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FOR THE GLOBAL DRINKS EXECUTIVE | OCTOBER 2026



PARTNER CONTENT

MONKEY 47 unveils its rare Distiller's Cut 2026 *See p6*

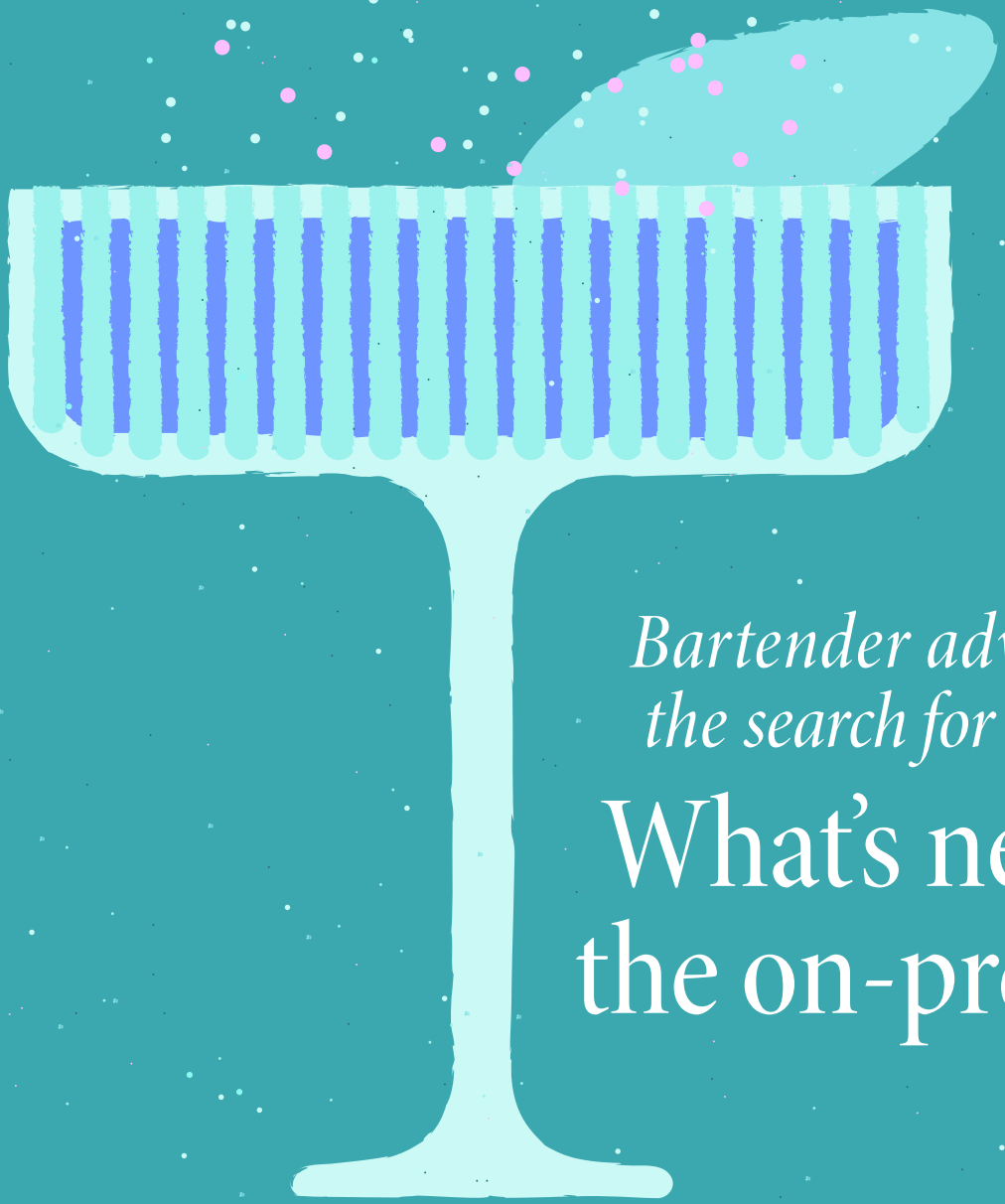


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Bartender advocacy to the search for meaning

What's next for the on-premise?

Cocktails
The five trends shaping serves in bars now

Sustainability
The case for pouring more wine on tap

No alcohol
Why hospitality is the key to category growth

Q&As with
Ferrari Trento, WineGB, Bero & Discus

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Monkey 47 founder Alexander Stein with the humble oyster mushroom that became the unconventional 48th botanical in Distiller's Cut 2026

Chasing curiosity: inside Monkey 47's search for the 48th botanical

Monkey 47 Schwarzwald Dry Gin is now one of the world's most easily recognisable ultra-premium gins, but the Black Forest-made craft brand has never followed the crowd by latching on to the latest on-trade craze or social media-led drinks fad. Since its launch in 2010 as a distinctly German gin, Monkey 47 has followed its own idiosyncratic path, bringing together British gin-making traditions, the spices of India and the rich provenance of the Black Forest with exceptional craftsmanship. The brand has remained inherently curious, obsessed with experimentation and keen to push the boundaries of what's possible in gin production.

The annual Distiller's Cut release exemplifies Monkey 47's singular approach. Once a year, the Pernod Ricard-owned distillery embarks on a quest to track down what in Latin is known as a *species rara* — an elusive botanical capable of adding a new dimension to the gin without compromising its quality or eclipsing its signature Schwarzwald Dry Gin recipe: botanically complex, floral, spicy and citrussy, with a crisp juniper spine. While 47 botanicals already deliver an intricate, multi-layered taste profile, the Monkey 47 team goes one step further each year, seeking out a rare 48th ingredient. The result is not simply another layer of flavour, but a new chapter in Monkey 47's story — one designed to intrigue and enthral gin enthusiasts around the world.

Recent Distiller's Cut releases have taken gin drinkers on some extraordinary journeys. The Distiller's Cut 2025, for instance, was distilled with Fleur de Sel crystals, hand-harvested from the Camargue in southern France — a wetland region famous for its flamingos and shimmering pink salt flats. The result was a delicate, briny character that brought a mineral dimension to the final spirit. Previous editions have been equally adventurous, with capers sourced from an Italian family farm providing the 48th botanical in 2024, while the 2023 release ventured even further afield, incorporating organic Canadian maple syrup from Quebec.

The latest highly sought-after **Monkey 47 Distiller's Cut** release revolves around an earthy ingredient discovered close to the distillery's location in southern Germany

Monkey 47's Distiller's Cut 2026, the 16th release in the series, found inspiration much closer to home, selecting the fan-shaped oyster mushroom as its unconventional 48th ingredient. Long prized by vegetarians for its meaty texture and mild flavour, the *pleurotus ostreatus* may seem an unlikely botanical for an ultra-premium gin. And while oyster mushrooms fit neatly with the current interest in savoury, culinary-driven cocktails — with bartenders pickling and fermenting them to amplify their umami character — Monkey 47's choice was not a calculated move to chase a trend.

"Monkey 47 has always followed its own path," explains Francesco Ottaviano, Pernod Ricard vice-president of marketing for gins and aperitifs. "We've chosen an ingredient that by chance aligns with the savoury trend, but there's a completely different story behind it." »

From stone cellars to copper stills

» This year's quest began in Baden-Württemberg, Monkey 47's home region in southern Germany. Leading the expedition was the company's founder, Alexander Stein, whose spirit of curiosity gave rise to the Distiller's Cut tradition in the first place. The search for an as-yet-unidentified *species rara* led him to Ulm, a small city on the left bank of the Danube. Here, they stumbled upon Burgpilz, a gourmet mushroom startup founded by Jochen Rank and Sven Gastrock, whose operation is housed within the vaulted cellars of the historic Wilhelmsburg fortress.

It turns out that the imposing 19th-century fortress is an ideal, sustainable location for cultivating fungi. Its natural limestone walls help inhibit mould, while the high humidity creates the moisture mushrooms need to thrive. The thick stonework also functions as a natural cooling system, removing the need for artificial refrigeration.

Ottaviano explains that, on visiting the site, Stein and the Monkey 47 team immediately felt a strong connection with Rank and Gastrock, recognising a shared commitment to sustainability, meticulous attention to detail and quality-driven craftsmanship.

Just as Burgpilz champions hand-crafted, sustainable practices in the cool, damp cellars of the historic fortress, Monkey 47 takes an equally exacting approach to gin-making. Its compact 100-litre copper stills are a fraction of the size of the 1,000-litre stills typically used by larger gin distilleries, while its botanicals are painstakingly selected, with many native to the Black Forest. It was, in effect, an instant meeting of minds: two artisanal producers working in tandem with the local geography, taking their time and employing patient craft techniques.

Integrating fungi into an already intricate 47-botanical maceration and distillation process presented the Black Forest Distillers with an unconventional puzzle. "Bringing an ingredient like this into our stills was a leap into uncharted territory, even for a team used to handling 47 complex botanicals. We never give out exact recipe details — we like to keep our secrets," says Ottaviano mischievously. "But I can confidently say the alchemy worked and the result is extraordinarily satisfying."

The resulting flavour profile is a spicy yet elegant dry gin, with delicate hints of anise, rounded off by subtle nutty, earthy notes layered over a backdrop of remarkable depth. Crucially, the unmistakable character of Monkey 47 remains fully recognisable, enhanced rather than overpowered by the umami-rich 48th ingredient.

A serve as intriguing as the spirit

To mark the launch of Distiller's Cut 2026, Monkey 47 has created a bespoke signature cocktail — the Bloody Mushroom. An elevated twist on the classic Red Snapper, the gin-based cousin of the Bloody Mary, it combines the spirit with beetroot, soy sauce and wasabi paste, adding layers of earthy depth, umami richness and a subtle kick.

The Distiller's Cut 2026 story extends beyond the liquid itself to its packaging, which echoes the design cues of the original Monkey 47. The 50cl apothecary-style bottle and stamp-shaped label remain, while mushroom-inspired textures and earthy metallic finishes nod to the novel 48th ingredient, complemented by a more collectable gold-ringed cork. The bottle is presented in a gift box featuring Monkey 47's distinctive signature wallpaper motif.

The highly anticipated Distiller's Cut 2026 will launch in October across key markets worldwide, with priority allocations going to the US and China — two important growth markets where Monkey 47 has built strong relationships with bartenders. Yet, as Ottaviano concedes, demand for the latest annual release always outstrips supply.

In keeping with the distillery's philosophy of doing things its own way, the October launch of the new Distiller's Cut will be anything but conventional. From 6–14 October, fans can enter a raffle via Monkey 47's D2C webshop, **monkeykiosk.com**, for the chance to win a code granting them access to buy one of the highly limited bottles.



Monkey 47 Distiller's Cut 2026, the 16th release in the series



Pleurotus ostreatus *contributes subtle, earthy notes to the expression*

For the on-premise, the big reveal is timed to coincide with leading trade show Bar Convent Berlin, which runs from 12–14 October and celebrates its 20th anniversary this year. Intriguingly, Monkey 47 will not host an official trade show stand. Instead, the brand is hosting an off-site event on Monday and Tuesday away from the convention floor. According to Ottaviano, invited guests will be rewarded with a unique experience.

With its limited production run and highly collectable status, this year's Distiller's Cut is bound to disappear almost as quickly as it arrives. As Bar Convent Berlin draws closer, the hunt to track down and try Monkey 47's new savoury twist is officially on. The Bloody Mushroom could well prove the star cocktail of the autumn season. GDI



COMMENT

Joe Bates

Welcome to the age of trade volatility. How the US–Canada trade war is ripping up the big beverage alcohol playbook

Two contrasting events last month threw a glaring spotlight on the hyper-volatility now facing the international drinks industry.

First, President Donald Trump introduced a strict import ban on packaged Canadian wine, beer (including alcohol-free), cider and spirits from 29 September, although some bulk alcohol products will be exempt. The beverages were included on a long list of other Canadian goods targeted for prohibition, ranging from cheese and golf carts to aluminium.

Trump's beef with the Canadian beverage alcohol sector springs from the country's provincial liquor boards' stripping American bourbon from their retail shelves in response to US tariffs in 2025.

Later that month, the president was in a more munificent mood, casually announcing the removal of a 10% tariff on Irish whiskey during the Amgen Irish Open trophy ceremony at his golf resort in Doonbeg, Ireland. He reportedly did so after Taoiseach Micheál Martin and golfer Shane Lowry had been "bugging" him about the issue. No doubt celebrations in Midleton and Tullamore that night continued into the early hours.

Welcome to the new world of off-the-cuff US trade policy.

The Canadian import ban may well turn out to be another example of classic, high-stakes Trump brinkmanship designed to force Ottawa back to the negotiating table. Even so, multinational drinks execs can't afford to blow last month's events off lightly. Too much is at stake. Canadian exports of alcoholic spirits to the US were worth US$687m last year, while US exports to Canada exceeded $238m in pre-trade-war 2024. The unpalatable truth is that the post-North American Free Trade Agreement era of frictionless transactions is rapidly unravelling.



Companies such as Diageo, Pernod Ricard and Constellation Brands spent decades building cross-border supply chains, with brands distilled, aged, blended and bottled across both countries. They did so on the assumption that geographical proximity and established trade agreements provided a degree of certainty. As the political and trade tensions between the US and Canada deepen, however, that model looks shaky, to say the least.

Aged spirits are particularly exposed. Unlike white spirits or RTDs, a barrel of Canadian whisky or Kentucky bourbon laid down today won't reach market for years. Massive capital commitments are put at risk by the sudden imposition of tariffs or import bans. Distillers may be forced to absorb escalating holding costs, postpone planned production expansion or even dump product into secondary markets, potentially disrupting carefully constructed global pricing policies.

Inevitably, the fallout from the rumbling trade war is extending beyond supply chains and changing consumer behaviour on both sides of the border. Brand equity built over decades for household names like Jack Daniel's and Crown Royal can evaporate within months if consumers are forced to switch brands, creating opportunities for local producers and international competitors to fill the empty shelf space.

If beverage alcohol is now routinely targeted as high-visibility collateral in unrelated geopolitical spats, North American brand owners will need to rethink how and where they manufacture and distribute. In-market processing, particularly in areas such as packaging, will become a priority.

Similarly, moving liquid across borders in bulk rather than as shelf-ready finished goods to bypass consumer-facing bans will be a smart play — an approach that Crown Royal is already reportedly employing. Over the longer term, producers in both countries are likely to seek to strengthen their presence in alternative markets across Europe, Latin America and Asia.

The brand owners best positioned for the years ahead will not be those simply waiting for a return to rules-based stability. They will be those investing in diversifying their businesses into new markets, while building flexible production models and resilient supply chains capable of adapting when the political landscape changes overnight. **GDI**

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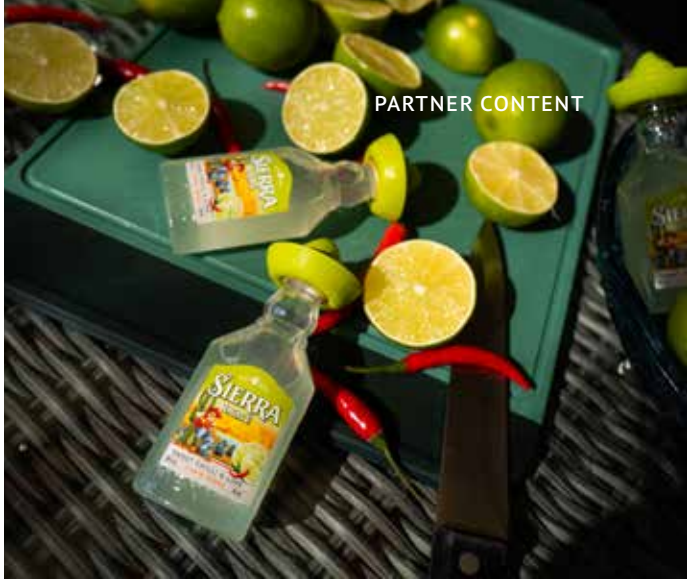


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Authenticity meets flavour innovation as Stock Spirits broadens Sierra Tequila's appeal with 100% Agave (left) and Lime Liqueur expressions

Premium and playful: Stock Spirits bets on two-track growth for Sierra Tequila

Sierra Tequila remains a crown jewel in the Stock Spirits portfolio. Over decades, the brand has carved out a dominant position in the European tequila market, combining distinctive packaging — complete with its iconic red sombrero perched on every bottle cap — with playful, party-focused marketing, accessible pricing and dependable quality. It's a winning formula that has established Sierra as one of Stock Spirits' most important international brands.

Yet times — and consumer tastes — change fast. Sierra Tequila isn't risking its hard-won market leadership by resting on its laurels. Earlier this year, Stock Spirits unveiled two distinctly different line extensions designed to keep the brand moving forward. Sierra Lime is a lower-ABV, flavour-led liqueur aimed at broadening Sierra's appeal across more social occasions, while Sierra 100% Agave is a three-strong premium range targeting growing consumer interest in tequilas with proven quality, authenticity and provenance.

A new route into tequila

The rationale behind Sierra Lime is simple: broaden tequila's appeal. The 18% ABV, margarita-inspired liqueur launched this spring in global travel retail with Gebr Heinemann and in Germany, ahead of a wider roll-out across Europe and international markets. Its flavour profile combines refreshing lime and balanced sweetness with a subtle hint of chilli, while the packaging reinforces its laid-back, playful character. A lime green sombrero cap sits above a colourful label featuring Pancho — Sierra's guitar-playing Mexican mascot — against a backdrop of the sun-soaked Sierra Madre mountains.

"Sierra Lime is very tasty," explains Hendrik Schatz, Stock Spirits global brand director. "Everyone likes it, even consumers that usually have no interest in tequila. We saw a similar thing with Sierra Tropical Chilli Liqueur, which launched three years ago and is successful in many markets."

For Schatz, however, the opportunity lies beyond making tequila more accessible. Sierra Lime can also broaden the brand's repertoire into more relaxed, sociable occasions, helping move tequila beyond its traditional late-night territory. Central to that strategy is the product's hero serve: Sierra Lime & Beer, an easy-to-make combination of a 4cl shot of Sierra Lime topped up with an ice-cold bottle of lager or pilsner beer. It's simple, refreshing and designed to introduce Sierra to a whole new set of drinking occasions.

Two very different product launches from Sierra Tequila demonstrate how **Stock Spirits** is keeping this established brand fresh, exciting and relevant to a broad range of tequila consumers

Sierra's premium play

Sierra 100% Agave takes the brand in a very different direction, tapping into the growing demand for affordable 100% agave tequila. The three-strong range — Blanco, Reposado and Añejo — is designed to work equally well as a shot or the base for quality cocktails, with a bottle design inspired by traditional Mexican tequila. The iconic sombrero cap is gone, but the distinctive hat now becomes an integral part of the label, alongside familiar Sierra cues including Pancho and the Sierra Madre mountains.

Schatz points out that many 100% agave brands sell for two or even three times the price of Sierra 100% Agave. "Especially in Europe, this creates a barrier, where a lot of consumers either won't try it or won't buy it repeatedly," he says. Following its initial launch in Germany, the UK and European airports through Gebr Heinemann, Sierra 100% Agave will roll out more widely across Europe.

The new range shines a spotlight on Sierra's authentic provenance, rooted in family-owned Destilerías Sierra Unidas in Guadalajara, Jalisco. The distillery's production team is guided by the company's fourth-generation female master distiller, Graciela Gonzalez, who will also play a key role in the launch marketing campaign. For Sierra 100% Agave, Gonzalez sources fully mature blue weber agave from the Sierra Madre mountains, a region renowned for producing exceptional-quality agave.

"Sierra 100% Agave has a true origin and a family story behind it," says Schatz. "It's the absolute perfect combination for Stock Spirits to have a unique brand and that strong partnership with the Gonzalez family, which goes back many decades."

Heritage and accessibility are central to Sierra's evolution: the brand is expanding its repertoire without losing its DNA. "Even though we are stretching the brand in new areas, Sierra will always stand for creating party moments," says Schatz. The context may have changed, he adds, but "consumers are still looking for fun".

By balancing flavour innovation with 100% agave craftsmanship, Stock Spirits is proving that an established brand can broaden its appeal while staying true to its distinctive, sociable spirit. GDI

News briefs

Catch up quickly on the global drinks stories that matter

COMPANY NEWS

Heineken has developed an app that allows consumers to design their own beer before ordering it from an AI-powered tap. Developed through the brewer's Heineken Studio experimental innovation platform, 'Personalised Draught' is able to pour "over 100 unique beers tailored to individual tastes, moods and occasions", according to the group (see p49).

Irish multinational **Glanbia** moved into the non-alcoholic beverage category with the release of a functional beer under its Optimum Nutrition brand, called ChampionSips. The American pilsner-style beer, which contains 10g of added protein, has been brewed in partnership with Wisconsin Brewing Co.

Heineken is to invest a "double-digit million-euro" sum in building a new brewery for Eichhof ahead of an upgrade of the brand's Swiss headquarters. The new "city brewery" in Lucerne, where the brand's HQ and "historic" brewery are also located, will produce and bottle the entire Eichhof range, as well as limited-edition SKUs.

