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FOR THE GLOBAL DRINKS EXECUTIVE | JUL/AUG 2025



Why *only* being a maverick is not a good long-term brand strategy

Interviews: Tenzing, EcoVadis, Hard Cut Vodka, Rabobank, Hattiers Rum & UrFriendCharles

UK drinks market battles tax hikes and shrinking hospitality sector

RTDs shake up the global beverage alcohol market

SUMMER Unlocking the aperitif growth opportunity
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COMMENT

Joe Bates

Drinking in dark times: why the world is turning to the bright hues and sunny flavours of the spritz

Global geopolitics took a dark grisly turn in June with the outbreak of war between Iran and Israel, another destabilising crisis for the international drinks business to navigate.

At *Global Drinks Intel*, however, we are keeping things light. After all, it's summer in the Northern Hemisphere — a peak period for the on-premise as (hopefully) warm weather, holidays, music festivals and sports events drive punters into bars, hospitality tents, pub gardens and restaurants.

Long sunny days and warm evenings are synonymous with two thriving, interconnected beverage alcohol categories this issue investigates in depth: aperitifs (p14) and the hugely popular spritz serve (p22).

Several factors have swollen their fortunes in recent years, most notably a health-driven pivot towards lower-alcohol serves and the spread in popularity of the aperitivo occasion — an early evening moment to pause, socialise and enjoy a snack and a light refreshing drink — beyond its Mediterranean roots.

The aperitif category is incredibly broad. It embraces an increasing variety of both traditional and contemporary vermouths, as well as wine and spirit-based products to tempt excited professional bartenders and budding home mixologists.

In her excellent article, Kathleen Willcox reports encouragingly that aperitifs are now being drunk all year round as the category begins to overcome its one big drawback — seasonality.

As climate change makes Northern Hemisphere summers increasingly un-

predictable (think chilly Junes or washout Augusts), relying solely on seasonal demand is a risky strategy.

Brand owners are realising that if the aperitif category wants to avoid being a fair-weather friend, it needs to reinvent itself for year-round relevance. Anyone for a hot vermouth toddy, or a mulled wine spritz?

NPD is a high priority for aperitif brands. Suppliers are introducing more premium products containing unexpected ingredients, like botanicals, flowers and aromatic herbs, as well as embracing quality natural ingredients as governments crack down on artificial colourings and additives. More no-alcohol aperitifs are also appearing to capitalise on the growing number of consumers avoiding alcohol altogether.

As for the ubiquitous spritz serve, Richard Woodard argues it is the “poster boy” for the broader aperitivo category. Still dominated by Campari’s hugely successful Aperol spritz, other Mediterranean liqueurs, most notably Instagram-friendly limoncello, are also joining the spritz party. Carbonated and low-alcohol, the spritz is also ideal for the fast-growing RTD sector.

As Woodard memorably put it, the spritz occasion is about as “zeitgeist-friendly as the booze world gets right now”, but there are challenges to overcome. The term ‘spritz’ has quickly become so broad, it risks losing meaning. Is it vermouth-based? Wine-based? An RTD cocktail? Without clearer distinc-



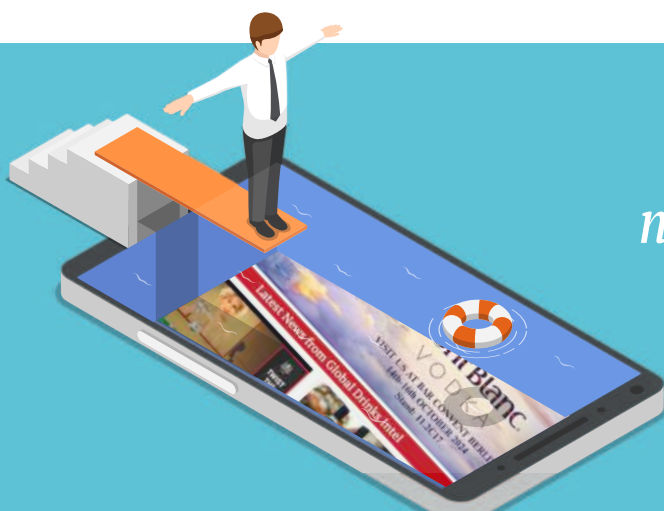
Illustration: Stock.com/Petrenko

tions, consumer confusion threatens to stall growth.

There is also growing competition from other low-ABV drinks. Hard seltzers, session beers and kombucha cocktails all vie for many of the same health-conscious consumers. Aperitifs must emphasise their sophistication, versatility and, in the case of older legacy brands, their heritage to stand out from the crowd.

At a deeper level, the rise of aperitifs and evolution of the spritz tell a timely, upbeat story: of consumers seeking balance, not excess; of rituals that offer connection in uncertain times; of brands learning to adapt, diversify and innovate while staying rooted in tradition. At a time when other alcoholic beverage categories are struggling, aperitifs and spritzes are success stories worth celebrating.

Moreover, as the world grows more turbulent, perhaps the aperitif category’s greatest opportunity lies in its original purpose: to pause, savour and bring people together. In that sense, it might just be the drink the world needs right now. **GDI**



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Olha Tsezareva

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GLOBAL DRINKS INTELLIGENCE

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Published by Global Drinks Intelligence, Ltd 2025©
ISSN 2632-7236 (print)
ISSN 2632-7244 (online)
Registration Number:
11672026 (England)
Printed in the UK by Splash.

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News briefs

Catch up quickly on the global drinks stories that matter

FINANCIAL RESULTS

Brown-Forman brought its latest financial year to a close with a quarterly dip in sales (-3%), bookending fiscal 2025.

Diageo roared back to life in its most recent quarter, posting impressive sales growth in its fiscal third quarter (+5.9%).

Viña Concha y Toro posted a very slight lift in reported sales from Q1 2025 (+1.4% in reported terms), with its continued focus on premium wine continuing to reap rewards.

COMPANY NEWS

Brown-Forman made significant distribution changes in the US following a request for proposals in 13 markets, cutting Republic National Distributing Co's (RNDC) responsibilities from 23 markets to 12.

Foley Family Wines & Spirits took on the US distribution responsibilities for canned cocktail company Sabé Beverages.

The CEO of scotch whisky distiller **Gordon & MacPhail**, Phillip White, announced he will be "stepping away" from the business after just over a year in the post.

Heineken partnered with SSP Group, an F&B outlet operator in travel locations, to set up two bars at Singapore Changi Airport.

ThaiBev's global unit **International Beverage** spent GBP7m (US\$9.3m) upping warehouse capacity in Scotland by almost 10%.

Pernod Ricard confirmed that Philippe Neusch, the director & operations VP for Martell, is leaving the group after just under two years in the role.

A particularly weak sugar harvest in Cuba this year is unlikely to impact **Pernod Ricard's** Havana Club Rum brand, a spokesperson told *Global Drinks Intel*.

Indian spirits major **Radico Khaitan** withdrew recently released single malt whisky Trikal due to concerns over its name.

Fragrance specialist Franck Marilly replaced Éric Vallat as **Rémy Cointreau** CEO. The appointment comes as the **French spir-**

its group withdrew its long-standing forecasts to 2029–30 after reporting its eighth consecutive quarter of declining sales.

US-based **RNDC** announced a "strategic re-investment" in its Texas operations, creating around 100 jobs. The news came as **the company** revealed it will shutter operations in California in September following a recent brace of sizable distribution moves in the US state.

Trade body **SpiritsEurope** appointed Mark Titterton, co-founder & director of the Forum for the Future of Agriculture, as its new director general from September.

Suntory Global Spirits was hit by a setback to its decarbonisation efforts in Scotland, where a plan to use hydrogen to power its Auchentoshan distillery was shelved.

Treasury Wine Estates spent just under US\$10m on bringing its production of no/low-alcohol wine in Australia in-house.

MARKETING NEWS

AB InBev revealed plans to leverage Michelob Ultra's "official beer" status at the FIFA Club World Cup. The beer giant also released details of a new FIFA Club World Cup-led marketing activation for **Budweiser**.

Beer brand **BrewDog** secured "official beer partner" status with UK soccer club West Ham United and its London Stadium.

Carlsberg debuted its tie-up with European soccer organiser UEFA with 'The Fare Game' activation that saw it book 30 Berlin taxi drivers in Berlin for 120 minutes, so they could watch Germany v Portugal.

Diageo leveraged the long-standing 'We Do We' campaign for its Smirnoff Vodka brand for the first global activation for RTD extension Smirnoff Ice.

Heineken assumed "official beer and cider" status at UK's Silverstone circuit, the home of the British Grand Prix. The beer giant also collaborated with upcoming film **F1 The Movie**, featuring Brad Pitt and Damson Idris, in a marketing move for its namesake brand's non-alcoholic extension.



Heineken partnered with SSP Group to open two World Bars in Singapore Changi Airport T2

Moët Hennessy tapped into parent company LVMH's recently announced partnership with Formula 1 to promote its Whispering Angel rosé wine brand.

Australian alcohol-free RTD Naked Life was launched in the US by **Molson Coors Beverage Co.**

Pernod Ricard launched the latest global marketing initiative for its Absolut Vodka brand, pushing a blend of dance and cocktails.

MERGERS & ACQUISITIONS

Australian Vintage acquired "international ownership" of Western Australian wine brand MadFish from domestic peer Burch Family Wines.

Constellation Brands finalised the offload of its "mainstream" wine brands to California-based The Wine Group.

