaf Forest & Crossip Dandy Smoke*

The pick of a strong Everleaf alcohol-free trio, Forest manages to be striking and accessible at the same time. Subtle, sappy and citrussy with a dry, savoury texture, it requires nothing more than tonic (or a few ice cubes) for an instantly elegant serve. A trophy winner in the World Alcohol-Free Awards, it's building a strong following in the bar community, particularly in the UK.

The wording on the Crossip Dandy Smoke bottle says it all: 'Rich. Spiced. Audacious.' This is a bold, brave drink that in no way replicates any alcoholic categories, but does the job of several — blended scotch, dark/spiced rum, añejo tequila — when it comes to mixing. An intriguing base drink for both alcoholic and non-alc cocktails alike.



Celebrity stardust *Amalve*

Pernod Ricard has been slow to get into non-alc, but acquiring a minority stake in this premium brand owned by Lewis Hamilton and Casa Lumbre last year was a shrewd move. Created by the agave genius Ivan Saldaña, it's authentically crafted and will suit sippers and mixologists alike.

Two alcohol proxies *Tanqueray 0.0% & Sober Spirits Whisky Bourbon 0.0%*

Not all big-brand zero versions are successful, but Diageo's Tanqueray 0.0% is the spirits version of Guinness 0.0. Its key notes of juniper and coriander are authentically gin-like, while the bright citrus and earthy angelica are pure Tanqueray. Likely to pull in lots of abstainers this Dry January.

Calixte Payan, the artisanal French non-alcoholic specialist behind Sober Spirits, is gaining a real reputation for the quality of his products, with the Rum and Whisky Bourbon probably the standouts. With its flavours of orchard fruit, caramel and ginger, it's a convincing alternative for lovers of blended scotch. Can be sipped neat, but probably best with ginger. Gold and trophy winner at the World Alcohol-Free Awards.



Q&A Mont Blanc Vodka is a 'tribute to both nature and French craftsmanship'

Inspired by the mountain from which it took its name, Mont Blanc Vodka balances tradition with modernity, says **brand ambassador Alexandre Vingtier**



How has Mont Blanc Vodka been growing since its inception in the early 2020s? Mont Blanc Vodka is inextricably connected to its homeland of France, and a sense of place is fundamental to the brand's identity. Its creation and development happen gradually and with consideration for overall market expectations.

Consumers pay particular attention to quality and choice, but it's important to note that Mont Blanc Vodka doesn't aim to fill every niche. For example, in its flavoured vodkas, the focus is on French ingredients, not exotic fruits — this is how the Mont Blanc Vodka Botanical Collection came into being, filled with fresh, vibrant notes of local herbs and plants. Today, the brand's portfolio includes a wide range of products designed to highlight the uniqueness of the moment dedicated to achieving perfection.

Some of the biggest vodka names are French. What makes the country so special when it comes to vodka production? France is renowned for its traditions in spirits production. For centuries, generations have developed a distinctive approach and vision for product quality, where modern technologies only highlight the unique character of the ingredients used.

The creation of Mont Blanc Vodka begins with 100% finest French wheat. The region's unique climate and soil combination allow for the cultivation of exceptional grain — the very same used to make famous French bread. It is this grain that gives the vodka its unique taste. It's no wonder that this particular location was chosen to create Mont Blanc Vodka.

How was Mont Blanc Vodka originally conceived? Mont Blanc Vodka was born from a desire to capture the essence of one of Europe's most iconic natural landmarks — the Mont Blanc mountain.

The idea was to craft a spirit that would be a tribute to both nature and French craftsmanship, one that could reflect purity, elegance and a sense of place. The shape of the bottle itself was inspired by the pristine alpine waters and glaciers of the region. When we talk about Mont Blanc, we imagine majestic snowy slopes and the heroes who have long sought to conquer those peaks.

Mont Blanc Vodka is a brand with a dynamic inner world, a reflection of a dream that inspires and ignites a passion to conquer new heights. The message of the brand is that each step towards conquering the summit is a reflection of a unique life journey and belief in oneself.

Which are the brand's strongest markets? Perhaps there isn't a particularly unique story to tell here. The strongest markets remain those with a deeply rooted culture of fine gastronomy, cocktail consumption and alcohol appreciation in general. These are, of course, Europe and the US. Among other countries, Israel stands out with its highly developed bar and restaurant industry.

How strong is the domestic market for vodka consumption and what percentage of your sales are made there? Initially, the brand's strategy was built on targeted expansion into other countries. There was no focus on the local market; only now are we beginning to gradually integrate into it.



Mont Blanc Vodka is 'a reflection of a dream that ignites a passion to conquer new heights'

In terms of exports, which markets are you focusing on? Mont Blanc Vodka is present on five continents. Our current objective is to deepen our distribution within these existing markets, making the brand more »

» accessible to consumers and more competitive. Among the key marketing tools we use to achieve this goal are trade media and international exhibitions. This year alone, we participated in two major events: TFWA World Exhibition & Conference in Cannes and Bar Convent Berlin [BCB]. We engage with consumers at points of sale, in bars and through key opinion leaders and social media.

How is Mont Blanc Vodka standing out in the crowded premium vodka sector? Mont Blanc Vodka strives to achieve the ideal and has an unbreakable connection with the alpine environment and its commitment to purity. It's crafted with exceptional Angeac-Champagne water, which gives it a crisp, clean foundation. Unlike many vodkas that rely on neutrality alone, Mont Blanc Vodka brings subtle mineral notes and a refined texture, setting it apart from many of its competitors. It's a vodka that balances tradition with a modern, sophisticated edge.

How and when is Mont Blanc Vodka typically consumed? Thanks to its quality and the availability of flavoured expressions in its portfolio, Mont Blanc Vodka is perfect for drinking neat and serves as an excellent base for cocktails, imparting not only the desired strength but also texture and taste. As they say, this is a matter of taste. When enjoyed neat, Mont Blanc Vodka pairs well with food, highlighting and enhancing dishes.

There are currently three expressions of Mont Blanc Vodka — Classic, Voyage and Pure Diamond. What differentiates these? Mont Blanc Vodka serves as the cornerstone of the collection, distinguished by its five-stage distillation process. Mont Blanc Vodka Voyage and Pure Diamond are limited releases, crafted as a tribute to the determination of heroes who inspire us to conquer new heights and reach new horizons.

Mont Blanc Vodka Voyage commemorates the 250th anniversary of the first voyage around the world under the French flag. It undergoes an additional filtration through natural plant-based materials — linen, mirroring the method sailors used to purify water on a long voyage. This process results in Mont Blanc Vodka Voyage with an exceptionally soft and rounded taste, leaving a clean and pleasant finish.

Mont Blanc Vodka Pure Diamond honours the first ascent of Mont Blanc in 1786 and the initial discoveries of precious crystals and minerals hidden within the glaciers of the Mont Blanc mountain range. The bottle features a hand-applied crystal as its key design element, symbolising the perseverance and determination to reach the summit. A defining characteristic of Mont Blanc Vodka Pure Diamond is its additional filtration through coconut charcoal, which enriches the organoleptic features of vodka.

Are there plans to expand your flavoured Botanical range? We have no such plans until 2027. The Botanical line consists of two self-sufficient products — Cucumber & Mint and Grapefruit & Rose — that have proven themselves superbly in a vast array of cocktail recipes, and we are currently fully satisfied with their performance.

How much of a role does cocktail culture play in brand awareness? Certainly, cocktail culture is one of the key pillars for Mont Blanc Vodka. A significant part of the audience discovers the product and becomes loyal to it through mixed drinks. This is especially relevant for a category like vodka because, unlike beer or wine, enjoying it neat requires a certain level of understanding and appreciation for the spirit.

Cocktail culture is incredibly dynamic; it's in a constant state of flux and evolution. We continuously see new mixes, flavours, unexpected ingredients, presentation styles and gastronomic combinations emerge. Moreover, cocktails provide endless inspiration for the visual expression of Mont Blanc Vodka. This is precisely why we are continuously active in this direction.



Alexandre Vingtier: 'Mont Blanc Vodka conveys a sense of heritage and premium quality'

You mentioned you were at TFWA Cannes and BCB. How important are bar shows to the growth of the brand? Without a doubt, participation in such exhibitions is a key driver for the brand, boosting its visibility, recognition and clarifying its market positioning. The BCB exhibition attracted attention from a wide range of industry representatives — including distributors, wholesalers, trade media, marketing agencies, suppliers and logistics companies — as well as end consumers. Approximately 4,000 guests visited our stand in Berlin. We received a great deal of positive feedback on the product's quality and design.

During the exhibition, we had the opportunity to meet many new potential partners in person and hold meetings with our existing distributors, who also attend this landmark event annually before the high season. One particularly important and gratifying observation was that many guests who visited our stand were already familiar with the Mont Blanc Vodka brand, thanks to media advertising and its presence on shelves in local markets and in duty-free shops. And yes, in 2026, we plan to be present at international exhibitions to continue introducing consumers to the brand.

Any NPD in the pipeline? Yes, these will be unique products that will stand out vividly in the market. The launch is planned for 2026. We will certainly announce them to the press when the time is right.

What are the goals for the brand? Mont Blanc Vodka is a young brand, yet it consistently conveys a sense of heritage and premium quality. Our goals are to share this feeling with the broadest possible audience, to cultivate a growing community of true connoisseurs around the brand and to expand distribution to achieve global recognition. These are all long-term objectives. Among our immediate priorities are conducting masterclasses for bartenders and securing placement in duty-free shops at key airports worldwide.

We sincerely hope that as many people as possible come to know and love Mont Blanc Vodka. This is a product that inspires and creates memorable experiences. Discover the elegance of Mont Blanc Vodka — enjoy it neat or in inspiring cocktails. GDI

What's in and out in spirits packaging design

The new frontier for spirits design is moving beyond luxury and extravagance, focusing instead on technology and genuine purpose to connect with an increasingly discerning drinker. **Joe Bates** reports



Vinolok's Duet collection 'combines the purity of glass with a wooden element'

Design has become one of the most powerful brand-building tools in the spirits world, extending packaging far beyond its utilitarian roots. Yet trying to find consensus among spirits packaging designers on what's driving the next wave of innovation is almost comically difficult.

Even so, clear themes do eventually emerge: storytelling that deepens brand meaning, sustainability that reassures increasingly eco-aware drinkers, aesthetics that engage and surprise, technology and AI that elevate engagement, and brand-protection measures that reinforce consumer confidence. Together, they're reshaping what a bottle can say and do in a crowded, fast-moving market.

This shift is also widening the creative lens across parts of drinks packaging design, once governed almost exclusively by cost, reliability and function. Even in traditionally hard-headed components, such as closures, aesthetics and brand expression are now central considerations as producers look to ensure every touchpoint reinforces the story their packaging is trying to tell.

High-end glass closure line Vinolok boasts a wide range of design options, according to marketing manager Klára Kašparová. "The Duet collection, for example, combines the purity of glass with wooden elements — closures where a wooden top, in light or dark tones, is seamlessly joined to a glass base.

"The whole product portfolio supports a variety of custom decorations," she insists, citing the options of laser engraving on both the top and side of the Duet collection, embossing, stamping, colour coating and printing. "This flexibility enables brands to align the closure design with their identity, whether rustic, luxurious, minimalist or craft-driven."

The Czech closure company has seen "demand for special shapes" to provide standout, adds Kašparová. "Vinolok's Edge collection provides creative, non-traditional shapes, giving bottlers more freedom to make their bottles truly distinctive."

Design: what's in and what's out

It is in the realm of aesthetics — shapes, colour, materials, typefaces and textures — where designers most often diverge, revealing just how subjective the craft can be. To pinpoint what's on trend, it can be easier to focus on what is falling out of favour, rather than chasing what's in.

"Ribbed bottles — for the love of God, no more," pleads Garry Calderwood, creative director at Manchester, UK-based agency Love. "It's sadly become ubiquitous despite the undeniable beauty of the forerunners like Harris Gin and Lind & Lime."

Also into the design bin for Calderwood, who has nearly 25 years' experience with drinks clients such as Beam Suntory, Moët Hennessy, Diageo and William Grant &



Garry Calderwood: Thumbs down to ribbed bottles and 'meaningless extravagances'

Sons, goes what he terms "meaningless extravagances". These include "brick-heavy bottles, mega caps and overfoiling to the point of Liberace-level ostentation", as well as "meaningless clutter and faux authenticity", such as exhaustively detailed back labels and fake "craft" ephemera. "It's all a bit like walking into a chain pub with depressing old prints on the walls," Calderwood says. »

» As for what's in, Fredrik Svalstedt, COO at Swedish agency Pond Design, whose client roster includes Jameson Irish Whiskey and Absolut Vodka, says both agencies and clients are becoming more adventurous with bottle labels. "Driven by the same force, that much within the spirits world has long looked uniform, brands are now pushing visual boundaries through label design," he says.

"We see labels of different sizes, unexpected shapes and asymmetric compositions that challenge convention and add a new layer of character to the bottle."

There is a move away from performatory 'greenwashing' to genuinely responsible design, especially in the luxury scotch whisky sector, notes Matt Waldron, senior designer at branding agency Bloom, a London-based firm with a portfolio that includes Lagavulin Single Malt Scotch Whisky, Inch's Cider and Foster's Lager.

"Brands are increasingly embracing recyclable materials, sustainable labels, non-toxic glues and recycled glass," says Waldron. "It's likely that companies will start investing in eco-foils and finishes that retain the tactile, premium feel consumers expect while reducing environmental impact.

Sustainability may now be an automatic element of the design process, but premium-positioned brands must still balance consumer expectations.

"Secondary packaging, in particular, remains a challenge," admits the founder & CEO of B Corp-certified UK brand Hattiers Rum, Philip Everett-Lyon. "The reality is it's often wasteful, environmentally questionable and expensive, yet it's still expected within the industry, especially for gifting and luxury retail." »



'Brands are pushing visual boundaries through label design': Pond Design's co-branded limited-edition bottle for Jameson Irish Whiskey's collaboration with sports firm Puma and the English Football League

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Pentawards: 'premium' spirits packaging now about 'values rather than vanity'



Johnnie Walker Blue Label Ultra, 'the lightest 70cl whisky bottle ever produced'

Firmly established as the world's leading packaging competition and now in its 19th year, the Pentawards continues to serve as a barometer for where design is heading.

Spirits dominate the beverage category, according to marketing manager Chloe Scanlan. "We see this [category] consistently grow every year, including for 2025," she confirms. With entries arriving from more than 60 countries, the category revealed strong creative momentum not only from established markets such as the UK, the US and Japan, but also across South America and Mexico, with entries from that region "earning top recognition".