Just over 300 employees in **Diageo**'s North America division are set to lose their jobs as part of the drinks major's global restructuring programme. According to a New York Department of Labor Worker Adjustment and Retraining Notification notice, 305 permanent jobs will be affected at the company's headquarters in New York.

DISTRIBUTION

The US arm of Spanish wine group **González Byass** has commenced the importation of Formula 1 driver Lewis Hamilton's non-alcoholic agave spirit brand Almave into the country. Distribution will be managed by Southern Glazer's Beverage Co.

Campari Group put its "largest-ever" investment into launching an aperitivo in a new market with the debut of Sarti in the US. Sarti joined Aperol, Campari and non-alcoholic mark Crodino in Campari Group's US aperitivo portfolio.

A Brand New Day is set to distribute the full Rémy Cointreau portfolio of brands — including Bruichladdich, Cointreau, Rémy Martin and The Botanist — in the Netherlands from 1 October, coinciding with the end of the distributor's tie-up with Campari Group.

Scotch specialist **CVH Spirits** said it wants to focus on single malts over volume propositions as the brand owner "re-establishes" its presence in South Africa. Domestic alcohol merchant Truman & Orange has been appointed as the exclusive distributor of CVH's portfolio in the country.

M&A

Asahi Group's UK subsidiary has agreed the divestment of wholesale business Nectar Imports to Irish distributor & brand owner C&C Group. Nectar Imports was acquired by Asahi Group in 2019.

Las Vegas-based **Toast Spirits** has agreed the sale of an unspecified size stake in its Beau Joie Champagne brand to singer Christina Aguilera. "When you first see Beau Joie, you immediately gravitate toward the bottle, but the real surprise is the wine," said Aguilera. "I was blown away by the taste and quality."

Heineken division Distribuidora La Florida has agreed the sale of the US beverage alcohol operations of FIFCO to private equity group Saothair Capital Partners. The New York state-headquartered business will revert to its former name of North American Breweries "to better align the company's identity with the deep regional heritage of its brand portfolio".

Tilaknagar Industries is poised to acquire a 30% stake in Mumbai-based Black Tiger Distilleries, which launched its new-to-market Bodega Suprema No5 line of tequilas in India in August.

Henkell Freixenet has bought a 60% share of Dublin-based distributor & importer Cassidy Wines. Citing IWSR data, Henkell Freixenet said: "The Republic of Ireland offers attractive growth potential, with the sparkling wine market recording a CAGR of 6% over the past ten years."

FINANCIAL RESULTS

Australian Vintage has fallen short of its forecast of a mid-single-digit lift in sales from the year to the end of June, but has managed to reverse its half-year decline, reporting a 2% top-line lift in H2.



Image: Dennis Leupold

Singer Christina Aguilera now has an 'unspecified stake' in champagne brand Beau Joie

Brown-Forman has had a slow start to its financial year, booking a 1% dip in sales from the three months to the end of July. The performance, which represents a deterioration on fiscal 2026's flat sales, was blamed by the brand owner on "the end of the Korbel [sales and distribution] relationship and the declines in used barrel sales".

PEOPLE

Southern Glazer's Beverage Co has created a new 'gold division' and hired AB InBev executive Glendal Vandenbempt to lead the unit. The division has been created to oversee the Anheuser-Busch — the US unit of AB InBev — portfolio in all markets where Southern Glazer's represents it.

Allison Stransky is set to take over as CMO of **The Boston Beer Co** on 12 October. She replaces Lesya Lysyj, who left in March after seven years with the brewer.

Zamora Co has appointed Mike Howard and André Duarte as the heads of its North American and Latin American businesses, respectively. Howard joined Zamora after almost one-and-a-half years as president of Stoli Group's North America division, whereas Duarte's move follows just over ten years at Brown-Forman.

INDUSTRY NEWS

English whisky has joined Irish, Scotch and Welsh whiskies in earning its own protected geographical indication (GI) status. The development provides legal protection of the terms 'English whisky' and 'English whiskey'. Trade association English Whisky Guild said the move "closes a long-standing gap in UK GI policy".

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Will wine on tap ever be free flowing?

Kegs can be more sustainable, efficient and save costs compared with alternative formats — so why is more wine not served on tap in the on-premise? **Jessica Broadbent** reports

The market for kegged wine remains small, but the format is a valuable option that is perhaps overlooked by an on-premise channel overwhelmed by more immediate challenges.

"In my view, draught is one of the most credible ways to decarbonise wine served by the glass, alongside refill/reuse, bulk shipping and lightweight glass," says wine sustainability consultant Anne Jones. "It is not a universal solution for all wine, but it is highly relevant for high-throughput on-trade."

In the US, wine-on-tap supplier Free Flow Wines ships to all 50 US states and says demand is growing in "most major wine markets". The company's highest-volume states are California, Florida, New Jersey, North Carolina and Texas. "Wine on tap gives guests more options at the by-the-glass level," says customer success & marketing director Julia Tarazoff. "Instead of having one or two bottles open at a time, operators can pour from a much wider rotating selection and avoid managing spoilage and inventory across dozens of opened bottles."

In Europe, French keg supplier Ecofass says growth is strongest in markets where operators already use kegged beer or cider, such as the UK and Northern Europe. Sales manager Sacha Dalloz-Bourguignon describes the overall market for the format as "niche but growing steadily, driven by on-trade operators looking to cut waste, improve pour consistency, and offer wine by the glass without spoilage".

Surely, this encompasses most venues in 2026? So why isn't kegged wine used more?



More wines, fewer open bottles: Free Flow Wines reports growing demand for wine on tap across the US

Breaking the quality stigma

Part of the reason is perception. "Wine has a strong bottle-and-cork tradition, and some consumers (and buyers) still associate kegged serving with lower quality, even though the technology now preserves wine very well," says Dalloz-Bourguignon.

For this reason, Tarazoff at Free Flow Wines says "many operators still don't highlight wine on tap on their menus" in the US, although this is slowly shifting. "From a quality standpoint, you can't argue that kegged wine is lower quality," she adds. Free Flow stocks wines that have a per-bottle-equivalent SRP of US$60-plus.



Anne Jones: 'Draught is one of the most credible ways to decarbonise wine served by the glass'

The relative anonymity of by-the-glass ordering in the on-premise can be beneficial to wine on tap, argues Jones, who points out that "it's rare to see the bottle when ordering wine by the glass" anyway. In this respect, the restaurant acts as endorser of the product and promises the consumer will enjoy it regardless of the packaging it's in.

"If a respected restaurant lists a wine at GBP9 [$12.17] a glass, most consumers aren't asking whether the container behind the bar weighs 600g and has a cork," says Jones. "In fact, draught can have a quality advantage for by-the-glass wine, because the system protects the wine from oxygen and avoids the variability of bottles left open."

Jones feels the conversation could do with broadening beyond a quality one. "The on-trade isn't always trying to serve the highest-quality wine possible; it's trying to offer the right quality and value for the venue, occasion and customer," she points out. "It's about value, and kegged wine has the ability to deliver on that: keg can improve the consistency and price point of by-the-glass service, which is arguably more compelling to an operator than abstract 'quality'."

So should operators be encouraging consumers to choose tap, or vice versa? "We are in a chicken-and-egg scenario," says Jones. "Venues find it hard to justify a move without demand, and customers find it hard to demand what they don't see in front of them. It's the commercial model that needs to stack up to break that stalemate." »

A question of logistics

» Free Flow Wines works with a network of draught-installation providers in the US and supports venues with the transition to its stainless-steel kegs.

Tarazoff says: "The biggest barrier [to wider adoption], or perhaps misconception, is the capital required to add draught equipment." To the contrary, she claims that "most restaurants and bars already have the draught equipment in place and can convert to pour wine on draught for as little as $250/tap, seeing ROI within months".

Ecofass reports that market readiness for keg "varies a lot" by country. "France, the UK and parts of Northern Europe have relatively mature keg logistics thanks to established beer/cider distribution networks, which makes it easier to plug wine into the same channels. Southern and Eastern Europe are earlier stage, though interest is rising," says Dalloz-Bourguignon.

Stainless steel and other returnable and refillable kegs add an extra layer of complexity to distribution compared to single-use kegs — although they are clearly better in circularity terms.

Jones points out that although distributors in the UK already understand keg logistics because of beer, "wine and beer production are very disparate, so to unite them with kegging, outward distribution and reverse logistics is tricky". She adds: "Geography therefore matters enormously. A dense London restaurant network is a much easier proposition for reusable kegs than fragmented, low-volume accounts hundreds of miles apart: distance and market destination materially alter both environmental and economic performance."



Kegging line at Free Flow Wines: refillable kegs are more complex to distribute, but offer clear circularity benefits

With improvements in bulk wine technology, shifting consumer attitudes toward wine on tap and clear financial benefits for on-trade venues, including waste reduction, it seems there are legs to the format. The question, hopefully, is when — not if — it becomes mainstream. GDI

POSITION YOUR BRAND AMONG SUSTAINABILITY LEADERS

Image: iStock.com

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Q&A with *Ferrari Trento director of communications, external relations & sustainability Camilla Lunelli*

What recent ESG initiative or improvement are you most proud of? Alongside our long-standing environmental commitment in agriculture — with our estate vineyards certified organic and Biodiversity Friend — we have recently focused on our carbon footprint, reducing it faster than planned by using only renewable energy, improving efficiency and lowering emissions. We also offset remaining Scope 1 and Scope 2 emissions through certified carbon credits.

What do you see as the biggest ESG challenge facing the drinks industry? One of the biggest is finding a balanced, responsible approach to alcohol and sugar. Abuse and excessive consumption must be clearly discouraged, given their health impacts. Yet we should also recognise the value of moderation, when linked to pleasure, conviviality and wellbeing. This



Camilla Lunelli: Sustainability must 'become a key criterion in decision-making, starting from the top'

is especially true for wine as an expression of culture, terroir and tradition.

What one piece of advice would you give to companies looking to strengthen their ESG performance? My advice would be to take a comprehensive view of the company's activities, identify where it can have the greatest impact, and act on clear priorities within a long-term plan. Sustainability should not remain a separate activity, but become a key criterion in decision-making, starting from the top.

Ferrari Trento won Sustainable Wine Producer at the Global Drinks Intel ESG Awards in 2023. How has winning an ESG award influenced your approach? It was both an honour and an incentive to continue with even greater commitment. It reinforced our responsibility towards our employees, our territory and all our stakeholders, and encouraged us to embed sustainability even more deeply in the way we think and act.

ESG roundup

Latest activations from the brand-owner members of the International Alliance for Responsible Drinking

In **Cambodia**, the **Asia Pacific International Spirits & Wines Alliance**, the country's Ministry of Transport and other partners agreed to establish a framework for joint action on education, enforcement and evidence-based programmes to support national and UN road safety goals.

Kirin became the first company in the Asia-Pacific to complete the verification of steps 1 and 2 of the **Science Based Targets Network** framework. The first two steps involve evaluating a company's environmental impact across its value chain and identifying the highest-risk locations that would benefit the most from setting environmental targets.

Heineken launched a regenerative farming programme in **the UK** as part of its global 'Brew a Better World' sustainability



strategy. Meanwhile, in **the US**, **Heineken** expanded its 'There's No Such Thing As Fine to Drive' road safety campaign through a new partnership with the restaurant reservation service OpenTable (above). The project lets diners appoint a designated driver when they book a table, who becomes eligible for a Heineken 0.0 gift card and a SafeRides.org discount voucher.

In **Japan**, **Suntory** announced that the 'Suntory Fund for Bird Conservation' charitable trust would start accepting grant applications for 2027 from September. The group has been involved in bird conservation since 1973, and to date the trust has granted over JPY700m (US$4.7m) to a total of 563 organisations.

Suntory also attended London Climate Action Week in **the UK** to promote the importance of investing in nature to curb the growing impact of biodiversity loss and ecosystem degradation. Suntory joined discussions on methods of scaling up environmental projects, presenting examples from its nature-positive initiatives on water source replenishment and sustainable agricultural sourcing.

Back in **Japan**, **Kirin** announced the milestone of a 100% take-up of paternity leave in 2025, against a national average of 50.9%. In January, Kirin joined a UN Fair Work initiative that includes a commitment to achieving 100% uptake of at least one month of parental leave regardless of gender.

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

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Last orders? Tens of thousands of hospitality venues throughout Europe shut their doors in 2025, with Spain seeing the equivalent of 31 closures a day

Europe's on-premise at a crossroads — recovery or more of the same?

Europe's on-premise is showing signs of an upturn. But with costs still rising, consumers tightening their spending and premiumisation under pressure, **Charlie Mitchell** asks: is the market really turning a corner?

Talk to any hospitality operator across Europe about 2025 and you will hear the same story: rising costs, falling footfall and a market that felt increasingly volatile, unstable and, for many, unviable.

That is, of course, assuming that they made it through the year. Many did not. Germany lost 12,300 hospitality venues for good, and Italy recorded 6,500 more bar closures than openings. In Spain, 11,183 hospitality establishments shut their doors — equivalent to 31 closures a day.

The same conversation with a finance director of a major beverage alcohol company will tell a similar story, albeit in a different tone. Declines were real, but easing; growth was measured in share rather than volume; and positive pockets of category performance provided some cause for optimism.

Both perspectives described what was, at best, a disappointing year and, at worst, a disastrous one.

As *Global Drinks Intel* begins its on-premise coverage, the question in Europe is not whether 2025 was a difficult year — it unquestionably was — but whether 2026 is really seeing the beginning of a genuine recovery. Or are we in the middle of another period where industry commentators and stakeholders desperately search for green shoots in a market that, at ground level, remains in decline?

The numbers tell the story

The IWSR on-premise figures for 2025 leave little doubt about the gravity of the situation. All three headline categories declined in volume year on year, with spirits down 4%, beer 5% and wine 6%. Of the ten largest markets for on-premise spirits consumption, eight recorded volume declines, six of them by more than 5%.

Drinks companies, meanwhile, pointed to a combination of heightened price sensitivity and weaker consumer demand in their financial reporting. Rising costs, driven by geopolitical and wider macro-economic pressures, pushed prices beyond what many consumers were willing or able to pay.

In many markets, the pressure was compounded by VAT rises and hospitality policies viewed by the sector as unfavourable. In Romania, for example, VAT rose from 19% to 21%, while a 10% increase in alcohol exercise duty directly contributed to a significant market decline.

Consumer behaviour mirrored the downturn painted by the volume data. NIQ Reach research showed a Europe-wide decline in on-premise visit frequency for the first time since it began collecting data in 2022, with more consumers planning to cut back visits (20%) than increase them (18%).

This expectation was borne out in the 2026 data, which showed that almost one in three European on-premise visitors had reduced their frequency of visits over the previous year. »



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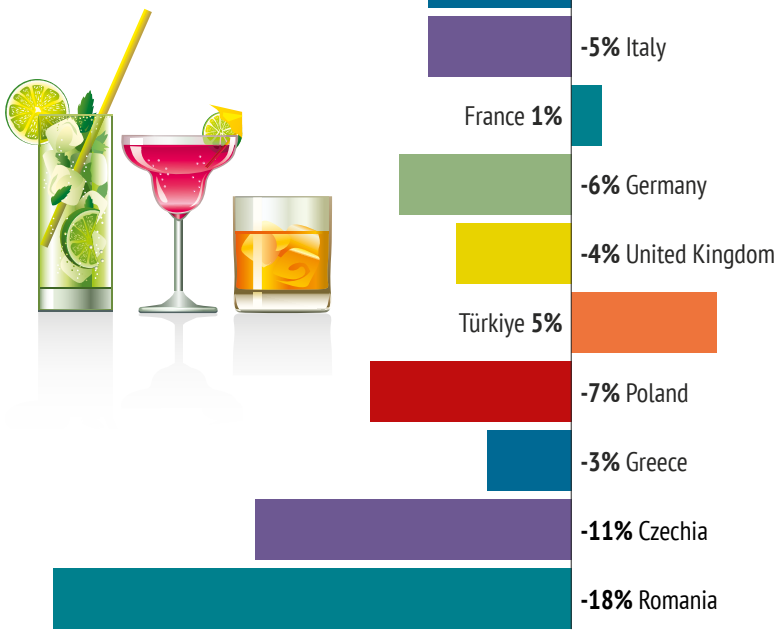
» The mantra of drinking 'less but better' held, but its meaning shifted. It was no longer simply about consuming fewer, higher-quality drinks per visit; on-premise users drank fewer drinks per occasion full stop, and also reduced the number of times they drank out.

Perhaps 'less and less but better' was a more accurate description of on-premise behaviour.

Thankfully for the industry, the 'but better' element held strong. Despite cost pressures and the continued squeeze on household finances, premium spirits, on the whole, emerged from 2025 less scarred than their standard counterparts (see table p19).

Premium spirits still delivered a mixed performance in volume terms, with vodka, whisky, gin and brandy all recording decline. However, premium spirits outperformed their respective total categories in nine of the ten largest categories, with gin the sole exception.

European On-Premise Spirits Volume Change 2024–25
Ranked by Volume Size of Country



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

An eastward shift

Fast-forward to 2026 and the noises from within the sector remain depressingly familiar. Germany's trade association said the start to the year was 'subdued', while UKHospitality reported 120,000 job cuts across the sector.

In France, 64% of Union des Métiers et des Industries de l'Hôtellerie members reported a decline in revenue during the scorching summer compared with the same period a year earlier.

Yet beneath the gloomy headlines, there are signs that the picture is beginning to shift. The pace of closures in France slowed, while business optimism among UK hospitality operators doubled. The Fifa World Cup provided a much-needed boost, with 19% of the Western European audience visiting the on-premise to watch matches.

Further east, the picture is more encouraging still. Hospitality revenue in Croatia rose 6.5% in inflation-adjusted terms in the first seven months of the year, according to industry specialists Pokazatelji.hr and Index, while Romanian horeca trade association figures showed a EUR500m (US$575m) increase in revenue despite a 10% drop in the number of trading venues.

Perhaps the strongest grounds for optimism lie outside Europe's traditional heavyweight markets. Bar culture is flourishing in cities that have historically sat outside the continent's established drinks capitals.

The 2026 edition of Europe's 50 Best Bars spotlights once-overlooked cities including Innsbruck, Prague, Thessaloniki and Bratislava, while Athens claimed both the top two positions, with four of its bars making the top 15.

With both venue quality and commercial performance increasing, there is a sense of an axis shift in the European on-premise from West to East — and with it, a shift in opportunities for beverage alcohol (and no-alcohol) brands. »



Image: 50 Best Bars

With two Athens bars heading the Europe's 50 Best Bars list — Line at No. 1 (receiving their award above) and The Bar in Front of the Bar at No. 2 — there is a sense of an West–East shift

Spritz takes centre stage

» Suppliers themselves have struck a cautiously optimistic tone in recent trading updates. Diageo's sales in Europe increased by 3.4% for the fiscal year ending 30 June 2026, buoyed by strong Guinness sales and performance in Türkiye. AB InBev reported low single-digit volume growth, which it "estimated to have outperformed the wider industry", while Heineken, too, returned to growth in the UK, France and Spain.

Campari Group perhaps provided the clearest success story, reporting a 1.9% increase in European sales in the six months to June. Much of Campari's reason for cheer centres around aperitifs and spritz — a category that arguably emerged as the winner of this year's European summer.

The Italian firm has maintained a dominant share of nearly 90% of all spritzes served across the UK over the past three years, according to IWSR data. To sustain this momentum, Campari has begun rolling out Aperol on tap across the UK this year to improve production efficiency and optimise service speed for high-volume on-trade outlets.

As consumers increasingly shift their on-premise visits earlier in the day — in Spain, for example, half of all dinner reservations are now made before 9pm, compared with just 27% a decade ago — spritz has been well positioned to capitalise, with the broader liqueur category benefiting (see p27).

No longer just a footnote on drinks menus, spritz is now a category in its own right, with the standard UK venue now listing an average of 4.6 different serves. And it's a global hit — nearly 1.5bn Aperol spritzes were consumed worldwide in 2024–25, while the broader category crossed 4bn annual servings, according to IWSR.

Vodka, too, is experiencing somewhat of a rebound in the European on-premise, with NIQ's Reach data showing penetration rising to 23% of visitors, up from 21% in 2025. The increase puts vodka ahead of whisky (22%), making it the most widely consumed spirits category among on-premise users across Europe.



Italian firm Campari Group has maintained a dominant share of nearly 90% of all spritzes sold in the UK market. Aperol (above) is the biggest seller, now commanding 13.6% of all British cocktail serves

European On-Premise Spirits Subcategory % Volume Change 2024–25
Total Category vs Premium Brands (Ranked by Volume Size of Subcategory)

Subcategory	Total Category	Premium Brands
Vodka	-4% ↘	-3% ↘
Whisky	-5% ↘	-5% ↘
Bitters/Spirit Aperitifs	-1% ↘	0% →
Liqueurs	-3% ↘	3% ↗
Gin & Genever	-8% ↘	-9% ↘
Rum	-6% ↘	-1% ↘
Brandy	-9% ↘	-5% ↘
Aniseed	-2% ↘	2% ↗
Agave-Based Spirits	2% ↗	11% ↗
National Spirits	-12% ↘	7% ↗



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

Premiumisation meets reality

While the desire to pay more for better quality held up in 2025, the signs point to a more difficult conversation in 2026. The European picture mirrors a global trend that Euromonitor International's global insight manager of alcoholic drinks, Spiros Malandrakis, has described as "premiumisation hitting a wall".