Alcohol industry data provider **IWSR** was acquired by trend forecaster WGSN for an undisclosed fee.

A report out of Australia mooted a return to the negotiating table for the owners of **Vinarchy** and for **Australian Vintage**.

Viva Wine Group entered into an agreement to acquire Dutch wine distribution business Delta Wines.

INDUSTRY NEWS

The Distilled Spirits Council of the US expressed concerns about President Donald Trump's recent threat of a 50% levy on imports from the European Union.

A day after a US federal court ruled against **President Trump's trade tariffs** on all imports into the country, an appeals court reinstated them while the White House appeals against the federal ruling.



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



New products

Take stock with our roundup of the latest drinks launches

Cortada Smoked Tequila

Kentucky-based spirits producer Luxco adds character to Cortada by smoking the agave it is made from with mesquite and Mexican oak.

- Tequila, blanco and reposado iterations; both 40% ABV.
- Debuted mid-June in Denver, Colorado, as well as online for domestic delivery in the US.
- SRPs of US\$49.99 for the blanco, \$54.99 for the reposado, both per 75cl bottle.



Eagle Rare 12yo

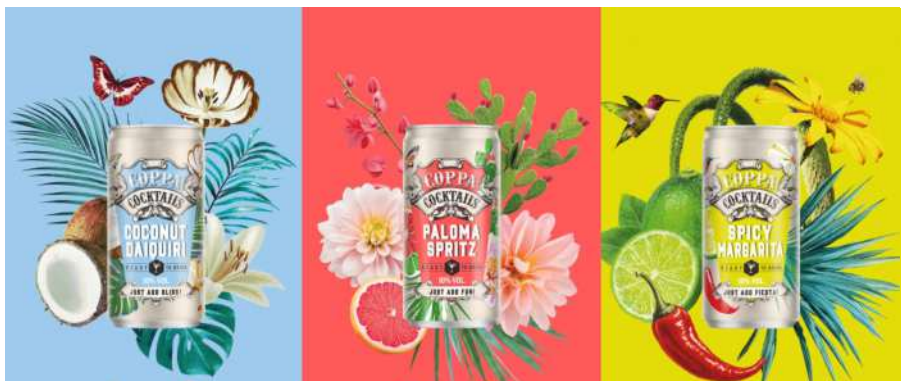
Sazerac Co's Eagle Rare brand has a new permanent addition to its ranks.

- American whiskey, bourbon, 12yo. Produced at Buffalo Trace Distillery in Kentucky; 47.5% ABV.
- Released in the US mid-June to both the on and off-premise; additional (unspecified) international markets to follow later this year.
- SRP of US\$49.99 per 75cl bottle.

Coppa Cocktails Coconut Daiquiri, Paloma Spritz & Spicy Margarita

Fifteen months after acquiring Coppa from Toorank, Spain's MG Destilerías is targeting the convenience trend (see p29) with three new flavours in 20cl cans.

- RTDs, premix cocktails. New variants comprise Coconut Daiquiri, Paloma Spritz and Spicy Margarita; all 10% ABV.
- Debuted in June in Greece, Italy, the Netherlands, Norway, Portugal, Spain and the UK.
- SRP of EUR3.50 (US\$4) per 20cl can.



Santo Tequila Extra Añejo

This online exclusive from Santo Spirits, owned by US rock musician Sammy Hagar and chef Guy Fieri, has spent 41 months in an ex-bourbon barrel.

- Tequila, extra añejo. Produced at El Viejo Distillery; 40% ABV.
- On sale now in the US, online only through the brand's official website
- SRP of US\$149.99 per 75cl bottle, 240 units available.



Prakaan The Tribura Series

International Beverage claims this trio of expressions are Thailand's first premium single malts.

- Whisky, Thailand, single malt. Three expressions: Double Cask, Peated Malt and Select Cask; all 43% ABV.
- Released in June "with an initial focus on" France, Germany and the UK ahead of a global roll-out "thereafter".
- SRPs of US\$89.99 for Double Cask, \$79.99 for Peated Malt and \$69.99 for Select Cask, all in 70cl bottles.



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Mozart Coconut Chocolate

Austria's Salzburg-based Mozart Distillery has extended its cream liqueur brand to include a coconut-flavoured version in the UK.

■ Cream liqueur, Austria. White chocolate and coconut flavour; 15% ABV.

■ Debuted in the UK in June, through "selected" off-premise outlets, as well as online for domestic delivery.

■ SRP of GBP19.50 (US\$26.30) per 75cl bottle.

Fever-Tree Non-Alcoholic Italian Spritz and Mediterranean G&T

This latest release expands Fever-Tree's RTD offering, joining the Blood Orange Gin Spritz launched earlier this year in partnership with Papa Salt Gin.

■ Alcohol-free RTDs, made with Fever-Tree Mediterranean Tonic Water and Italian Blood Orange Soda; 0.5% ABV.

■ Available at Sainsbury's and Waitrose in the UK since June.

■ SRP of GBP1.90 (US\$2.50) per 25cl can.



Isco Spirits' Pizza Vodka

Rhode Island-based Isco Spirits claims to be the first to market with this novel flavoured vodka.

■ Vodka, flavoured. Distilled from organic wheat and featuring natural flavours, including herbs, spices, tomatoes and mozzarella cheese; 40% ABV.

■ Released in the US early June, available online for domestic delivery.

■ SRP of US\$19.90 per 37.5cl bottle, also on sale in 75cl.



Garavogue 20yo Irish Single Malt

Garavogue Whiskey is the first release from Sazerac Co's recently rebranded Hawk's Rock Distillery, previously named Lough Gill Distillery.

■ Whiskey, Ireland; aged for a "minimum of 14 years" in ex-bourbon barrels; 47% ABV.

■ "Limited quantities" available through Sazerac's distributor networks. In Ireland, the UK and the US, as well as in global travel retail.

■ SRP of US\$199 per 70cl bottle.

Daughters of the Vine Sangria

Treasury Wine Estates is targeting younger consumers with a "disruptive alternative in the RTD cocktail space".

■ RTD, sangria; Spanish red wine base infused with blood orange and ginger; 7% ABV.

■ On sale since June in the UK off-premise through multiple retailer Sainsbury's nationwide and online.

■ SRP of GBP2.75 (US\$3.70) per 25cl can.



Cutty Sark Scotch Whisky & Ginger Ale

La Martiniquaise-Bardinet's blended scotch Cutty Sark has debuted in the RTD category with a highball (see p29).

■ RTD, comprises Cutty Sark Blended Scotch Whisky with ginger ale; 5% ABV.

■ Available in the US off-premise now, with Bulgaria and Portugal roll-outs to follow later in the summer.

■ In the US, SRP of US\$9.99 per four-pack of 25cl cans.

Copenhagen Distillery Whisky Rare Edition Batch No.4

Following on from Rare No.3 which used emmer grain, the spelt grain focus marks a "thoughtful reflection of Denmark's agricultural heritage".

■ Whisky, Denmark, single malt; made using spelt grain. Aged for an unspecified period in Hungarian oak; 47.9% ABV.

■ Available in "select markets across the globe", including eight European countries.

■ SRP of EUR320 (US\$365) per 70cl bottle, limited to 1,000 units.



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MARKETING TRENDS

Chris Tyas

From BrewDog to Monster: why only being a maverick is not a good long-term brand strategy

The recent BrewDog Punk IPA rebranding has got me thinking about mavericks. Specifically, the decline of maverick brands. And the high risk attached to any brand choosing to make ‘maverick’ its long-term brand strategy.

BrewDog’s brand refresh — “a new look for a new era”, it promised — came about following a well-documented period of upheaval at the business, which last October reported losses doubled to GBP59m (US\$79.8m) for the year ending 31 December 2023, the final 12 months with its co-founder James Watt as CEO.

Then in May this year, under a new CEO (James Taylor, its third since May 2024), the brewer unveiled its first major packaging update and redesign since 2020. But rather than “disrupting” the category as promised, the result has drawn criticism from some for being bland.

Or, to put it another way, the BrewDog brand has matured — from punk to grown-up.

Another brand built on being a maverick that’s had a different kind of torrid time is Monster, which recently suffered sinking stock after announcing below-expectation quarterly profits and blamed convenience stores, more competition and a move away from sugary drinks.

Even Red Bull, the second-highest selling soft drinks brand in convenience stores, has recently seen sales start to flatten, with volume growth easing (to 8.7% in the year ending 31 December 2023 after rising by around 20% for two consecutive years).

So, why?

BrewDog’s brand refresh: the punks grows up?



More than a one-trick pony? Carlsberg Britvic has released a seven-step strategy to drive sales in the convenience channel

Like BrewDog, Monster has talked about wider market conditions being the problem. My take, however, is that each has demonstrated a similar gap in their marketing strategy.

Positioning yourself as the antithesis of something is all fine and well for a startup and a challenger brand but, as a long-term strategy, this has risks — notably, it leaves you exposed to being what the next new brand positions itself as being counter to.

Or, to put it another way: while a maverick brand can stand out from the competition by being unique and innovative, creating a distinct brand identity for a while, for long-term success it needs to be rooted in more.

To prove this point, consider vodka-based hard tea RTD Surfside — the fastest-growing alcohol brand in the US off-trade last year, with its US-based parent Stateside Brands reporting 362% value growth in scanned retail just in the US.

Its phenomenal growth is reminiscent of that enjoyed by Monster and BrewDog five or six years ago. Surfside is using the same maverick strategy as Monster and BrewDog, but is demonstrating a new type of rebellious attitude.