Branding studio Human 'broke entirely new ground' with its design for Gran Maizal

A clear shift is emerging in how 'premium' is being expressed via packaging, notes Scanlan. "Heavy glass and ornate finishes are giving way to smart material innovation, refined restraint and design that communicates values rather than vanity," she says.

This year's Pentawards winners epitomise this new design priority, Scanlan says, highlighting Diageo's Johnnie Walker Blue Label Ultra, Hennessy Paradis Cognac and Mexican whisky Gran Maizal as examples.

"The lightest 70cl whisky bottle ever produced", Johnnie Walker Blue Label Ultra's teardrop-shaped vessel harnesses ultra-lightweight engineering to use 29% less glass than its predecessors, while challenging long-held luxury codes.

Creative studio NR2154 partnered with premium hardwood producer Danzer on its Hennessy Paradis redesign, using 3D veneer technology and waste wood to create "a sculptural, fluid form with surprising lightness".

Meanwhile, branding studio Human "broke entirely new ground" with its design for Mexican corn whisky Gran Maizal, incorporating corn leaves into its label and mud on the bottle neck — a textural narrative rooted in Mexican tradition.

Elevated cues are now also influencing packaging designs in the booming no/low space, adds Scanlan, pointing to Stranger & Stranger's hobnail-textured bottle design for La Petite Victoire Non-Alcoholic Blanc De Blancs Wine as leading the charge.

Storytelling proved another defining force, with bottle and label designs for Nochaca Tequila and amaro and limoncello line Nazionale Spirito Italiano showing that "cultural specificity, when executed with craft, adds emotional depth without sacrificing shelf impact". Even technology-forward entries, like Fujifilm's Japanese sake Fujioh, "connected provenance and process in fresh ways".

Sustainability, Scanlan concludes, is no longer a trend but "the baseline". The Johnnie Walker Black Label Paper Bottle exemplified this future-facing outlook, using PulPac's Dry-Moulded Fibre to cut weight and emissions while retaining brand equity. As EPR legislation looms, Scanlan notes that brands are already pivoting toward lighter, mono-material and easier-to-recycle solutions.

Unlock the power of unboxing

» Although much of today's spirits design focuses on storytelling and provenance, there is a growing demand for packaging to surprise and stimulate. The popularity of online unboxing culture has only amplified that demand, with consumers expecting packaging to deliver a moment of theatre as well as information.

Dram5, a new limited-release whisky blind-tasting box containing five 5cl single-cask, natural-colour, non-chill-filtered scotch whiskies (right), leans directly into this shift. Company owner & founder Yu Song describes the brand's philosophy as stripping back branding bias.



"At the heart of Dram5 is the belief that whisky should be discovered through taste, not reputation," he insists. "By removing labels, logos and preconceptions, we allow flavour to take centre stage, encouraging curiosity, conversation and genuine discovery."

That thinking, Song notes, shaped everything from "the sculptural simplicity of the box" to "the deliberate rhythm of the unboxing", creating what Song calls "quiet theatre, immersive, elegant and ultimately driven by the joy of not knowing what comes next". »

Smart packaging: the need for balance

» Smart packaging is becoming a strategic asset for drinks brands, enabling everything from on-pack special effects to deeper product stories via QR codes and enhanced security through NFC tags.

Yet, while the technology is advancing quickly, consumer acceptance depends on a careful balance: brand owners push for richer digital engagement, while designers must ensure these features feel intuitive, unobtrusive and genuinely useful rather than gimmicky.

"I think new technology has a clear role to play, both in protecting brand integrity and enriching the consumer experience," maintains Angus Lugsdin, co-founder & director of Devon, UK-based craft distillery Salcombe Distilling Co. "Features like QR codes and digital tags can help reduce counterfeiting while also opening up a new dimension of storytelling.

"By scanning a pack, consumers can be taken on a deeper brand journey, discovering the provenance of our ingredients, the craft behind the spirit, and the people and places that inspire it," he adds. "It's a simple but powerful way to extend the experience beyond the bottle, creating a more personal and immersive connection with the brand."



Bronwen Westrip: 'A tap or scan that leads only to a static web page will be quickly forgotten'

However, technology for technology's sake can be a turn-off for digital native Gen Z customers, warns Bronwen Westrip, executive creative director at Denomination, a drinks design consultancy based in Australia, the UK and the US.

"Today's consumers, especially Generation Z, are increasingly cynical and weary of digital gimmicks," Westrip says. "They're cautious about data capture and actively avoid unnecessary screen time. In this context, the key question becomes: how do you make consumers want to use these technologies and, quite honestly, how do you make them care?

"A tap or scan that leads only to a static web page will be quickly forgotten. But a digital experience that brings the brand to life in a way that's uniquely relevant — a guided tasting, an interactive way to 'split the G', a tailored cocktail recommendation or access to limited releases — can transform authentication into a moment of delight." »

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Carrefour adopts circular packaging solution

Leading French grocery chain Carrefour has launched the reuse programme Loop, developed by waste management firm TerraCycle, in 345 stores nationwide. The system allows shoppers to buy products in reusable packaging, pay a deposit and return them to the store without cleaning. Suntory and MBWS-owned William Peel are among the drinks companies participating.

Frugal paper bottle makes Indian debut

In a milestone for sustainable packaging and UK–India trade relations, Goa-based Rhea Distilleries launched India's first paper bottle for its Fidalgo Premium Cashew Feni spirit during UK Prime Minister Keir Starmer's trade visit to India in October. UK-based Frugalpac has partnered with India's packaging giant ITC Packaging and Printing Business to produce Frugalpac paper bottles in South Asia.

A question of safety

» Denomination's Westrip also stresses the important role smart packaging technology has to play in combating the interconnected problems of counterfeit alcohol and illicit alcohol poisoning.

"As incidents of counterfeit and tampered alcohol rise, particularly cases linked to ethanol poisoning in travel and emerging markets, means consumer safety has moved to the centre of the conversation in global spirits," she says. "What was once a niche issue is now a mainstream concern.

"As travellers and collectors seek assurance that what's in the bottle is genuine and safe, tamper-evident and interactive packaging is fast moving from innovation to necessity. Trust and transparency are increasingly crucial to category growth and loyalty."

Though consensus on the next 'in' design remains elusive, the convergence of meaningful storytelling, verifiable sustainability and useful technology ensures that packaging is now the dynamic, indispensable stage for every brand's identity. GDI

Packaging roundup

Four recent drinks packaging developments with sustainability, collaboration, technology and storytelling at their heart



Cielo X 'Diamond in the Sky' decanter unveiled

Cielo Tequila has unveiled Cielo X, an extra añejo line extension aged ten years in white oak casks, priced at US$800. The new expression features a sleek decanter designed by US agency Cult Marketing, with a diamond-shaped stopper and a minimalist label design to create a contemporary look that plays on the brand's strapline, 'Diamond in the Sky'.



Isle of Jura pack aims to simplify whisky buying

New packaging for Whyte & Mackay's Isle of Jura 12yo Single Malt Scotch Whisky aims to simplify the buying process. The expression, which replaces the 10yo as the brand's entry-level reference, sports an on-pack taste scale to communicate the strength of the distillery's three signature flavours: peach, citrus and walnut. More technical information can be accessed via an on-pack QR code.

Paris Packaging Week's 25th edition to spotlight sustainable luxury

From circularity and smart packaging to regulatory guidance and decoration tech, the 2026 edition has much to offer the drinks sector. **Joe Bates** reports



Cross-industry collaboration is a priority at Paris Packaging Week, with content structured around themes rather than market silos, giving drinks producers access to thinking in adjacent luxury categories

For beverage brands navigating tightening regulations, changing consumer expectations and the rise of sustainable luxury, Paris Packaging Week 2026 is shaping up to be a must-attend event.

Running from 5–6 February, the trade show will celebrate its 25th anniversary with an expanded format, new innovations and a sharpened focus on circularity that speaks directly to one of the drinks sector's most urgent priorities: sustainability.

Show organiser Easyfairs is clear about the significance of the moment, says senior marketing manager Karen Abarian. "After 25 years, we wanted this milestone to feel truly special — not just bigger, but more inspiring and more meaningful for our community, especially for the drinks sector, which has always been such a vibrant part of the show," she says.

This ambition is reflected in the show's theme: 'Iconic', which stands for 'innovation, celebration, outstanding, networking, inclusivity and creativity'.

Abarian says the theme sets the tone for a festival that anchors heritage while embracing forward motion. "It is our way of celebrating everything this industry represents while also looking ahead and inviting people to join a movement that is more sustainable, inclusive and forward thinking," she explains.

For many drinks producers, the most immediate pressure point is the EU Packaging and Packaging Waste Regulation (PPWR), the phased implementation of which becomes legally mandatory from August 2026. Abarian notes that PPWR is "front of mind for everyone," and Paris Packaging Week has built an extensive programme to help brands navigate this complicated transitional period.

Attendees can expect technical guidance, design strategies, regulatory insights and a headline keynote providing invaluable top-down insights on this key topic from Vitalie Taittinger, president & CEO of the world's third-oldest champagne house, Taittinger.

Building on the success of 2025, which saw a 27% rise in visitor numbers, the 2026 show will welcome more than 155 new exhibitors, a clear sign of the acceleration in materials science, decoration technology and circular-economy systems.

Abarian highlights a new Innovation Trail that will spotlight ten "forward-thinking suppliers" offering a direct route for drinks brands to identify future-ready packaging partners. For producers seeking to balance heritage with innovation, this curated pathway could be a valuable resource.

New Refill & Reuse Zone

But perhaps the biggest step change for drinks brands comes in the form of the new Refill & Reuse Zone, created with New Era, a European coalition promoting circular packaging systems. The area explores returnable glass, closure systems and refill station concepts, giving visitors an unusually practical look at what circularity could mean in commercial environments.

Complementing this is a pair of crucial conference sessions that dive deeply into the realities of reuse. The first, 'Reuse in the wine & spirits sector: where are we really?', will dissect what progress has actually been made, examining pertinent issues such as format standardisation, capture rates, industrial washing and the economic models that could progress circular systems beyond pilot schemes.

The second session, 'Traces of reuse on glass: how are they really perceived by consumers?' will present findings from a scientific study exploring whether visible markings on reused glass affect premium-brand perception. "This one's fascinating, because it explores something that hasn't really been studied before: how consumers perceive the small visible marks that appear on glass bottles after reuse," says Abarian.

AI is another hot topic the show will address. In the expanded Discovery Zone, brands will encounter innovators exploring smart packaging, intelligent decoration and AI-driven design tools, while conference sessions will probe how AI and PLM (product lifecycle management) are reshaping efficiency and sustainability.

Design will take centre stage in the expanded Pentawards Village, dedicated to the winners of the annual packaging awards (see p36). Abarian promises a "bigger, more immersive" programme with 100 award-winning designs and archive highlights.

Looking ahead, Abarian hopes that by 2030, "Paris Packaging Week will stand for much more than an event" and will have become "a global meeting point for responsible packaging, where regulation, design and innovation come together". GDI

Q&A

Carlsberg global sponsorship director Louise Bach



Louise Bach: football 'has a way of connecting across ages, economic status and geographical borders'

Carlsberg sponsored European football from the late 1980s until 2016, then took a breather. Now the Danish brewer is back with a multi-year sponsorship and pouring rights deal for Uefa men's, women's and futsal national tournaments up to 2030. **Olly Wehring** catches up with the brewer's global brand director to find out how this and other sports partnerships plug into its long-term plans

Where does the sport aspect sit in the marketing mix for brand Carlsberg? Sport is one of the biggest platforms there is, and football has the biggest audience. It has a way of connecting across ages, economic status and geographical borders. For the Carlsberg brand, sport has always been a key area of focus.

There's also the enjoyment of our products — alcoholic or alcohol-free — by the spectators, whether in the stadium or bar, or at home. The product has been linked with sports for many years, so it's a very natural and authentic link. Other categories have to work a bit harder to get that organic connection with the fans — our product is already right there.

How do you square this legacy position with younger LDA consumers who may be less interested in beer and/or alcohol? We have to be very alert to the no/low-alcohol trend, obviously. You'll see us doing more around Carlsberg 0.0%, and we'll bring more of our non-alcoholic beverages into the sponsorship space as well. Meanwhile, in the stadium, we need to have different types of our products available.

We also use our 'local power' brands. We're a sponsor of the Azerbaijani national team, for example, with the Xirdalan brand and the whole premise of that sponsorship is around Xirdalan 0.0.

How will you activate the Uefa partnership in those markets that are not taking part in the tournament? Obviously, Asia is extremely important for us. The good news is that the data from the broadcasters shows a lot more Asian fans tuning in to watch European games live even though they have to stay up late to watch them. We'll look to bring the Euros closer to fans in Asia through local activations, such as a trophy tour.

We know the main audience for the Euros is in Europe, but the Asian audience is growing and all the popular European players will be playing. We're seeing that many younger fans follow players more than they follow clubs.

We have the advantage that we've been in football for a very long time. In Asia, our consumers are used to seeing Carlsberg and football together through our Liverpool Football Club sponsorship [Carlsberg has partnered with the English Premier League team since 1992]; they're used to having brand experiences with us within football.

We'll keep building on that platform so when we get to Euro 2028, it doesn't come as a surprise. It's a natural continuation of everything we've done over the past 35 years.

How do you gauge the ROI on what must be a very expensive arrangement for Carlsberg? It's not a secret to anyone that sponsorships are expensive. But we don't go into this unless we're certain we can deliver a positive ROI on this. We look at the tangible as well as the intangible ROI. For the former — things like tickets and pouring rights at the stadiums and at the fan zones — we can calculate that short-term value exactly. Longer term, we look at the brand health, the perception of Carlsberg.

The whole strategy around the group's 'Accelerate Sail' framework is around investing in long-term growth and not only looking at the short term. It has to be both.

What's the metric that you use to show your line manager that you're performing successfully? Internally, we need buy-in from our markets, who need to utilise the assets that we produce here in the global team. We also have a brand health tracker tool that we use every single time we do anything.

We will have a rolling ROI and once we get to the end of the women's Euros in 2029, we'll sit down and do a complete ROI. In the meantime, the golden number is from brand health. We need to move the needle for the Carlsberg brand. »

» **How have the marketing assets available to you changed over the time you've been doing this?** The first big change is around the contract with our partners. In the past, it was very transactional: here are the assets and here's what you're paying for them. Today, it's much more of a dialogue based around what Carlsberg's business needs are and what assets we need to fulfil those needs. Contracts are rooted much more in our business objectives. That's the starting point.