NIQ's Reach research suggests that the appetite among European consumers to spend more on better-quality drinks in the on-premise remains strong, with 58% saying they would choose high-quality drinks over cheaper alternatives. But their ability to do so is increasingly uncertain.

Just 50% state they would be likely to pay more than usual for a better-quality drink when out, down sharply from 62% in 2025. Meanwhile, 31% anticipate spending less on eating and drinking out in the coming months as disposable incomes tighten.

The positive news is that visitation remains stable and healthy. Despite the challenging environment, 54% of consumers across Europe still visit the on-premise at least once a week, unchanged from 2025.

More importantly, 61% plan to maintain that frequency, while 17% expect to increase it. The 22% planning to visit less frequently are skewed towards those who already visit less often, suggesting that, at worst, overall visitation will remain broadly stable over the coming year.

So is the tide turning? There are certainly reasons for optimism, but the pressures that have stunted growth over recent years still linger. GDI

Why bartender advocacy is the key to brand growth in the on-premise

As consumers become more selective about drinking out, drinks brands must give them a compelling reason to spend — with bartenders at the heart of the experience. NIQ global on-premise insights leader **Graeme Loudon** reports



Image: iStock.com/monkeybusinessimages

Three-quarters of bartenders say consumers will pay more for drinks in a venue for the experience

With penetration now at 82%, down one percentage point (pp) year on year, and weekly visitation falling to 59% (also down 1pp), on-premise suppliers and businesses are operating in an increasingly competitive and challenging environment.

Continued financial pressure on consumers is adding to the strain, creating a more volatile and uncertain market where every drinking-out occasion and purchase needs to work harder to justify its value.

Yet the outlook is not uniformly negative. NIQ's recently released *Global Bartender Report* — the largest study of hospitality professionals globally — shows that premium and independent bars are outperforming the wider market, particularly when they combine quality and value on higher-spend occasions.

Consumers still crave premium drinks, but they are becoming more selective about where and when they enjoy them. To justify paying a higher price, they need their experience to deliver a clear level of quality and value.

For businesses, this means shifting from simply driving volume to focusing on the moments that matter most — creating experiences that give consumers a compelling reason to spend. High-quality cocktails, for instance, clearly meet these expectations. Drinkers generally perceive them as worth their price, helping to explain their enduring popularity across the global on-premise (see p22).

But the appeal of mixed drinks goes beyond what is in the glass. Bar professionals play a crucial role, shaping the entire experience (the added value that consumers are increasingly willing to trade up for), while also having a direct influence over what they order. They are, in this sense, the gatekeepers of experience, spend and brand choice.

For drinks brands navigating a pressured on-premise, this makes bartender engagement more important than ever. However, it needs to move beyond a traditional supplier relationship to become more genuine and meaningful. That means investing in bartender advocacy, understanding what professionals need to deliver better experiences, and providing the products, knowledge and support that help build quality cues into every serve.

When consumers are questioning whether an experience is truly worth the spend, brands that equip bartenders to answer that question convincingly can create a powerful route to growth.

TOP **TAKEAWAYS**

- Consumers are selective about where and when they spend. Brands and venues must make every occasion feel worth the price.
- Premium and independent bars are outperforming the wider market, particularly when they combine quality and value.
- With 77% of bartenders citing experience as a reason guests pay more, their role in delivering quality, personal service and engagement is increasingly important.
- Bartender advocacy has to be earned — brands must build advocacy through support, relationships and education.
- The best activations are partnerships — they should improve the guest experience, add value for staff and feel authentic to the venue.

The human touch

For consumers to justify spending more on a drinking-out occasion, the experience needs to offer something they cannot easily replicate at home or find elsewhere.

In fact, 77% of bartenders say experience is a key reason guests are willing to pay more to drink in their venue, while 81% consider delivering new or elevated experiences essential or very important to their overall venue concept.

Crucially, a premium experience is about more than the drink itself. It encompasses atmosphere, service, safety and social connection. NIQ's research shows that excellent customer service is now the third most important factor consumers associate with a premium food-and-beverage experience, while two in three guests say they want personal service rather than something purely functional.

Bartenders are uniquely placed to bring these elements together. They oversee not only the preparation of the drink, but also the interaction surrounding it, using their expertise, recommendations and storytelling to build genuine connections with guests. From a thoughtful serve to a moment of theatre or spectacle, bar professionals can transform a drink into an experience — and give consumers another reason to spend. »

Big or independent?

» Specific spirits brands feature in 24% of bartender recommendations, compared with 36% for cocktails, highlighting a significant opportunity for spirits brands to harness bartender advocacy. But earning that influence is about more than visibility or keeping pace with the latest trends. Brands need to understand what drinks professionals value in the products they choose to champion.

Increasingly, bartenders are looking for spirits with an authentic identity, strong craft credentials and credible provenance — qualities they can draw on to create better serves and more compelling experiences for guests. Almost half value a brand's perceived authenticity, while more than one in three favour brands that are local or have a strong regional identity.

At first glance this might suggest that bar staff are naturally predisposed towards smaller, independent producers. But as long as they demonstrate the qualities bartenders value, there are opportunities for global producers too. The *Global Bartender Report* shows that the ideal backbar is remarkably balanced, with an almost equal mix of large, recognisable and trusted brands alongside independent, craft and smaller producers.

Category differences reinforce this point. In whisky, bartender recommendations tend to favour conglomerate-owned brands, while independent labels are more prominent in agave-based spirits. This is likely because leading single malt scotch brands, for example, often carry strong credentials around quality and provenance regardless of who owns them. In tequila, meanwhile, questions around transparency, sustainability and cultural authenticity can make independent producers more compelling alternatives.

The message for drinks brands, whatever their size, is clear: ownership alone does not determine bartender preference. Brands must consistently demonstrate the qualities that matter to drinks professionals and reinforce why they deserve a place in the bartender's consideration set.

The phases of brand advocacy

To earn a bartender's recommendation, brands need to understand the different stages of the advocacy journey and build influence at each one. Imagine a guest requests a peaty whisky. The bartender first considers the brands that come to mind, then narrows the choice to those they know well enough to meet the brief, before finally selecting the brand they have the strongest affinity towards. That final step is what determines the recommendation.

Building this kind of advocacy requires sustained investment across three key areas: support, relationships and education. Support demonstrates that a brand genuinely understands and values the bar and its team. Relationships build trust and personal connection, giving bartenders a reason to feel invested in a brand beyond the product itself. Education gives bartenders the knowledge and confidence to use, talk about and recommend a brand.

Advocacy cannot be bought through distribution, visibility or portfolio breadth. It must be earned through consistent engagement that makes bartenders feel supported, connected and confident. The strongest brands will therefore treat bartender relationships not as a route to short-term activation, but as a long-term investment in influence and growth.

BARTENDERS DRIVE CHOICE

NIQ's ***Global Bartender Report*** estimates that the average bartender in a premium or luxury venue will actively influence

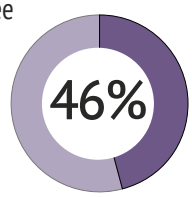
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DRINKS DECISIONS EVERY YEAR



Image: iStock.com/Dragan Zigic

This knowledge translates directly into sales, because nearly half (46%) of consumers agree they are likely to purchase a drink based on a bartender's recommendation



Source: NIQ Global Bartender Report 2026

THE **RESEARCH**

NIQ's *Global Bartender Report*, powered by BarSights, is the largest study of hospitality professionals globally, surveying 1,732 hospitality professionals around the world. Respondents were hand-selected to ensure a high-quality and insightful view of the on-premise sector in 2026, providing comprehensive insights into a crucial audience for suppliers and brands. NIQ's expert team can also deliver bespoke analyses, pinpointing tailored opportunities for individual brands and operators. Learn more at **www.niq.com** or email **graeme.loudon@nielseniq.com**

From sentiment to partnership

Activations are one of the most visible ways for brands to engage with bartenders and venues. But they should be seen as opportunities for genuine partnership rather than standalone marketing exercises. Almost four in five operators (79%) say the quality of in-outlet activation is an important part of their suppliers' offering, underlining the value these initiatives bring when done well.

Effective activations turn positive sentiment into stronger relationships, greater guest engagement and commercial performance. Successful execution means understanding each venue, supporting staff and enhancing the guest experience. Done poorly, activations can damage the relationships brands aim to build.

There is no one-size-fits-all approach. An activation that works in one venue may be completely inappropriate for another. The strongest initiatives are built with venues, reflecting the character, needs and realities of each establishment. When an idea feels authentic to the space, it can enhance the atmosphere and give consumers another reason to engage.

NIQ's report shows that, for more than half of bartenders, enhancing the guest experience is the biggest motivation for collaborating with brands on in-venue activations. Add opportunities for staff development and engaging elements (like product sampling and tastings for guests) and an activation becomes an experience that gives bartenders an opportunity to demonstrate their expertise and create memorable interactions with drinkers.

The best partnerships are not those that generate the most visible brand presence, but those that genuinely improve the venue, add value for staff and create a more engaging experience for guests. If a brand gets this right, bartender advocacy can become one of its most powerful tools in building long-term growth in the on-premise. GDI

What's next for cocktails? Five trends shaping serves right now

From 'culinary' cocktails to reimagined classics; from globalisation to the search for meaning — these are the most influential trends sweeping through bars today. **Richard Woodard** reports



Saikindō's big poppa puts a savoury, umami-led spin on the negroni, inspired by the smooth rhythm of the The Notorious B.I.G.'s 84 BPM hip-hop classic of the same name

These are undeniably difficult times for bars, and for the on-premise in general. Rising costs, cash-strapped consumers, moderation… The list of challenges goes on. At the same time, customers are demanding more from their nights out in terms of value for money, quality of drinks and the sheer pleasure of interacting with other people in a shared space.

"Consumers are much more informed than they were ten years ago," says Giacomo Giannotti, founder of Barcelona bar Paradiso, which ranked No.4 in last year's World's 50 Best Bars list. "They travel, follow bars on Instagram and TikTok, and can see what's happening in Tokyo, Mexico City, London or Barcelona almost instantly, so expectations are much higher."

The director of trend consultancy The Vandal Agency and creator & editor of IWSR's Radius innovation tracker, Claudine Ben-Zenou counts off three broad consumer trends: money, moderation — and boredom.

"A lot of guests have worked through a run of lists that felt fairly similar, and are after something different," she explains. "Honestly, most of it comes down to giving people a reason to leave the house. Money is tight, so the drink has to feel worth it, and that applies right across the list rather than just at the top."

More than ever, venues should aim to have a broad, rather than narrow, appeal, says *Global Drinks Intel* on-premise columnist Charlie Mitchell, who is also data & insights director at drinks marketing agency Wilde Toast. "Becoming famous for ten excellent drinks is better than being a flash in the pan with one, and then changing," he argues. "This requires skill, dedication and training."

Innovation and change, however, can come at a cost, impacting already tight margins. "Every additional process costs labour, equipment, storage, training or wastage somewhere," says Monica Berg, co-owner of London bar Tayēr + Elementary, No.5 on the World's 50 Best Bars list. "That's why systems are becoming just as important as creativity. I've always believed that before creativity comes organisation, methodology and order. The best bars will find ways to make increasingly sophisticated drinks while making the operation itself simpler, faster and more consistent."

At such times, tracking the latest shifts in consumer behaviour, and how they manifest themselves in the bar environment, is all the more vital — if venues are out of step with the zeitgeist, their competitors will reap the rewards. On the following pages, some of the most distinguished and experienced voices in the sector give their views on the top five trends for bars right now. »

TOP **TAKEAWAYS**

- As bars face challenging trading conditions, identifying the latest trends is vitally important, especially as customer expectations are higher than ever.
- Savoury/culinary cocktails are having a moment, with umami to the fore, while perennial and rediscovered classics — martinis especially — are also popular.
- Bars are more attuned to moderation — which doesn't necessarily mean not drinking — with lower-ABV drinks and miniature serves part of the picture.
- As the cocktail world globalises, maintaining a local identity is vital, as is giving customers a meaningful, fun experience with social interaction at its heart.

Culinary & savoury cocktails



Saikindō's Marco Corallo used AI to turn the sensation of 'tasting sounds' into cocktails that bridge music and flavour

In terms of flavour trends, this is now almost ubiquitous. Wilde Toast's Mitchell points out that 29% of listed cocktails at the 50 Best Bars in Asia have some form of savoury ingredient, with Europe at 21%. "Within this, we are seeing umami, in particular, as a growing trend, with ingredients such as miso, mushrooms, tomato blends and even the likes of blue cheese making it into lists across Europe," he says.

Likewise, Johnnie Walker global brand ambassador Tim Philips-Johansson sees a rise in cocktails using "vegetables and seasoning", adding: "The resurgence of the martini is a great example of this, with bartenders increasingly experimenting with savoury and umami-led ingredients to give this classic serve a new twist."

Marco Corallo, beverage director of the newly opened Saikindō at Four Seasons Abu Dhabi, leans into the trend with the bar's Aji No Hibiki menu, exemplified by the big poppa cocktail, combining wasabi, tomato dashi and vanilla (see image p22). "I think savoury drinks are growing because guests have a better understanding of saltiness, umami and flavour in cocktails," he suggests. "People are more exposed to what's happening in restaurants, and they're bringing that same curiosity to what they drink."

Paradiso's Giannotti reckons bartenders are now "thinking more like chefs, using vegetables, herbs, fermentation, fats, umami and acidity", while Tayēr + Elementary has worked with everything from tomato, whey and truffle to shiso, timur pepper, cedarwood, jasmine and vetiver. However, Berg cautions: "I'm less interested in finding the next 'weird' ingredient than I am in understanding ingredients better."

Moderation & lighter serves



The moderation trend may be inescapable, but leading bars now have an increasingly nuanced understanding of what it means. "I don't necessarily see people stopping drinking. I see people becoming much more deliberate about when, what and how much they drink," says Berg. "Someone might have a martini, then something non-alcoholic, then a lower-ABV drink. They don't necessarily identify as a 'non-drinker' or even someone who drinks less. They simply want more choice."

Giannotti echoes this view, arguing that tapping into moderation "doesn't just mean non-alcoholic cocktails, but also more low-ABV serves, aperitif-style drinks and cocktails where alcohol isn't the dominant sensation".

Ben-Zenou of The Vandal Agency identifies mini serves as "the most commercially significant shift of the year", responding both to moderation and to customers' squeezed disposable incomes. "Bars still need stand-out serves to attract an audience, and sessionability to keep people in their seats past the first round," she explains. "Smaller formats solve both."

Ben-Zenou identifies mini-martinis as the prime driver here, often offered alongside a full-size pour to allow customers to choose their commitment level. "It lowers the risk of trial," she points out. "You can work through a menu, rather than gambling GBP16 [US$22] on one unfamiliar drink."

To Berg, there are broader ramifications. "For bars, I think that's really interesting, because it challenges this very binary idea we've had around alcoholic versus non-alcoholic drinks," she says. "I'd much rather think about a menu as a spectrum, where strength is another variable alongside sweetness, acidity, bitterness or texture." »



Moebius Milano says balancing the comfort of classics with the curiosity of something new is key to getting customers to explore beyond familiar serves



Saikindō reimagines the piña colada for its knockin' boots serve, with roasted fruits, cold-brew coffee and miso adding savoury, umami notes

Classics, perennial & rediscovered

"Classic cocktails remain the framework upon which the vast majority of bartenders build their creations, in the name of accessibility, clarity and appeal to a broader audience," says Giovanni Allario, bar manager at Moebius Milano, ranked No.7 on the World's 50 Best Bars 2025 list.

"For us, and more generally speaking, the main challenge has been striking the right balance between comforting/classic and experimental/new: making customers feel comfortable when choosing their drinks, while still offering something intriguing and new enough to spark their curiosity and encourage them to choose one of our creations rather than a classic cocktail."

At Saikindō, Corallo says: "For me, the return to classics is a real opportunity for bars to build their own identity. Too often, classics are treated as standard, while all the creativity goes into signatures. But if guests are actively ordering classics again, bars have a chance to make them their own, either through a subtle twist or by really perfecting the recipe… If you put the same care into a negroni or whiskey sour as you do your signatures, guests start to see your bar as a destination for great classics too."

The martini remains the pre-eminent classic, but Wilde Toast's Mitchell also sees rising interest in neglected serves that had previously fallen out of favour, such as gimlet, white lady and clover club within gin and, for tequila, toreador and el diablo. "We put this down to bartenders looking to introduce new serves to generations of consumers that have previously not encountered them, and going back in the annals to find interesting — and usually delicious — forgotten serves," he says. »

Global versus local

"The cocktail world is more connected than it's ever been, with global lists, bar takeovers and the trade show circuit all accelerating the spread, so trends move fast, particularly at the premium end," says Ben-Zenou of The Vandal Agency — and Paradiso's Giannotti agrees. "An idea developed in Barcelona can influence a bartender in Singapore within days, and vice versa," he adds.

But globalisation has its potential downsides. "That's incredible for education and progress, but there is also a danger that everything starts looking and tasting the same," warns Berg. "I really hope the next stage is global knowledge, but local expression. The techniques can travel. The information can travel. The inspiration can travel. But what you make with that knowledge should ideally tell me something about where you are. A bartender in Mexico, Colombia, Japan, Norway or London shouldn't necessarily make the same drink just because we're all looking at the same Instagram feed."

This concept of 'bar terroir' is crucial in a competitive landscape. "The bars that stand out are not those that copy international trends, but those that interpret those trends through their own culture, ingredients and traditions," argues Giannotti.

Ben-Zenou agrees that "the best bars still draw on where they are", explaining: "The pattern we see is global technique and format with local flavour: a mini serve or a savoury martini executed with regional ingredients and reference points. Regional variation hasn't disappeared; it's just moved from the format to the flavour."

Giacomo Giannotti believes the bars that stand out are those that put their own culture, ingredients and traditions at the heart of global trends





Monica Berg: 'Bars exist because people want to be around other people… Perhaps the next big trend is simply remembering what bars are actually for'

Make it meaningful

Beyond the topics of flavour, ABV, reimagined and riffed classics, and global trends, it's easy to forget that the best bars are about much more than just going out and having a few drinks. In an increasingly experiential economy, consumers are looking for a good reason to venture out of their front doors and part with their hard-earned cash. "Guests still want a 'wow' factor, but it needs to have a purpose: the technique, story and flavour all have to work together," says Paradiso's Giannotti.

Creating a new cocktail can be fiendishly complicated, but is the customer interested in the process, or the results? Ben-Zenou highlights the increasingly influential role of playfulness, or "knowing kitsch", while Allario from Moebius says: "The overall simplification of service, and the type of experience customers are looking for, is leaning towards something more relaxed and fun."

Berg sums up: "We've spent years talking about drinks that photograph well, experiences that are Instagrammable and all the other things that came with social media. But, ultimately, bars exist because people want to be around other people… Perhaps the next big trend in bars is simply remembering what bars are actually for.

"And perhaps we also need to stop assuming that the success of our industry should be measured by how much alcohol we persuade people to drink. If someone comes into my bar, has two brilliant drinks instead of four average ones, eats something, spends time with their friends, and leaves wanting to come back, I'm not sure that's a loss. Actually, I think that might be a much healthier definition of success." GDI



VIEW FROM THE ON-PREMISE

Charlie Mitchell

Patience is the virtue for standing out in an increasingly dynamic cocktail category

World's 50 Best recently unveiled its 2026 lists of the 50 Best Bars of Europe and Asia. Cue the inevitable cocktail of scepticism, excitement, indifference, celebration and resentment — depending on your perspective (and, of course, whether your venue made the list).

Regardless of your reaction — and notwithstanding the lack of any serious scrutiny of how the rankings are actually decided — the lists do offer a snapshot of 100 incredible bars across two vastly different continents (and, in Asia's case, a vastly vast one).

The best of them are genuinely world-class, with drinks programmes that push the boundaries of mixology and bring together the very best techniques and ingredients to create the most delicious drinks available.

As a result, the drinks lists of these venues read as an encyclopaedia of creativity for bartenders and for brands alike. Anyone hunting for the next big drinks trend is likely to find inspiration among these pages, while those looking to refine a drinks programme could surely be assisted by adopting some of what is happening in the top echelon of bars.

So we decided to have a closer look. We collected every available menu and subjected them to a painstaking manual analysis to uncover the trends shaping global cocktail culture.

What we found was a cocktail category that, at the very top end at least, is vibrant, dynamic and fluid. Alongside the classics are returning favourites — why hello white lady and gimlet; we'd almost forgotten you existed — as well as emerging cocktails, riffs and a plethora of new trends.