With slogans like ‘Gluten can piss off’ and ‘Blessed by the rabbi himself’, the brand plays into classic rebel behaviour — a sure way to gain short to mid-term traction.

However, in the long term, it’s far better to focus your brand according to shopper

needs, always working to stay a few steps ahead of what they want.

This is the exact strategy Carlsberg Britvic — the business with a portfolio ranging from Tango and Robinsons to J20 and Fruit Shoot, which launched in January following the acquisition of Britvic by Carlsberg in 2024 — is now following.

In May, the company released details of its new seven-step strategy for retailers — a plan to achieve growth by meeting different consumer needs which, it claims, can drive soft drink sales in the convenience channel alone worth GBP225m.

Opportunities it has identified are leaning into soft drinks that fuel beyond traditional energy drinks — including, notably, stimulant drinks, mealtimes (soft drinks featured as accompaniments in just 28.6% of meals eaten in the UK last year) and treating.

The lesson is clear: you need to be more than ‘just’ a challenger brand to resist being uprooted over time.

‘New’, ‘different’ and even ‘quirky’ can be good for business for a while, encouraging trial, but long-term success comes from loyalty, which comes from long-term brand commitment, investment and an understanding of the importance of being more than a one-trick pony. **GDI**

Chris Tyas is chief strategy officer at independent creative agency Impero.
www.weareimpero.com



On our radar

From tequila-fuelled adventures to spritz-soaked summers, five drinks campaigns raising the bar



Spritz o'clock Aperol

Campari Group draws on Aperol's role in popularising aperitivo with a new worldwide activation called 'L'unico. Per tutti' — 'The only one. For everyone'. Live in 30 markets, it includes social media, YouTube, OOH and influencer content, as well as a 60-second TV spot following a waiter trying to keep up with demand for the bittersweet aperitif's flagship cocktail in a packed Italian bar.



Getting fresh St-Germain

Game of Thrones star Sophie Turner is back promoting St-Germain Liqueur for Bacardí. The rom-com-inspired sequel to last year's ad sees Turner step behind the bar and 'Sip into Something Fresher' to promote the St-Germain hugo spritz. The campaign also features culinary digital collaborations and a branded pop-up experience in New York City.

Ocean swell Bombay Sapphire

Bacardí's 'Step Into The Blue' campaign for Bombay Sapphire puts the gin's vibrant blue bottle centre stage. The message? "Embrace moments of beauty each day." The activation includes a 20-second spot, digital OOH placements and social content across key markets, including the UK, Italy, France and North America. Bacardí also revealed the brand will sponsor the E1 powerboat racing series.



Anything goes Casamigos

Diageo's new campaign for Casamigos — 'Anything Goes with My Casamigos' — marks a new chapter for the ultra-premium tequila that soared to success behind the charisma of co-founder George Clooney. With Clooney gone, Diageo introduces a cast of quirky characters like 'The Cowboy' and 'The Big Shot' for the brand's first global push. Spanning TV, digital and outdoor platforms, the ads invite audiences into a 'House of Friends', where there are no strangers, only friends you've yet to meet.



Aussie angle Yellow Tail

Casella Family Brands is celebrating the laid-back Aussie spirit and joy of doing your own thing with three new TV ads for Yellow Tail Wine in the UK. Supported by social media and in-store efforts, the spots show people enjoying quirky feel-good moments — like swinging in the rain with a dog on their lap — under the catchline: 'Good on ya!' The move follows a packaging update for the brand in all markets.



ESG roundup

Latest efforts from brand-owner members of the not-for-profit organisation International Alliance for Responsible Drinking

ENVIRONMENTAL

Asahi partnered with the British Beer & Pub Association and Zero Carbon Forum in **the UK** to produce a report on the significant climate risks facing the country's barley and hop crops. The report warns that both crops face diminishing yields and quality due to drier summers and wetter autumns, and offers advice on how brewers, farmers and the government can work together to mitigate these risks.

Asahi also switched on its recently constructed solar farm in **the UK**, which will provide all of the company's electricity needs in the country for the next decade. The company's unit in the country will be implementing a range of biodiversity initiatives at the site, which will generate 22.3 GWh of electricity per year.

In **Vietnam**, around 200 **Carlsberg** staff and managers marked World Environment Day 2025 with a coastal clean-up initiative. The volunteers collected over three tonnes of rubbish from beaches in Phuoc Tinh, helping to restore the natural beauty of the shoreline. Representatives from Denmark's embassy in the country also joined the volunteers, highlighting the importance of cross-sector environmental partnerships.

Kirin's Lion unit installed just under 2,450 solar panels at its flagship brewery in East Tamaki, **New Zealand**. The layout is one of the largest rooftop installations in the country and will provide 14% of the brewery's electricity needs.

Suntory unveiled its mid to long-term plans for utilising hydrogen in **Japan**, with the intention of becoming the first business in the country to engage across the green hydrogen value chain, from production to sales. The 'Suntory Green Hydrogen Vision' builds on a history of public-private part-

nerships under the government's 2017 Basic Hydrogen Strategy. Suntory collaborated with regional authorities and other partners to create Japan's largest 16 megawatt power-to-gas system in Yamanashi Prefecture.

SOCIAL

AB InBev's OB Beer division in **South Korea** commenced a responsible drinking activation ahead of the country's university festival season. 'Cass 0.0 Attack' uses quizzes and games to promote non-alcoholic beverages as alternatives to regular alcohol consumption and heavy drinking at university festivities, and will visit universities around the country this summer.

In **Japan**, **Kirin** partnered with Waseda University's student health association to raise awareness about the importance of responsible drinking. Timed to coincide with the beginning of the academic year, the 'Kirin Responsible Drinking Seminar' advises students on how to deal with anxiety and peer pressure, warning against binge drinking or drinking while still underage.

Back to **South Korea**, and **Lotte Chilsung** unveiled 'Drink Responsibly' labelling, starting off with the company's main brands. A new drink-driving warning symbol has been added to Lotte's existing label warnings, which concern consumption during pregnancy and underage drinking. Recent legislation requiring a drink-driving warning on alcohol packaging will take effect in 2026, but a spokesperson said Lotte was introducing its changes "pre-emptively" to help establish a "responsible drinking culture."

Aware.org conducted a nationwide survey in **South Africa** to evaluate teenagers' awareness of the risks associated with underage drinking, as part of its flagship '#NOtoUnder18' initiative. Researchers



Lotte Chilsung's new 'Drink Responsibly' labelling

found high awareness among the country's teens, who mostly recognise the negative effects of underage drinking.

Staying in **South Africa**, and the **Drinks Federation of South Africa** launched an industry-wide initiative to promote responsible alcohol marketing. The 'Small Print, Big Impact' campaign is designed to make the self-regulatory Alcohol Industry Communications Code of Conduct more widely understood and implemented across the sector, from producers through to marketers and communication teams. The code aims to ensure ads are socially responsible, do not target minors, avoid misleading claims and do not glamourise alcohol.

GOVERNANCE

Diageo partnered with the Wine & Spirit Education Trust (WSET) to launch exclusive spirits training for female staff in India's hospitality sector. The programme is for junior professionals and female bartenders, with around 80 women expected to receive internationally recognised WSET certifications free of charge during its first phase, thereby improving their employment opportunities.

Finally, in **the UK**, the William Grant Foundation, which has managed donations to good causes on behalf of **William Grant & Sons** since 2014, released its 2024 annual review. The latest report details the distiller's initiatives and donations to a variety of causes linked to health and social support, Scottish culture, natural and built environment, and youth opportunities. **GDI**



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



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Climate change drives producers to re-evaluate supplier relationships

ESG is about far more than compliance and PR — it's about survival, strategy and stakeholder confidence, the CEO of business sustainability ratings provider EcoVadis tells **Rosie Davenport**

"Regulatory pressure is only one driver for ESG," according to EcoVadis co-founder & co-CEO Pierre-François Thaler, reflecting on the geopolitical changes and legislative resets driving sustainability discourse.

Having been at the forefront of assessing companies' environmental, social and governance (ESG) performance for almost two decades, he is a well-placed authority on the trends impacting global boardrooms.

"The commitment to sustainability and ESG has become more and more important for customers, consumers, financial institutions and other stakeholders, but also from a risk management perspective," Thaler says.

As a result, ESG issues are no longer confined to the pages of sustainability reports or corporate strategy decks. For global drinks companies, ESG is now shaping everything from raw material sourcing to supply chain design and investor relations.

The push for ESG excellence is coming from every direction, warns Thaler, not just regulators, but investors, insurers, customers and communities. For the drinks industry, a sector deeply connected with agriculture, water, packaging and global logistics, the pressure is particularly acute.

Climate risk at core of operations

"Beverage companies, similar to the food industry, are highly exposed to sustainability risks such as water use, packaging, agriculture and labour conditions," says Thaler.

"From the field to the factory, and all the way to the consumer's glass, climate-related disruptions are having a profound impact on how beverage companies operate, source and plan for the future."

The most critical of these disruptions is water availability, a risk that sits at the heart of every drinks product.

"As a core ingredient and a necessity in processing and cleaning operations, water underpins the entire value chain of beverage manufacturing," explains Thaler. "Regions once considered stable are experiencing



Pierre-François Thaler: 'Greater emphasis on climate risk disclosure and sustainability ratings'

stress, pitting industrial users against communities and agricultural needs."