The second point is around utilising the new world of marketing — we can't call it 'digital marketing' anymore, because digital's now an established part of marketing. So it's about showing up on the right platform at the right time with the right tone of voice and the right message. We spend a lot of time working on these four areas with our insights team, our digital team, our media team and our media agency.

We're constantly evolving our assets, because the world is changing so rapidly, so we have to have that flexibility in our contracting to make sure we cater for both the known and the unknown future. You'll see us show up on different platforms and with a different type of message than we had before. We've been a bit guilty in the past of assuming consumers know we have credibility within a particular space. So we need to change that narrative.

'At the end of the day, we sell beer. But we can facilitate change by working with the right partner'

We've also just changed the positioning of the brand six months ago, to 'give more access to more people to more of the best'. We have to back that positioning with our activations, otherwise it's just marketing fluff. We don't just want to show up with a global badging exercise; we want to really make an impact.

How do you intend to do that without becoming too 'marketing-y'? We're at the very beginning of our journey on this new brand positioning. The first big consumer moment we had was the Nations League final, when we did something for taxi drivers [see below].

We're looking at this from a community point of view, and what I love about sport is that there are so many different types of communities that we can tap into. For us, it's never just a 'one and done'. For the Uefa European Under-21 Championship this summer, for example, we gave all our assets over to the Common Goal organisation, which invites footballers to donate 1% of their salary to good causes. You didn't see Carlsberg anywhere during the Under-21 Euros.

At the end of the day, we sell beer. But we can facilitate change by working with the right partner.

What type of marketing asset has been the most effective in its delivery of success? One that has surprised me the most is the power of the legends, the former players. As an alcoholic beverage, we take a responsibility in not moving too close to the current players. In the last ten years, we've used former players a lot — and that's across both the Uefa and Liverpool partnerships.

Seeing the impact a legend has on a fan is quite incredible. I often joke that I can make grown men cry — here's how! Utilising the legends in different ways to get our brand message across is really exciting.

I'm also really excited about the omnichannel experience — driven digitally, manifested physically — that we're going to give fans. The fan in the stadium is going to see us show up in the same way as a fan sitting in China is, for example.

The sums of money to sponsor football today must be eye-watering. Are you approaching a point when it's no longer worth it? As long as the right holders can still show how you can get a positive return on investment, I don't see why the prices can't continue to grow. But, when we look at the types of sponsorship proposals we've been getting in the last couple of years, there's been a bit of stagnation.

Some of the assets are finite: a football club only has X amount of LED minutes or space on a perimeter board available, so at some point, they cannot sell anymore, because they have too many sponsors on there.

As a rights holder, you have to take a good look at yourself [and ask] how much can I actually give to my partner? I can't speak to what's going on on their side, but at some point, their finite assets are going to run out. It's on them a little bit to come up with ways of letting partners activate new assets that they can bring to the table.

At the end of the day, we're not going to pay more for the same, but we are going to pay more if we're shown how we can solve our business objectives in a better and more efficient way. That's a conversation worth having.

Is it a good thing professionally that you're not a big football fan? You don't need to like it to understand it. I don't need to bite the donut to know that it's sweet. I may not find football particularly exciting, but I understand fan culture and I understand marketing.

Do you still enjoy what you do? I do. A big part of my job is about relationships, so what I do doesn't really feel transactional. I really enjoy building those relationships and making sure that they help us as a business as well. GDI



Carlsberg's 'Fare Game' activation surprised taxi drivers, who often work during major sporting events, with a night off to watch last May's Uefa Nations League semi-final between Germany and Portugal live

Moderation, premiumisation and regulation shape Polish market

Poland's traditional reputation as a hard-drinking nation is changing fast as consumers prioritise quality over volume and increasing regulatory pressure alter the alcoholic beverage market's direction. **Joe Bates** reports



Image: iStotk.com/Zhelka-Boss

Poland's capital city Warsaw has played a central role in the country's continuing economic growth

The Polish alcoholic beverage market faces mixed fortunes as it heads into 2026. It faces significant challenges due to upcoming regulatory changes, but is being boosted by premiumisation, diversification and the growing popularity of no/low products. Poland's robust economy, which the EU forecasts will grow 3% this year driven by strong private consumption and investment, is another cause for optimism.

Spirits, especially vodka with its near 75% share of the category, and beer remain Poland's favoured alcoholic beverages. They accounted for the lion's share of the country's overall PLN68.6bn (US$18.84bn) alcohol market, according to 2024 figures from trade body The Polish Spirits Industry Employers' Association (ZPPPS).

Changing consumer preferences

Yet consumer tastes are changing. Beer consumption is declining and there's growing demand for whisky, gin and tequila. Scotch whisky, for instance, enjoyed a 5.6% increase in exports to Poland in 2024, reaching 48m bottles, according to the Scotch Whisky Association. In pre-pandemic 2019, exports totalled just 33m.

Consumers are also trading up, with whisky accounting for 89% of luxury alcohol sales in the country, according to a 2024 KPMG report on Poland's luxury goods market. The country even boasts its own small, but growing, craft whisky scene. Notable brands include Wild Fields, a single malt matured in Polish oak barrels, and Paprocky, a family-owned, small-batch single malt from the west of the country.

Domestically produced whisky was Poland's fastest-growing spirits export in 2024, increasing fivefold to PLN197m (ZPPPS figures) — an impressive result but still dwarfed by the country's vodka exports, which totalled almost PLN900m.



Henkell Freixenet supports Lubuski and and other local brands with POS displays

Wine shows its potential

Wine holds less than a 9.5% value share of Poland's overall alcoholic beverage sector but is growing steadily, especially among younger LDA consumers. Henkell Freixenet, the world's largest sparkling wine group, is optimistic about the growth opportunity.

"There remains significant untapped potential for high-quality sparkling wines in Poland," notes head of communications Vanessa Lehmann. "We anticipate ongoing consumer migration toward premium offerings. Next to Mionetto Prosecco, we see big potential for our brand Freixenet in Poland, with our internationally leading premium cava Freixenet Cordon Negro."

Given that Poland prohibits most alcohol advertising apart from beer, Lehmann says Henkell Freixenet must find "alternative ways to remain visible". She adds that off-premise retail stores remain the company's primary communication channel.

"A well-planned, eye-catching display is one of the most effective tools for promoting alcohol at the point of sale," Lehmann says. "They are highly diverse, tailored to seasonal occasions and the format of each retail outlet. We create them for our key brands — global brands such as Mionetto and Freixenet, or our local brands such as Lubuski [Gin] and [vodka and liqueur range] Dalkowski."

Poland has a long winemaking tradition, with historical records showing Cistercian monks producing wine as early as the 12th century. Over the past 25 years, winemaking in this coolest of climates has taken off in earnest, with over 500 small, family-owned wineries active and more than 1,000 hectares under vine, according to Wineanorak.

Yet many Polish consumers remain wary of home-produced wines, says IWSR senior market analyst Eastern Europe Urszula »

KEY TAKEAWAYS

- Poland's spirits market is no longer dominated by vodka, and beer consumption is waning.
- Consumers are trading up to whisky, gin and tequila, and no/low alcohol is booming.
- Producers face mounting pressure from steep excise hikes and proposed sales restrictions, even as premium segments grow.
- Producers are responding to market pressures with 'drink less but better' strategies and a focus on no/low NPD.

» Wolska. "Polish wine production is developing, but it's not yet a significant category," she points out. "Polish wine is expensive compared to other origins, and Poles these days are very price-conscious. There are also doubts around the quality, since Poland is not a wine country.

"When faced with a choice, Poles tend to go with well-established and more affordable Portuguese or Georgian wine," Wolska adds. "Another factor is distribution — Polish wine is only available in selected retailers or selected regions, and this limits potential growth."

No/low records dynamic growth

In contrast, no/low-alcohol products are going from strength to strength, with ZPPPS data showing sales of 0.0% ABV beverages doubling in 2024 to reach PLN2.78bn, a shift driven by the hotel/restaurant/catering and off-premise channels. Non-alcoholic beer is particularly popular, accounting for 7.5% of all beer sales in 2024.

"No/low is one of the most dynamic trends in the alcohol industry — in Poland as well as internationally — and retail chains have clearly recognised its potential," says Henkell Freixenet's Lehmann. "Mionetto 0.0% is the leader in the non-alcoholic sparkling wine segment, but our 0.0% portfolio is extensive and continues to grow. This year [2025], for example, we introduced Freixenet Cordon Negro 0.0%, which already has a loyal following."

Regulatory pressure ramps up

Per-capita alcohol consumption in Poland is falling with Poles now drinking one litre of spirits per person less than in pre-pandemic 2019, and sales of spirits falling 15% nationwide between 2021 and 2024, according to ZPPPS data. Yet by European standards, Poland remains a heavy drinking nation with average annual per capita consumption at around 11L (in pure alcohol), well above the EU average of 9.8 litres.

The Polish government is considering amendments to the existing Act on Upbringing in Sobriety to make alcohol less physically and economically available. This move includes proposals to restrict sales, especially in certain venues like gas stations during specific hours. Multi-purchase promotional offers, viewed as hidden advertising, are also in the crosshairs.

In November last year, the Polish parliament approved a hefty 15% hike in excise duty on alcohol for 2025, followed by a further 10% increase in 2027, both considerably higher than the 5% increases in each of those years previously written into law. The plans were presented as a way to improve Poles' health.

Unsurprisingly, Polish spirits producers remain unhappy about the increasing tax burden on the industry, arguing it contributes PLN26bn to the country's economy annually, while providing tens of thousands of jobs and supporting other sectors such as farming, packaging, transport and logistics.

"We are an industry with one of the highest tax contribution rates in the entire economy," ZPPPS president Karol Stec told the association's annual press briefing last October. "Within the alcohol market, it is the spirits sector that carries the burden of excise duty to the greatest extent: with less than 39% of the total alcohol consumption, we generate more than 70% of the revenues from this tax.

"Any sharp increase in excise duty not only hits producers, but also paradoxically reduces budget revenues, moving consumption to the grey economy."

As in many other high-tax countries, illicit alcohol production and counterfeit sales remain a significant problem, with this dark market now amounting to 18m litres per year, resulting in a tax loss of PLN1.3bn, according to ZPPPS calculations.

Poland's drinks market stands at a fascinating crossroads — one where rising regulation meets the consumer's growing appetite for quality, diversity and moderation. How the industry balances these opposing forces will determine whether the coming years mark a sobering slowdown or a spirited transformation. GDI

Warsaw's Stock Spirits Group strengthens domestic business despite market pressures

Despite rising production costs, higher excise duties and an increasingly regulated market, Stock Spirits Group enjoyed another strong year in its home market of Poland last year. The group continues to benefit from a broad, well-balanced portfolio and a focus on innovation across key categories such as whisky, gin and vodka.

"Our diverse portfolio and consistent investment in innovation have helped us stay resilient while supporting responsible, sustainable growth," a company spokesperson tells *Global Drinks Intel*.

That resilience is reflected in Stock Spirits Group's dynamic approach to category expansion and premiumisation. The company has made strong inroads in whisky with the Polish launch of Clan Campbell in October 2024, targeting younger consumers and recruiting from vodka drinkers.

Backed by a modern 'Join the Clan' positioning that highlights inclusivity and shared energy, the brand has already captured a 5.5% share of Poland's mainstream whisky segment, the spokesperson notes. Alongside whisky, Sierra Tequila also remains a standout success, commanding a 48% share of the category and 74% awareness, with the flavoured Sierra Tropical Chilli proving especially popular. Further variants are planned for 2026 to build on this.

In the gin segment, Stock Spirits Group is investing behind Finsbury, a London Dry gin brand that dates to 1740, as it seeks to tap into growing consumer curiosity for classic and flavoured gins. A broader Finsbury range, including flavoured and non-alcoholic expressions, will launch in spring 2026, underlining the group's strategy to cater to the 'drink less but better' trend shaping Polish consumption.



Vodka, the company's core category, continues to evolve through innovation. The relaunch last year of Biały Bocian refreshed the brand's premium image and introduced a new herbal-flavoured variant alongside a CSR partnership with a nature charity devoted to caring for storks, the brand's symbol. Meanwhile, Stock Prestige Wow (left), featuring shimmering glitter that activates when shaken, injected new energy into the premium vodka space and connected with younger, experience-driven consumers.

Crowning these initiatives is Stock Spirits Group's EUR50m Lublin distillery, inaugurated in 2024. One of Europe's most advanced facilities, it enhances production autonomy while cutting emissions through heat recovery, biogas generation and water reuse.

Campari Group CEO Simon Hunt

After a mid-single-digit increase in Q3 sales, Aperol owner Campari Group is 'heading in the right direction', according to CEO Simon Hunt. Interview by **Olly Wehring**

Boosted by a 4.4% Q3 uplift, Campari Group's nine-month sales are up 1.5%. What do you credit this performance to? The teams have been working their backsides off in a very tough environment. It's encouraging to see a determination within the 'Camparista' community that I have to admit is a bit different from what I've seen before.

Secondly, from a portfolio point of view, we are the leaders in the spritz category, which is an affordable yet aspirational play. So, while we're facing the same challenges as everyone else, we still have a lot of opportunities.

We're still very small in a number of markets, so we have opportunities that some other companies don't have. Even in markets where we have scale, like Germany, there are some interesting things going on; the growth of Sarti Rosa, for example, is defying the dynamics of the marketplace in Germany. The same can be said of Crodino [Non-Alcoholic Spritz] in a number of other European markets, or Aperol in the UK, where it's up 22% in the nine months to the end of September. We have a mix of different opportunities, but it's also hard work by the team and a good portfolio.

Sales of Aperol in the third quarter came in down by 1%. Are you concerned? Consumption in Italy broadly has been soft for the this whole year, but particularly in August, when every beverage category was down by 10% — including water!

Then, in Germany, we're seeing purchase behaviour — in both the on and off-premise — impacted by high interest rates. Meanwhile in the US, we had a bit of destocking for Aperol.

For the underlying trends, you need to look at the sell-out and not the sell-in. While Aperol was down 1% in Q3, we've been gaining share in pretty much every market we operate in. More importantly, there's the sheer geographic expansion opportunity we have. I'm not too concerned. My focus is on the sell-out and on doing the right thing for the consumer for the long term.



Simon Hunt: 'For me, it always comes back to strategy: what do you want to do?'

The House of Agave talked of "seeding markets" beyond North America. How aggressively are you pursuing this? Campari has an established network around the world, with 27 in-market companies. It also has the ability to build edgy, democratised brands — that's exactly what Espolòn is. The team started to see consumer trends looking for these kinds of brands in tequila.

We're starting to see Espolòn palomas being enjoyed in the Italian aperitivo moment, so the consumer demand is there and the team's clearly making good traction. If we can leverage a great brand, a strong route-to-market and a compelling quality and price point within tequila in a meaningful way, then we're going to win.