Of course, these are bars that are expanding the horizons of the category, with cocktails operating at the cutting edge of innovation.

Not every trend will filter down to the mainstream, and those that do will likely be diluted and adapted to suit the tastes of the masses. Both lists, but Asia's in particular, heavily feature savoury cocktails, with ingredients such as miso, olive



Illustration: istock.com/Irma Miller

oil, beetroot and even beef jerky not uncommon.

Will these flavours make it to the high street bar in their 50 Best incarnations? Probably not, but don't be surprised to see the savoury inspired cocktails become an increasingly prominent subcategory across all sectors of the market.

So how on earth do drinks brands navigate such a kinetic, ever-changing category? Cocktails are flying and everyone wants a piece of the action, but the relentless pace of change brings a serious blink-and-you'll-miss-it risk for brands of jumping on the latest trends.

This creates particular challenges for notoriously bureaucratic — and often glacial — brand and innovation teams. By the time they've navigated the process and brought a trend to market, they are often behind the ever-shifting curve.

Take tequila cocktails as a narrow example. Wilde Toast's latest research suggests that, after decades of growth, the classic margarita is now on the other side of the curve. It remains popular, but momentum is waning. The spicy margarita, by contrast, is firmly at the top of the tree, while a second wave of cocktails vies for position.

But that second wave — led by the likes of the paloma — is already becoming highly competitive. It is also an increasingly expensive space in which to compete. Brands are investing heavily to 'own' these serves, building associations between their brands and cocktails that are on the rise.

The most fertile, accessible and rewarding ground may actually lie behind the juggernauts — and even the more recently emerged drinks. Rather than chasing the obvious winners, brands could look to the periphery. Third and fourth-wave cocktails may hold the keys to future growth, offering less-crowded serves without the need for such high levels of investment.

Returning to tequila, our analysis identifies re-emerging classics such as the toreador and el diablo, alongside emerging serves such as ranch water as particularly well-positioned. Investing to build brand association with these serves now may well prove fruitful in the long term.

However, this kind of success does not happen overnight. Fleeting cocktail trends that come and go are far harder to capture than building established, enduring serves. Just look at the spritz category for evidence. Aperol's success was decades in the making, built through a sustained focus on key cities and occasions, backed by genuinely best-in-class marketing and activation.

Now, the hugo serve is building on that momentum. Bacardí's St-Germain has taken a similarly long-term approach to investment and activation, helping drive a 1,300% rise in search interest over five years. Such numbers are impressive, but achieving them requires three things: the skill to identify a burgeoning trend, the courage to invest early and the patience to wait for the returns.

With cocktail culture so dynamic, fast-moving and volatile, the sensible play may actually be the slowest one. In a world where stakeholders increasingly look no further than the next 12 months, however, the difficulty may lie less in convincing consumers and more in convincing board members. GDI

Charlie Mitchell is data & insights director at Wilde Toast. His columns provide an on-the-ground perspective from the on-premise, based on extensive, ongoing bartender and consumer research. Email him at ***charlie@wildetoast.co.uk***



Star power: Game of Thrones *actor Sophie Turner fronts St-Germain's 'Delight in Life' spritz campaign, marking her third consecutive year with the brand*

Can RTDs provide a new launchpad for traditional liqueur brands?

Ready-to-drink formats are the next frontier for liqueur brands looking to bring their heritage to a new generation of consumers. **Eloise Feilden** reports

2026 has been the summer of spritz. In the UK, online searches for terms 'spritz recipe' and 'hugo spritz' increased by 100% in the three months to 16 July 2026 compared with the equivalent period in 2025, according to Google Trends analysis.

A Bacardí UK consumer survey conducted as part of the *Bacardí Cocktail Trends Report 2026* also found that more than one-third (34%) of UK consumers aged 18–29 selected the spritz as their No.1 cocktail choice for summer.

The spritz's UK success reflects a wider trend taking shape across Europe: one where long drinks and lower-ABV serves are taking precedence on cocktail menus.

The impact on liqueurs is inherently positive. Big brands like Aperol, Campari and St-Germain remain inextricably linked to aperitivo culture and the classic pours that accompany it. The category has managed to remain both relevant and popular even amid the wave of declines hitting the drinks sector in recent years.

"The aperitivo occasion is one of the few bright spots in the industry in the last five years, and continues to be so," says Spiros Malandrakis, global insights manager for alcoholic drinks at Euromonitor.

Pernod Ricard VP global marketing, gin & aperitif Francesco Ottaviano agrees, arguing that spritzes line up with the "longer, lighter and lower-ABV serves" increasingly popular with consumers. "These lighter drinks, including spritz serves, are more sessionable, allowing longer occasions with friends," he says — a factor driving current consumption patterns.

Beyond the hero serve

Still, this positivity paints just part of the picture for liqueurs in Europe. IWSR data reveal CAGR volume declines in three of the top five European markets for liqueurs between 2019 and 2025 — Poland (-5%), Spain (-1%) and Germany (-4%). The UK (0% change) and France (+2%) were the only outliers, though gains remained minimal (see Data Drop p28).

For Emma Fox, global VP of Bacardí-owned St-Germain, the primary problem for the category lies in usage. "Many consumers still associate a liqueur with one particular cocktail or an after-dinner occasion, meaning bottles can be purchased for a single recipe and then left unused," she explains. "Brands, therefore, need to prove they can offer more than one hero serve."

The challenge persists in both the on-premise, where "every bottle must justify its place through versatility, rate of sale and its ability to work across the menu", and at home, where "consumers similarly want bottles that can earn their place by working across different drinks and occasions".

Malandrakis blames the lacklustre performance of liqueurs on a lack of innovation, arguing that complacency and traditionalism — "the classic problems of our industry"— are all too prevalent among the category's big-hitter heritage brands.

So where should brands turn for their next phase of innovation? And how can they continue to buck the downward trend experienced by large swathes of the sector? »

The on-the-go opportunity

» For Euromonitor's Malandrakis, ready-to-drink formats are the answer. He argues that RTDs remain "a lost opportunity" for liqueurs, saying the possibility for collaboration and hybrid formats is "yet to be fully realised".

RTD success found by big brands in other categories could be easily replicated by liqueurs, he claims, arguing that "if Jack-and-Coke could find a way to communicate and make it work — OK, it took them 100 years, but they did — maybe some of these [liqueur] brands that have very famous signature serves can, and should, be doing something similar".

Indeed, with the right attention, the two categories could turn out to be a perfect match, with both sides set to benefit from the other's strengths. The RTD segment, says Malandrakis, has struggled with brand recognition. "RTDs are successful for two or three years, but by year five, they tend to go out of fashion and something else comes to replace them."

On the flip side, liqueurs are often heritage brands which have stood the test of time. "Jägermeister has been around for decades," points out Malandrakis. "Baileys has been around for decades. Fernet-Branca has been around for decades. Campari too, and it's being consumed by everyone from my dad, who is reaching his 80s, to young hipsters in Berlin." Combining the two, he suggests, allows heritage brands to bring innovation to their large, loyal consumer base.



Schwartzhog Kräuter owner Hardenberg Wilthen says liqueurs' adaptability gives the category an edge



A classic bar call, bottled: the Jack-and-Coke RTD brought the iconic serve to shelves in 2023

Simple serves, new occasions

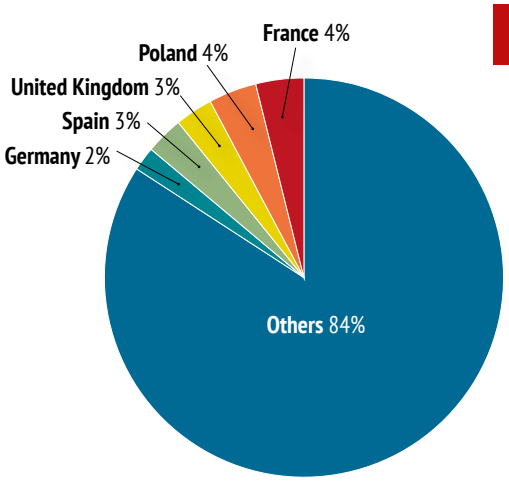
Liqueur brands are beginning to take note of the growing opportunity offered by on-the-go formats.

At German liqueur producer Hardenberg Wilthen, business development director Carl Graf von Hardenberg says of RTDs: "Their success demonstrates that consumers are looking for simple serves and clearly defined drinking occasions. At the same time, liqueurs can benefit from their versatility: a single product can be enjoyed neat, in a simple mixed drink or in a cocktail, allowing it to serve a variety of occasions." »

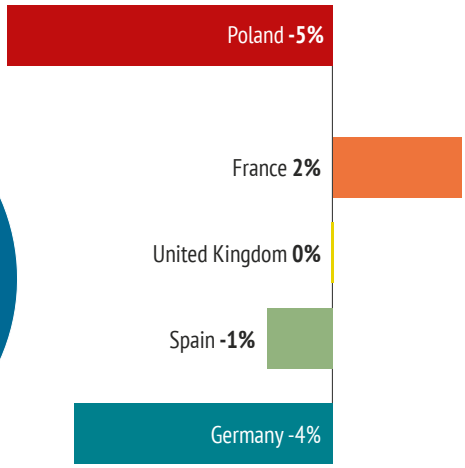
DATA DROP

Top 5 Markets for Liqueurs in Europe

% Share of GTR Volume Total 2025



% CAGR Volume 2021–25



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

TOP TAKEAWAYS

- UK searches for 'spritz recipe' and 'hugo spritz' doubled year on year, while 34% of 18 to 29-year-olds named the spritz their No.1 summer cocktail.
- The rise of lighter, longer spritz cocktails has boosted the liqueur category, which remains closely linked to aperitivo culture.
- Declining alcohol consumption continues to weigh on the category, with IWSR data showing volume CAGR declines in three of Europe's five largest liqueur markets.
- Liqueur brands are increasingly turning to RTDs to unlock new drinking occasions and reach a broader consumer base.
- Stock Spirits Group and Pallini were among the first liqueur producers to embrace the format, with bottled and canned limoncello spritz offerings.
- The biggest opportunity may be to focus less on categories and more on the occasions and experiences consumers seek.

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Lagoute



» Early RTD adopters include Warsaw-based Stock Spirits Group, which extended its Limoncè range with a bottled spritz ready-to-drink in April, adding to the existing range of Limoncè Originale, a limoncello with an ABV of 25%, and Limoncè Aperitivo (14.8% ABV), which launched across Europe in 2025.

Italian family-run spirits firm Pallini, too, now produces its limoncello spritz in a 25cl canned format. "The success of RTDs reflects consumers' desire for convenience, consistency and easy-to-enjoy drinking experiences, particularly in social occasions," says president & CEO Micaela Pallini. "We see the growth of RTDs as an opportunity for the wider liqueur category."

Making heritage relevant

RTDs can also assist with one of the main challenges faced by the liqueur category: the fight to stay relevant. "The category benefits from an incredible heritage, but it also needs to remain contemporary," admits De Kuyper Royal Distillers global brand & customer marketing director Marieke Liesting.

"That means continuing to innovate, inspiring new serves and showing how liqueurs can be enjoyed across modern drinking occasions," she says, which is precisely the role that RTDs can play.

Liesting sees a synergy between the two categories, both of which aim to make cocktails more accessible across a wider range of occasions.

She says: "Liqueurs remain the foundation of many cocktails, while precrafted solutions like batched and draught help the on-trade address challenges such as staff shortages, speed of service and consistency. Together, these formats make cocktails more accessible across a wider range of occasions."



Stock Spirits Group and Pallini have taken their signature spritzes into RTD bottles and cans

Not everyone shares this view, however. Hardenberg Wilthen's Graf von Hardenberg sees RTDs as a potential threat to the category, posing competition "through their convenience in spontaneous and social drinking occasions".

But the risk of liqueur brands cannibalising their full-strength and larger formats by investing in RTDs remains low, particularly in on-premise channels.

As The Bitter Truth founder Stephan Berg puts it: "RTDs cannot replicate the theatre, customisation or ritual of handcrafted cocktails in bars or elevated home hosting settings. [They] offer zero flexibility in adjusting sweetness, bitterness or strength. Cocktail-making with liqueurs allows drinkers to tailor their drink to their needs and wants."

A future beyond categories

What the RTD format *does* offer liqueur brands is another string to their bow, creating an opportunity to draw in new, younger LDA consumers.

At Argentinian liqueur brand Fernet-Branca, international head of advocacy & ambassadors Nicola Olianas says the future success of the category relies on precisely this kind of evolution, arguing that the brands that will succeed are those which understand the changing motivations of their customer and adapt accordingly.

As he puts it: "I don't believe the future of the drinks industry will be defined by categories. It will be defined by occasions. Consumers don't choose between a liqueur, an RTD or a spirit; they choose the experience they want to have. The brands that succeed will be those that make those occasions more meaningful." GDI

The Bitter Truth (left) says RTDs can't match the theatre and ritual of cocktails, while Fernet-Branca argues the future belongs to occasions, not categories





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Liqueur roundup

Liqueur brands from India to Italy are shaking up a category known for its heritage and history with rebrands, pizza partnerships and even a new fashion line



Tuscany's Amaro Santoni gets a new name

Famiglia Santoni, a distillery founded in 1960 in the town of Chianciano Terme, Tuscany, has relaunched Amaro Santoni, a 16% ABV liqueur built around Chinese rhubarb and a blend of 34 botanicals, as Santoni L'Aperitivo. Its relaunch includes a new bottle design which takes inspiration from Florentine architecture.



Amante 1530 looks to shake up the spritz

Italian amaro brand Amante 1530 has launched in the UK in a bid to "challenge the default spritz". "Amante exists because the spritz most people drink hasn't changed in years, and I believed drinkers were ready for something more elevated," said CEO Ana Rosenstein, who co-founded the brand alongside The Police frontman Sting.



Delevingne sisters launch liqueur apparel

Della Vite, the vegan drinks brand owned by model Cara Delevingne and her siblings Chloe and Poppy, has partnered with clothing brand Delta Roam on a crossbody bag designed to store its spritzes. The bag's yellow colourway matches Della Vite's Sicilian Lemon Spritz, one of four flavours in the range alongside Aperitivo, Hugo and Bellini.



Cocchi partners with UK chain Rudy's Pizza for Negroni Week

Italian vermouth and aperitivo producer Cocchi has partnered with Rudy's Pizza Napoletana across the UK. Three expressions — Cocchi Storico Vermouth di Torino, Cocchi Rosa and Cocchi Americano — were made available on the 40-strong restaurant group's Negroni Month menu in September. Cocchi will remain on the menu as house-pour vermouth.

Davana Vermouth Indica grows domestically

Davana, a Goan liqueur brand made from a chenin blanc wine base infused with 21 to 23 locally sourced botanicals, has expanded its footprint to other Indian states including Delhi, Pondicherry, Pune, Indore and Bhopal, taking the brand's presence to eight cities across India.



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Q&A *with WineGB CEO Nicola Bates*

Britain's wine sector is at a pivotal moment, with plantings, production and exports all on the rise. WineGB CEO Nicola Bates discusses how the trade body plans to help producers build on that momentum and support the industry's next phase of growth. Interview by **Olly Wehring**



Nicola Bates: The challenge has shifted from improving British wine to proving 'the quality of the sector'

This month marks your third anniversary with WineGB. Where did you come from? I'm at that stage in life where I describe my career in decades. I spent my first decade-ish in communications and public affairs with different trade associations, engaging with government to tell stories. In 2010, I stood as a candidate in the [UK] general election and used that to move into the commercial sphere and became a board director at a big communications and public affairs recruitment company for almost a decade.

I missed the public realm, so applied successfully for the director of external affairs role at [UK alcohol marketing regulator] The Portman Group. I'm very much a gamekeeper turned poacher; it's much more fun telling a story about a category than about the more controlled component.

During my three years at WineGB, I've been able to reshape it and build out a government affairs function. Off the back of my first year, which was all about meeting everyone, listening and understanding, we built a three-year strategy to help our members make wine, market wine and tell their story.

Your experience seems to have covered two main areas: lobbying and marketing. WineGB is quite rare in that it's a trade association and a marketing organisation. Normally, these are kept separate. The connections the industry had with government departments and politicians were already good. For me, it's about building from that and putting in place a more professional engagement profile.

The focus over the last three years has been around identifying how we optimise this time when we're on trend and growing, in order to make sure there's long-term continuity for the industry. How do we put the industry on the best possible route for growth going forward?

We have seven wine producing regions and there are plenty of people making fewer than 10,000 bottles a year. As much as we want the Chapel Downs of this world to have success, we also want these smaller businesses to become successful. We have good relationships with government, so it's about building that professional basis, which then allows us to continue to punch above our collective weight.

How do you define success if your areas of responsibility are so broad? We're here to promote the sustainable growth of UK wine. Fundamentally, that means it has to be profitable. It also has to look after the environment in which it operates and it has to have long-term credibility.

Our 'make' challenges include ensuring the yields are the strongest that they can be and are of the right quality. We also need to make sure we're getting the right number of people into the industry. By 2040, we anticipate we'll need 30,000 people, from around 25,000 now.

On the marketing side, the challenge we face today is ensuring that sales equals production. Also important today is how we prove the quality. Ten to 20 years ago, the challenge was around improving the quality; now, it's about how we prove the quality of the sector. Finally, we need to make sure we're protecting the industry's reputation and telling its story.

Our definitions of success are to be able to answer all those different questions.

Is the change from improving to proving the quality quite recent? It predates me. WineGB celebrates its 10th anniversary next year and it probably coincides with the organisation's founding.

We back this with our awards, which have been running for a long time now and feature independent judges who really evaluate the quality — they're very candid with us. The wines now are so much better than ten or 15 years ago, and we have independent proof of that. We also back this with the Golden 50 Wine List, which started two years ago. These are UK wines that have won gold medals in either UK or international competitions.

It's really powerful to have these independent proof points that indicate where we're matching in the world. It's not us asserting it; it's our brands delivering externally, and that reflects on the whole industry. »

» **What's the rate of growth of the UK wine industry?** The level of growth has been remarkable. Since 2010, we've seen an increase in plantings 500%-plus, doubling in the last five or six years, to approaching 5,000 ha. In sales terms, we've gone from about 3.3m bottles in 2018 — which was our original biggest harvest with 13.3m bottles produced — to around 9m bottles in 2024.

We've started to see a slight downturn, simply because of where the economy is. The fundamentals in terms of the product, however, remain really strong.

Exports account for around 9% of total volumes today, up from 4% in 2021. We expect to hit 1m bottles for exports either this year or next. If we continue to grow this level of export penetration, while also deepening our involvement with existing and new consumers in the UK, then we're going to be in a really strong place.

In this economy, to be able to say there's this really vibrant, fast-growing agricultural sector in the UK is a brilliant position to be in. People want to hear that story.

Does that message travel or is it limited to the domestic market? We're doing more on our export messaging, certainly, but we are on trend — and have been for a long time — domestically. We're trying to take advantage of that by leveraging the media's affinity with UK wine. To them, it still feels like quite a novelty.

Presumably that novelty element isn't enough to grow the export side? It comes down to three areas. Firstly, there's what the brands are doing themselves. We have several that are taking a leading position and opening up markets internationally, to the extent that we're in 50 different markets. A lot of that is down to their own work.

Secondly, there's what we can do as a category, through things like attending trade shows and running roadshows in core markets, to deepen our penetration into those markets we're already in, rather than necessarily opening up new markets.

The third piece is about what role government plays. The Department of Business & Trade is supportive, but we'd love to establish a partnership model to allow us to take our product out in a far more impactful way. The EU supports its food and drink producers to the tune of EUR180m [US$155m] a year. That supports the marketing of their wines in our country. We do not have the same amount of support when we're going into their markets.

We have credibility for our wine, especially on the sparkling side — 90% of our exports are sparkling. We want to work with government to leverage that as an opportunity to open up more markets.

What's the brand strength of the sector? The brands we have are able to represent not only the diversity and mix of our category, but also how innovative everyone is. On the sparkling side, we have brands that can tap into the markets for traditional method, top-quality champagne, all the way through to prosecco. In still wine, we have a really exciting group of white wines at play and an interesting number of reds coming through.

Where is UK sparkling seeing success? In the UK, annual champagne sales are at around 25m bottles. We sell about 6m bottles of English sparkling here and about 5m of that is traditional method — that's remarkable. Prosecco, meanwhile, sells about 130m bottles a year in the UK. English charmat has the potential to take a small sliver of that market. For us, it's about competing in the categories our producers find themselves in.

WineGB is about to embark on its next three-year strategy. How did it perform against its last plan? One of the most important things was to define our mission — we understand exactly what we're here to do. We also put together a lot of guidance to support members, [including setting up] a 'Knowledge Hub' that allows people not only to find the information they need, but to discover things they didn't know they needed to know.

On the people side, we extended our 'Sustainable Wines of Great Britain' certification programme, which looks at finding the most sustainable ways to look after a vineyard, to include the people element.