This has already created reputational and operational issues. Coca-Cola, for example, faced significant public backlash and plant closures in India due to perceptions of over-extraction in drought-prone regions. Such scenarios aren't isolated incidents; they reflect the new normal for brands operating in water-stressed markets.

Disrupted harvests, fragile supply

The drinks industry, points out Thaler, "depends heavily on agricultural raw materials, barley, hops, grapes, citrus, sugarcane and, above all, water."

These crops are under growing threat from climate change. Yields are being reduced by heat stress, altered rainfall and shifting growing seasons, while the quality of ingredients — especially in wine and craft spirits — is becoming less predictable.

This uncertainty is creating a second layer of vulnerability: supply chain instability.

"Companies are re-evaluating supplier relationships," Thaler explains, "placing greater emphasis on climate risk disclosure and sustainability ratings."

Drinks brands, many of which rely on complex international supply networks for ingredients and packaging, are turning to

platforms like EcoVadis to assess suppliers on environmental, labour and ethical criteria. Sustainability has moved beyond being a cost centre; it's becoming a proxy for resilience, agility and brand protection.

Challenges & financial risk

Climate risk doesn't just disrupt agriculture. It's also destabilising day-to-day operations. From wildfires to floods to transport delays, the frequency of climate-related disruptions is increasing, and so are the financial consequences.

Companies are already reporting higher insurance premiums, energy bills (particularly from refrigeration) and infrastructure costs. As Thaler puts it: "Rising temperatures also lead to increased energy costs, particularly for refrigeration and cooling — essential for preserving product quality."

Consequently, many beverage companies are investing more heavily in risk mitigation, from backup energy systems to diversified sourcing strategies and physical resilience upgrades at production sites.

Industry leaders driving change

Despite these risks, there are signs of significant progress. Industry leaders like AB InBev and Pernod Ricard are stepping up their ESG commitments — not just for their own operations, but across supply chains.

Companies are pushing ESG considerations deeper into procurement processes, incentivising sustainability performance and tying corporate financing to measurable outcomes. Net zero targets are increasingly viewed as strategic levers that influence how capital is allocated, risk managed and competitive advantage maintained.

The message for CEOs is clear: ESG is about much more than compliance or reputation. It's about survival, strategy and stakeholder confidence.

Whether it's rising costs, supply chain shocks or shifting consumer expectations, ESG factors are reshaping the global drinks industry. While the road ahead is uncertain, the direction of travel is not. **EDI**

Rosie Davenport is the founder of specialist sustainability and communications agency Impact Focus. impactfocus.co



Image: Shutterstock/CharmedLight

The early evening is fast becoming a key consumption occasion around the world as consumers embrace its lower-energy, informal nature and low-ABV serves

Aperitifs: the ancient ‘cultural ritual’ quenching today’s low-ABV thirsts

Rosé wine’s unchallenged conquest of the summer bar is in the rear-view mirror. While there will always be a place for thinking and drinking pink, the current moment’s embrace of the spritz cocktail and other low-alcohol cocktails has turned aperitifs into the main character at bars, poolsides, beaches and, of course, on all the chicest yachts in the Mediterranean.

The spritz is the most obvious vehicle for the aperitif (see p22), but the opportunity to explore a wide range of light, bright cocktails starting with brunch and ending well into the wee hours of the night has jet-tisoned a range of vermouths, wine aperitifs and spirit aperitifs into the spotlight. In response, producers, mixologists and drinks enthusiasts have been quick to find new ways to create and consume them.

It’s no secret that alcohol sales are slumping, but there are pockets of extraordinary success amid the general gloom. The volumes of premium-priced bitters and spirit aperitifs grew 18% between

Low-alcohol and even — whisper it — alcohol-free aperitifs are the toast of the town as health-conscious revellers seek out lively, authentic elixirs with all-natural ingredients. **Kathleen Willcox** reports



Valentina Simonetta:
‘The rise of low-alcohol flavoured drinks has transformed the aperitif category’

2018 and 2023, with a 19% compound annual growth rate (CAGR) forecast through 2028, according to IWSR data. Premium light aperitifs also grew at a more modest pace of 4% between 2018 and 2023, with growth projected in super-premium values

at a CAGR of 3% through 2028. Spain, Germany and the UK are also expected to grow their spirit aperitif markets by 5%, 12% and 4%, respectively, through 2028, according to IWSR (see p18).

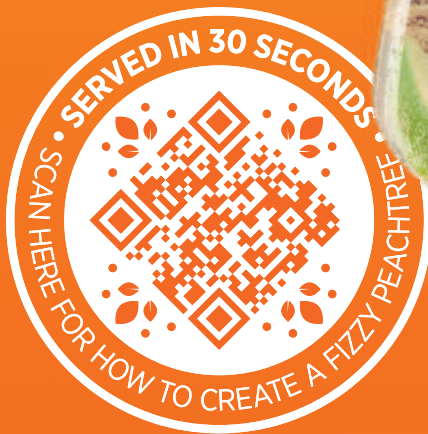
“The rise of low-alcohol flavoured drinks has transformed the aperitif category,” says Valentina Simonetta, global marketing director at Stock Spirits Group, which has more than 70 brands in its portfolio, and recently launched Limoncè Aperitivo, a 14.8% ABV citrus-based aperitif.

“While summer naturally lends itself to lighter, refreshing drinks, the aperitivo is ultimately about occasion, not just a season. It’s a cultural ritual — a moment to pause, connect with people and slow down. In Italy, it’s deeply ingrained in everyday life, but globally, we’re seeing consumers embrace it as a lifestyle.” >>

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Aperitif occasion expands

» Sipping an aperitif feels especially refreshing in the summer, but Giorgio Bava, export area manager for Italy’s Cocchi, a maker of wine-based aperitifs and Piedmontese sparkling wines, argues that, traditionally, it’s a year-round ritual in Italy.

As the way consumers approach drinking continues to change, Bava predicts



Giorgio Bava: ‘People are looking for lighter, more approachable ways to enjoy alcohol’

that the aperitif will be embraced year-round globally. “We have seen strong growth over the past couple of years, which is incredibly encouraging, especially for a small family-owned business,” Bava says, adding that interest in Cocchi Vermouth di Torino, a sweet Italian vermouth, and Cocchi Americano, a wine-based aperitif, is particularly strong.

“The growth in markets across the world, even ones where vermouths and aperitifs aren’t traditionally part of the drinking culture, reflects the broad trend in which people are looking for lighter, more approachable ways to enjoy alcohol.”

At Poli Distillerie in Veneto, Italy, fourth-generation owner Jacopo Poli says that he and siblings Barbara and Andrea have been thrilled to see the global paradigm shift away from overconsumption, toward the aperitif.

Poli produces grappa, brandy, gin and whisky using one of the few ancient alembic (alchemical) stills made of copper in existence, as well as artisanal liqueurs, including vermouths, amari and aperitifs.

“We’re currently working on new products, inspired by a lively and steadily growing demand internationally,” Poli says, adding that the producer closed out both 2023 and 2024 with double-digit growth.

“In Italy, the aperitivo is more than a drink: it’s a daily social ritual. A transition is taking place in consumption habits globally, driven by changing consumer preferences and a growing focus on health, quality and creativity.” He puts this shift

Know your aperitif

The word ‘aperitif’ is derived from the Latin *aperire*, which means ‘to open’. These lower-in-alcohol elixirs meant to excite taste buds and conversation come in many forms. Here are the main players:

■ **Vermouth:** Wine-based, herb-infused. Arriving in dry (white) and sweet (red) forms, the most famous brands Martini & Rossi and Cinzano dominate, but craft brands are creating a buzz.

■ **Wine aperitifs:** Essentially an aromatised wine, macerated with herbs, spices, roots and peels to impart flavour, then fortified with alcohol. Pernod’s Lillet is a key brand.

■ **Spirit aperitifs:** Lower in alcohol than traditional spirits, most are flavoured with herbs, spices, fruit and flowers, typically indigenous to the region from which they hail. Campari and Aperol are key brands.

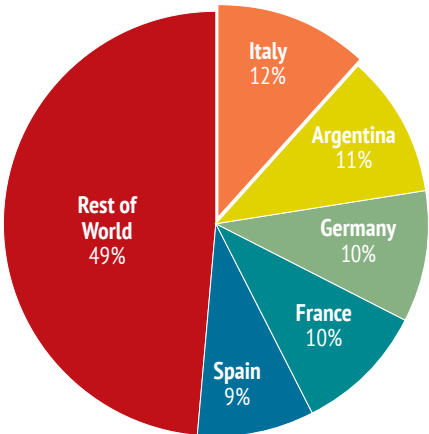
down to today’s consumers, especially members of Generation X and Millennials, being more informed and selective.

Matteo Luxardo, export manager of family-owned and operated Luxardo SpA, attributes the growth of the aperitif market in part to the rise in lighter cocktails like the negroni, spritz and americano.