Courvoisier has started cycling year-prior performance. Are you having any cognac-fueled sleepless nights? When we bought Courvoisier, it was very clear this was a long-term play. This brand is not going to be fixed in quarters. I used to run Courvoisier back in my Allied Domecq days. Under its previous ownership [with Suntory Global Spirits], it didn't get the level of focus that it's getting from us. We've been getting some very good execution in the UK and a positive response in the on-premise. Cognac is a tough category in the US, where the market leader is being pretty aggressive on price and consumer trends are adverse to the category. Our opportunity is to come out and define the brand, irrespective of the category. That's not a quick fix; that takes time.

We're confident we can do it, but judge us in ten years. It's a bit like owning an amazing townhouse in Chelsea [in London] or a brownstone in New York — if you want one, you've got to pay the ticket price, then maintain it, then get it valued. That's the stage we're at now.

Are you comfortable with Courvoisier's price positioning? A lot of people get seduced by the cognac category, thinking it's all US$5,000 bottles. The bulk of the market starts at VS level. We're broadly in the right place price point-wise. There are a few markets I'd like to see us optimise that a bit, but ultimately, it's about the ladder from VS to VSOP to XO and then what other variants you want in different markets.

In the US, we must win first at VS, so getting the right value equation between the consumer and the price point is key. Asia-Pacific is a slightly different game in that Courvoisier is tiny — the brand does less than 2% of its sales in China, for example — so we're starting from scratch.

Where have you got to on the "organisational restructuring" process announced in February? The team had already committed to looking at SG&A (Selling, General & Administrative) and to target 200 basis points by the end of 2027. Again, this has involved tough decisions on structure. We're on track to deliver year one of the target and that will flow into year two.

For me, it always comes back to strategy: what do you want to do? If we answer that question, then it becomes very clear what resources and what structure we need.

We have some things that are very different from any other company I've worked in. If we can put all that together, then we have a really interesting strategy. GDI

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

NA drinks viewed as healthy, but joyless

It's not enough to position a product as better for you, argues **Victoria Watters**. Adult non-alcoholic brands must also deliver emotional upside



Image: Olga Yastremska

In *The New Consumer*'s recent survey of thousands of Americans, participants were asked to rank nearly 100 food and beverage items on two axes: how healthy each item seemed and how happy it made them feel.

Among adult beverages, non-alcoholic (NA) beer and canned cocktails landed near the middle — not especially unhealthy, but also not especially enjoyable. They performed just slightly better than diet soda and plant-based meat on the happiness scale.

Wine fared best among alcoholic options. Red wine, in particular, was seen as modestly healthy and made people feel moderately happy. Spirits and beer were viewed as less healthy, though still tied to positive emotional associations.

The results raise a fundamental question for non-alc brands: if consumers associate NA drinks with health, but not happiness, how can the category hope to scale?

Perception varies by demographic

Broken down by demographic, the survey reveals a more nuanced (and optimistic) picture for NA. Younger LDA consumers, especially Millennials and Gen Zers, show higher levels of acceptance across the board.

This cohort rates alcohol alternatives as more enjoyable and healthier than older generations do. It also embraces newer categories like THC-infused beverages, which it ranks as relatively healthy and emotionally rewarding, on par with, or better than, many traditional alcoholic beverages.

Men tend to associate beer and whisky with greater enjoyment than women do, and perceive them as slightly healthier. Meanwhile, women more often find satisfaction in foods and beverages considered more nutritious, like salad or diet soda.

For NA brands, these splits offer critical targeting cues. Consumers aged 21–35 in cities, particularly those with higher disposable incomes, are the keenest adopters.

They're seeking alternatives aligned with wellness goals that still deliver satisfaction. They are also more likely to be swayed by storytelling, social proof and design-forward branding than blanket health claims.

A cultural myth begins to crack

For decades, conventional wisdom suggested that moderate drinking might be healthier than abstinence. A glass of wine with dinner or a pint after work was supposedly good for you. But new studies are rewriting that narrative.

The Canadian Institute for Substance Use Research recently examined over 100 alcohol-related studies and found that the supposed benefits of moderate drinking were largely the result of flawed comparisons.

Many studies had measured light drinkers against groups that included former drinkers, people who had often quit for health reasons. Once those biases were corrected, the protective effects vanished.

The World Health Organization went further. In 2023, it confirmed that no amount of alcohol is safe for human consumption. Alcohol is now classified as a 'Group 1 carcinogen', placing it in the same risk category as asbestos and tobacco.

While much of the public is ignorant of these findings, awareness is growing. For brands in the NA space, this presents an opening, though not without friction.

What it means for NA brands

The research paints a complicated picture. NA options are widely viewed as healthier, but rarely as sources of joy. For a category built on the promise of 'feeling better', that should give pause. It's not enough to position a product as 'better for you'. Brands must also deliver emotional upside. If a beverage feels like a compromise — something you settle for rather than reach for — it risks being overlooked, no matter how clean the label.

This is especially important in a post-pandemic era, where consumers still prize indulgence, escapism and celebration. Lean too far into wellness or functionality without addressing fun, and brands may struggle to achieve repeat purchase or mass appeal.

This means, most of all, resisting the urge to sell based on fear. The WHO's carcinogen classification matters, but consumers aren't likely to switch based on health risks alone. They switch when an alternative feels just as satisfying — and maybe even cooler — to drink.

The opportunity ahead

Cultural sentiment is slowly but steadily turning. Younger consumers are less beholden to alcohol's legacy associations and more curious about alternatives.

Early adopters are seeking beverages that offer both wellness and enjoyment. The science is firmly on the side of reduced alcohol consumption, even if public policy and the mainstream media haven't fully caught up.

For NA brands, the mandate is clear: build a category that tastes good, feels good and stands for something bigger than just subtraction. Perception may lag reality, but with the right positioning and product experience, brands can close that gap and open a wider lane for the future of drinking. GDI

Victoria Watters is co-founder of Dry Atlas, the leading media company focused on alcohol alternatives. More at ***www.dryatlas.com***

‘Beer remains at the core’ as Molson Coors pursues non-alcoholic growth

Since ‘moving beyond beer’, Molson Coors has grown its NA portfolio substantially. It’s a strategy that ‘considers consumers and occasions equally’, vice president NA beverages Kevin Nitz tells **Maia Gosselin**



Molson Coors’ investment in the NA space has been a ‘sustained effort to transform’ the company

While the last few years have seen a steady decline in sales for the beer industry — and overall beverage alcohol — the category has a history of bouncing back. What motivated Molson Coors to pivot to growing its non-alcoholic portfolio with a particular focus on mixers and mocktails for the long term? Interestingly enough, our push into NA began more than five years ago when we changed our name from Molson Coors Brewing Company to Molson Coors Beverage Company. We made that move because we want consumers to have lots of options to choose from in our portfolio, no matter the occasion. Beer remains at the core of what we do and who we are, and we’re fortunate to have some of the industry’s most iconic brands — from Coors Light and Miller Lite to Blue Moon Belgian White and Peroni.

When it comes to non-alc, we’re focused on three big areas that help us reach many more consumers while expanding into new occasions for our business. Those three areas are: alcohol replacement, think non-alc beers like Blue Moon NA and Peroni 0.0, as well as Naked Life Non-Alc Cocktails; adjacent products, like Fever-Tree; and pure-play non-alc, such as ZOA Energy, our brand with Dwayne ‘The Rock’ Johnson.

Having a strategy that considers consumers and occasions equally has really allowed us to build our non-alc portfolio in a thoughtful way over the last few years, and now we have a strong foundation to build upon.

There are multiple factors contributing to the no/low movement, from sober curious and health concerns to financial strains. Which of these has had the biggest impact? It’s ultimately a personal decision, and the reasons can vary greatly, which is why we’re committed to providing options that help people celebrate and connect with or without a beer. For those who want to moderate their drinking, we have low and no-alc products that can be a ready replacement — something like our US NA beer brands [Peroni 0.0 or Blue Moon Non-Alc] or Naked Life, Australia’s top-selling NA cocktail brand, which we brought to the US this year.



Kevin Nitz: ‘We’re committed to providing options that help people connect with or without a beer’

But we also want to appeal to people in moments that aren’t typical alcohol occasions, and that’s where a better-for-you energy drink like ZOA, which is packed with electrolytes, can show up. Or Fever-Tree, is a product that’s unique in that it can function in an alcohol occasion — mixed for a premium cocktail experience — or enjoyed on its own any time of day.

> *‘When it comes to non-alc, we’re focused on three big areas: alcohol replacement, adjacent products and pure-play non-alc’*

Molson Coors has seen solid success with its investments in the NA category, where others have not done so well. To what do you attribute this? Our investment in the NA space has been a sustained effort to transform this company, and it’s something we’re committed to. Beer will always be in our DNA — that’s a very important point here — but reaching more people for more occasions is the mission.

We’ve invested in our brands at the local level to really connect with consumers on their home turf. Take ZOA, for example. We’ve invested heavily behind a year-long national sampling program that began in January and resulted in getting more than 750,000 cans in people’s hands.

We’ve also continued to build a roster of brands that we think have real growth potential and plenty of runway left for expansion. We’re also continuing to look for opportunities that fill white spaces for us. »

» **Can you elaborate on some of the initiatives that Molson Coors is executing with Fever-Tree in the US?** We have a solid foundation with Fever-Tree. It's already the top-selling premium mixer brand in the US. Even so, we see a ton of room for growth. There are thousands of stores, bars and restaurants that sell our beer, but not Fever-Tree. That's a lot of opportunity.

We're investing in both sales and marketing to get the word out about what a fantastic product Fever-Tree is and to make it the 'go-to mixer'. A national campaign is rolling out with a simple yet powerful concept: 'When a majority of your drink is the mixer, you should mix with the best.' There will also be some high-profile partnerships and sponsorships. More to come there.

The company has entered into a distribution agreement with non-alc RTD brand Naked Life in the US. How is this strategy progressing? Naked Life is the first non-alcoholic RTD brand in the Molson Coors total beverage portfolio, so we're very excited about the potential of the brand. We have a great-tasting liquid that can be enjoyed during all occasions, whether it's a tailgate, summer barbecue, or during Sober October or Dry January. Naked Life is designed to fit into modern lifestyles with true-to-cocktail taste, just five calories, zero sugar and a premium experience.

We just finished Sober October and are heading into Dry January. Does Molson Coors undertake specific strategies focused on these 'dry' months? One interesting thing about the growth of NA is that it's no longer just for niche occasions. Dry January drove a lot of the NA conversation for several years, and then it was joined by Sober October. That is when a lot of people, both media and consumers, tended to turn their attention to NA products such as NA beer brands or NA canned cocktails.

At this point, we see our NA brands as compelling propositions year-round. We don't confine our sales and marketing efforts to any particular time on the calendar. That's something that's changed in the last couple of years, and which certainly reflects our mission of becoming a 'total beverage company'. That said, during key times of the year, such as Dry January and Sober October, we're going to make sure our brands are at the forefront.



Molson Coors rolled out Australian alcohol-free RTD brand Naked Life in the US in May



Blue Moon NA (left) and Peroni 0.0 'offer premium beer-drinking experiences without the alcohol'

Which demographics show the most interest in NA options? The exciting thing about the NA space — and specifically what we're building at Molson Coors — is that the audience crosses all demographics. For instance, the audiences for Fever-Tree and ZOA might not be quite the same, but the goal is to have compelling offerings for everyone and anyone in the NA space. That can be an energy drink, a mixer, a non-alc beer, or beyond.

Social media has been integral in generating buzz around no/low. How does this fit into your overall strategy of reaching consumers? It is an essential part of our strategy across brands, including our NA portfolio. That includes tapping tastemakers and mixologists to showcase how Fever-Tree is the better mixer for your favourite cocktail and creating social content around how ZOA is the perfect better-for-you energy option. We're committed to reaching consumers both in the real world and online, and social media is a crucial part of how we do that.

Where does the Molson Coors non-alcoholic beer portfolio fall in the company's plans? As I've said, beer is central to what we are and what we do, and that's not changing. NA beer dovetails perfectly with both our legacy and our future, offering a high-quality alternative for our products that have alcohol. Both Blue Moon NA and Peroni 0.0 offer premium beer-drinking experiences without alcohol, and with no drop-off in terms of flavour.

'NA beer dovetails perfectly with both our legacy and our future, offering a high-quality alternative for our products that have alcohol'

How big do you anticipate the overall NA segment will get? Is there one subset where you envision the most opportunity? For more than five years, we've been building a broad and compelling portfolio of products that include beer and beyond beer offerings — including NA.

The goal isn't to drill into one part of the NA space, but to show up in a variety of ways that meet consumers where they are. That includes the spaces where we currently have brands, but also segments where we don't, but would like to be involved. We're always looking at opportunities to continue building out our NA portfolio.

Between on-premise and off-premise, where is there more growth and potential? The reality is that both on and off-premise are huge opportunities for our NA portfolio. The focus for on versus off-premise depends on the brand. As a functional better-for-you energy drink, ZOA, for instance, is obviously largely an off-premise play. The distinction there is that for an energy drink, we see it not necessarily as something for the gym, but for all sorts of occasions.

Something like Fever-Tree, though, we believe has a ton of runway in both the on and off-premise. Mixers have just as much importance in the home fridge as the bar/restaurant fridge. That's one reason we are so optimistic about being able to grow that brand, even as strong as it already is.

Naked Life is another great opportunity — it started in the off-premise, but the on-premise provides a lot of opportunity as people look for alcohol-beverage replacements at their favourite bars, restaurants, venues and so on. Ultimately, our job is to build all our NA brands the best we can in both channels.

Any plans for additional non-alcoholic M&A in the near future? We're continuing to build a world-class beverage company that offers products with and without alcohol and we're always exploring our options. Ultimately, we want strong brands that have the ability to grow. GDI

Ninety years strong: Heaven Hill toasts family, resilience and diversification

Heaven Hill Brands co-president Kate Latts looks back on nine decades of remarkable corporate achievement and shares the company's vision for the future

What do you think your founders would make of the company Heaven Hill Brands has become? When I reflect on 1935 and the step my grandfather and his brothers took to invest in a company against the odds and fill the first barrel in Bardstown just months after Prohibition ended, I imagine they would be quietly proud and perhaps a little astonished by how far the company has come.

They had no distilling experience, but they had a strong business sense, resilience and what I imagine was a vision for opportunity when others might have seen uncertainty.

Today, we remain family-owned, still based in Kentucky, still deeply rooted in the bourbon tradition, yet with a global reach and a diversified spirits portfolio and a culture of innovation. I believe they would smile at the continuity of values and the scale of ambition.