We've done loads on marketing, such as working with London Wine Fair to tell the category story and creating the Golden 50 wine list. Finally, on the quality side, we are the secretariat for the Protected Designation of Origin scheme and [launched] our 'Back British Vineyards' campaign, which calls for duty relief for wine bought during a vineyard visit.

How has the flow of wine producers from elsewhere to set up shop in the UK held up in recent years? We're definitely seeing lots of cross-fertilisation. It's one of the joyous things about England being a hub for the wine trade for such a long time — we've always had people coming through. There's always been an appetite either for us to be over there learning or for others to come to the UK to experience our wines.

How much of that migration to the UK is due to climate change? The wine industry as a whole is finding a lot of circumstances difficult. Climate change is one of them, [as are] the economy, consumer demographics and moderation trends. There's movement in the industry because of all of these. At the moment, I believe people see the UK as an opportunity and are interested in its styles of wines rather than this being a negative push factor. We remain a pull factor.

Is there concern that the UK sector's current air of optimism jars with the wider category outlook? You can never gauge when you become popular! Domestically, we outrank most other wine categories for engagement with consumers aged 25 to 45. They're excited because we're local, sustainable and the quality is there. Theoretically, then, if we have people who are so invested early, then we have an audience who will go on their entire journey with us. From a UK perspective, then, I think we're OK.

Globally, there's more of a challenge. As long as we can utilise the government overseas, then we still have a space to be in. It isn't easy, but then again, making wine in England and Wales has never been easy! That's the challenge. GDI



WineGB chair Charlie Holland and CEO Nicola Bates call for excise duty to be removed from D2C cellar-door sales. WineGB claims the move could save UK vineyards around GBP6m a year



Thou shalt go to the pub: alcohol-free beer producer Lucky Saint has made the on-premise a priority, opening its central London pub near Regent's Park in 2023

From shelf to serve: why the on-premise is no-alcohol's 'vehicle for growth'

Hospitality is by no means as inundated with as many alcohol-free beverage options as retail, but the increasing consumer thirst for moderation is forcing the former to catch up. **Jessica Broadbent** reports

The alcohol-free category has so far defied the maxim that 'brands are built in the on-premise'.

Across beer, spirits and wine, established brands have debuted zero-ABV extensions in the off-premise while new, dedicated no-alcohol (NA) brands built momentum in retail. Now, brand owners say, the on-premise is finally coming into its own as an important proving ground for the category.

Alcohol-free UK brewer Lucky Saint says the NA drinking occasion in the on-premise has broadened beyond Dry January and other wellness months. "People are consuming these products in the moments when they're also drinking," says insights & category director Lou Pollitt.

She attributes this to improving quality, range and distribution, health trends and increased investment behind mainstream alcohol-free brands, such as Guinness 0.0, which has won over more sceptical consumers. But the category is also contending with many of the same challenges facing beverage alcohol in the on-premise.

"Pub closures, price inflation and efficiency drives, which mean that fewer taps are available not just to the bigger brands, but also to smaller, dedicated players," Pollitt says.

Beer leads the on-premise charge

Alcohol-free beer is both the primary NA volume driver and its most established category in the on-premise.

Lucky Saint's sales are "fairly equally split" between channels, though Pollitt says the on-premise "has always been a real priority". The company launched its 0.5% ABV lager on draught in London venues in early 2020, before going nationwide for Sober October. (UK/EU/Australia guidance allows 'alcohol-free' drinks to contain up to 0.5% ABV.)

"Our draught launch was the first for any major dedicated brand into the on-trade," Pollitt says. "For us, draught really equalises the experience." The brewer underscored its commitment to the on-premise by opening The Lucky Saint pub in 2023.

Alongside traditional on-premise venues, many alcohol-free brewers dabble in sports occasions and other outdoor events. "Some of the places that we can play in are different to full-strength," says Pollitt.

"We have a really strong relationship with the running community; we do a lot of work with Strava. Whereas full-strength brands are focused more on audience for sport, we can be a bit more on the participation side."

After five years as a one-SKU brand, the company expanded into functional lager in April with Lime & Sea Salt. The response has been "pretty astonishing", according to Pollitt. "Alcohol-free inherently has something taken away from it. Functional can add that back in," she says. "But we need to give people credible propositions that meet a clear health need and are easy to understand. Hydration is a really obvious starting point for that."

Lime & Sea Salt's launch has been led by direct-to-consumer (D2C) sales, but Pollitt says the lager has had "a lot of interest from the on-trade, which we didn't necessarily expect from the functional side of things".

Fellow alcohol-free brand Big Drop Brewing agrees that functional NPD must be carefully considered. "I'm all for innovation," says CEO Rob Fink. "But I think if you start running around throwing stuff in liquid just because somebody thinks the next big thing is going to be 'X', then you risk alienating your own audience." »

RAISE YOUR BAR

DE KUYPER BATCHED AMARETTO SOUR, ALSO IN 0.0%

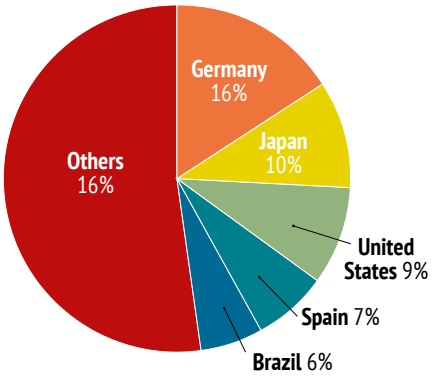


Please drink responsibly.

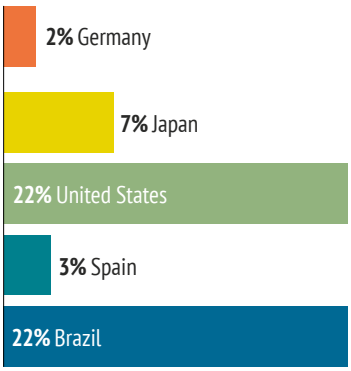
DE KUYPER
LET'S COCKTAIL

Top 5 Markets for No-Alcohol (NA) Beer, Spirits, RTDs and Wine

% Share of Volume Total 2025

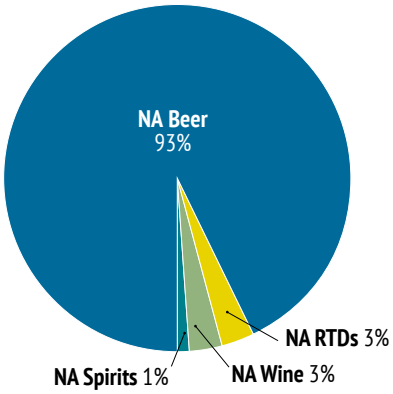


% CAGR Volume 2019–25



No-Alcohol (NA) Beer, Spirits, RTDs and Wine Categories

% Share of Volume Total 2025



% CAGR Volume 2019–25



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

» Founded in the UK in 2016, Big Drop brews to 0.5% from the outset, rather than removing alcohol from full-strength beer, which it says preserves body and aroma. The company has built its brand around the breadth of its offering.

"We get that 60% to 70% of the country [UK] drinks lager, but there's still a consumer out there who's wanting an alcohol-free IPA — that's where we can come through," says Fink.

When it comes to draught, Fink says: "Generally, it's absolutely essential to be on the front bar." As an independent brand fighting for tap space against established names like Heineken, which has large contracts and runs its own cellar-maintenance service, Fink advises: "You have to play where you can win."

He explains: "You need to find somebody who hasn't sewn up all their listings with a larger provider. You need a route-to-market to get listed in the first place — a wholesaler won't take you unless somebody's going to buy you. Then really, it's about brand. This is a branding game. You're trying to convey to people that your brand stands for something different."

Big Drop targets "lunchtime" and "casual dining" occasions. D2C alcohol-free sales are increasing, says Fink, driven by consumers seeking a "midweek treat".

Given this development, Fink might take a different route-to-market if he was launching Big Drop today. "I would build the brand through e-commerce first," he muses. "Then I would look to get some on-premise listings around that, then go into the supermarkets last."

US on-premise grows

In the US, dedicated non-alcoholic brewery Bero says the off-premise is growing in the "high single-digit, low double-digit range", while "this year the on-premise is growing at 45%" — albeit from a smaller base.

Like Big Drop and Lucky Saint, Bero has an ABV of 0.5%. (In the US, beverages labelled 'alcohol free' must contain no alcohol, while those 0% ABV–0.5% ABV are classified as 'non-alcoholic'.) The brand was founded in 2024 by ex-Nutrabolt president John Herman and *Spider-Man* actor Tom Holland (see p42).

Herman predicts the NA channel will "expand dramatically" in the on-premise over the next five years, describing this growth as "extremely important" to the category. "By having a stronger on-premise business, brands can in turn have greater velocities at shelf, distribution winds and expansion within retail," Herman says. "So it becomes a healthy cycle. The on-premise is really the vehicle that can grow this category further."



Big Drop's gluten-free range includes Milk Stout (above), Citrus IPA, Pale Ale, Brown Ale and Lager



Bero released its Kingston Golden Pils in glass in the on-premise in August

Though Bero's sales are still skewed to the off-premise, the company aims to "flip that in the very near term". Initiatives include the introduction of glass bottles, — a simple way to brand build, says Herman.

"Oftentimes, if your can-only brand is being served in a restaurant, for example, then it's not being presented with the can," he explains. "With a glass bottle, we can be presented with the bottle as well. The branding opportunity for sampling and trial really makes it stand out."

Besides, he adds: "Beer just tastes better out of a glass bottle than out of a can. I don't know the science behind it, but it truly does! At the same time, the smaller craft non-alc players haven't made this move." »

» "The beer in your hand is a bit of an accessory, and we wanted to make sure that Bero looked great in the highest end of settings and blends in more with the aesthetic of those kinds of establishments than our craft beer competitors in non-alc do," adds Herman.

But Bero's cans aren't disappearing anytime soon. "Generally, the on-premise accounts will be a high bottle focus, while the off-premise will be a heavy can focus," he says.

When it comes to draught, Herman says the US is still behind the UK. "The category needs to move to becoming a higher-velocity play before it can warrant that tap space," he says. "We're not completely sold yet, but we're exploring [it] long term."

Spirits extensions vs new brands

» Henkell Freixenet's alcohol-free strategy has been to lean on established brand equity, which it says "gives on-trade partners confidence" to list new SKUs and helps consumers in their choices due to the "familiar brand worlds".

"Wherever possible," says head of communications Vanessa Lehmann, "we believe it makes sense to position alcohol-free variants alongside their alcoholic counterparts. From a consumer perspective, this makes it easier to identify and choose the option that best fits the occasion.

"It also reinforces the idea that alcohol-free variants are a natural part of the brand portfolio rather than a separate or niche category. For the on-trade, it helps create a more inclusive drinks offering while leveraging the recognition and trust already associated with established brands."

The occasion for alcohol-free spirits undoubtedly sits with cocktails. Lehmann says the on-premise remains important for discovery, particularly in the aperitif moment, where many consumers simply aren't aware of the range of options.

She says Henkell Freixenet is seeing "particularly strong momentum" in countries with established aperitivo and cocktail cultures, such as Germany, Poland, the UK and the US. However, the off-premise remains the company's biggest sales channel for "many" of its alcohol-free lines.

Cocktail-liqueur specialist De Kuyper Royal Distillers has seen its 0.0% ABV portfolio expand to form 9% of total volumes produced, and global marketing director Marieke Liesting says: "We see 0.0% becoming a structural part of the cocktail occasion."

Last year, the Dutch company launched a ready-to-serve range for the on-premise called Batched 0.0%; the line's Pornstar Martini is now De Kuyper's third best-selling premix cocktail.

"That crossover strength surprised us," Liesting admits. In the six months to June, Batched comprised 28% of the company's RTS volumes domestically. "And we're seeing the same development beyond the Netherlands," Liesting says. "Globally, non-alcoholic cocktails already represent around 15% of our total pre-crafted volume."

De Kuyper also produces a range of kegged cocktails, but will there ever be enough demand to justify putting non-alcoholic cocktails on tap?

"Bar space will always be valuable, so demand needs to be strong enough to justify a dedicated tap," Liesting says. "But as the 0.0% cocktail occasion continues to grow, I can certainly see draught becoming increasingly relevant, particularly in high-volume venues where speed, consistency and ease of service really matter." »

- After initially building momentum in retail, no-alcohol (NA) brands are increasingly looking to the on-premise to drive discovery, trial and repeat purchase.
- NA beer leads the on-premise charge. Established alcohol-free brands are gaining traction through draught, pubs, casual dining and sporting occasions.
- Draught remains an opportunity and a challenge. Being on the front bar can help normalise the NA experience, but scarce tap space makes listings hard to come by for smaller brands.
- NA consumption is extending beyond wellness months into everyday moments such as midweek treats.
- Functionality offers new opportunities, but suppliers warn against adding ingredients simply to chase the next trend.
- NA wine continues to face a significant taste and quality challenge, but the on-premise is emerging as a bright spot as by-the-glass availability improves.





An alcohol-free option was added to The Freixenet Solare portfolio in June (left). De Kuyper's Batched 0.0% range makes up 28% of its domestic RTS volumes





Noot's ready-to-pour bottles and canned RTD range offer twists on classic cocktails infused with 'natural nootropics' such as green oat, lemon balm and green tea

Functionality: the next frontier?

» Noot Drinks Co was founded in Australia in 2020 by brothers Kieron and Christian Barton and Gareth Whittle, the trio behind cider brand Rekorderlig. The brand's non-alcoholic range includes spirits and RTD cocktails containing functional ingredients like green oat, green tea and lemon balm, which promise consumers a "boost".

Noot's approach with the on-premise is hands-on, working with bartenders so they feel comfortable selling and serving the brand. Getting venues on board, Whittle says, has been "so far relatively straightforward". For NA brands, it's a case of "right time, right place, right product".

He adds: "It's a great margin opportunity for the bars, which ultimately, that's what they're interested in, isn't it?" Whittle says the on-premise opportunity lies in "curated" drinks and quality offerings. "[Large brands] can buy volume, but if you're just buying space, eventually consumers go, 'Yeah, but I don't actually want that'," he says.

In retail, Whittle says the category is increasingly moving beyond the alcohol aisle, particularly as functional brands enter the market. "Everything's occasion-led now," he says. "That's the key takeout for the beverage sector: what occasion are you looking at — is it after the gym, pre-gym, early evening, just before bed? That's the category."

Retailers, Whittle adds, are already having these conversations. "It's fascinating to see how things are changing — and how quickly," he says. But can this approach work in the on-premise, where space is at a premium? "Absolutely, there's room to categorise by what occasion you're after, and I think that's where it'll head."

For Whittle, "the dream scenario" is for venues to offer a separate list of functional cocktails. Perhaps, indeed, this is the way the wind is blowing, at least in some corners of hospitality. Six Senses' new US$1,000-plus-a-night "luxury wellness" hotel in London offers a non-alcoholic version of every cocktail on its menu.

On the whole, though, this is clearly not the norm, and DioniLife co-founder Damian McKinney says "the on-premise is doing itself a disservice" by not offering more alcohol-free choices.

UK-based DioniLife launched in 2024, with the acquisition of alcohol-free beer Mash Gang, and has since released two new non-alcoholic brands: La Borosa Mexican Agave Spirit and Pavari 17 Mediterranean Aperitif. Both brands are also available in canned RTD cocktails: La Rosa Margarita and Paloma, and Pavari 17 Spritz.

McKinney says it is well known that "54% of drinkers are now moderating", yet if you enter a bar and "ask what percentage of fantastic non-alcoholic drinks they are offering, it's probably 5% at most and the quality will be variable".

When it comes to cost, McKinney is confident that NA pricing should match alcohol, because consumers want to "fit in". He says: "Bizarrely, price is also driven by value associated with it. If you give something to somebody cheap, they think it *is* cheap."

McKinney feels there is real opportunity for functional products in the on-premise, particularly around hydration and energy in venues like clubs. "It fits, functionally, the occasion. I think that's the key," he says. DioniLife, he reveals, is in the process of testing a functional liquid. »



DioniLife released its agave spirit La Borosa and Mediterranean-style aperitivo Pavari 17 in August 2025

Wine brings up the rear

» While NA spirits and beer are looking towards functionality, wine is focused on closing the "taste gap" with full-strength products and building consumer trust.

No/low brand Wednesday's Domaine describes the NA wine category as "almost the final frontier in terms of consumer adoption of an alcohol-free alternative".

Having started life as a 0% ABV brand, the UK-based company has recently launched three 6.5% ABV SKUs and founder Luke Hemsley says he views both no and low as offering "equal opportunities".

Channel-wise, Hemsley says the bulk of non-alcoholic wine is still consumed in the off-premise, which leaves the category "in a state of flux". He explains: "Supermarkets are still presenting customers with relatively low-price, low-quality options.

"What's ultimately happening is you're getting a little bit of a trial, but you're getting very limited repeat purchase. We're stuck in a bit of a loop whereby there isn't sufficient volume of interest or data for retailers to take a punt on higher-quality, more premium options."

The on-premise, meanwhile, is a "bright spot", says Hemsley. In the category's early days, the risk of wastage made operators reluctant to offer alcohol-free wine by the glass, while the cost of committing to a full bottle made consumers hesitant to try it.

"That's changed and is changing quite rapidly — that's reflected in terms of listings that we now have," Hemsley says. Wednesday's Domaine is available by the glass across UK restaurant groups Gaucho and Barrafina, boutique hotel chain Cubitt House and pub group Chickpea.

Asked what's driving the growth and Hemsley describes it as a "slow virtuous cycle" of supply and demand as consumers begin to seek greater alcohol-free wine choices in the on-premise. Despite the uptick, he says: "Ultimately, as a brand, you must be omnichannel to create different ways for customers to discover and experience your product."

Power of a familiar label

For French wine and spirits group Les Grands Chais de France, alcohol-free brand extensions — such as JP Chenet 0.0% — lead its on-premise NA offering.

"Extending trusted brands into non-alcoholic variants benefits both operators and consumers," says UK marketing manager Henry Colyer. "For the trade, it simplifies purchasing by enabling venues to source premium alcoholic and alcohol-free wines from a single, trusted supplier.

"For consumers, trusted brands remove uncertainty. Guests are far more likely to choose an alcohol-free alternative when they recognise the quality and heritage behind the label, giving operators greater confidence that the product will drive repeat orders."

The company's dedicated alcohol-free brand, Nozeco, launched in 2017 and claims to be the "market leader" in the UK. The majority of Nozeco volumes are sold in the off-premise, though Colyer says this is due to "the natural development of a new category rather than a conscious decision".

Like Hemsley at Wednesday's Domaine, Colyer says it can be easier to build dedicated NA brands in retail first. "Grocery listings of non-alcoholic wines build trust in product quality, so consumers know what they want when shopping in the on-trade market," he says.

Format-wise, Colyer notes a "growing preference" for smaller packs in the on-premise, which offer "quality, profitability and operational efficiency".

He adds: "That said, by-the-glass serves continue to play an important role, particularly in restaurants with strong food-led occasions and sufficient volume to maintain quality. Ultimately, the format should reflect the venue's trading style and customer demand."

When the hype settles

So what comes next for the NA category? Are too many brands flooding the market? While quality remains a key consideration, the on-premise is under pressure from all sides, limiting the amount of space operators can dedicate to alcohol-free brands. Is there a risk of saturation?

"I think there'll be a fairly brutal overhaul," says Noot's Whittle. "Buyers will go, 'These aren't delivering.' We've seen it many times across different categories — there's an initial excitement to get something on shelf and then it settles down."

Whittle says the brands that survive will be those with a distinctive proposition and a clear understanding of the occasions they are targeting.

"Consumers are going to be very intentional about the brands that they want to see on shelf or behind the bar," he says. "Brands need to make sure that they understand what they're offering and why." GDI



Wednesday's Domaine Vignette is a 0% ABV red wine alternative for midweek dining



Nozeco was established in the off-premise, but is starting to gain a foothold in the on-premise



The JP Chenet 0.0% range includes both sparkling (above) and still de-alcoholised wines

Celebrity can open doors, but the (non-alc) beer must do the rest

Bero co-founder & CEO John Herman says his partnership with actor Tom Holland has accelerated the brand, but the real test is whether the non-alcoholic beer can earn its place with consumers and bartenders. Interview by **Jessica Broadbent**



Bero co-founders Tom Holland (left) and John Herman set out to 'be something completely different'

How helpful to Bero is having Spider-Man — AKA actor Tom Holland — as co-founder? Bero's not quite two years old yet. Growth- and distribution-wise, we are in the position we are today because we have a super-credible, involved and authentic partner in this business. Tom isn't a celebrity collaborator. I don't call him and say: "Hey, you owe me a social post." He's the guy that was texting me late last night with naming suggestions for a new flavour of shandy.

The brand's acceleration and that spotlight has been wonderful, but if a brand is built with a celebrity tie-in that doesn't have credibility or a soul or quality or operational capabilities, it will fail. That's where when a consumer walks into the on-premise, they'll see through your brand really quickly — and sometimes they'll judge you as being *just* a celebrity brand. A celebrity can't get a brand everywhere.