“Growth has been fuelled by the rise of home cocktail culture post-Covid-19,” he says. “And consumers, especially in urban areas, are embracing the ritual of Italian aperitivo year-round, driven by food pairings or after-work meetups.” »

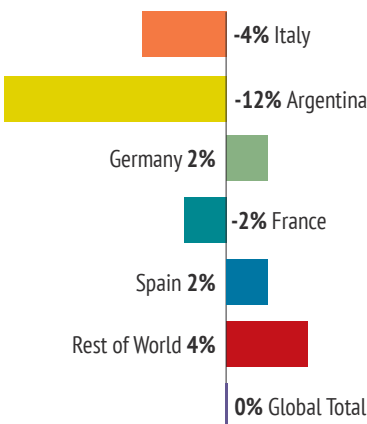
DATA DROP

Top 5 Markets for the Aperitivo Occasion
Market Share (Vol) 2024



Source: IWSR. Figures are based on sales of vermouth, wine aperitifs and spirit aperitifs. Figures exclude duty free

Chg Vol 2023–24



Key Takeaways

- Aperitivo is being embraced as a low-ABV opportunity to connect with others year-round.
- New ingredients are appearing in aperitifs and ready-to-drink options are expanding.
- Producers are working with bartenders to create new low-ABV cocktails.
- Consumers want premium artisanal products with a modern twist.
- As governments crack down on artificial additives and colouring, producers are leaning into quality natural ingredients.
- As the mindful drinking movement rises, expect more no-alcohol aperitifs to appear.

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Aperitivo growth in the US, Germany, Spain and the UK

With happy hours and casual meetups for pre-dinner drinks increasingly popular in several international markets, recent IWSR data offers insight into the state of play in the US, Spain, Germany and the UK.

The US: on the higher side

Spirit aperitifs continue to grow in the US on the back of the rising influence of low-key consumption occasions that tap into the trending lower-ABV cocktail movement.

Prosecco is also surfing this wave, whether consumed on its own as a lower-cost, more casual alternative to champagne, or used as the base ingredient in the popular spritz serve (see p22). Meanwhile, volumes of premium-priced bitters/spirit aperitifs have surged in the US, with CAGR growth of 18% from 2018–23. This momentum is expected to accelerate, with IWSR forecasting 19% CAGR growth for 2023–28.

Another growth area in the US – and in a number of top 20 markets – is premium-plus light aperitifs suited to low-key, spontaneous drinking occasions,” reports IWSR chief operating officer research & operations Emily Neill.

“With a typical ABV of 15%–22%, they can be served over ice, but owe much of their success to their versatility, consumed in a spritz or a number of cocktails, including the white negroni and vesper. Premium light aperitifs increased their

volumes at a CAGR of 4% from 2018–23 in the US, with growth expected to moderate in the coming years; super-premium volumes, however, grew at a CAGR of 7% between 2018–23 and are expected to expand at a CAGR of 3% to 2028.

Spain: less but better

In Spain, there has been a notable gear change from high-intensity night-time experiences to lower-tempo daytime and evening get-togethers: consumers are increasingly swapping out spirits for beer, wine, *tinto de verano* (red wine cocktails) and spritzes. As a result, bitters/spirit aperitifs saw volumes expand at a CAGR of 8% from 2018–23, with further growth expected to 2028, at a CAGR of 5%.

“The Spanish market is increasingly driven by afternoon and evening occasions, all of which are conducive to a ‘less but better’ attitude that drives premiumisation across all major categories,” explains Neill. “It is important not to underestimate the significance of this shift in a spirits market that, for the past two decades, was built on the back of explosive night-time drinking.”

Germany: putting on the spritz

In the world’s largest sparkling wine market, Germany, prosecco has succeeded in creating new drinking occasions, particularly via the spritz trend, which has

driven spirit aperitif volumes to a new high. Bitters/spirit aperitifs expanded at a CAGR of 3% from 2018–23, according to IWSR data; however, premium-priced products enjoyed explosive growth, rising at a CAGR of 12% over the same timescale.

“Spirit aperitifs will gain momentum across all price bands, as the underlying trend towards lighter drinking remains strong,” says Neill. “However, growth will decelerate as the category faces competition from wine-based aperitifs, liqueurs and RTDs.” IWSR predicts CAGR growth for spirit aperitifs from 2023–28 will be essentially flat, including for premium products.

Neill says this reflects the fact that the spritz is evolving to create opportunities for other categories in Germany, including liqueurs – in particular, limoncello.

The UK: shots to sophistication

A gradual move away from late-night, high-tempo shot consumption to more relaxed early-evening drinking in the UK has benefited the more sophisticated aperitif occasion, underpinned by the popularity of cocktails.

“This has driven further growth in liqueurs, as well as spirit aperitifs,” reports Neill. IWSR data shows that volumes of bitters/spirit aperitifs grew at a CAGR of 5% between 2018–23, while liqueurs expanded at a CAGR of 4% over the same timescale.

Blank canvas for creativity

» One of the most exciting areas of the aperitif market, for both producers and imbibers, is the creativity it affords. “We are seeing a wave of unexpected ingredients

in the aperitif market,” says Elena Branda, marketing manager at Piedmont’s Perlino, producer of sparkling wine and vermouth. “Ingredients like hibiscus, yuzu or smoked botanicals are appearing.”

Branda sees the rise across the board: in vermouth, thanks to an increase in craft cocktails; in wine-based aperitifs, due to light, refreshing cocktails like the spritz; and in spirit-based aperitifs, like bitters and amaros, driven by cocktail culture and a demand for bold and complex flavours.

Producers are capitalising on the wave of interest by providing consumers with new opportunities to engage with aperitifs.

Poli Distillerie places “strong emphasis” on education. “We don’t just promote our products,” says Jacopo Poli, “We explain the cultural rituals and heritage behind them. Grappa is often perceived just as an after-dinner digestif, for example. But through

Jacopo Poli: ‘In Italy, the aperitivo is more than a drink: it’s a daily social ritual’



Elena Branda: ‘We are seeing a wave of unexpected ingredients in the aperitif market’

tastings, events and cocktail suggestions, we’re showing how it can also play a starring role in mixology and aperitifs.”

At Milan-based Ginrosa, the team is »



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THE
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» working with bartenders to expand the aperitif opportunity, says David Lynch, co-founder of Italian Spirits Company, which imports Ginrosa to the US.

“A typical American bar might have a dozen different tequilas and countless whiskies, but a majority of drinkers don’t understand that there are alternatives to Campari, with a different flavour profile,” Lynch explains, adding that they are actively working with restaurants and bars to move vermouth to centre stage.

“Especially in accounts that only have beer and wine licenses,” he says. “Consumers are legally allowed to purchase aperitivo products with wine, so they can create a semblance of a ‘cocktail’ program in their establishment.” As beer and wine consumption declines across the world, and drinkers seek out lower-ABV options, aperitifs are shoe-ins, Lynch says.

Stock Spirits’ Simonetta reports that bartenders and mixologists have started to reintroduce vermouth into contemporary cocktails in response to the desire for “low-ABV options and flavour versatility”.

In addition to collaborating on cocktail ideas, the company is also meeting the consumer where they are with ready-to-drink lower-alcohol options, she adds.



Matteo Luxardo: No/low aperitifs are ‘knocking hard. Sooner or later, we have to open this door’



David Lynch: Finding replacements for banned colourings will soon become ‘a very urgent issue’

Modern & artisanal

Across the world, people are consuming less alcohol. And when they do drink, they want to make sure it’s an artisanal product, with complex, modern flavours.

“There is a clear premiumisation trend, with people willing to pay more for artisanal quality and distinctive flavour profiles,” says Jacopo Poli. “This is reflected in the growing popularity of small-batch spirits and aperitifs with unexpected ingredients, like botanicals, flowers and aromatic herbs.”

The desire to explore new ingredients, formats and occasions, “especially those that excite younger consumers”, fuels Stock Spirits’ research and development, Simonetta says.

“Innovation for us starts with understanding these evolving expectations and translating them into products that feel fresh and relevant without losing our brand heritage,” she explains. “Our launch of Limoncè Aperitivo fits modern habits without sacrificing flavour or authenticity.”

At Ginrosa — a historic brand of aperitivo bitters created in the 1880s by a woman named Annunciata Bourne, in part, as a feminist retort to Campari — the team is leaning into its progressive roots.

“We are positioning Ginrosa as a Campari alternative,” says Lynch. “One with less pronounced sweetness and quinine bitterness and more spice and florals than Campari. It is also coloured with a natural cochineal dye, as opposed to a synthetic dye.”

Quality natural ingredients

For years now, consumers have been reading labels with more care and seeking out F&B brands that use ‘whole’ ingredients they can pronounce. That trend is becoming tougher to ignore as governmental bodies across the world crack down on additives and artificial colourings.

This is an increasingly important distinction in this category, especially since the FDA (US Food and Drug Administra-

tion) recently moved to ban artificial colourings, including Red 40 (or E129), which Lynch says is the most widely used additive in aperitifs. (Red 40 is already restricted in countries outside the US, like the UK, Australia, New Zealand and the EU.)

“Finding replacements for Red 40 and other artificial colourings that the FDA has set its sights on banning is going to become a very urgent issue for producers across the spectrum,” Lynch predicts. “It is the natural wine ethos applied to spirits and aperitifs, and it is increasingly prevalent.”

Cocchi’s Bava concurs, saying that there is a “growing demand for transparency in ingredients and processes”. Professionals and consumers are increasingly “seeking products made with minimal colourants, no artificial flavourings and high-quality natural components,” he says.

“More producers are focusing on traditional methods: sourcing botanicals with care and embracing regional identity as a key part of their storytelling.”

Going low, even no

Aperitifs are naturally lower in alcohol than classic cocktails. But many want extremely low-alcohol, and even no-alcohol, options for their cocktails.

The more mindful drinking movement is reshaping the aperitif market, argues Perlini’s Branda. “There’s a strong rise in organic and low-ABV options,” she says. “There’s also rapid growth in non-alcoholic aperitifs and RTD formats targeting mindful and younger consumers.”