Heaven Hill has weathered many challenges, from the 1996 distillery fire to seismic geopolitical changes. Which milestones most defined the company's character? The fire in 1996, which destroyed our distillery, rickhouses and nearly 100,000 barrels, was one of the most devastating events in our history. Yet, as my father, Max Shapira, often says, it was the loyalty and spirit of our people, that 'we're all in this together' attitude, which allowed us to rebuild stronger than before.

Another milestone was our early decision to diversify beyond bourbon during the so-called 'bourbon depression' years. When others were stepping away from whiskey altogether, we made the choice to invest in other spirits categories. It wasn't about abandoning bourbon. It was about ensuring our family business could endure, evolve and continue to lead when the category inevitably rebounded.



Kate Latts: 'Reaching 90 years is both a milestone and a springboard'

More recently, the 2022 transition when Allan [Latts] and I became co-presidents, marked another moment of continuity, reaffirming our family's long-term commitment to leading with the same sense of stewardship that has guided every generation before us, rather than focusing on short-term gains.

With this year's opening of the Heaven Hill Springs Distillery in Bardstown, you've come home. What does this US$200m investment represent? The new distillery is absolutely a statement of intent. It says we believe in American whiskey, we believe in Kentucky and we believe in our brands. It is truly a 'coming home' moment as we return distilling operations to Bardstown, where the first barrel was filled in 1935, reinforcing our roots and our enduring connection to community.

Heaven Hill Brands' new 'Thriving Together' corporate purpose, launched this year, aims to define how you approach growth, people and community. How did that idea come to life? 'Thriving Together' captures our belief that business, brands, people and community are deeply interconnected. The concept emerged from reflecting on what it means to be a family-owned company in today's world: namely, how we can grow responsibly, inclusively and sustainably.

In practice, it means investing in our people by fostering a culture of respect, opportunity and ownership, knowing that when people thrive, the company thrives.

As you prepare to celebrate Heaven Hill's 90th anniversary on 13 December, what excites you most about your brands and your people? Reaching 90 years is both a milestone and a springboard. For our bourbon portfolio, the opportunity ahead is enormous. The category is enjoying global admiration, premiumisation continues, and consumers are seeking authenticity and craftsmanship — qualities embodied by brands like Elijah Craig, Evan Williams, Heaven Hill Bottled-in-Bond, Henry McKenna and Old Fitzgerald. We're excited to deepen those stories, expand internationally and continue elevating quality and innovation.

Beyond whiskey, we've also built strength across categories that reflect our independent spirit and entrepreneurial mindset. Brands such as Deep Eddy Vodka, Lunazul Tequila and Ocho Tequila each embody a distinct ethos that complements our whiskey heritage.

Deep Eddy captures the easygoing authenticity and vibrant creativity of its Texas roots; Lunazul honours generations of family craft and Jalisco tradition; and Ocho represents true single-estate tequila artistry. Together, these brands demonstrate how diversification, done with purpose and respect for heritage, enables us to connect with new consumers, celebrate global craftsmanship and uphold our unwavering commitment to quality and authenticity.

For our people, I am passionate about developing the next generation of leaders, both within our team and across the industry, and fostering a workplace that reflects our spirited commitment.

The next chapter is about building on 90 years of history with intention, humility and excitement, honouring our past, empowering our present, and shaping a future that fulfils our mission to lift the human spirit and vision to be an admired, family-owned global supplier of beloved brands that continue thriving together for generations to come. GDI

HEAVEN HILL BRANDS

The company's 'Thriving Together' tagline was unveiled alongside a new brand look in July

HEAVEN HILL
BRANDS

CELEBRATING 90 YEARS of THRIVING TOGETHER

A spirited legacy poured into every bottle



From a modest start in 1935, Heaven Hill has grown into the largest independent, family-owned and led distilled spirits company of brands in the U.S. Nearly 90 years later, we continue Thriving Together, lifting the human spirit through the brands we build, the people we empower, and the communities and legacy we grow together.

@HEAVENHILLBRANDS

Heaven Hill Brands, Bardstown, KY © 2025 Think Wisely. Drink Wisely.



US INDUSTRY INSIDER

Victoria Watters

Rethinking RTD positioning in the global alcohol alternatives market: it's the story, flavour and emotion that matters

Over the past few years, I've watched the alcohol alternatives category evolve from a niche wellness experiment into a global movement. What began as a handful of small-batch spirits alternatives has become a multibillion-dollar category spanning markets worldwide.

But as the category scales, one question keeps resurfacing: should non-alcoholic RTDs act more like cocktails — or more like sodas?

At the heart of the question is how consumers worldwide perceive value, identity and joy in what they drink. And as more regions adopt no/low-alcohol options, clarity is becoming its own currency.

How we got here

In the US, the 'modern soda' trend reshaped expectations about what a soft drink could be. Brands like Poppi, Olipop and Spindrift took soda's nostalgic cues (bright packaging, fruit-forward flavours) and added a wellness twist.

These better-for-you sodas now command premium shelf space and prices, challenging legacy players like Pepsi and Coke on both perception and profit.

At the same time, non-alcoholic RTDs emerged as a category breakout. They offer the complexity of a mocktail in a much more convenient format. Indeed, at Spirited Away, the booze-free bottle shop my husband Douglas and I opened in New York City in 2020, RTDs routinely top the bestseller list.

But convenience has its limits. Some consumers love the taste but balk at paying US$6 for a drink they can roughly recreate at home. Others question the pricing of even more complex formulations. While the RTD boom delivered approachability, it also raised new questions about value.

The pricing paradox

At the heart of this debate is context.

A $6 non-alcoholic spritz might make sense when it's positioned alongside spirits alternatives, but not when it ends up next to a Poppi or Olipop at a Whole Foods



Bought by PepsiCo in a US$2bn deal in March, Poppi started out as a home-brewed beverage

supermarket. Those modern soda brands have set new expectations for what consumers get in a can.

They've proven that soda doesn't have to be cheap, or unhealthy, to sell. Poppi doubled its sales in 2024 before being acquired by PepsiCo. Olipop, valued at more than $400m, sells prebiotic sodas at a higher price point than Pepsi itself.

Their advantage is clarity. Phrases like 'modern soda' and 'a new kind of soda' make sense, while 'alcohol alternatives' and 'non-alcoholic cocktail' are murkier.

These RTDs sometimes require a lengthy explanation: "It's not juice, it's not seltzer, it's not the sugary mocktail you remember from years past…"

Brands can educate consumers via effective storytelling and expectation-setting in their marketing. But if a consumer isn't familiar with the brand? They don't like decoding what should be a simple purchase.

The case for 'premium soda' positioning

With the alcohol alternatives category, language is often the barrier. Descriptors like 'mocktail' and 'canned non-alcoholic cocktail' are reductive and cumbersome.

For consumers who don't come from cocktail culture, 'premium soda' can be a simpler, more inviting entry point. It conveys quality and enjoyment without needing translation.

Framing certain RTDs as premium sodas offers clear advantages. It simplifies marketing and lowers operational costs. Soda production is more scalable than complex cocktail-style builds, and consumers already understand what they're getting.

But the shift comes with trade-offs. Rebranding as soda risks losing the 'craft' halo that helped early RTDs command higher prices among consumers who already understood the category. It can also cap pricing potential, as premium sodas typically top out at $3–$4 at retail. For brands that trade on exclusivity or complexity, that's a meaningful adjustment.

Still, in mass retail, simplicity converts faster than nuance.

Redefining 'premium' for a global consumer

As the category matures, 'premium' no longer just means expensive ingredients or minimalist packaging. It's about delivering clarity of purpose. How can a product fit naturally into a consumer's life, wherever they are?

In Europe, that may mean botanical sodas with real fruit juice and clean labels. In Asia, function-forward sparkling teas. In North America, simple RTDs that focus less on imitating cocktails and more on creating refreshing, social drinks people want to grab again and again.

The opportunity is massive. But to seize it, brands must adapt to local expectations while maintaining coherence. As I often tell founders: format doesn't equal identity. Cans are just delivery systems; it's the story, flavour and emotion inside that define what the drink becomes. GDI

Victoria Watters is co-founder of Dry Atlas, the leading media company focused on alcohol alternatives. Prior to Dry Atlas, she spent a decade as a brand & content marketer in New York City before opening Spirited Away, the first non-alcoholic bottle shop in the US. Subscribe to her newsletter at ***dryatlas.com***

Mexico's Grupo PSA invests in Neurita Tequila

UK-based Neurita Tequila secured financial backing from its distillery partner Grupo PSA. The investment, financial details of which were not disclosed, will support the female-founded brand's international expansion in 2026, with a focus on the US market. It follows Neurita's move earlier this year to work with Grupo PSA on a 100% agave range, including a premium blanco expression and updated packaging designed to position the brand for wider distribution.

Angus Dundee unveils Glencadam visitor centre

Angus Dundee Distillers marked the 200th anniversary of its Glencadam Distillery in Scotland by opening a new visitor centre in November. The facility is the result of a "multimillion-pound" investment by the family-owned company. The project created 12 new positions across hospitality, retail and tours.

Bench Brewing purchases brand brace from Ace Beverage

Canada's Bench Brewing Co has acquired the Ace Hill beer and RTD brand and Liberty Village Cider mark from Ace Beverage Group. The Toronto-based brands will continue to operate under their existing identities after the deal is completed, with Bench Brewing gaining "all intellectual property and distribution rights". Financial details were not disclosed.

Chanrossa acquires Feragaia non-alcoholic spirit control

Independent luxury goods group Chanrossa purchased a majority stake in Scottish 0.0% ABV spirits producer Feragaia. The non-alcoholic brand joins R&B Distillers in Chanrossa's growing "new wave spirits" portfolio alongside single malt whisky maker Isle of Raasay Distillery.

Ridgeview Estate Winery enters administration

Ridgeview Estate Winery appointed administrators in late September, according to a notice published on the UK sparkling wine producer's website. Philip Harris and Neville Side of FRP Advisory were named as joint administrators of the winery, which is based in the southern English county of Sussex.

US craft spirits contract as economic pressures persist

The US craft spirits industry recorded its second consecutive year of declining sales in 2024, as producers faced persistent economic and distribution challenges, according to recent data.

Twelve-month sales fell by 6.1% in volume to 12.7m nine-litre cases, and by 3.3% in value to US$7.58bn, as reported in the American Craft Spirits Association (ACSA) and Park Street's latest annual report in the *Craft Spirits Data Project*.

Meanwhile, the number of active craft distilleries in the country decreased sharply to 2,282 as of August 2025, down more than 25% from 2024 levels.

The ACSA said part of the decline reflected a revision of its research methodology rather than outright closures. That said, employment within the sector dipped for the first time post-pandemic, falling to 28,628 full-time staff.

Craft's share of the US's total spirits market by volume was down to 4.5%, compared to 4.6% in 2023 and 4.9% the year before. Value share held steady, however, at 7.5%, although marginally down from 2022's 7.7%.

Exports were down by about 21% in 2024 to 142,000 cases, with many producers shifting their focus to home-state sales — now accounting for 48.5% of total volumes. The total amount invested by craft distillers fell to $811m, marking the first contraction since tracking began in 2016.

ACSA CEO Margie Lehrman described the results as "a wake-up call" for the country's policymakers, citing the need for greater market access and regulatory flexibility to support independent distillers.

Amoon Spirits leverages smart bottle tech for vodka debut



US startup Amoon Spirits has launched what it claims is the world's first 'smart vodka', introducing an app-connected bottle system.

The company's namesake brand features packaging that has been designed to light up, to spin a vortex inside the bottle and synchronise with an app for custom effects.

The system uses the company's patented 'Vortex Control Unit', which powers an internal stir bar and LED lighting. Through the Amoon app, drinkers can change colours, patterns and vortex speed, turning the bottle into a display piece as much as a spirits vessel.

Bourdon Spirits Co updates flagship Copper & Kings brandy portfolio

Kentucky, US-based Bourdon Spirits Co has refreshed its full Copper & Kings line, following the American brandy and bourbon brand's acquisition from Constellation Brands last August.

The revamped line-up introduced three core iterations: a 6yo VSOP American brandy (43% ABV), a 6yo bottled-in-bond American apple brandy (50% ABV), and a straight bourbon blend (46.5% ABV) finished for three years in ex-brandy barrels. Each expression carries an SRP of US$19.99, $24.99 and $29.99, respectively, per 75cl bottle.

Bourdon Spirits founder Rob Bourdon said the launch signals a "return to authenticity, craft and creative innovation," adding that the company aims to "reclaim America's original spirit — brandy — with integrity and adventure".

The new releases are now available at the Copper & Kings Distillery in Louisville's Butchertown neighbourhood, with wider distribution to follow.

Founded in 2014 by Joe and Lesley Heron, Copper & Kings produces a range of spirits using unconventional techniques such as bourbon barrel-aged brandy and brandy barrel-finished bourbon.

Switching from glass to recycled aluminium 'changed everything'

Named after its west of England home, Penrhos Spirits is very much a family affair. Its namesake gin first appeared eight years ago as a way to utilise 'wonky' fruit; then in 2023 everything changed. Co-founder Harriet Evans tells **Olly Wehring** how



Harriet Evans: recycled aluminium 'definitely felt like the right way for us to go. The bottle is lighter when it's full than the glass bottle is when it's empty!'

What's the history of Penrhos Spirits? We started in 2017. My dad, Richard, and brother Charlie were fruit farmers here in Herefordshire. They teamed up and started Penrhos Fruit. A lot of the fruit wasn't really good enough for shop shelves, so they were looking to do something with this wonky fruit — this was before the term 'wonky' was as widely used as it is today. They discussed with my mum, Sally, and Charlie's wife, Kate — along with 20-year-old me in the background — how to use this fruit.

We looked at cider, but Herefordshire was saturated with cider. Instead, we settled on gin. At the beginning of 2019, we launched Penrhos Gin in glass bottles. Our 'thing' was around the wonky blueberry, which is still our logo today. Our London Dry gin contains wonky blueberries from the farm. That's how we started.



Penrhos uses 'wonky' fruit and hedgerow botanicals grown and foraged on its Herefordshire farm

Where did you learn how to produce gin? Being farmers, both dad and Charlie are very practical. They went on a course together and learned quite quickly. I'm biased, I know, but our Dry Gin is so smooth and it's just very drinkable. They seem to have quite a knack for making good gin.

Charlie describes it as like making a cake and you keep the ingredients the same!

What's the ownership structure of the company? It's still owned by the family. My dad realised that maybe he's not made for the spirits world and is actually a much better farmer. He's more in the background, whereas I've stepped up and taken more of a role.