Being co-founded by Tom has brought Bero a lot of opportunities, but the reality is that on-premise beverage directors worry about their guest experience a great deal, so the brand has to stand on its own two feet.

Will we see more celebrity-backed no-alcohol (NA) brands going forward? Many celebrities look for a hot category and where they can make a potentially quick buck. There have been other celebrity-linked entrants since Bero came out.

If the brand's grounded with great liquid and it can live without a celebrity five or ten years from now, and if it has a team behind it that knows how to operate in a high-growth, stressful industry then the brand has a shot. If it's fully dependent on a celebrity name, it'll fall apart. Consumers are too smart for that now.

More broadly in NA beer, how concerned that the ongoing gold rush could over-dilute the segment? This is less of an issue today than it was three years ago, when brands were rushing into the space with a bad product. It was risky because it increased the likelihood of a consumer's first experience with the category being negative. I don't see that as being a major factor anymore, because the quality in non-alcoholic as a category has improved.

There will always be three to five 'winners' that come out of it, but I don't think new entrants is a bad thing at all.

How has the NA beer category fared so far this year? Non-alc has become a really strong segment of the overall beer category. It's now viewed less as a tertiary category or separate entity and more as a subset within total beer. While you're seeing craft breweries close and legacy beer brands decline around the world, non-alc beer continues to grow in the high double-digit range, which is extremely encouraging.

At a channel level, there are new brands entering into the space and we're all telling our unique story to the consumer we're trying to attract — this is the best thing possible for a category that, while it's growing, remains a very small part of the total. We need it to grow faster and become much more meaningful, so that more consumers understand its role within the total set while more bartenders and buyers are thinking about it also.

In the US, the segment is seeing a lot of its growth in the country come from the on-premise. Earlier, the adoption of brands in the legacy beer space along with brands such as Athletic saw the off-premise lead the way. Today, the on-premise is really the vehicle that can grow the segment further. Indeed, while the US off-premise is in the plus high single/low double-digit range, the on-premise this year is growing at 45%.

That's extremely important because, more often than not, the first introduction to a brand happens in the on-premise. By having a stronger on-premise business, brands can have greater velocity in distribution and on-shelf at retail. So it becomes a healthy cycle that brands can lean into. It's certainly one we're trying to lean into.

The trend for 'zebra striping' is a strong opportunity for Bero and for NA beer. Around 90% of our consumers still drink. While Tom's teetotal, if I go out with my buddies, part of why I'm out is to have a little escape. »

» I don't want to have five beers and not be able to remember things, so the idea of having a 4% ABV or 5% ABV beer, then a non-alc fits my lifestyle.

Nowadays, it doesn't take an Oura ring to know that when you drink [too much] alcohol, you sleep poorly and feel bad the next day. All these things are leading people to make better decisions about what they put in their bodies. Whether you call it zebra striping or a normal lifestyle, that's just how people are reacting.

Has the segment's historical dynamic of 'off-premise first, on-premise second' changed? For Bero, the off-trade's still ahead of the on-trade. However, we want to flip that in the very near term. We're aggressively working to build the brand there.

In the US, the on-trade is still, to some extent, the Wild West: [NA] drinks menus are developing, with non-alc beer combined with non-alc cocktails and functional drinks. Brands like Athletic are starting to get into that space and we're focused on into it too. I think it's going to become very crowded, so a brand's distinctiveness and succinctness is paramount.

In its aesthetic and its look, we've been developing Bero for the on-trade since day one. Our introduction of a bottle [in July] was a pretty big undertaking, given that glass bottles were largely taken out of the supply chain here during the craft beer boom.

We're not completely sold on draught yet, but we're exploring this for the longer term. Ultimately, NA beer needs to become a higher-velocity play before it can warrant the tap space. Beyond the complexity of putting NA in draught, that's the bigger hurdle we need to solve first.

In Europe, it's a completely different story — the segment is much more developed than in the US. In Spain, for example, over 10% of overall beer sales are NA; it's a similar story in France and Germany. The UK isn't quite as developed, but you can't walk into a bar, pub or restaurant and not find a few non-alc options on draught. That makes Bero's relationship with the UK much more on-premise dominated — we're in about 1,300 locations.

How far behind Europe do you feel the US is for NA beer's on-premise penetration? In the US, non-alc beer right now is in the sub-2% range of total category. We've seen analysts quoting a potential ceiling of between 10% and 20%. The on-premise is going to drive that for the foreseeable future. Given the segment's at around US$2bn [per year] right now, if the on-trade's growing at over 40% and the off-trade's in high single-digit growth, NA beer in the US is on course to double in size to $4bn by 2030.

In volume terms, we expect to see the on-premise account for 70%–75% of NA beer volumes by 2030, from around 45%–50% now. This is all going to happen, but it's going to take time.

What's been NA beer's hindrance to growth in the US on-premise? Could it be slower consumer demand or a lack of brands? It's a bit of everything. We need to give credit to Athletic for looking at a consumer opportunity in the US that would previously be linked to having a drinking problem and for switching the dynamic to 'I just don't want to drink alcohol'. They helped change the dynamic to something more mainstream.

Another problem in the US has been that we have a very convoluted route to market. Even though we're NA, we're still regulated and treated in many of the 50 states in the same way that full-strength alcohol is. That means we go through the three-tier distribution system, and securing access to more on-premise locations is going to be dependent on the distributor prioritising it. That's an additional layer of training, education and development that doesn't exist in much of the rest of the world.

For a category to grow, it can't be done by just one brand. When you look at legacy beer brands that have created an non-alc version, that's wonderful because they put a lot of marketing dollars behind it, but that's for a brand that's relevant more to older generations as opposed to the next generation. Pure-play brands deliver a level of authenticity and credibility to the category that those brands can't. Legacy brands deliver beer credibility, but not NA credibility.

While many other pure-play brands have chosen to emulate Athletic, we never set out to do that. We really want to be something completely different, to drive incrementality and a different demographic while expanding the mindset of usage. The more [NA beer] brands that can discover a distinct moment or consumer will allow the category as a whole to grow, as opposed to just cannibalising itself.

How have you tried to achieve this with Bero? As well as brewing great beer, we look at innovation differently. For many, innovation can look like proliferation, whereas for us it's more about introducing new consumers or usage occasions.

Two-thirds of our consumers are under the age of 45. For the NA beer segment and its brand leader, it's only about 45%. We're capitalising not only on Gen Z consumers, we're also capitalising on the 30-somethings with kids who want an elevated form of beer that speaks to their lifestyles.

It's important to bear in mind that NA beer has a younger consumer, is more balanced in gender, ethnicity and heritage, and is pretty differentiated to full-strength beer.

What longer-term challenges do you foresee for NA beer in the on-premise? There are so many layers of education — consumer, distributor, retailer and bar owner — that it's going to take time, which in turn becomes a risk for the category.

If we can't holistically educate and develop all the people in the chain that need to be part of the journey, NA beer won't hit the scale in the on-trade that it needs to. That makes it harder for brands to thrive and grow, because you need to be able to hit a level of scale that allows you to be a sustainable business. GDI

Bero unveiled Spider-Man collectible cans to coincide with the release of its co-founder's latest film in July



Bulk means business: why this robust channel deserves more attention

Bulk spirits operators are proving their resilience in current market conditions, with trust and reliability holding the key to building long-term relationships. **Richard Woodard** reports



Tomatin sees potential across Asia — notably Japan and China — as well as Latin America and Africa

There's sometimes an air of snobbery around attitudes to the bulk spirits sector. For many, 'bulk' is simply another way of saying 'cheap' — products that, because of their lack of obvious sex appeal, aren't worth paying much attention to. As a result, bulk spirits simply don't get talked about very much.

But that's a mistake. As American Whiskey Association (AWA) president & CEO Michael Bilello points out: of the 8.3m proof gallons of bourbon exported in H1 this year, 5.87m proof gallons — or 71% — were shipped in bulk (US Customs Service data provided by the Census Bureau).

"Bulk trade is not a secondary or niche part of American whiskey exports," he says. "It is an important commercial channel that allows US producers to serve international bottlers, brands and customers while creating additional demand for American grain, barrels and distilling capacity."

That function is all the more important at a difficult time for the industry. Hans van der Kloot, president of Sasma, a Dutch-based business that spans beverage alcohol, plus the food, pharmaceutical, cosmetic and industrial bulk spirits sectors, acknowledges the impact of the current business landscape, but adds: "Bulk trading tends to be somewhat more resilient than finished goods, because buyers still need to source base material regardless of broader market conditions."

Sasma has been expanding its range — especially agave spirits and rum — and is seeing renewed interest from RTD producers, as well as from the pharmaceutical and cosmetic sectors, which Van der Kloot says "tend to be less cyclical than beverage alcohol".

Where the opportunities lie

And there are still opportunities. Scotch malt distillery Tomatin, which combines bulk sales with its branded business, highlights Asia — especially Japan and China — plus Latin America and Africa. Global sales director Graham Nicolson says: "India is on the radar of everyone at the moment, which makes it a very competitive market. The FTA [free trade agreement with the UK] will have a long-term positive impact, but I don't think it is the instant silver bullet that many think. The market is complex and will take time to settle."

The reduction in import tariffs brought by the FTA will boost scotch, but it won't be straightforward. Indian spirits companies like Radico Khaitan import a lot of bulk into the country for their IMFL brands — the company puts its annual purchases of malt scotch at about GBP20m (US$27m) — and Radico Khaitan's president of international business Sanjeev Banga acknowledges the financial benefits of the cut.

But what to do with the savings? Keep them and improve margins? Pass them on to the consumer by lowering prices? Reinvest in quality by increasing the malt content in the blend? "Which route a company will take will depend upon their own strategy," Banga concludes.

The tariff cuts will also, theoretically, make Bottled-in-India (BII) scotch more competitive. But, as Banga points out, import duty is only one element of the cost chain. Even for Bottled-in-Origin (BIO) scotch, prices are only expected to fall by 8% to 10%; for BII whiskies, it will be less.

Flexibility amid uncertainty

In recent months, the opportunities offered by India have been overshadowed by conflict in the Middle East and its effect on shipping, particularly in the Strait of Hormuz. For Van der Kloot, the disruption "was the defining story for our market this quarter", sharply driving up freight, insurance and fuel costs and feeding directly into ethanol and neutral alcohol pricing. »

TOP **TAKEAWAYS**

- Bulk spirits are an important part of the global industry, with operators currently scenting opportunities in markets across Asia, Africa and Latin America.
- India's free trade agreement with the UK will reduce bulk scotch import tariffs, but the situation is complex and price reductions may not be as substantial as some hope.
- The conflict in the Middle East, leading to shipping disruption in the Strait of Hormuz, has had a mixed impact on operators, although costs have been driven up.
- While price is crucial, companies stress the importance of longevity, trust and liquid quality when creating and maintaining business relationships.

» By contrast, Nicolson reports "very little direct impact" on Tomatin, arguing that supply chains are far more stable than they were during the Covid-19 pandemic, although costs remain elevated. "Overall, I would say the key challenge facing the market is demand and customer caution, rather than supply chain availability," he says.

Nonetheless, there are undoubted challenges in today's marketplace, challenges which the AWA's Bilello believes bulk spirits are well equipped to address.

They offer, he says, multiple options for importers, from local bottling to private label programmes and other brand development opportunities. They can also help to lower freight and packaging costs, improve responsiveness to market demand and allow businesses to use bottle sizes, packaging and formats suited to a particular market.

Making the case for bulk

Part of the AWA's remit is to lobby for improved representation for bulk spirits during trade negotiations, which tend to focus more on bottled goods. Bilello argues that bulk can often create a bridgehead into markets where finished products might struggle due to freight costs, packaging requirements, tariffs or local tax structures.

"Market access must include both the bottle and barrel," he says. "If a trade agreement lowers the tariff on a finished bottle, but leaves bulk whisky trapped behind discriminatory taxes, customs rules or bottling restrictions, it has addressed only part of the opportunity."

Individual businesses have their own responses. Earlier this year, Sasma opened a new purpose-built logistics and blending facility in Halsteren, the Netherlands, strategically located between the ports of Rotterdam and Antwerp. The plant has a capacity of over 1m litres and aims to offer a "one-stop shop" for bulk spirits needs.

"We now own the process end to end — from receipt and storage through to blending, dilution, denaturing, filling and despatch," says Van der Kloot. "The practical benefits are faster turnaround, custom batch sizes, greater specification flexibility and the confidence that comes from working with a supplier who controls the process rather than relying on third parties."



Sasma's new bulk spirits hub, strategically located between the key ports of Rotterdam and Antwerp

Beyond the price tag

Price will always be at the centre of any bulk spirits deal, but there are, arguably, more important factors, with the AWA championing long-term partnerships over mere commodity transactions. "In bulk spirits, the liquid may begin the conversation, but reliability wins the relationship," says Bilello.

Tomatin's Nicolson concurs, explaining: "We need to look at the bigger picture and ensure we have trust from our partners. 'Can this company supply me quality spirit when I need it, and for the foreseeable future?' are the questions that buyers ask themselves after the initial headline price discussion."

And, of course, the liquid has to be right. "Good, consistent spirit is the cornerstone," Nicolson adds. "If it is not good quality, then price will not matter." GDI



The annual World Bulk Wine Exhibition aims to 'support producers in identifying new markets'

Bulk trade prepares for WBWE 2026

Bulk spirits operators are gearing up for the annual World Bulk Wine Exhibition (WBWE), which takes place in Amsterdam from 30 November to 1 December — an annual gathering of hundreds of exhibitors from a wide variety of nations.

Organised by Vinexposium, last year's event, the 17th edition, attracted 2,150 participants from 60 markets (up 8% on 2024) and 240 exhibitors representing 25 countries, with bulk spirits a small but growing part of that mix, accounting for 6% of exhibitors. More than 1,000 business meetings were organised, and more than 1,000 products tasted, with initiatives including the International Bulk Wine Competition (which also includes spirits) and The Academy encompassing "strategic conferences, geopolitical analyses and masterclasses".

New WBWE director Caterina Tucci says of this year's event: "The WBWE is a long-standing event for the bulk sector, and our ambition is to continue evolving its role in line with market shifts. In a complex environment, we want to support producers in identifying new markets." Find out more at worldbulkwine.com



Image: iStock.com/bluejayphoto

Across Germany, drinkers are cutting back on beverage alcohol, with the latest industry data revealing declines across every major drinks category in 2025

Germany's drinkers are changing. Can its struggling spirits industry keep up?

Beer, wine and spirits are all losing ground in Germany. But amid the gloom, pockets of growth are emerging in the spirits category. **Joe Bates** reports

Germany is falling out of love with alcohol. That's the damning picture painted by the latest industry data, with every major drinks category in this key European market declining in 2025.

Beer, still by far the country's favourite alcoholic drink, bore the brunt of the downturn, with sales falling almost 6% to around 78m hectolitres — the lowest level since records began in 1993. Wine was hardly spared, with consumption down 4.3% year on year to 17.8m hectolitres, according to the International Organisation of Vine and Wine.

Cheer was also in short supply in the spirits sector, where a swing towards health and moderation collided with a lingering cost of living crisis. According to the German federal government, 149m litres of pure alcohol from spirits were taxed in 2025, down 5.3% year on year.

This dispiriting drop is part of a longer-term decline: Germany's five largest spirits categories — vodka, brandy, bitters, rum and korn spirits — all recorded negative CAGRs between 2019 and 2025.

Lighter aperitifs prosper

There *are* pockets of growth, however. "The aperitif category continues to benefit from consumers looking for lighter, more convivial and often lower-ABV drinking occasions," observes Pernod Ricard marketing director Northern Europe, Benjamin Franke. "Brands such as Lillet and Ramazzotti are very well positioned to address this trend. At the same time, moderation is becoming increasingly important, with 'sober curiosity' and 'zebra striping' entering the mainstream."

In response, adds Franke, Pernod Ricard has expanded its portfolio for those "looking to moderate their alcohol consumption".

Franke also heralds RTDs as a major growth engine in the German market, with convenience and flavour innovation helping to drive demand.

Pernod Ricard has "actively invested" in the category, he says, with recent launches spanning Havana Club Spezi, a 10% ABV collaboration between the Cuban rum brand and German cola-and-orange soda brand Spezi; Ramazzotti Limoncello Spritz, packaged in a 20cl glass bottle; and Malibu Peach Iced Tea, a 10% ABV rum-based canned RTD. »





Recent Pernod Ricard RTD launches in Germany include Havana Club Spezi (left) and Ramazzotti Limoncello Spritz

'Fundamental shift' to NA spirits

» The importance of the no-alcohol (NA) segment is hard to ignore. IWSR ranks Germany among the world's fastest-growing markets for NA spirits, with volumes forecast to rise at a CAGR of 11% over the next three years.

"We do not see mindful drinking as a short-term trend, but as part of a fundamental shift in consumer behaviour," says Carl Graf von Hardenberg, director international business at Hardenberg-Wilthen AG, one of Germany's largest and oldest spirits producers. "People are making more conscious decisions about when, what and how much they drink. At the same time, they still want sophisticated beverage choices in social situations."

To tap into this trend, the Saxony-based producer recently introduced Hardenberg Zero.Zero, an alcohol-free gin built around botanicals including bergamot, bitter orange peel and ginger.

Tequila sees an opening

Tequila, meanwhile, is bucking the broader downturn. Germany was the world's third-largest export market for tequila in 2025, behind only the US and Spain, according to figures from the Consejo Regulador del Tequila (CRT). Around 6m litres were consumed in the first 11 months of the year, up 1.1% on the same period in 2024.

Market leader Sierra Tequila, owned by Poland's Stock Spirits, is moving to capitalise on this momentum. In March, the group unveiled its Sierra 100% Agave range, comprising blanco, reposado and añejo expressions, and targeted at value-conscious consumers keen to step up from cheaper, standard mixto tequilas (see p9).

The bitter exception

Bitters, Germany's joint-second-largest spirits category alongside brandy, has had a tough few years. The category accounted for 11% of the market in 2025, according to IWSR, but posted a negative CAGR of 3% between 2019 and 2025.

Jägermeister, however, continues to defy the decline. Global sales of the market leader rose 7.7% to 9.2m cases in the year ending March 2026, with Jägermeister Orange emerging as a key growth engine both in Germany and overseas.

The zesty, citrus-forward line extension of the classic German herbal liqueur has proved particularly effective at bringing new consumers into the brand.

"Following its debut in Germany as one of the most successful spirits launches in a decade, it has helped attract new consumers and drinking occasions," says Mast-Jägermeister Deutschland GmbH managing director Torsten Römsch.

"To sustain this momentum, we continue to invest in brand-building, consumer experiences and strong partnerships across retail and the on-trade."

That confidence is also reflected behind the scenes. In April, Mast-Jägermeister opened a new EUR17.6m (US$20.3m) barrel-storage facility in Kamenz, close to the Polish border. Spanning 5,000sq m, the sustainable facility houses 225 barrels of ageing base Jägermeister spirit, underlining the company's long-term commitment to its flagship brand.

In the marketplace, meanwhile, Römsch says the focus is on creating "relevant brand experiences" wherever people come together to celebrate. That means festivals, events, cultural collaborations and the brand's content-to-media campaign, 'The Night Is Yours'.

"Our aim is to strengthen Jägermeister's authentic connection with music, subculture, and the communities that have always been at the heart of the brand." »

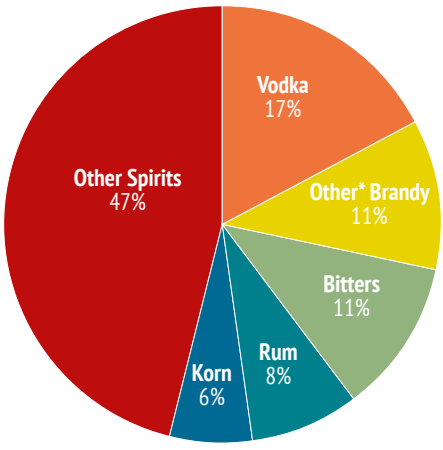


Hardenberg Zero.Zero targets consumers seeking sophisticated non-alcoholic options

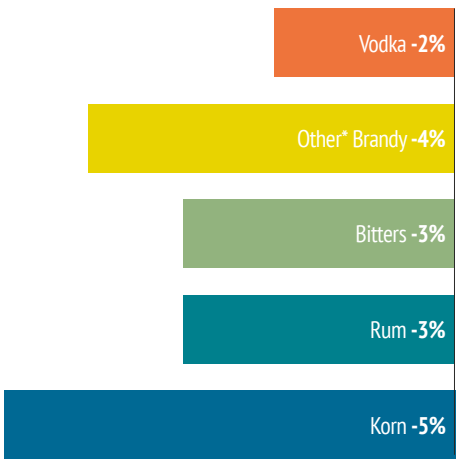
DATA DROP

Top 5 Spirits Categories in Germany

% Share of GTR Volume Total 2025



% CAGR Volume 2019–25



**Other brandy refers to non-cognac brandy*

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

TOP TAKEAWAYS

- **Market contraction**. Germany's overall alcohol market declined sharply in 2025, driven by falling sales, a shift towards moderation and cost of living pressures.
- **Growth pockets**. Spirits producers are finding refuge in no/low-alcohol offerings, lighter aperitifs, convenient RTD cocktails and resilient categories like tequila.
- **Orange future**. Jägermeister Orange has proven a game-changer for the historic German bitter, recruiting new consumers and broadening consumption occasions.
- **Heritage categories are being reinvented**. Producers are attempting to modernise traditional German spirits including korn, using premium ingredients, contemporary positioning and new product formats.
- **Regulatory threat**. The industry faces a major threat from a proposed 20% excise tax hike on spirits set for 2027, alongside expanding bans on drinking in public and proposed advertising restrictions.