The Italian Spirits Company has just started importing a non-alcoholic version of one of its aperitivo bitter products, notes Lynch. “I expect that it will quickly become one of our top-selling SKUs,” he says.

Matteo Luxardo has also noted the push toward ever-lower alcohol levels. “The trend of no/low-alcoholic aperitifs is knocking hard on our door,” he says. “Sooner or later, we have to open this door.” **EDI**

Stock Spirits concentrates no/low efforts

As the appetite for no/low-alcohol grows apace, Warsaw-based **Stock Spirits Group** is cementing its standing as a major supplier with significant investment and activations

Stock Spirits has revealed plans to boost its presence in the rocketing no/low category with significant investment and activations over the coming months.

Key to this will be a raft of innovative new no/low products spanning its entire portfolio. Chief marketing officer Anne Martin says the range is designed to meet an array of consumer demand moments.

"We anticipate continued growth in both the no and low segments," she says. "We are already playing in those spaces and are moving at pace to bring new offers to market."

Stock Spirits' portfolio features gin alternative Finsbury 0.0 Alcohol Free, plus several lower-ABV brands, including vodka-based Lubelska Shottini (10.5% ABV) and Limoncè Aperitivo (14.8%), which has just rolled out in France, Italy, Germany, the Balkans and Poland.

The company has also been expanding into the ready-to-drink sector, with several RTD products under Sierra Tequila, Clan Campbell, Republica and other flagship Stock Spirits brands.

Martin says no/low growth is being driven by shifts in consumer behaviours and there is "strong interest across all markets".

The alcoholic beverage industry is being reshaped, adds Stock Spirits CEO Jean-Christophe Coutures, and Gen Z consumers are having the most impact. He says that while traditional alcohol consumption remains strong, a major new survey by Stock Spirits found that Gen Zers are embracing a



Anne Martin: Stock Spirits has a 'very strong' R&D team with 'a proven ability to craft great liquids'

unique attitude towards drinking, "driven by their desire for meaningful social experiences, quality products within mainstream pricing".

"Like all previous generational eras, consumer demands and needs continue to evolve," explains Coutures. "What we are seeing is that Gen Z remains deeply invested in social occasions and experiences. They want products that reflect their unique personalities and preferences, while not compromising on taste."

Innovation-first approach

"Our innovation-first approach is exactly why Stock Spirits is the perfect fit for this emerging generation. They expect brands to move at their pace as standard. We're making sure Stock Spirits stays ahead by offering the right products, at the right price, in the right places."

This is an area in which Stock Spirits exceeds consumer expectations, adds Martin, providing well-crafted, quality innovations such as Limoncè Aperitivo, which has been "well received" in both the on and off-trade.

"This innovation was awarded several medals in international competitions and received very positive feedback at the Roma Bar Show earlier this month," she says.

"Distribution is building and initial results indicate very positive consumer reaction. The brand will be supported by a significant marketing investment with activations scheduled across summer to drive awareness and trial".

Stock Spirits' RTD range is "growing strongly, particularly in Czechia and

Germany", adds Martin, revealing that further expansion with Sierra Tequila is set for several new markets, including the UK.

The Sierra range of canned "bar-quality" Margaritas launched in April in two flavours: Lime and Strawberry. The brand has also created a Mango Margarita exclusively for the Czechian market. Martin says the Sierra extension meets increasing demand for convenient canned ready-mixed cocktails.

"Stock Spirits has a very strong R&D team with a proven ability to craft great liquids and is moving fast to bring news to each market in line with local consumer demand," she adds. "Our marketing teams have increased their investment to drive awareness and trial of those new products across channels and consumer touchpoints."

Building on the success of its alcoholic RTDs portfolio across leading brands, such as Republica and Admunsen Vodka, Stock Spirits is writing the next chapter of its RTD journey in Czechia with the launch for three non-alcoholic SKUs.

Stock Spirits is not simply following the no/low trend, explains Martin, it is actively shaping it. "By blending deep consumer insight with agile innovation and smart investment, the company is well-positioned to lead this rapidly evolving category," she says.

"Whether it's premium RTDs, flavour-forward spirits or eye-catching zero-proof serves, Stock Spirits is delivering against modern drinking occasions with ambition and affordability at its core. As European Gen Zers continue to redefine the future of alcohol, Stock Spirits is making it clear: it's not just ready for the change – it is leading it." **GDI**



Stock Spirits' no/low offering includes Limoncè Aperitivo, Finsbury 0.0 and Sierra Margarita RTDs



The spritz is a 'key driver' of Luxardo SpA's sales, with its products 'thriving' in Italy, the US, the UK, the Netherlands, Greece and Eastern Europe

It's the 'it' drink of summer, but what's next for the spritz serve?

At a time of immense challenges in beverage alcohol, the spritz occasion offers a prospect as bright and enticing as the perfect poolside Aperol spritz served on a sunny summer afternoon.

Light, refreshing and informal — whether combined with hugely popular prosecco (see chart p24) or used in on-trend RTD spin-offs — it's about as zeitgeist-friendly as the booze world gets right now.

"In line with the prosecco trend, and the

The poster boy of the broader aperitivo trend, the spritz has taken off across Europe and North America — and is diversifying in order to attract yet more fans. **Richard Woodard** reports

aperitif trend, we observe a clear spritz trend and great potential for this category," says Vanessa Lehmann, head of communications at Henkell Freixenet, which uses its Mionetto franchise to span the prosecco and aperitivo categories.

"The spritz not only represents an

easy-going lifestyle — it's simple to prepare and marks the transition from work to leisure, inviting people to relax, unwind and enjoy time together," she adds. "It also stands out for its versatility — whether as a classic aperitivo or mixed with limoncello, it offers multiple variations for any occasions."

So significant is the opportunity that Blanca de la Infiesta, CMO at Spain's Zamora Company, has set up a dedicated spritz team under global brand spritz category director Priti Punjabi. "It's no secret in this industry that consumers are looking for lighter drinks in more daytime occasions, such as aperitivo," says Punjabi. "So capitalising on this shift in consumption is paramount for all of us."

A strategic opportunity

Henkell Freixenet and Zamora Company may be two of the larger companies »

Henkell Freixenet taps into the spritz trend with Mionetto Aperitivo and Prosecco



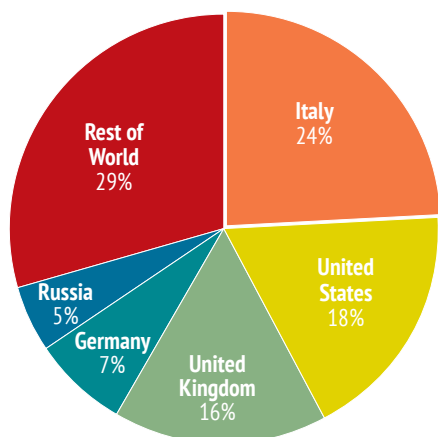


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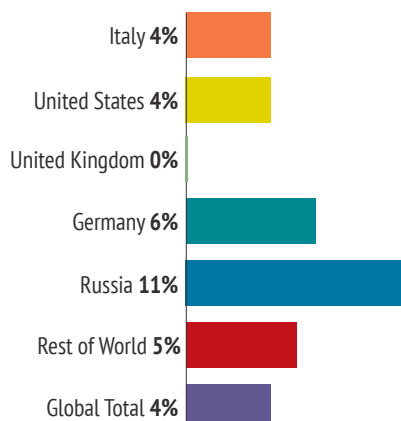


A taste of
ITALIAN LIFESTYLE

Top 5 Markets for Prosecco Market Share (Vol) 2024



Chg Vol 2023–24



Source: IWSR. Figures reflect sales of prosecco, which is not always consumed in a spritz, and exclude duty free

Key Takeaways

- The spritz has become many people's go-to serve during the on-trend early evening aperitivo occasion.
- Aperol has spearheaded the phenomenon, expanding out of Italy and Germany to conquer most of Europe and North America.
- The classic spritz has morphed into many forms, including the limoncello spritz and using a host of ingredients, such as amari and liqueurs.
- The arrival of spritz RTDs boosted the serve's appeal even further.
- Next on the spritz to-do list is expanding its appeal into Asia-Pacific, and deseasonalising a serve so closely associated with the summer.

» focusing on the spritz trend, but they are by no means alone. “At Marie Brizard, the spritz trend represents a strategic opportunity and it’s a natural playground for our portfolio,” says international brand manager Vanessa Grangier.

“Citrus is at the heart of this spritz movement and our range of limoncello, aperitivo, tangerine and pink grapefruit li-

queurs responds perfectly to this appetite.” In France, the company has extended this strategy with a dedicated spritz range featuring three variants: Limoncello, Aperitivo and Elderflower.

As the breadth of the products and flavours referenced suggests, the spritz has come a long way from its origins, and the foundational role played by Campari Group’s superstar Aperol brand. The global spread of Aperol over the past ten years has been nothing short of astonishing.

“A decade ago, 75% of Aperol sales were in Italy and Germany,” says Andrea Neri, managing director House of Aperitifs, at Campari. “Today, the same proportion is spread across six markets: Italy, Germany, Austria, France, the US and the UK, with the US now being the third-largest market, with growth potential.” The company’s sights are now set on Asia-Pacific, where Neri sees “significant opportunities”.