What size has the company and the brand grown to today? We have a national listing with [UK multiple retailer] Sainsbury's, which has massively helped grow the brand. Their first order, in September 2023, was for 15,000 bottles, which took us three weeks to get together.

The change from the original glass bottle to recycled aluminium in early 2023 changed everything for us. It made us not only a gin brand, but a brand that was actually challenging the norm. To give you a sense of volumes, we took delivery of 50,000 recycled aluminium bottles at the start of 2025. Today [November], we have 14,000 left.

Did you worry about bringing another USP into play for the brand? When we started looking to order more bottles, they were going to take about a year to arrive. Charlie's quite innovative and likes to look at what's out there. He explored the Frugalpac [paperboard-based] bottle, but we decided it wasn't for us. Then, at a local cricket match, Charlie saw a woman with a recycled aluminium water bottle. After a lot of research, he managed to find a 70cl version.

It wasn't an easy decision. Actually, it was terrifying, because no one had done it. Before, we were very stuck with what we had, because we had a blue bottle for the Dry, a red bottle for the Cloudy Rhubarb, a green for the Apple & Elderflower. Alongside all of its ecological credentials, we can now just change the label.

As we started to learn more about recycled aluminium, it definitely felt like the right way for us to go. The bottle is lighter when it's full than the glass bottle is when it's empty! »

» **How did you secure the Sainsbury's listing?** Charlie and I are quite vocal on LinkedIn — we're also quite persistent. At the time, he was messaging their buyer and they instantly loved [the aluminium bottle]. We kind of went at it in a back-to-front way, because we were then asked to pitch to their Future Brands team. Normally, this team finds you and then puts you in front of the buyer.

At this point, we didn't even have bottles, we just had an example one. They loved that we were a farming family trying to do something a little bit different and a little bit better. They also loved that they'd be able to launch the first recycled aluminium bottle on their shelves.

I was so thankful for the Future Brands team, because I'd never dealt with a grocery listing before — their terminology is a different language in itself. We got so much support; for the first 12 weeks that we were in store, we had a free aisle fin that we could put information on and had in-store sampling. We were also featured in *Sainsbury's Magazine* and fronted social media content. These are all things that would have cost a small, growing brand like ours a lot of money.

Who do you consider to be your competition? We always tend to sit next to Chase Spirits' namesake gin brand, because we're both from Herefordshire. We also have a very similar story to the likes of [English gin brand] Warner's, both coming from farming backgrounds and both caring for the environment.

What has your funding journey been? We're lucky that we're based on our farm. The distillery is in our old calving shed, which is right in the middle of our farmyard. I love that we're now making gin in there. As the brand's grown, we've taken over more of the farm's existing buildings.

We have raised some investment, to the tune of around GBP100,000 from two investors — one is a friend of the family, the other we found through an agency. The thing is, though, when you're growing a brand, you're constantly wanting more money to do more marketing and get your name out there.

Do you have an exit strategy? I don't really know how to answer that. Penrhos is the name of my family's farm, where I've grown up. I just want to keep growing the brand.

When friends send me photos of our gin in Luton Airport, for example, that's just crazy to me. At the moment, we want to keep growing it and getting recycled aluminium bottles on every shelf that we can.

Chase Spirits was acquired by Diageo in 2020. Doesn't that sort of transaction appeal to you? That was a huge thing for Herefordshire. But who knows what the future holds? I'm still young, so I have plenty of go just to keep selling gin.

What's been the lowest point of the journey for you so far? Every day's like a rollercoaster, really, with ups and downs. Without wanting to sound like a broken record, Covid was obviously really hard. Like most people, we pivoted to making hand sanitiser.

Waiting to hear whether we'd got the Sainsbury's listing was also incredibly tough. You don't actually hear from them for a very long time, so you don't really know if you have a listing or not. That was quite terrifying.

'Everything seems to take so long. We might speak to a buyer and they'll say: "Let's catch up in a year". And I'm thinking, in a year?!'

Everything seems to take so long. Being in a farming environment, we're used to things being fast-paced. If something breaks and you can't irrigate your cherries, you're going to fix it. With Penrhos Gin, we might speak to a buyer and they'll say: 'Let's catch up in a year'. And I'm thinking, in a year?!

I think we've been quite lucky, though, in that there's nothing that really stands out to me. Anyone will say that growing their own brand is really hard, and it is. Obviously, you think your brand's amazing, so why wouldn't everyone want to buy it?

What advice would you give to someone who's just starting out? Your brand needs to have a point of difference. I don't think you can just bring out a gin now in a bottle with a label and hope you're going to make a success of it. Also, look at your competitors and identify what's gone well for them and what hasn't worked.

I genuinely believe our bottle has really put us in a strong position. I mean, global travel retail hadn't entered our minds as an opportunity until we realised how perfect this bottle is for travel. So definitely make your brand as unique as you can.

Where do you see Penrhos 12 months from now? I certainly hope to see us continue to grow in travel retail. We've just been listed in Dubai, which is huge for us. We've also just launched our first recycled aluminium bottle in one litre. Then there's the 5cl packs, which are perfect for aeroplanes. So, yes, definitely high hopes for travel retail.

I'd also love to add a few more retailers to the list of places where you can buy our gin. I'd like to see us keep growing and keep making delicious gin and saving more wonky fruit. Ultimately, that's why we started doing this. GDI

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

The Penrhos Spirits team: Richard Williams, Kate Turner, Harriet Evans, Sally Williams and Charlie Turner



Five lessons from a drinkpreneur Caleño founder Ellie Webb

Since launching Caleño in 2019, founder Ellie Webb has helped shape the UK's no/low-alcohol movement, transforming the alcohol-free spirits brand from a kitchen experiment into a supermarket-listed staple. Interview: **Henry Mathieu**

Let your story lead

For Ellie Webb, the founder of UK-based Caleño Non-Alcoholic Spirits, authenticity is the cornerstone of building a meaningful brand. "If you have a story behind your brand, tell it," she says. "That will most help you connect with your consumers."

Caleño was born from Webb's experience working in the drinks industry in her late 20s, while wanting to cut back on alcohol. "The more I got out there, the more people resonated with that, even if they weren't talking about it publicly," she recalls.

That openness quickly became part of the brand's DNA. "If you're a founder, you are your brand's biggest cheerleader," Webb says. "Getting out there and communicating why you feel passionate about what you're doing is really important."

It's also a reminder that authenticity cuts through more than ever. "Consumers are very switched on," she adds. "They'll reject brands that feel inauthentic or lack depth."

Do one thing brilliantly

In a crowded marketplace, focus is everything. Webb's advice: don't overcomplicate things. "Sometimes doing one thing really well is all that matters," she says. "Communicating one simple message can be way more effective than doing ten things not that well."

From the outset, Caleño's mission was clear: to show people that they could have fun without alcohol. That clarity guided everything from partnerships to placement, with the brand choosing upbeat UK venues like Revolución de Cuba and Barrio Bars to bring its cocktails to life. "It's easy to get distracted and try to do a lot of things," Webb reflects. "But if you look at the bigger picture, you might realise you're not achieving much."

That same principle shaped Caleño's early strategy. "We had to say no quite a lot in the first few years," Webb says. "There were many international opportunities, but we wanted to focus on growing the UK market first."



Ellie Webb: 'Your bottle often has to do the talking'

Collaboration beats competition

For growing startups, the right alliances can be transformative. "Partnerships are key when you're small and growing," Webb says. "Not everyone has the budget to bring on a celebrity, but you can still find authentic ways to expand your reach."

Caleño has collaborated with delivery service Deliveroo, supermarket chain Waitrose and meal kit retailer Gousto to get samples directly into consumers' hands, and with travel brand Kilroy on a competition offering a backpacking trip around Colombia — a nod to Webb's South American roots and the brand's inspiration.

"By combining our forces, we reached a much wider, relevant audience," she says.

Beyond brand tie-ups, Webb values founder communities such as Kindred Spirits and Buy Women Built, which encourage collaboration over rivalry. "You're in a group where most of the founders will have encountered your issue before," she explains. "You can either spend days or weeks figuring something out, or someone can give you the answer in two minutes."

For Webb, these networks prove that collaboration isn't weakness — it's strategy. "In big companies, you'd never talk to your competitor," she says. "But here, you're helping each other."

Make your packaging work harder

In the drinks world, first impressions matter and your bottle often has to do the talking. "Packaging isn't just decoration," says Webb. "It's your way of communicating. It's often the first and only chance to explain who you are, so you've got to make it work as hard as possible."

When Caleño launched, its vibrant design stood out — bright, joyful and unmistakably non-alcoholic. "We wanted people to be curious about the product and not shy away from the fact it was alcohol-free," Webb explains.

Over time, she's come to see the bottle as valuable real estate. "We highlight how to serve it, because in the non-alcoholic space that's not always obvious," she says. "We also show that we're a B Corp and a Buy Women Built business — things that matter to people."

Still, finding the right balance takes work. "We've poured over our labels endlessly for hours," Webb admits. "It's about not overloading consumers with information, but still communicating everything we need to."

Stay customer-centric, not founder-centric

Finally, Webb says, never assume your priorities match your customers'. "Don't confuse your passion with your customers' priorities," she cautions. "As founders, we can become emotionally attached to what we love about our brand, but you have to remind yourself to stay customer-centric."

That means listening. Caleño regularly conducts surveys, focus groups and even one-to-one interviews to better understand its audience. "We've had hour-long phone conversations with customers," Webb says. "Sometimes what you assume is important turns out not to be, and things you never expected can be what drives loyalty."

One customer, she recalls, bought several bottles every week simply because he loved sharing them with friends. "It was a reminder of how much you can learn by just talking to people," she says. "If you stay authentic, focused and connected to your customers, that's when your brand really starts to resonate." GDI



Bacardí predicts shift to earlier drinking and 'unapologetic opulence'

Retailers must move towards more meaningful occasions, cater for micro-indulgence and offer storytelling cocktail experiences, according to the seventh annual *Bacardí Cocktail Trends Report*.

In partnership with London-based trend forecasting agency The Future Laboratory (TFL), the study highlights five trends set to reshape the spirits industry in 2026:

- **Drinking earlier**, with 'happy hour' having a renaissance and replacing late-night excess.
- More **physical experiences** to meet demand for screen-free, slow downtime.
- **Locally sourced ingredients** to accent cocktails — 77% of consumers check ingredient origin labels.
- **Experiences** that reflect consumers' identity through emotional engagement.
- A shift to **maximalism**, with show-stopping cocktails, glamour and "unapologetic opulence".

The report also predicts the 20 most popular cocktails. In order, the list is led by the margarita, mojito, piña colada, rum-and-Coke and whisky-and-Coke.

TFL co-founder Martin Raymond said: "Brands are delving beyond traditional frontiers to capture spending. True value for today's consumers means appearing across the many touchpoints and occasions they inhabit."

Harding+ reports 'standout' growth in spiced rum sales

Rum is surpassing overall spirits growth in Harding+'s onboard beverage alcohol business — with the spiced subcategory driving the boom, reports the specialist cruise retailer.

"Rum continues to be one of the most dynamic categories across our global fleet," said Harding+ head of commercial planning & liquor, tobacco and confectionery Stuart Brown. "It now represents close to 10% of our liquor revenue through around 65 SKUs.

"Rum isn't just holding its own, it is outpacing overall spirits' growth. Spiced rum is the standout performer: it is growing at five times the rate of the wider category. That momentum is being fuelled by strong guest demand, smarter data-led assortment decisions and high-impact brand activations."

Brown said Harding+'s spiced rum activations, particularly those focused on Bacardí Caribbean Spiced, The Kraken Spiced and Captain Morgan Spiced, delivered "exceptional results". Bacardí Caribbean Spiced activations on P&O Cruises' *Britannia* and *Arvia* ships lifted average revenue by 203%, he revealed, while basket penetration more than doubled at 127%.



Harding+'s activations for Bacardí Caribbean Spiced lifted average revenue by 203%

Since rival cruise retailer Starboard entered land-based resorts in September 2024, Harding+ has become the world's only 100% specialist cruise retailer.

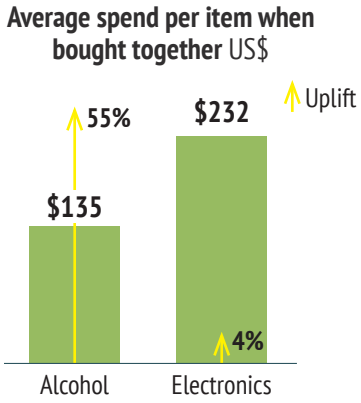
Last year, the company processed 6m guest transactions across 300 shops on 86 ships, with over 90% of Harding+ guests indicating that they planned shopping time into their cruise.

Cross-category spirits collaborations drive higher retail spending

Cross-category pop-ups and other collaborations can generate a "marked increase" in shopper spending by significantly boosting conversion and overall basket sizes — with alcohol playing a key role, suggests new research from travel retail market analyst M1nd-set.

The study focused on five core categories in total — perfume, confectionery, alcohol, tobacco and skincare — and showed that various combinations of these drove up per-head spends. In particular, key pairings like confectionery with alcohol or tobacco, or perfume with alcohol or skincare, delivered strong sales uplifts. Some pairings — for example, alcohol and electronics — can boost spend by as much as 55%.

The rise is particularly sharp with multi-category purchasing, running from US$100 for one category to $209 for seven. At the moment, 85% of shoppers buy only one or two categories — the average is 1.6 — with



Source: M1nd-Set

Gen Z and Millennials purchasing more, and shoppers from Africa, the Middle East and South America showing distinct multi-category preferences.

Fewer than 2% of travellers buy five or more categories, highlighting the scale of untapped spending potential. For spirits brands, the research insights suggest they must collaborate more with categories like confectionery and beauty — especially as management consultancy Kearney has warned the industry needs to stem a continuing decline in spend per passenger (-17% in 2024).

M1nd-set CEO Peter Mohn emphasised that the industry needs to move from simply trying to bundle categories and become more innovative. "Today, it's about creating immersive, experience-led activations that connect diverse luxury and core categories under a unifying theme," he said.

Taking this to heart recently were Pernod Ricard and L'Oréal Paris, which partnered their respective high-end Royal Salute Whisky and Men Expert skincare franchise to broaden the consumer base of scotch "through diverse touchpoints", and expand the reach of men's cosmetics in traditionally male spaces in travel retail.