Finding balance

» The Bitter Truth, founded by Munich bartenders Stephan Berg and Alexander Hauck in 2006, continues to perform strongly despite the considerable pressures facing Germany's on-premise. The producer of premium cocktail bitters, liqueurs and aromatised spirits celebrates its 20th anniversary this year, with co-founder Stephan Berg saying the milestone has put a renewed spotlight on its home market.

"Everyone we speak to is undoubtedly under pressure," he says. "Running just a bar with no food is becoming increasingly difficult. Per-capita spending has dropped, nights start earlier, and most days end earlier too."

According to Berg, the versatility of bitters is helping the category adapt to a changing market. "They work not only in alcoholic drinks but also in no/low-alcohol serves, bringing balance and complexity. At the same time, our range of liqueurs is getting more popular by the day, fitting well into the recent spritz trend and going hand in hand with our bitters."

Last year, The Bitter Truth launched Hazy Hops Bitters — a nod to the company's Bavarian heritage and Germany's beer culture — using Bavarian-grown hops as its primary aromatic focus. Yet in this busy anniversary year, travel, masterclasses and partner visits haven't left much time for product development, Berg reveals.

"As we rush towards the end of 2026, we have been listening to the bar trade demanding the return of a product that we produced about ten years ago," he says. "With Bar Convent Berlin in October [see p58], we will have a small production run of our Aromatic Leaf Bitters available again."

Old categories, new ambitions

Germany's traditional grain spirit, korn, and weinbrand (brandy) continue to lose volume, weighed down by long-held consumer perceptions. Korn is often associated with low-cost shots, while brandy is increasingly viewed as a drink for older generations.

But a new wave of producers is looking to give these legacy categories a modern lease of life. Among them is Nork, a startup founded in 2016, which is reinventing korn through premium, local ingredients, contemporary packaging and unusual cask finishes, including peat-smoked whisky barrels and sweet-wine casks.

Meanwhile, Hardenberg Wilthen has been expanding its historic Hardenberg korn brand into the whisky category. "We are using almost three centuries of expertise in grain production and distilling to create modern German whiskies," says Graf Von Hardenberg. "The Hardenberg Club Triple Malt Whiskey is a good example: it translates our distilling heritage into a contemporary product concept and is designed to appeal both to experienced whisky drinkers and consumers discovering the category for the first time."

The regulatory squeeze

Despite their ambitious plans, Germany's spirits producers may soon face another major hurdle. A regulatory bombshell is heading towards the already beleaguered industry, with the impact set to be felt from 1 January 2027.

In July, the German Federal Cabinet approved a budget plan to raise excise taxes on spirits, sparkling wine and alcopops by 20%. Beer and still wine would be exempt under the draft legislation, which will add around EUR0.70 to a standard 70cl bottle of 40% ABV vodka. Framed as a health-driven measure, Germany's Finance Ministry expects the tax hike to generate an additional EUR455m in revenue.



Nork Derbe Cherry Brandy Cask: a cask-finished expression aimed at reviving the korn category

But the plans have met fierce opposition from the drinks industry. In early September, an alliance of German beverage trade associations — including the Federal Association of the German Spirits Industry and Importers (BSI) and the Federal Association of Wine, Sparkling Wine and Spirits (BWS) — called on the government to abandon the increase.

The group argued that higher taxes don't necessarily translate into higher revenues, pointing to the UK's recent excise increases as an example of a similarly "misguided and loss-making" fiscal measure.

The alliance warned that the hike would hit wine and spirits producers of all sizes, both domestic and international, as well as restaurants, bars and logistics companies, with consequences ranging from job losses and lower sales to rising costs. It also challenged the health rationale for the increase, noting that weekly alcohol consumption in Germany among 18 to 25-year-olds is now at its lowest level since 1973.

The proposed tax hike is not the only sign of a tougher regulatory climate for beverage alcohol. Deutsche Bahn began rolling out a ban on alcohol consumption across its 5,400 stations in September, while Germany's Green Party is calling for further restrictions, including tighter controls on outdoor advertising, campaigns and sponsorships. It has also called for an end to the long-standing exception allowing 14 and 15-year-olds to consume certain alcoholic drinks under parental supervision.

For Germany's already battered spirits sector, these headwinds add another layer of pressure. If passed, the tax hike will likely spur companies to invest further in their NA lines and push more drinkers towards the comparatively less-taxed wine and beer categories. GDI



The Bitter Truth's Hazy Hops Bitters nods to its Bavarian heritage and Germany's beer culture

Heinemann taps Iceland's high-spending liquor shoppers

Germany's Gebr Heinemann has officially launched its duty-free operation at Iceland's Keflavík Airport, the country's main international gateway, marking a significant shift from state-run to private-sector retail. Wine and spirits are a key focus category for the new operation.

Iceland's government-owned airport operator, Isavia, awarded the contract to Heinemann two years ago, following its decision to outsource the retail operation previously run through its now-defunct subsidiary, Fríhöfnin. In its final full year of trading, Fríhöfnin generated ISK15.162 billion (US$126m) in revenue, although the liquor share was not disclosed.

Since then, Heinemann has gradually revamped the stores and now operates under the new Ísland Duty Free brand — '*Ísland*' being Icelandic for 'Iceland'. The travel retailer's nearly 4,000sq m footprint comprises a 1,600sq m departures store, a sprawling 2,000sq m arrivals store and a gate unit.



Heinemann's new Ísland Duty Free arrivals store

The sizeable arrivals store reflects historic high spending on liquor by Icelandic travellers returning from abroad. As in other Nordic markets in mainland Europe, alcohol is heavily taxed and sales are controlled by a state monopoly: ÁTVR through its retail arm, Vínbúðin. This makes the Heinemann arrivals store a magnet for shoppers wanting duty-free prices and wine and spirits.

Heinemann has its highest-ever share of local products in the new offer (30%), giving Icelandic liquor brands greater exposure to international travellers. Keflavík is predominantly a leisure airport, with leisure travellers accounting for around 90% of its 8.16m passengers in 2025.

Brown-Forman bets big on premium-plus whiskey in GTR with new digital tool

Brown-Forman Global Travel Retail unveiled a new digital engagement tool at the TFWA World Exhibition in late September, as part of its 'Be a Traveller, Not a Tourist' campaign.

Designed to connect Jack Daniel's with the vacation experience, the new tool offers travellers city recommendations around the world and forms part of a broader increase in the company's investment in GTR activations.

"We are significantly stepping up our investment in premium travel retail, with a growing number of impactful activations planned across major hubs around the world," said Brown-Forman GTR director Oscar Camargo.

Jack Daniel's and what Brown-Forman called "the premium-plus whiskey opportunity" were a key focus at Cannes, with Woodford Reserve, The Glendronach and other high-end spirits also showcased.

Jack Daniel's is the top premium whiskey in GTR and the top premium-plus whiskey across GTR and domestic markets by both volume and value (IWSR data), and Brown-Forman has rolled out its "most strategically targeted media programme" for the brand in the channel to date.

Part of the global 'That's What Makes Jack, Jack' campaign, the programme combines "high-impact airport OOH with data-driven digital targeting of confirmed travellers before and during their journey" at GTR hubs including Seoul, London, Dubai and Amsterdam.

Meanwhile, Brown-Forman showcased a new GTR range for The Glendronach, which is celebrating its 200th anniversary. The Glendronach House Editions — inspired by Seville, Venice and Paris — underpin a major GTR push for the brand, which is already live in Europe. Activations are scheduled for Asian hubs, including India. An influencer campaign featuring seeding with whisky bloggers, is helping to amplify the launch globally.

Woodford Reserve has also launched a new immersive GTR campaign celebrating historic "firsts in American whiskey" and inviting travellers to discover its premium-plus portfolio. The activation puts the spotlight on GTR exclusives such as Woodford Reserve Double XO Blend, which showcases the distillery's double-barrel ageing technique.

Heineken serves up personalised beer with AI

Beer producer Heineken has introduced Personalised Draught as "a first look at the future of beer". Developed by its innovation arm, Heineken Studio, the AI-driven technology assesses tastes, moods and occasions to create more than 100 tailored beers.

From a single tap, Heineken says drinkers can choose from 135 different expressions, with options spanning traditional brewing characteristics such as strength (0.0%–5% ABV) and intensity.

For now, 'Personalised Draught' can only be tried at the Heineken Experience in Amsterdam and the Heineken Studio Truck, where visitors can interact with the technology. The truck will be going global with appearances at motorsports events like F1 Mexico and the Las Vegas Grand Prix.


Customers scan a QR code to create their tailored draught serve



MARKETING TRENDS

Chris Tyas

The next big drinks innovation isn't in the liquid

For years, drinks innovation has mostly meant putting something new in the bottle: a new flavour, botanical, limited edition or twist on something consumers already know. Which is why I was interested in what Diageo has been saying recently.

Under new CEO Dave Lewis, the British multinational's strategy talks about building a "full price and format ladder" and serving consumers across a wider range of occasions. In July, it also launched 'Small Bottle, Big Possibilities' in the UK, giving 20cl and other smaller formats more visibility across 230-plus stores at supermarket chain Asda, with Tesco and Sainsbury's to follow.

On the face of it, this is a story about smaller bottles. But there's a more interesting idea underneath it.

Maybe drinks companies don't need to spend quite so much time inventing new liquids. Maybe there's more growth to be found in changing the way existing ones fit into people's lives. Because lack of choice is hardly the problem.

Gin is the obvious example. Pink gin led to flavoured gin, then increasingly exotic flavoured gin, until shelves were packed with different versions fighting for broadly the same drinking occasion.

At some point, another flavour stops feeling particularly new. That doesn't mean liquid innovation has run its course. IWSR estimates innovation contributed 55% of the US$231bn of value added to beverage alcohol over the past decade.

But there are other places to innovate.

Start with the bottle

Diageo's small-format push is a good example. Why does a bottle of spirits have to be 70cl? A smaller bottle costs less to try, involves less commitment and makes sense for people who still want a drink but don't necessarily want a full-size bottle in the cupboard.

There's evidence of that shift already. In the US, individual small-format alcoholic drinks are now a $670m business and grew 16% last year. NIQ found nearly half of small-bottle buyers mentioned affordability, while more than 40% pointed to portion control and occasion suitability.



Groove Armada musician & Wildfarmed co-founder Andy Cato with Signature Brew MD Tom Bott

Gallo is seeing something similar in wine. Its 20cl Tetra formats have become its fastest-growing pack size by dollar sales growth.

Think about the moment

Kocktail is interesting for a similar reason. Its new Kocktail Glass puts 10cl of a premium premixed negroni, margarita or old fashioned directly into a reusable cocktail glass. Add ice and a garnish and it's ready.

The cocktail obviously still has to taste good. But what the UK-based small-batch brand has really done is remove some faff.

You can have a decent cocktail at home without buying several bottles, measuring everything out or wondering where the cocktail shaker went.

IWSR says global RTD volumes grew 3% in 2025, while every other major alcohol category declined. It also argues that successful RTDs increasingly need a clear job to do, whether that's at a barbecue, on the beach, before going out or when you want a decent cocktail at home.

Brands often begin with, "What can we make?" Perhaps the better starting point is, "Where are we useful?"

Create conversation

Then you have BuzzBallz and Pop-Tarts. They've teamed up on two limited-edition 15% ABV cocktails inspired by Frosted S'mores and Frosted Brown Sugar Cinnamon Pop-Tarts.

Is the world crying out for a Pop-Tarts cocktail? Probably not. But that's almost beside the point.

It taps into 1990s nostalgia, gives Millennials something instantly recognisable and makes the launch something people might actually send to each other.

London independent brewery Signature Brew is doing something different with its new lager, Do It Right, created with electronic music duo Groove Armada and regenerative farming business Wildfarmed. Here, beer becomes a way into music and regenerative agriculture.

In an aisle already full of perfectly decent drinks, sometimes the story around the product earns the first bit of attention.

Perhaps the product isn't the starting point

Recent Ipsos–IWSR research suggests people are becoming more intentional about when, where and how they drink. At the same time, social connection and memorable experiences remain important reasons for drinking.

People might be drinking less or drinking more selectively. They haven't suddenly lost interest in seeing friends, going out or having a good night.

Another gin flavour might technically be new. But does it give someone a new reason to buy gin? Perhaps the bigger opportunities are more practical.

Make the bottle smaller, so I can afford to try it. Make the serve easier, so I can have it at home. Put it in a format that fits the occasion. Connect it to something I already care about.

For a long time, drinks innovation teams have essentially been asked: "What new drink can we create?" The more useful question now might be: "Why would someone choose this drink tonight?" 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 brands set their sights on Asian markets including China, Hong Kong, Japan, Malaysia and Singapore, harnessing the power of celebrity names and social media



Carlsberg *Asia unit targets 'digitally savvy'*

Carlsberg's Asia unit partnered with Chinese social media & e-commerce platform RedNote for a digital marketing campaign aimed at the so-called "digitally savvy". 'Cheers From the Origin' is targeted at "key" Asian markets including China, Hong Kong, Malaysia, Singapore and Vietnam, and includes a video ad starring Chinese actor Shawn Dou.



Pernod Ricard *Martell & the Moon Festival*

Pernod Ricard is running a marketing campaign for the Martell cognac portfolio centred around the Chinese Mid-Autumn Festival. A series of travel retail activations are planned across the group's Asia region, including in China, Singapore and Taiwan, until 31 October. Visuals focus on the moon — a central feature of the annual event.

Diageo *Johnnie Walker enlists Arata Iura*

Diageo recruited Japanese model & actor Arata Iura for a one-time marketing move for Johnnie Walker scotch whisky's Blue Label iteration. As part of the partnership, Iura featured in the Japanese-language edition of *Forbes* magazine, as well as in a video interview which revolved around Johnnie Walker's strapline, 'Keep Walking'.

Heineken *Tiger Beer gets musical*

Through August and September, Heineken ran an AI-powered campaign allowing consumers to turn "personal stories of courage into songs". Making a tenuous link to the Singaporean beer brand behind the activation, Heineken says: "The campaign is built on the belief that everyone's inner tiger is more powerful than they think."





Suntory Global Spirits *Ambassador for Haku*

In a flurry of firsts, Suntory Global Spirits has launched the inaugural marketing campaign for Haku Vodka and hired Japanese musician & actor Rina Sawayama as its global ambassador. Sawayama stars in an ad for the campaign, 'Made to Shine', which hopes to capitalise on international interest in Japanese culture.



GTR staff–shopper interaction rises, but alcohol buyers harder to reach

Exclusive new figures, drawn from m1nd-set's B1S database, reveal a rebound in staff engagement across global travel retail, while highlighting contrasting trends among alcohol shoppers in Europe and Germany. **Michael Barrett** reports

Staff–shopper engagement is making a strong comeback in global duty free. In H1 2026, m1nd-set figures show 56% of shoppers interacted with a member of staff — up from 47% in 2023. And those conversations matter: three-quarters of those who engaged said staff influenced their purchase decisions (see below right).

Staff engagement has recovered steadily since the Covid-19 pandemic. After falling from 63% pre-Covid to 47% in 2023, interaction levels rose to 49% in 2024, 53% in 2025 and 56% in H1 2026.

While the frequency of interactions has fluctuated, their influence has remained consistently strong. After climbing from 49% pre-Covid-19 to 77% immediately afterwards, the influence of staff–shopper interactions settled in the low-to-mid 70s, before reaching 75% this year.

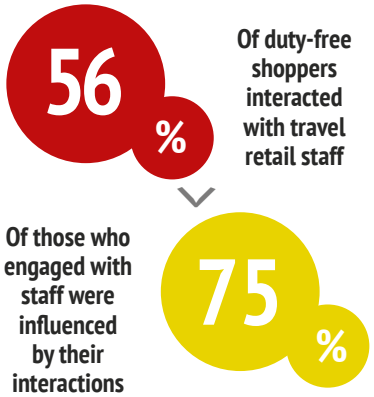
The regional picture is relatively even, with interaction rates ranging from 52% to 58% (see chart below). The Americas record the highest staff influence at 78%, while Europe sits slightly below average at 73%. Africa & the Middle East tells a different story, combining above-average levels of engagement with below-average influence.



Image: iStock.com/OlenaYakobchuk

More shoppers are seeking the advice of GTR staff, with contact rising steadily since the Covid-19 pandemic

Interaction with Sales Staff & Impact
Duty-Free Shoppers (YTD 2026)



Less contact, greater impact among global alcohol shoppers

Alcohol shoppers may be less likely to seek staff assistance in travel retail, but when they do, it counts.

Just 40% of global alcohol shoppers interacted with staff in H1 2026 — well below the 56% duty-free average, according to m1nd-set (see top chart p53). Yet 78% of those shoppers reported that the interaction influenced their purchase, 3% higher than the overall duty-free figure (see chart two, p53).

Interaction between global alcohol shoppers and travel retail staff has »

Interaction with Travel Retail Sales Staff & Impact YTD 2026
Duty-Free Shoppers Comparison by Airport Region

	Global	Africa & Middle East	Americas	Asia-Pacific	Europe
Interaction with sales staff	**56%**	57%	58%	55%	52%
Influence of the sales staff (% out of those who interacted)	**75%**	74%	78%	75%	73%

Green/gold cells indicate significantly higher/lower versus global figures

Source: m1nd-set.com

» hovered around 40% over the past two years, following a gradual decline since 2023. The real movement has been in effectiveness, with staff influence rebounding strongly in 2026 after several years in the low 70s.

Regional differences are more pronounced among alcohol shoppers in travel retail, according to m1nd-set. Interaction is highest in the Americas (44%) and lowest in Africa & the Middle East (35%), while staff influence is strongest in Africa & the Middle East (81%) and Europe (79%).

Europe: consistent chat, growing influence

In Europe's travel retail stores, alcohol shoppers broadly mirror the global picture. Forty per cent interact with staff, while 77% of those interactions influence the purchase decision, marginally below the global alcohol benchmark.

Staff interaction in Europe has risen steadily from 33% in 2023 to 40% in the first half of 2026 (see chart third right), while influence has increased from 65% to 77% over the same period. When shoppers engage with staff at European airports, staff influence is considerably higher than in other regions, reaching an impressive 81%.

Germany: more interaction, less impact on sales

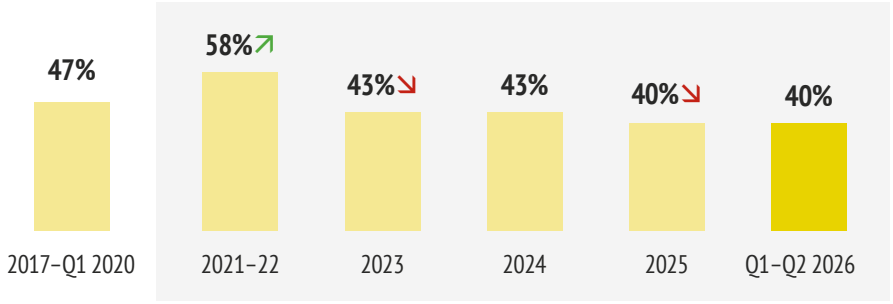
Alcohol shoppers in Germany's travel retail stores interact with staff slightly more frequently than the European and global averages, at 42%.

However, these interactions are less influential, with just 68% of shoppers reporting that their exchange affected their final purchase decision (see chart bottom right). This is significantly below both the European and global alcohol averages for staff influence.