‘The occasion is evolving far beyond the original serve’

Where the Aperol spritz has led the way, many others have since followed — initially via the hugo spritz, but now with an apparently endless list of me-too serves, with limoncello increasingly influential.

Punjabi reports that Zamora’s Villa Massa brand is capitalising on the limoncello trend, doing well in Germany, the Netherlands and Belgium.

Similarly, Antiche Distillerie Riunite Srl CEO Nicola dal Toso reports a positive year for the company’s Rossi Limoncello in 2024, with sales accelerating in 2025. “The spritz has become a cornerstone of the Rossi

Limoncello drinks strategy,” he adds. “The limoncello spritz is a nice alternative in the spritz category. Its popularity is attributed to its refreshing taste, occasion versatility, appealing to consumers looking for new, lighter and more approachable cocktails.”

Nonetheless, there’s plenty of room on the spritz bandwagon for all manner of flavours and styles.

Describing the spritz as a “key driver” of the company’s sales, Luxardo SpA export account Nicolò Luxardo says its Luxardo Aperitivo, Limoncello, Bitter Rosso and Bitter Bianco products are all “thriving” in markets such as Italy, the US, the UK, the Netherlands, Greece and Eastern Europe.

“The spritz is moving beyond the classic serve, with more people looking for lighter, fresher flavours,” he adds, namechecking Luxardo Limoncello combined with white wine, soda or ginger ale. “It is an easy, refreshing option that fits the growing demand for citrus and botanical-style spritzes.”

The scope of the spritz is amply illustrated by the number of products made by Gruppo Caffo 1915 Srl, which Matthijs van Zanten, global marketing & brand development director, mentions in connection with the trend: aperitifs, amari, liqueurs, spirits, prosecco and soft drinks.

“The spritz occasion is evolving far beyond the original serve — with venues of all types embracing it as a creative opportunity,” he says. “We now see everything from botanical, savoury and citrus-forward twists to jug serves designed for sharing.

“What unites the modern spritz is a set of key attributes: low-alcohol, sparkling or lightly effervescent, served in »



‘The spritz has become a cornerstone of the Rossi Limoncello drinks strategy’

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» large, festive glassware with plenty of ice and fresh garnishes — all designed to enhance the aperitivo mindset and social experience.

“For hospitality venues — not only cocktail bars — the spritz has become a powerful way to differentiate, maximise guest experience and drive engagement through visual appeal and versatility,” says Van Zanten. As examples, he cites the combination of Amaro del Capo with tonic and lime in the Capo tonic spritz, and a twist that also uses Calabrian red pepper, the Capo arrabbiato spritz, also known as the ‘angry boss’.

Rise of the RTD and RTS

The common factor with all these riffs on the original spritz is that someone — bartender or consumer — has to make them. No surprise, then, to see a burgeoning number of spritz RTDs rushing to market — a confluence of two of the most dynamic trends in the market right now.

Everyone’s doing it, including Luxardo’s low-alcohol (2.1% ABV–5.9% ABV) trio of 20cl bottles, developed with Greek importer Granikal: Aperitivo Spritz, Limoncello Spritz and Bitter Rosso & Soda. “These RTDs are ideal for on-the-go enjoyment or quick service in busy venues,” says Nicolò Luxardo.

Bottega developed its first premixed Lemon Spritz in 2023, after persuading bartenders to try combining its namesake prosecco with Bottega Limoncino. The ready-to-serve spritz combines sparkling wine, Bottega Limoncino and mint leaves. So successful was it that the company fol-



Campari Group’s market leader Aperol has its eyes set on Asia-Pacific and becoming a festive staple



Bottega has added Limespritz to its RTD range

lowed up this year with what company president Sandro Bottega describes as the “more savoury” Limespritz.

The secret to the product’s success has been a combination of low alcohol content and flexible formats — 20cl bottle, 25cl can and 75cl bottle. “People are increasingly looking for RTD, portable and easy-to-consume beverages, especially in social settings, outdoor events and parties,” says Sandro Bottega.

“Spritz RTDs can tap into the convenience factor, allowing consumers to enjoy a sophisticated drink without the need for mixing or bartending skills. They’re perfect for picnics or backyard barbecues, where ease and convenience matter.”

Importantly, argues Antiche’s Dal Toso, RTDs can expand the appeal of the spritz serve still further. “We believe RTDs will find success in on-the-go formats, retail shelves and outdoor settings like festivals, social gatherings and picnics,” he says.

Elephant at the bar: seasonality

Festivals, picnics, barbecues — the spritz has become an indelible part of many people’s summers. That’s a powerful message,

but it comes at a price: seasonality. How do you sell a spritz on a damp February night in Manchester?

Well, that’s pretty much what Aperol is trying to do. Neri says it has become a “staple of winter rituals through après-ski activations across the Alps and in the US — California, Montana, Wyoming and especially Colorado and Vail”. He adds: “Our ‘White Christmases are Overrated’ campaign has helped position the Aperol spritz as a festive favourite, supporting our broader deseasonalisation strategy.”

Beyond tackling seasonality, where does the spritz go next? Geographically, Asia looks like the big prize, as referenced earlier by Campari’s Neri. Henkell Freixenet’s Lehmann concurs, with Mionetto Aperitivo (full-strength and alcohol-free versions) launching in the region this year.

“With recent listings in major markets like Thailand, Singapore and Indonesia, we have successfully increased our presence in the APAC region for Mionetto Prosecco and Mionetto Aperitivo,” she says.

In terms of flavour, it increasingly seems that anything goes.

Zamora’s Punjabi believes a classic spritz should always have a wine base, but she adds: “The interpretation of ‘spritz’ is so wide now — it now just means a fizzy, refreshing drink. In countries like the US, which is more cocktail-forward, you are seeing agave-based spritzes, whereas in more classical aperitivo-respecting markets, like Germany or Italy, you are seeing a wide array of liqueurs being mixed with prosecco per the original.

“At Zamora, we are even seeing a growing interest in our Licor 43 spritz. Each serve offers the consumer a different spin on the refreshing drink — hugo is a bit more floral, limoncello is more democratic. The possibilities are endless, but the strategy has to be right.” **GDI**



Capo tonic spritz and the ‘angry boss’ — Capo arrabbiato spritz with Calabrian red pepper



Spritz roundup

Five new launches that caught our eye this month

Recent product launches and marketing campaigns reflect the growing diversity of the spritz serve, and its expansion beyond Europe to become a truly global phenomenon



All in one: Mionetto's Aperitivo Kit

Henkell Freixenet's new Mionetto Aperitivo Kit aims to allow consumers to customise their aperitivo moment, choosing whether to enjoy it with or without alcohol. The kit, combining Mionetto Prosecco and 0.0% with Mionetto Aperitivo and Aperitivo Alcohol Free, has "exceeded expectations" in markets such as France and Poland.



Zonin expands Limoneto network

Two years after launching its Limoneto Spritz at Vinitaly, Zonin1821 has expanded its distribution network, focusing on key markets such as the US, the UK and Germany, plus Denmark, the Netherlands and the Baltics. Vice president Michele Zonin said the company had "invested in continuously refining [Limoneto's] taste profile" over the past two years.

Lemonier's Calabrian roots

Gruppo Caffo 1915 Srl has launched Lemonier, a Calabrian lemon liqueur with Mediterranean herbs, bottled at 15% ABV. Designed to respond to consumer demand for lower-alcohol, limoncello-style products, it is said to be ideal for spritz serves, offering "a fresh and approachable alternative to traditional, higher-ABV liqueurs".



Lolea Aperitif gets its sparkle on

Zamora Company has revamped its Lolea brand, launching two new RTD spritzes. Lolea Citrus Spritz combines basil and bergamot, while Lolea Floral Spritz uses blood orange and orange blossom, both bottled at 8% ABV, with an SRP of just under EUR10 (US\$11) in European markets including Spain, the Netherlands and Germany, with the US to follow in Q3.

Funkin spritzes up its range

Canned cocktail brand Funkin has expanded into the spritz market for the first time with a duo of Funkin Spritz cans. Available in two flavours — Limoncello and Raspberry — the new range offers a lower ABV of 4.5% and a longer serve than the brand's core line of cocktails. The brand says it is "confident they'll become a year-round must-have".





with actor & Hard Cut Vodka co-founder Dolph Lundgren

Dolph Lundgren became the latest celeb to launch a drinks brand in March. But Hard Cut Vodka is more than a sideline for the action star: 'This is my full-time job. I spend 80% of my time on Hard Cut and 20% on movies.' Interview by **Olly Wehring**

How involved have you been in the creation of Hard Cut? I used to drink vodka back in the 1990s, then I moved to tequila for a while and then whisky, before I went back to vodka. About six years ago, I was out with my wife [co-founder Emma Krokdal], and I was looking for a good vodka to drink. I looked at the back-bar and there were a lot of cool-looking tequila and whisky bottles, but the vodka section looked a little boring.

I tried a few, but didn't really like anything and started complaining to Emma. She came up with this idea: 'You're Swedish, you played a Russian, you're a chemical engineer — why don't you make your own?'

We tried a bunch of vodkas to find something that was smooth enough to drink straight up, over ice — the way I like to drink it. We found that we liked potato vodkas the best, because they're smoother and creamier. We ended up finding one that's made in Idaho.

We started working with [former Moët Hennessy executive, Leblon Cachaça founder & current Hard Cut CEO] Steve Luttmann about four years ago and he put us in touch with the distillery. I've been involved in picking the actual liquid, and Emma and I were involved in the design of the bottle; we wanted it to look kind of macho, with big shoulders. I came up with the name, which comes from the Hollywood editing world.