AF beverages leave Dry Jan behind

Leading specialist non-alcohol retailers reveal the category has outgrown Dry January. **Joe Bates** takes a deep dive into what is fast becoming a year-round retail staple

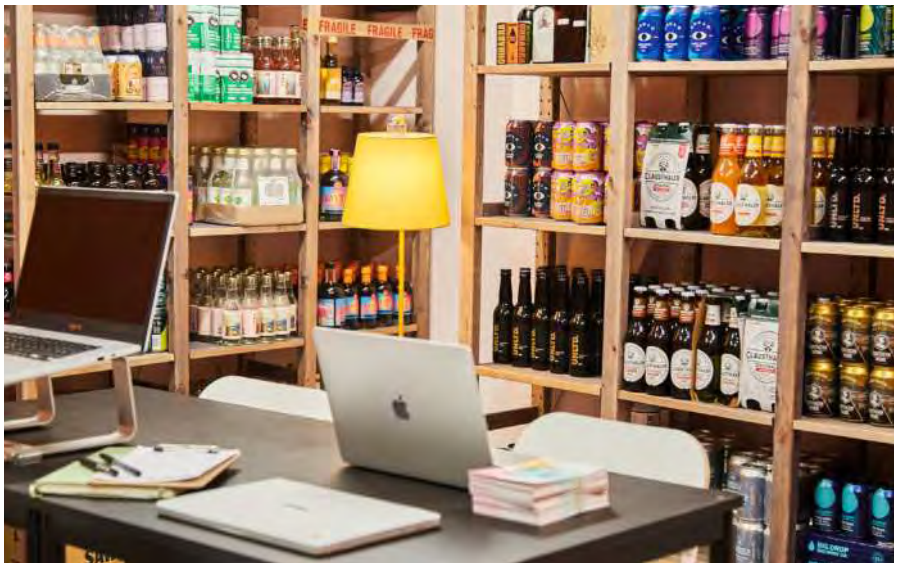


Image: Beca B Jones

Retailers in the UK — including Club Soda (above) — report a 'deseasonalising' of the no/low category

Dry January has dominated the popular perception of the growing non-alcoholic drinks category in the UK for years. The event consistently captures headlines, coincides with new no/low-alcohol product launches and drives consumer curiosity.

Yet quiz leading specialist adult non-alcoholic (NA) beverage retailers in the UK about what's been happening over the past 18 months, and a very different picture emerges of a sector rapidly 'deseasonalising' and behaving much like any other mature beverage category.

Signs of this shift were apparent in the run-up to Christmas 2024. *The Guardian* newspaper reported that revellers in the north-east of England were opting for NA drinks on 'Mad Friday', the usually boozy last Friday before Christmas. Meanwhile, television channel Sky News ran a story on the demise of the traditional alcohol-soaked work Christmas party.

These stories suggest a faltering of traditional UK drinking patterns, but it's specialist no/low-alcohol retailers that are seeing the ground-level detail. They are recording what's actually selling, who's buying and, most significantly, how consumer behaviour is shifting in ways that no longer fit a seasonal narrative.

Christmas outperforms Dry Jan

"Christmas is without doubt the busiest period of our calendar, more so than Dry January," confirms Tom Proctor, founder of The Alcohol Free Co, a startup e-commerce retailer and wholesale distributor.

"At Christmas, you can see a variety of different types of orders: small orders where they are just looking to gift something in a hamper, and large ones where they want to stock up for the festive period, as well as gift boxes flying out of the door."

It's a similar story at Club Soda, a leading UK-based mindful drinking movement and company with a tasting room in central London where customers and the drinks trade can try and buy NA drinks.

"Christmas and July have been better than Dry January for alcohol-free sales for the last few years," says co-founder Laura Willoughby MBE. "People are still cutting back on spending in January."



Tom Proctor: 'Christmas is the busiest period of our calendar, more so than Dry January'



Laura Willoughby: 'Christmas and July have been better than Dry January for the last few years'

If further proof of the trend was needed, another UK-based NA retailer Wise Bartender also says the data is crystal clear. "Christmas is the busier trading period," says founder Tom Ward. "January is equivalent to an October, so around the fourth-busiest month of the year."

It's not just December — summer no/low sales boom

It's not only Christmas that's proving a bumper sales period for the category. The great British summer, once routinely associated with boozy music festivals and outdoor events, is also increasingly linked with more mindful drinking.

Last August, upscale supermarket chain Waitrose reported a "significant surge" in its sales of no/low-alcohol products. Total sales were up a healthy 32% year on year; of particular note were sales of no/low spirits (+85%) and beer (+50%).

"The sober curious movement is growing, showing a trend towards wellbeing-focused drinking that doesn't compromise on flavour or social connection," noted Waitrose no/low buyer Sarah Holland. "This shift is undoubtedly driven by the increasing availability of premium non-alcoholic beverages that offer the same complexity and enjoyment as their alcoholic counterparts."

These retailer comments suggest that NA drinks are now following the same seasonal pattern as their alcoholic counterparts, rather than acting as a one-off health-driven corrective. »

Who's driving the category?

» Much expert drinks industry analysis of the rise of no/low focuses on Gen Z's 'shunning' of alcohol. A recent GlobalData report revealed that four-fifths of Gen Z consumers agreed that no/low-alcohol options help them prioritise their health and wellbeing, for example. At the coalface, however, specialist drinks retailers see something a little different.

"It seems drinking less has become more prevalent across all age groups, but I find the mid-30s to 60s are driving the growth," says The Alcohol Free Co's Proctor.

"While it could be said younger people are drinking less, I don't believe they are necessarily having more conventional AF drinks, like non-alcoholic beer. From our sales data, it would be mid-life health-conscious individuals who are driving the growth."

Wise Bartender's Ward agrees that older, 30 to 50-year-old, health-conscious professionals are driving the category. "We aren't seeing those Gen Z customers," he insists. "In fact, we think them not drinking is a bit of a myth and is a skew in the data as Gen Z includes 13-year-olds!"

Mood-enhancing drinks enjoy growth

The overall no/low market in the UK is undoubtedly in fine fettle, with IWSR predicting a healthy CAGR of 7% over the next two years. Peer underneath the bonnet though and retailers report that some categories are faring better than others.

Club Soda's Willoughby sees a particularly bright future for functional and mood-enhancing drinks. "It is already a big category, as it includes everything from electrolyte drinks to calming afternoon drinks with ashwagandha and lion's mane," she explains.



'Feel good spirit' alternative Smiling Wolf is leading the mood-enhancing beverage charge in the UK

"What is happening is the occasion is extending from daytime drinks that have a fruity taste to sophisticated evening serves, so you can extend the positive benefits into socialising. It makes sense, as many of the ingredients help with relaxing, which mimics alcohol. So look out for HooRay, Three Spirit and Smiling Wolf in your local bar."

Wise Bartender's Ward highlights increasing sales of NA wine. "Beer has always been strong," he notes, "but over the last 12 months, the growth has been with wine. The biggest loser to this is spirits, which we are seeing in steady decline."

NA wine is also Club Soda's best-selling subcategory. "Our range is far better quality than the supermarkets', so we do really well," Willoughby says. "Supermarkets have generally not worked out that people want to pay for quality when it comes to alcohol-free wine."

D2C the 'heartbeat' of NA brand strategy in tough UK market

In the highly fragmented and competitive UK no/low-alcohol space, brands find the direct-to-consumer (D2C) channel an indispensable revenue builder, especially in the startup phase. The benefits are multiple, from higher margins, closer customer relationships and reduced upfront costs to immediate access to customer data and faster feedback loops.

"D2C isn't just a revenue channel. It's the heartbeat of our strategy," says the co-founder & CEO of ginger and apple cider vinegar aperitif Mother Root, Bethan Higson. "It's the space where we test, listen and stay human as we scale."

Cornish craft brewer Firebrand Brewing Co, which recently boosted its brewing capacity in part to meet consumer demand for AF options, has a similar story. "Our D2C channel is by far the fastest-growing area, especially for our alcohol-free range," says co-owner & head brewer Joe Thomson. "Online this year, we've seen huge growth," he says, noting that the company's biggest challenge has been keeping up with demand as subscriptions grow, and ensuring stock accuracy, fulfilment quality and timely delivery.

London-based NA functional spirits brand Smiling Wolf found one of the biggest challenges of growing its online D2C business is reaching customers digitally. "Between AI and social platforms' constant algorithm changes, what were your learnings six months ago no longer apply, and then three months later, these learnings no longer apply," says co-founder Hamilton Lowe. "The constant need to post and learn is not only time consuming, but hard to keep track of next to all the other demands of the business."



Joe Thomson: Firebrand's D2C channel is 'by far the fastest-growing area' for its AF range

Solihull NA brand Saicho Sparkling Tea recommends focusing on storytelling to scale D2C sales. "Lead with experience, not explanation," counsels co-founder Natalie Winkworth-Smith. "Sensory storytelling creates deeper connections.

"Consistency is everything," she adds. "Our brand standards ensure that whether someone encounters us at a Michelin-starred restaurant or on Instagram, they experience the same level of sophistication."

NA wines' premium push

Large drinks retailers may be playing catch-up when it comes to NA wine, but it is a category they are undoubtedly paying more attention to. The UK's largest specialist wine retailer with over 200 stores, Majestic Wine, sees "huge potential" for AF products being driven by a strong premiumisation trend, according to no/low buyer James Cox.

"We've definitely noticed a real shift in momentum in the NA wine category," he explains. "One of the key drivers has been the significant improvements in quality — non-alc products are a much bigger focus for wine producers now than they were a few years ago, and that's making them far more appealing to consumers."

"For retailers, this continued step change in quality is one of the key drivers turning curious browsers into confident buyers. It's this shift that is helping the category move from seasonal spikes to dependable, year-round performance." GDI

The Christmas forecast: data reveals how to boost festive beverage sales

With the crucial festive season well underway, evolving drinks habits and broader societal shifts mean realising its potential in the on-premise requires far more than simply taking orders. CGA by NIQ's **Rachel Weller** examines learnings from Christmas past



Image: iStock.com/LightFieldStudios

Consumers view the on-premise as a sanctuary where they can disconnect from the noise of everyday life

The on-premise is now fully into ivy, tinsel and mistletoe season mode. This is traditionally the most profitable time of year for bars, pubs and restaurants, so it can be tempting for venues and operators to assume the opportunity will take care of itself.

But if businesses want to truly maximise sales — and ensure that Christmas helps offset slower periods in the months ahead — a more strategic, targeted approach can really pay off.

Knowing the main dates when people are most likely to go out to celebrate key occasions and the drinks they tend to choose in which channel can help venues fully realise the potential of the drinks industry's strongest trading period.

Data from CGA by NIQs RSM Business Tracker shows that pubs led sales performance during the 2024–25 festive period in Great Britain, as consumers favoured casual visits over formal dining and late-night venues.

Total managed operators saw like-for-like sales rise by 3.2% in December 2024 compared with the same month in 2023. Specifically, wet-led pubs performed particularly well, achieving growth of 5.2%, followed by pub restaurants at 4.1%.

Meanwhile, restaurants (+1.6%) recorded a more modest increase, while bars (+1.3%) experienced the smallest uplift.

In sales terms, the overall weekly average declined slightly by 0.5% year on year. However, when data are broken down by individual weeks, it is clear that some performed significantly better than expected.

Indeed, from mid-December to the first week of January, sales recorded a steady and sustained uplift compared with the previous year: up 1.3% in the week ending 21 December, 2.5% the following week and an impressive 11.8% in the first week of January.

This suggests that while overall sales may fluctuate slightly from year to year, focusing closely on the key central weeks of the festive period can make a meaningful positive difference for hospitality venues.

As for specific days of the week, weekends remain the peak trading times during Christmas, but brands and venues should also pay attention to weekdays, depending on where key festive dates fall. These are the busiest times of the season, so activations need to be well-prepared, and suppliers should be ready to offer the necessary strategic support to operators.

Seasonal sips

Category performance is a crucial area that brands and operators should monitor closely during the festive season. Consumer preferences often differ from the rest of the year, while also reflecting — in fact sometimes amplifying — broader trends.

Last year, total wet sales in Great Britain reached GBP2.96m (US$3.92), up 1.4%. Most beverage categories saw value growth compared with the previous year, particularly lagers, ales and draught (LAD), which experienced the highest increase (+2.8%) in market share.

Soft drinks grew by 0.9%, while spirits rose 1%. Wine and champagne was the only category to see a notable decline, falling 2.3%. With the wine category showing a general downturn, this figure suggests that drinks choices over the current Christmas period are likely to reflect broader market trends.

Looking more closely at subcategories within the top-performing beverages during the festive season, all spirits saw strong uplifts compared with the rest of the year, with the total rate of sale change over the four weeks leading up to Christmas rising nearly 40% versus the 2024 average. »

THE **RESEARCH**

CGA by NIQ's suite of Consumer Research services and On Premise Measurement gives brands and operators an unrivalled and comprehensive view of the British on-premise market, helping suppliers and operators explore category, channel, occasion and brand insights to optimise sales and marketing strategies. The annual *Christmas Report* offers more detailed, granular data specifically focused on the busiest season of the year. To learn more visit **www.nielseniq.com** or email Rachel Weller at **rachel.weller@nielseniq.com**

» Drinks often associated with winter such as cream liqueurs and dark spirits — such as golden/dark rum, imported whisky, brandy and scotch — performed particularly well in Great Britain, posting year-on-year sales increases.

The beer category's performance also reflected broader consumer trends, particularly the continued popularity of dark beer, no/low-alcohol beer. Stout saw a rate of sale increase of nearly 50% in the four weeks leading up to Christmas compared with the 2024 average, while no/low beer rose 37.6%, suggesting that consumers are no longer restricting these drinks to Dry January but have incorporated them into their regular drinking habits (see related story p56).

Other notable performers include RTD products and cask ale. In contrast, standard lager lagged behind other low-alcohol subcategories, with a more modest rise.

On-premise visits

CGA by NIQ research shows that three in four British consumers visited a licensed venue during the 2024 festive period, up 2 percentage points (pp) compared with the previous period. Additionally, 34% of consumers went out more frequently during the festive period (+6pp versus their typical frequency over the year).

To evaluate whether this trend is likely to continue for 2025–26, CGA by NIQ asked consumers why they went out more frequently after Christmas Day, as that period appeared to be particularly busy for venues. One in three said they simply had more free time, over one in four reported feeling more relaxed and less stressed and 23% were off work. These are all very positive indicators as it is fair to expect that a similar behaviour could repeat this year, giving operators and brands more opportunities to capitalise on.

It is also particularly insightful to explore why people chose not to go out as much before Christmas Day, as this can reveal what might deter them.

More than one in five Brits said Christmas celebrations were too busy, while 16% wanted to avoid the large holiday crowds: these consumers are seeking calm and relaxation, rather than heavy partying.