Germany has seen a significant recovery in staff–shopper engagement, rising from 20% in 2023 to 42% in H1 2026. However, the sharp fall in staff influence — from 79% in 2025 to 68% in H1 2026 — suggests that stronger engagement is not yet translating into greater impact. This points to an opportunity to improve the effectiveness of staff interactions and strengthen their influence at the point of purchase. GDI

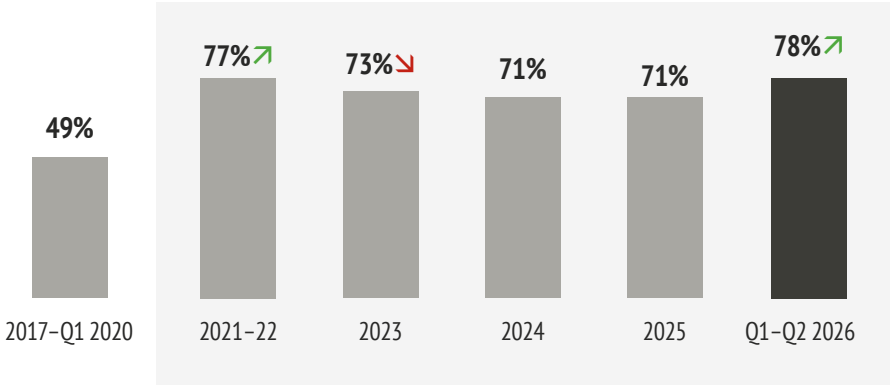
For more detailed insights on European alcohol buyer behaviour, please contact m1nd-set directly at ***info@m1nd-set.com***

Global: Interaction with Sales Staff Alcohol Shoppers



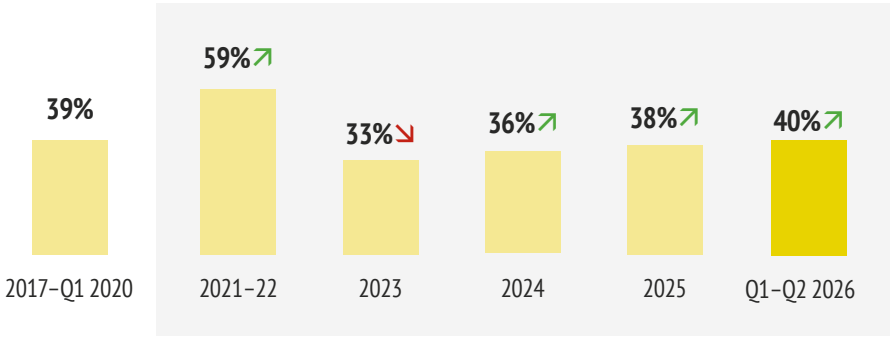
↗/↘ cells indicate significantly higher/lower versus the previous period

Global: Staff Influence Among Buyers who Interacted Alcohol Shoppers



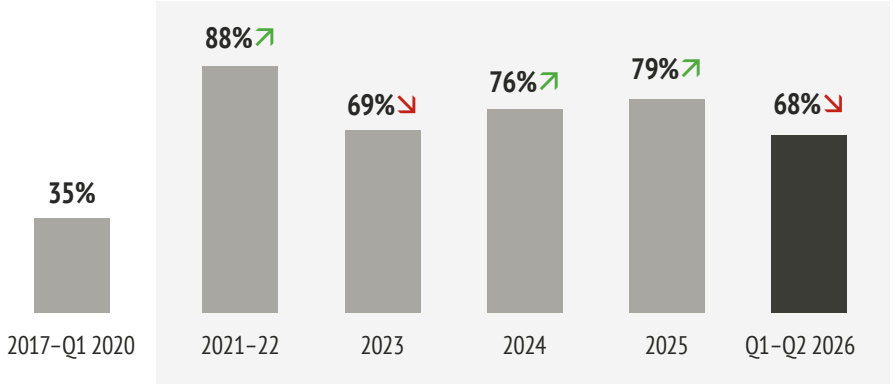
↗/↘ cells indicate significantly higher/lower versus the previous period

Europe: Interaction with Sales Staff Alcohol Shoppers



↗/↘ cells indicate significantly higher/lower versus the previous period

Germany: Staff Influence Among Buyers who Interacted Alcohol Shoppers



↗/↘ cells indicate significantly higher/lower versus the previous period

Source: m1nd-set.com

New products

Take stock with our roundup of the latest drinks launches





2026 Van Winkle Whiskey Collection

The annual series from Sazerac Co's Old Rip Van Winkle Distillery, which moved to Buffalo Trace in 2002, returns this year with six expressions, the oldest having been matured for 23 years.

- American whiskies, six expressions, all distilled at Sazerac's Buffalo Trace Distillery in Kentucky. The range comprises:
  - Old Rip Van Winkle Bourbon 10yo, SRP of US$169.99 per 75cl bottle.
  - Van Winkle Special Reserve Bourbon 12yo, $199.99.
  - Pappy Van Winkle's Family Reserve Bourbon 15yo, $299.99.
  - Pappy Van Winkle's Family Reserve Bourbon 20yo, $399.99.
  - Pappy Van Winkle's Family Reserve Bourbon 24yo, $499.99.
  - Van Winkle Family Reserve Rye 13yo, $299.99.
- On sale in limited — albeit unspecified — quantities in the US on and off-premise channels from this week.



Arbikie Highland Estate Distillery's The Signature

Positioned as the first iteration in the brand's "long-term single malt programme", The Signature has been distilled using barley grown on the Arbikie Estate in Angus.

- Scotch whisky, single malt, Highlands,10yo. Matured in ex-bourbon; 48% ABV.
- Released on 7 September — the tenth anniversary of the distillery's commencement of production. On sale online for worldwide delivery, as well as "through Arbikie's worldwide trade partners".
- SRP of GBP250 (US$338) per 70cl bottle, limited to 1,000 units.

Remus Repeal Reserve Rye Whiskey

This limited edition represents the debut rye whiskey from MGP Ingredients' Remus brand.

- American whiskey, straight rye, Indiana. Comprises reserves of the brand's "95% signature rye mash bill" distilled in 2015 and 2016; 55.5% ABV.
- Released this week nationwide in the US through selected operators in the off-premise channel.
- SRP of US$79.99 per 75cl bottle, available "while supplies last".



The Glendronach Boynsmill House Edition

Brown-Forman is marking the 200th anniversary of The Glendronach with this limited-edition iteration named after Boynsmill House in the grounds of the distillery.

- Scotch whisky, single malt, Highlands, 14yo. Aged in ex-oloroso and pedro ximénez sherry, as well as the "introduction of a small number" of ex-claret wine casks; 46.8% ABV.
- Unveiled and released mid-September, on sale online for worldwide delivery.
- In the UK, SRP of GBP95 (US$128) per 70cl bottle, on sale in limited — albeit unspecified — quantities.



Kentucky Boy

Brown-Forman has resurrected the "dormant" Kentucky Boy brand name to commemorate the 50th anniversary of the start of master distiller emeritus Chris Morris' career with the group.

- American whiskey, straight bourbon, Kentucky; 50% ABV.
- On sale online for domestic delivery (where legal) in the US from this week. Also available through selected off-premise operators in Kentucky.
- SRP of US$99.99 per 75cl bottle, available in limited — albeit unspecified — quantities. »

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

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G&Tea Original & Passionfruit

» Caffeine-free G&Tea is owned by South African-born entrepreneur Alex Young.

- Gin-based RTD, US. Made with London Dry gin, South African rooibos tea and clover honey. Debut comprises two variants: Original and Passion Fruit; both 7% ABV.
- Initial roll-out to Chicago from 7 September, with plans for state-wide Illinois expansion in "boutique" retailers and on-premise venues "[without] a dedicated bartender".
- SRP of US$6.95 per 35.5cl can and $18.95 per four-pack.



Bruichladdich Octomore 17 Series

This is the Rémy Cointreau-owned Bruichladdich Distillery's 17th annual release of its heavily peated Octomore extension.

- Scotch whisky, single malt, Islay. Four 70cl iterations:
  - Octomore 17.1: age not disclosed. Made from 100% Scottish Concerto barley, matured in first-fill bourbon barrels; 59.7% ABV. Carries an SRP of US$204.99 per 70cl bottle.
  - Octomore 17.2: age not disclosed. Made from 100% Scottish Concerto barley, matured for four years in second-fill French oak bourbon casks and finished in first-fill port casks; 59.5% ABV. SRP of US$244.99.
  - Octomore 17.3: 5yo. Made with single-farm, single-field and single-vintage barley grown on Octomore Farm, matured in first-fill bourbon, second-fill ribera del duero, sauternes, eiswein and syrah casks; 60.9% ABV. SRP of US$279.99.
  - Octomore 17.4: age not disclosed. Matured in first-fill oloroso sherry casks and finished in French virgin oak; 57.2% ABV. SRP of US$249.99.
- Iterations 17.1–17.3 available nationwide in the US since 1 September, online and through specialist whisky retailers. Octomore 17.4 launching 1 October in the US in "highly limited" quantities, exclusively online.





Skrewball P&J Whiskey

Pernod Ricard, which acquired a majority stake in Skrewball in 2023, has unveiled the first flavour extension from the brand — a peanut butter and strawberry jelly RTD.

- American whiskey, flavoured. Contains Skrewball peanut butter whiskey with "strawberry jelly flavours", 35% ABV.
- Released across the US in September.
- SRP of US$3.99 per 10cl can and $1.99 per 5cl bottle.



Black Pearl: Tribute to the Birthplace of Louis XIII

Each decanter of Rémy Cointreau's Black Pearl: Tribute to the Birthplace of Louis XIII is presented in a 'cooling cellar', which keeps the liquid at a minimum temperature of 13°C.

- Brandy, Cognac. Blend based on an eau-de-vie selected from Louis XIII's rare, aged 'demijohn' collection and 'infused' in a tierçon cask from the Le Grollet cellar; 40% ABV.
- Limited to 398 decanters worldwide, available in the UK since September at "select luxury on-trade venues" including The Dorchester and The St Regis London hotels and at the Louis XIII Boutique in Harrods department store.
- SRP of GBP21,000 (US$28,452.70) per 70cl bottle.

Ardbeg Trudernish

Named after an ancient settlement on Islay, Trudernish will be a permanent addition to Moët Hennessy's Ardberg portfolio, while also showcasing a pack update that will apply across the brand's core range.

- Scotch whisky, single malt, Islands (Islay),15yo. Matured in a mix of ex-bourbon and oloroso sherry, plus new charred oak; 48.8% ABV.
- On sale since 15 September, available online for worldwide delivery, as well as through specialist spirits retailers in the UK off-premise.
- In the UK, SRP of GBP80 (US$108) per 70cl bottle. GDI



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Bar Convent Berlin 2026: the show floor starts here

BCB returns to Messe Berlin from 12–14 October for its 20th edition, with 560 exhibitors, 2,200 products and around 12,000 visitors expected. Education takes centre stage, with a revamped programme spanning 'heads', 'hearts' and 'tails' — covering trends and creativity, workplace culture and wellbeing, and practical skills. Here's a rundown of some of the must-visit stands.

Bacardí (Teeling) Stand 18A20
Bacardí will launch Teeling Irish Whiskey's Small Batch Whiskey Santa Teresa Cask at BCB Berlin, a collaboration with Venezuelan rum producer Santa Teresa 1796. The Bombay Sapphire and Martini owner will also spotlight Teeling Wonders of Wood 4, alongside the core Teeling range. Bacardí will bring back Teeling's 'Irish Coffee Speed Round Competition', following the activation's debut at BCB London. Visitors can also try the Teeling frozen Irish coffee and the phoenix twist, made with Teeling Whiskey, ginger, lime and yuzu. Global brand ambassador Rob Caldwell and European brand ambassador Beibhinn O'Reilly will be available to meet visitors.

Calvados Christian Drouin Stand 18D16



French calvados producer Christian Drouin will showcase its latest product releases at BCB, led by Experimental Kilchoman Angels and Réserve Amphora, both of which will debut at the show. La Blanche de Christian Drouin, Calvados Christian Drouin Millésime 2006 and Le Gin de Christian Drouin will also be on display, as well as other products from the company's core calvados range. Christian Drouin CEO Guillaume Drouin will be on hand to meet visitors at the stand.

Giulio Cocchi Stand 18D19
Italian drinks producer Giulio Cocchi will showcase its range of aromatised wines (including vermouths and aperitifs), sparkling wines and the new Barolo Chinato Cocchi BK135 — a 1,891-bottle run based on the company's "historic export recipe". The stand will host a dedicated Negroni sbagliato experience, with cocktail serves combining Cocchi vermouth and sparkling wine. GM & export director Roberto Bava, export area managers Giorgio Bava and Gabriele Savino and advocacy manager Sonia Elia will be available to meet visitors.





La Martiniquaise-Bardinet (Saint James) Stand 20B09
La Martiniquaise-Bardinet will showcase the full range of Martinique rhum brand Saint James, from white agricole to its 1997 vintage, released to mark the 30th anniversary of the Martinique AOC. The company will also unveil a new Saint James edition at the show, which was "designed to appeal to consumers seeking indulgence, discovery and novelty". LMB will use BCB to meet European partners, strengthen relationships with bartenders and connect with the international cocktail community. Group communications manager Donatien Ferrari will be available to meet visitors.

Maison Ferrand Stand 18A07
Maison Ferrand will showcase the French group's core portfolio, led by Planteray XO 20th Anniversary, Cut & Dry and Stiggins' Fancy Pineapple. Citadelle Original, Ferrand Cognac 1840 Original Formula and Ferrand Dry Curaçao will also feature, alongside recent launches like alcohol-free gin Citadelle 0.0, Planteray Rum Oceana and Ferrand Le Renegade N°5. Maison Ferrand will use BCB to meet bartenders, distributors and customers,



with marketing & communications director Angélique Jullienne available to meet at the stand.



Mont Blanc Vodka Stand 20B20
Mont Blanc Vodka will showcase its latest release, Grande Époque, at this year's show, alongside the core Mont Blanc range. The 40% ABV Grande Époque has been distilled seven times, matured for three months in French oak and rested for 90 days before bottling. Sales and marketing reps will on the stand, which will host guided tastings and serve vodka cocktails. Mont Blanc Vodka will use BCB to meet on-premise professionals, gather insight into market trends such as "menu engineering, guest expectations and the balance between novelty and classic appeal".

Pallini Stand 18D07-01
Italian drinks producer Pallini will showcase its flagship limoncello alongside non-alcoholic Pallini Limonzero at this year's BCB. The stand will also include Pallini Spritz in keg and RTD formats, with the kegs available to sample. »



Meet us to see Pharma, 12 – 14 October 2026, Exhibition Centre Berlin

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» Pallini will use BCB to build on the performance of its limoncello and discuss changing approaches to aperitivo and spirits with the international bar community. CEO Micaela Pallini, commercial director Luca Cervellione Pallini and world business developers Marco Violin and Nikolaos Tsagkarakis will be in attendance.



Ron Centenario Stand 17A65

Costa Rican rum producer Ron Centenario will showcase its export portfolio, led by 30 Aniversario, 25 Gran Reserva and 20 Fundación. The stand will be pouring the brand's Café Coffee Liquor. Costa Rican bartenders Walter Zuñiga and Byron Gutiérrez, winners of the Costa Rica Spirit Masters competition, will whizz up Ron Centenario cocktails on 13 and 14 October. Head of international business Miguel Sequeira Torres, commercial director Jorge Mayorga and international business executive Paola Gutiérrez will attend.

SIP (Share. Inspire. Pioneer.) by Pernod Ricard Stand 20A11

Pernod Ricard will bring its interactive platform SIP (Share. Inspire. Pioneer.) — a "global community built for the people who make hospitality happen" — to life through its 'Back of House' activation. The hospitality-first experience has been inspired by "the bartenders' staff room, the place where teams gather between shifts, real conversations happen and new ideas take shape". Hosted in partnership with Hamburg's Nick & Nora bar, the activation will spotlight a curated portfolio of Pernod Ricard brands, including Absolut, Lillet, Havana Club, Skrewball and Código. Pernod Ricard on-trade education & advocacy lead Pauline de Pins and skrewball founder Steve Yeng will be in attendance.

Spiribam Stand 18A08

French spirits group Spiribam will bring several new products to BCB Berlin, including Maison Cartron's Le Noctis 1938 Liqueur de Plantes. The group will also showcase two new additions to its SHAK.R Cocktails RTD range, Mango Colada and Peach Martini, alongside a revamped Rhum Clément portfolio, including Clément VO, which is now available internationally. These will be joined by Le Philtre Vodka, the latest addition to Spiribam's portfolio. Guest bartender Carlos Ilgen from Munich's El Tato bar will serve cocktails at the stand, while export director Benoit de Truchis will be available to meet. »







Solex Europe (White Birch)
Stand 20B16

» Solex Europe will showcase the White Birch Vodka range at BCB, including the Classic, Gold, Cranberry and Orchard Pear iterations. The Slovenian drinks company will use the show to unveil its "premium infusions" line, alongside a sensory experience run by bartender & perfumer Arnd Heissen. Solex Europe will also use BCB to present its latest innovations, meet existing and potential partners and explore opportunities in the horeca channel, which it says is "becoming a key focus for our business". Head of marketing Kristina Kalmykova will be available to meet visitors.

The Bitter Truth Stand 17C22

German producer The Bitter Truth will showcase its namesake cocktail bitters and liqueurs at BCB Berlin, alongside spirit brand Tiki Lovers Rum. The Tiki Lovers range includes white and dark rums, as well as banana and coffee extensions. The Bitter Truth will use the show to demonstrate how bitters and liqueurs can be used to add balance and complexity to cocktails, with visitors able to explore the wider portfolio across both brands.





Tapì Group Stand 18D37

International group Tapì designs, produces and distributes closures for spirits, wine, beer, soft drinks and other categories such as perfume. Its namesake Italian brand and French closure manufacturer Les Bouchages Delage will be among those featured at the group's stand this year. Tapì Group will use BCB to meet drinks producers looking at closure options.



Vinolok Stand 17B10

Czech closure producer Vinolok will showcase its range of glass stoppers for food and beverage packaging at BCB Berlin. The company has five 'collections' of closures and has worked with drinks brands including William Grant & Sons' gin Silent Pool and Sogrape Vinhos' port brand Sandeman. Vinolok will highlight its Czech production heritage and sustainability efforts, such as local sourcing — the company claims "over 70%" of the materials for its closures come from within 40km of the glass furnace. GDI



Discus export promotion manager Joel Matticks

The Distilled Spirits Council of the US puts education, bartender advocacy and market-specific strategies at the heart of its global export drive, as promotion manager Joel Matticks tells **Olly Wehring**



Joel Matticks speaks to attendees at the House of US Spirits event in London last month

You're in London for the House of US Spirits event, sponsored by the Distilled Spirits Council of the US [Discus]. What does your role with the trade body entail? Every year, we apply for funding from the US Department of Agriculture [USDA] to put on promotions in different markets around the world, such as this one here in London, then Paris after this. We organise a combination of events and trade trips to shows like Bar Convent Berlin. I manage the allocation of those funds. I've been with Discus for two-and-a-half years, so I'm fairly new to the industry. I came from the USDA, actually, where I managed a different grant programme.

How easy is the USDA funding conversation? It's pretty straightforward. The department has relationships with a lot of different commodity organisations around the country that use the same market access programme. We apply for funding from the programme every year.

Which export markets do you prioritise? There are two buckets: educational and developed. Educational markets are where the middle class is developing, and include the likes of India and the Philippines, which are our priorities for the next couple of years. We try to educate these consumers in the differences between American, Irish and scotch whiskies, for example. The developed markets are home to consumers who are more familiar with American whiskey, such as Australia, Germany, Japan and the UK.

Who decides which markets you focus on? We're member-driven, so we'll ask our member companies where they'd like to be. We're guided by them. We also conduct our own desk-based research to identify population areas with the right demographics that helps make sense of our investment programme.

Is there a textbook about promoting in developed markets that you refer to for educational markets? The world's constantly changing, so although there are strategies that have worked in the past, we look at every market through a different lens. It's tough to generalise across markets and across time. You need to change it up and take a different approach every time.

We're always trying to refresh our export promotion programme and to find different ways to promote US spirits around the world.

Is your job made harder by geopolitical factors, such as import tariffs? In my position, things are pretty consistent around the world. We're always approaching these markets in the same way — by looking to where the buyers are.

Where are your efforts proving most successful? India's really exciting for us. We're going to be at ProWine in Mumbai in mid-November, and our bartender education is a great programme that's been really successful in India. The aim is for bartenders to act as our ambassadors — that's the approach in all of our markets, really.

That sounds like quite an old-fashioned approach in this day and age. We also target media folks with these events and we always evaluate what we're doing. Besides, we can be pretty flexible in our approach if we find what we're doing isn't working.

How do you define your strategy as working or not working? We drive towards promoting distillers that are already in the market as much as we aim to support brands in getting into a new bar or getting a new listing. The more ambiguous part of the strategy is the education piece. We'll deem our work a success if we can start to educate people about US spirits.

How do you balance the established with the new-to-market US spirits brands? We try to make our events suitable for everyone. Some distillers are here to talk to media; some are looking for a new bar listing. Discus is member-driven and they're all on the same page, so the balance doesn't require a lot of management from our side.

What keeps you awake at night, professionally? It's very boring things, such as logistics — do we have the right glassware at the venue? Has the product made it through customs? It's important that these programmes go off without a hitch. That's not just my main focus, it's my only focus.

Which other markets are you running events in over the coming months? After this, we're going to Paris and then Bar Convent Berlin, which we're going to tie Warsaw onto as well. Our last show of the year will be in India.

You're getting married this month. What's on the bar? We have Maker's Mark as the bourbon, but really, I don't have any favourite children. Honestly, I could have gone with any of them! GDI

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


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