Economic factors also played a role — people reported using Christmas gifts, end-of-month paychecks and post-Christmas promotions to fund nights out. This indicates that even when treating themselves, people remain careful about every penny they spend.

When British consumers do decide to go out, food-led channels remain the most popular choice. Food pubs lead the way, capturing 50% of preferences, although this represents a 2pp decline compared with the previous year.

Casual dining venues come second but are gaining significant ground, up 3pp — likely because they offer that relaxed atmosphere that consumers seem to crave. That said, it is important to bear in mind that nearly one in four people still go out frequently in the two weeks before Christmas for work-related socials and parties.

Restaurants remain the fourth favourite, experiencing a slight year-on-year decline between 2023 and 2024, although CGA by NIQ data suggest that two-thirds of consumers actually plan to visit them more in the future.

Also reflecting broader trends, venues offering experiences and activities are seeing the strongest growth in visitation. Last year, Christmas markets and pop-ups were visited by a notable 28% of consumers, up 1pp from the previous festive season.

Cinemas are also gaining popularity, attracting 23% of consumers, up 3pp year on year. Festivals and other experience-led venues recorded a 10% preference each, having increased by 2pp and 1pp respectively.

Festive eating and drinking

Overall, most consumers visit venues for both food and drinks, so operators and suppliers should ensure they can offer combined food-and-drink packages to drive higher spend. But people's festive hunger and thirst can vary significantly depending on the specific day, occasion driver or period within the season.

On Christmas Eve, here data show a higher interest in food-led occasions, while the weekend before Christmas week and New Year's Eve see a stronger skew towards wet-led visits to the on-premise.

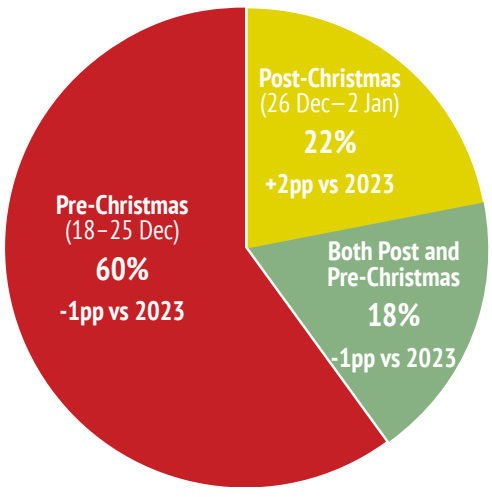
So, while operators and suppliers should cater to both food and drink, these day-specific preferences present opportunities to maximise category mix and with-food offering sales or promote particular brands. In fact, 38% of consumers consider it important that festive drinks feature a recognised brand.

The festive season is a critical time for the on-premise sector. As the traditionally strongest trading period of the year, it can place considerable pressure on operators, brands and suppliers to maximise performance, adding significantly to an already highly stressful time. But this pressure can be relieved: by making decisions grounded in well-interpreted data, the season can be a rewarding celebration for all. GDI

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DATA DROP

When did British consumers go out the most over the 2024 festive period?



Source: CGA by NIQ CGA Christmas Report 2024. Sample Size, 1,477–1,493

Key takeaways from CGA by NIQ's Christmas Report 2024

- Three-quarters of British consumers visited a licensed venue during the 2024 festive period.
- While most people went out before Christmas, visitation remained high after, making the period between Christmas and New Year.
- Food-led channels were the top choice for visits, with casual dining gaining popularity, while restaurants saw a decline.
- All categories saw value uplifts versus 2023, except for wine and champagne, with no/low experiencing the highest growth while also gaining share at the expense of other categories.

Wine Paris introduces ‘Be No’ zone for 2026

Wine Paris 2026 returns to Paris Expo Porte de Versailles from 9–11 February with a new structure designed to reflect rapid shifts across the global drinks industry. The 2026 edition is expected to host more than 6,000 exhibitors from 60 countries and 60,000 visitors. Organiser Vinexposium will bring wine, spirits and no-alcohol beverages together under one roof via three distinct zones — Wine Paris, Be Spirits and the newly created Be No — in a bid to provide clearer navigation for buyers and respond to evolving consumption trends.

Be Spirits will operate as a stand-alone event, while Be No will offer a dedicated platform for fast-growing alcohol-free categories. The repositioning marks a strategic push by Vinexposium to modernise its flagship show and offer a more comprehensive view of the drinks market’s future. Here’s a selection of some of the most enticing stands to visit over the three days.

Australian Vintage

Australian Vintage returns to Wine Paris 2026 with a vibrant focus on Poco Vino, its upbeat single-serve range that continues to gain global traction. The team will spotlight its 18.7cl French varietals and reveal fresh innovations designed to appeal to younger drinkers drawn to bold design and easy discovery. Visitors can expect an energetic, immersive experience at **Stand E205** in **Hall 6**, with CEO Tom Dusseldorp and the wider team on hand to guide buyers and partners through what’s new.



Bear Brothers Distillerie

In **Hall 2.2** at **Stand K055**, Bear Brothers Distillerie will present its growing range of gin, vodka and newly launched French whisky, produced entirely in-house at its Toulouse facility. Founded in 2019, the distillery works with organic, locally sourced ingredients and spring water from the Pyrenees, using Stupfler copper stills for small-batch production. Its focus on regional sourcing and controlled distillation has shaped a portfolio known for clean, expressive flavours.



Bijou

Bijou arrives at Wine Paris 2026 as one of the UK’s fastest-growing French wine brands, ready to spotlight the authenticity and regional character behind its award-winning portfolio. Alongside its signature rosés, the team will highlight the breadth of its organic, HVE-certified wines from Languedoc and Provence, produced with growers committed to biodiversity and low-input practices. Expect stories of old bush vines, drought-resistant varieties and limestone-rich soils — plus a first hint at a possible new sparkling release for 2026.



Bodegas López

Bodegas López will spotlight its long-aged Montchenot range at Wine Paris 2026. The Argentine producer plans to present new releases of Montchenot 10 Años 2016, 15 Años 2011 and 20 Años 2006 — all blends of cabernet sauvignon, merlot and malbec made using the same approach since the label’s 1956 debut. Each wine spends five to six years in large foudres before extended cellar ageing, offering buyers a rare look at mature, traditionally crafted reds.

Ca’ Botta

Italy-based Ca’ Botta will spotlight its dried-grape wines made through natural appassimento in high-altitude vineyards between 380m–520m. The winery focuses on “concentrated, full-bodied styles shaped by strong winds, a south-west exposure and acidity that balances the naturally higher alcohol”. Key releases include Cajo’ Amarone della Valpolicella DOCG, Pian di Mezzo Amarone Riserva DOCG, Costa Rossa Valpolicella Ripasso DOC Superiore and Torcinato Valpolicella DOC Superiore, each reflecting the estate’s emphasis on intensity and site-driven character.



Casa Marin

Casa Marin heads to Wine Paris 2026 with a refreshed look for Viñedos Lo Abarca — Línea de Autor, designed by Felipe Marín and inspired by the mosaic-like slopes of Chile’s smallest coastal appellation. As the only producer able to use the Lo Abarca DO, the winery will pour new 2025 releases, including Cipreses Sauvignon Blanc, Casona Gewürztraminer and a low-alcohol Kabinett-style riesling. Visitors can also discover Costal, an accessible white blend that broadens the range. General manager Jamie Verbraak will be on-stand throughout. »



Familia Torres

» Familia Torres will debut its own stand this year while continuing to participate within the Primum Familiae Vini stand, offering visitors a broad look at its premium releases and latest projects from Spain, Chile and California. Centre stage will be its long-running work recovering ancestral grape varieties, showcased through seven limited wines including Clos Ancestral, Grans Muralles and Forcada. The team will also present Jean Leon experiments, a growing de-alcoholised range — including the new Casals Zero Vermouth — and fresh initiatives tailored to the off-trade.



Henkell Freixenet

Henkell Freixenet arrives at Wine Paris 2026 with a broad showcase spanning its global sparkling icons and a raft of new releases. Visitors to **Stand C129** in **Hall 6** can explore the company's diverse line-up — from Freixenet, Mionetto and Henkell to Alfred Gratien Champagne and Gratien & Meyer Crémant — alongside a dedicated spritz bar. The team will also spotlight its fast-growing alcohol-free range at a separate tasting space, underscoring the group's depth, scale and continued momentum across both traditional and zero-alcohol categories.

Herita Marzotto Wine Estates

At **Stand E181** in **Hall 5.2**, Herita Marzotto Wine Estates will draw attention to new travel retail-exclusive Santa Margherita Valdobbiadene Prosecco Superiore DOCG Brut. Produced by the long-established



Venetian estate, the limited edition features packaging inspired by the city's architecture and aims to appeal to travellers seeking distinctive, design-led Italian wines. The bottling offers fine, persistent bubbles, crisp fruit notes and a light, versatile style. Its release reinforces Santa Margherita's continued investment in the travel retail channel and its global brand positioning.

Osborne



Osborne will bring a broad selection of wine and spirits, led by its rioja portfolio, including the full Montecillo and Viña Monty ranges. Headliner Viña Monty Graciano 2016 will be a key focus. The Spanish group will also feature its sherry and port offerings, alongside Nordés vermouths and gins, including the forthcoming Premium Nordés Edition, plus Gold 999.9 Gin and Carlos I brandies.



Pegasus Distillerie

Pegasus Distillerie will use its European debut to introduce its four organic core spirits — Pegasus Vodka, Orion Gin, Eau d'Or and Minty Liqueur. The stand will feature a full brand showcase, including a masterclass on next-generation iStill distillation and the distillery's own methods, such as dynamic maceration and drop-by-drop reduction. An exclusive cocktail menu at the Infinite Bar will demonstrate the range in service as the producer begins its search for distribution partners.

Solex Group

Solex Group will showcase its full vodka line-up: Five Lakes, Siberian Express and White Birch. Visitors can sample the range in a dedicated lounge and explore White Birch cocktails at the Infinity Bar. White Birch is a Siberian-style wheat vodka made from premium wheat spirit and natural water, filtered nine times and finished with organic birch sap for added smoothness.



Wines of South Africa

Wines of South Africa will introduce its first official pavilion, bringing a sizeable group of producers under one banner to strengthen the country's profile in the European market. The collective stand is designed to highlight the breadth of styles coming out of the Cape, reflecting sustained demand and long-established trading links with the region. WoSA aims to boost visibility for participating wineries and provide a focused platform for engagement with buyers, importers and other key trade stakeholders.

Weingut Emil Bauer

The Wagram region will take centre stage as Weingut Emil Bauer Winery showcases the "bright, food-friendly style that defines this corner of Austria". Visitors can explore expressions of grüner veltliner and the region's rarer roter veltliner, known for its spice, depth and ageing potential. The family estate will present a line-up shaped "by balance, freshness and a clear sense of place", offering attendees an accessible introduction to Wagram's character and a taste of Austria's evolving white wine story. GDI

*Discover more about Wine Paris 2026 at **wineparis.com***



VIEW FROM THE ON-PREMISE

Charlie Mitchell

Bringing the joy back: will 2026 herald a more fun approach to drinks in the on-premise?

After over a decade of premiumisation shaping new drinks strategies, product launches and communication strategies, perhaps now is the time to lighten up.

Drinking is a serious business. There are tasting notes to be made, flavour profiles to compare, distillation processes to consider, cask finishes to explore and ester contents to geek out about. For many of us, this is really important — and really interesting — stuff.

We live in a world inhabited by drinks nerds, no more so than in the trade bubble in which drinks manufacturers and experts find themselves. I love nothing better than immersing myself in the product detail of new launches in this very publication. Learning about the latest botanical mix for a new gin, the next rye mash bill expression of bourbon or the innovative flavour-adding process for the next great rum is genuinely interesting.

We've all been mesmerised by enthusiastic brand ambassadors telling us all about the processes and details that make their products superior to others and — what's more — passing on that knowledge as the diligent apostles and converts that we have just found ourselves.

In this manner, drinks brands and even whole categories have educated and converted swathes of consumers, persuading them to trade up; to pay more for the privilege of imbibing such a prestigious product. Gin and craft beer led this wave in the early 2010s, with premium expressions of all categories following suit. Even now, the ultra-premium baijiu category is gaining value share as it, too, follows a well-trodden path of consumer education.

But are we in danger of taking ourselves just a little too seriously?



Image: iStock.com/Olena Osypova

A few years back, I went for a trade night out with a bloke who carried a thermometer in his pocket to test, and then record, the temperature of cask ale served. Needless to say, when drinking those ambient (10.3°C to be very precise) pints, the joy was drained each time a thermometer was dunked and a notebook was taken out.

Of course, that is a somewhat extreme showcase of nerdiness, but perhaps the point holds when we compare our industry bubble to the punter in the bar. Yes, they may have a passing interest in the floral notes or the length of the taste, but is an explanation of the hand-processed agave and the charred-oak barrel finish really what they are looking for after a long day at the office?

In a quest to demonstrate quality credentials in a market where drinks brands have been embarrassed to admit they are anything other than super-premium, perhaps we have lost the fun and, with it, lost a connection to a consumer base who is increasingly looking for cathartic hospitality experiences.

Hospitality, at its best, is an immersive escape from a serious and scary outside world; a place to disconnect from devices and let our hair down, an inclusive space where all are welcome and all are well cared for.

To many, premiumisation has become pretentious and the reserve of the few. We have inadvertently excluded swathes of the population by making our drinks inaccessible and difficult to appreciate.

Take tequila, for example. It is an undoubted (and, unfortunately, rare) bright spark in the global on-premise, with performance far outshining the wider spirits category. It, like every other category, has shifted perceptions and driven value growth in higher-quality brands as consumers make more informed choices.

But even in the US — among the most established markets for premium tequila — just 37% of tequila drinkers care if the tequila they drink is 100% agave. It is the original 'fun' category, yet we are in danger of sapping that fun and forcing a set of rules and regulations on consumers that just aren't interested. Perhaps we should focus on delivering flavoursome and fun drinks, rather than an alchemy lesson in drinks production?

We are already seeing winning brands who are bringing the fun back, that are resonating with younger audiences and who are not focusing on the spirits base of their products, but the proposition itself (hello, BuzzBallz).

We are also seeing fun rituals return to the sector, with my personal current favourite the 'Craig David' — a half-shot of pineapple juice, a shot of (good-quality) tequila, followed by another half-shot of pineapple juice. Give me that over a complex ruby port-finished reposado with lingering notes of smokiness most days of the week, but especially Friday and Saturday.

So, yes, as we enter the closing years of the Roaring 20s, perhaps we can liven things up a bit, take ourselves a little less seriously and give our guests good times, as well as an education in serious drinking. GDI

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



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