All of this blended together to create something that I felt I could stand behind.

You haven't leaned into your Northern European roots. There was a temptation. We spoke to a Swedish vodka brand, which was quite smooth as well, but the supply side didn't work out. We're very interested in getting Hard Cut into Sweden and Norway, where my wife's from.



Dolph Lundgren: 'It's an advantage to have a known person involved, because it brings eyes to the brand'

It feels good that our vodka's American-made — the US is the first market we're tackling now. At the same time, with all the tariff wars going on and everything, it makes things quite simple that it's all here. The biggest part of the puzzle — the liquid — is in the market.

The vodka shelves are incredibly crowded and have been for a very long time. Who are you looking to replace? We just launched two months ago, so we're still finding our way. We're not really looking to replace anybody per se. If you think about the vodka market strategically, the main brands have been around for a long time. If everything works out, we hope to be the new vodka standard that will take market share from everybody. When people realise our vodka tastes better, they can enjoy being part of this brand.

Celebrity fronted brands have been a thing in alcohol for a very long time. It's an advantage to have a known person involved,

because it brings eyes to the brand. I don't know many celebrity brands where the owner has been involved in creating the brand and coming up with the recipe. I don't know how many were founded like ours. Hopefully, Hard Cut will stand out in that way too.

Moving forward, how involved do you intend to be with the brand? I just came from Florida where I did social media content for ABC Fine Wine & Spirits, which has around 100 stores in the state. We'll be live there this fall. Then, in two weeks, I'm going to Sweden, where we're going to start a small-scale introduction to the state-owned liquor retailer [Systembolaget].

I'm involved; this is my full-time job. I still have a few movies that I'm trying to get made, but on a daily basis, I spend about 80% of my time on Hard Cut and 20% on movies.

What are your aspirations for Hard Cut?

In the short term, I hope to bring it to as many consumers as possible. We're starting in America first, then hopefully heading to other countries around the world.

From a longer perspective, it wouldn't be so bad if we could expand this brand and be more of a business owner rather than an actor. It's more satisfying to run a successful business than just do the same thing for 40 years.

What's your perception of the alcohol industry? It's a softer, friendlier crowd than the entertainment business, which tends to be really hard and a bit insecure. All artists have inner doubt, which fuels their creative urges. You feel a little more like people are in competition with each other in Hollywood.

In the beverage industry, I've felt people are more relaxed and it's more fun, which is a really important part of it. On a social level, I like it better than Hollywood, for sure. **GDI**

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



La Martiniquaise-Bardinet has unveiled Cutty Sark's debut RTD product in the shape of its signature serve, the Scotch Whisky & Ginger Ale highball (ABV 5%)

From convenience to craft, nostalgia to nutrition, 'RTDs are here to stay'

The global ready-to-drink (RTD) alcoholic beverage market has undergone a remarkable transformation in recent years, moving from a niche convenience offering to a fast-growing and strategically critical category for major drinks companies and challengers alike.

"RTDs are indeed a dynamic and growing category, consistently gaining share of total beverage alcohol," says a Diageo spokesperson. "The data shows us they primarily steal volume from beer and wine. This offers Diageo an opportunity to recruit new consumers in different occasions."

That opportunity is driving considerable innovation, investment and diversification. At VK and Hooch brands owner Global Brands, head of brands Craig Chapman says the UK market alone has doubled in

Ready-to-drink alcohol is shaking up the global market – positioning itself not merely as a stopgap alternative to bar service, but as a dynamic and evolving cornerstone of modern beverage consumption. **Henry Mathieu** reports

value over the past decade, "from GBP228m in 2014 to GBP543m in 2024".

Canned cocktails, in particular, are outperforming other segments. "Premium and super-premium canned cocktails have played a key role in this growth, contributing over GBP10m in RSV in the last 12 months, which reflects a growing consumer appetite for high-quality, bar-standard cocktails in a convenient format," Chapman adds.

Susie Goldspink, senior analyst at IWSR, notes that growth is industry-wide. "We have seen significant investment and innovation from companies from all sectors of the drinks industry – beer, spirits, soft drinks and wine," she says. "All players see this as an opportunity to build new brands or extend their existing ones into new areas."

However, the pace of innovation is slowing – in 2021, more than 3,400 new RTD products were launched in the world's top 10 markets for the category, but last year that figure dropped to just over 1,800, according to IWSR's RTD Innovation Catalogue.

"Having reached a peak in 2021, new RTD product launches have been declining year on year, while volumes remain steadier," observes Goldspink. "The category is be-

coming less reliant on a never-ending stream of product launches, and RTD innovation is simply becoming more efficient."

Power of premiumisation

Premiumisation remains a prominent theme, but it must be balanced with accessibility – a tightrope companies are learning to walk with increasing dexterity.

"RTDs sit at the nexus of multiple consumer trends," notes Diageo's spokesperson. "We've identified three desires they tap into: convenience, moderation and exploration." These trends are key to the format's resilience and broad appeal. "The multitude of formats available mean RTDs can shape-shift to be relevant across occasions."

This idea is echoed at La Martiniquaise-Bardinet (LMB), where the company has launched a new suite of branded RTDs, including Cutty Sark & Ginger Ale, Gibson's Gin & Tonic and Negrita Cola. "We focus on low-alcohol (5% ABV), affordable, convenient, easy-going solutions," says international marketing manager Laure Habbouse. "We believe that the long-term trend of premiumisation will continue, but in the short term, affordability is key."

Chapman believes the dynamic is also shifting consumption habits. "Unsurpris- ➤



Smirnoff Ice marked its anniversary with a new look

MARKET INTEL RTDS

ingly, inflation has caused consumers to be conscious of how much they are spending. However, this is actually driving demand for premium canned cocktails as consumers swap spending in hospitality venues for socialising at home.”

Global Brands is attempting to meet demand across the board. “Our portfolio means we have something to cater for all types of consumers — whether they’re prioritising value with a multipack of lower-ABV cocktails, or looking for something more premium to recreate that special occasion feeling,” Chapman says.

At Clonakilty Distillery, the focus is squarely on the premium end of the spectrum. “Clonakilty has a unique and authentic brand story,” explains founder Michael Scully. “We are perfectly placed to offer RTDs at the premium end of the market.” The company’s entry into RTDs began with a partnership in Japan, where it launched a 35cl, 7% ABV offering through Lawson Group. “We are now evaluating options as to whether Clonakilty should expand its RTD offerings to other markets,” he adds.

Functionality & moderation

As consumer health consciousness continues to shape F&B categories globally, RTDs have demonstrated their ability to tap into moderation trends.

“Their premixed nature means RTDs are able to offer consumers control of their alcohol, sugar and calorie intake, tapping into the long-term trend of consumers drinking better, not more,” says the Diageo spokesperson. “Our RTD strategy reflects this.”

Goldspink agrees: “Flavour and convenience are key drivers of RTD popularity. The wide range of flavour profiles, cocktail choices and low-sugar/carb options means there is something for everyone.”



Clonakilty Distillery cans its Japanese RTDs locally

The initial surge of hard seltzers was built on this exact proposition. “Health factors certainly played a part in the rise of hard seltzers,” Goldspink adds. “These low-sugar/low-calorie options often focussed on these elements in their brand communications.”

Even at the premium end, moderation is increasingly central. “While premium RTDs are slightly higher in ABV, they are still a lot lower than traditional bottled spirits,” Scully points out. “This taps into a significant sector of our health-conscious customers.”

Formats, flavours & packaging

RTDs are, by their nature, suited to experimentation. Their format lends itself to novel flavour combinations, exciting packaging solutions and alternative serves that align with current consumer habits.

Chapman highlights the strong performance of ‘nostalgic’ brands, such as Reef, Hooch and VK, which resonate with Gen Z and Millennial consumers. “To capitalise on the increased demand for nostalgic products, this year we launched our Hooch RTD in draught format for pubs and bars,” he says. The innovation includes “vibrant tap handles and one-of-a-kind glassware in the iconic nostalgic branding”.

Reef also became the first UK alcoholic RTD available in Tetra Pak. “It offers a fully resealable carton — perfect for on-the-go summer sipping,” Chapman notes. “It is approximately five times cheaper than standard bottle formats, while also currently being exempt from DRS [Deposit Return Scheme] regulations.”

LMB has similarly streamlined its packaging strategy. “We have decided to focus on the 25cl slim can format,” says Habbouse. “Lighter, reducing waste, nomadic, durable and easy to store.” These practical qualities align well with sustainability goals and meet consumer expectations for convenience and portability.

Indeed, packaging has become a front-line battleground in RTD development. Diageo highlights the importance of visual appeal. “RTD shoppers tend to be open to

Hooch RTD is now in draught for the on-premise

RTD LAUNCHES 2021 v 24

- More than 3,400 new RTD products were launched in the world’s top 10 markets in 2021; this plummeted to just over 1,800 in 2024.
- One in three RTD launches was a hard seltzer in 2021; last year that dropped to one in nine.
- FAB (flavoured alcoholic beverage) RTDs are growing — 16% in 2021, but 28% in 2024.
- The cocktail/long drinks segment cemented its RTD leadership position, up from 38% of new releases in 2021 to 42% last year.
- No-alcohol RTDs are also growing (6% of new launches in 2024, up from 3% in 2021), as are wine spritzers/coolers (7% in 2024, up from 4% in 2021).

Data: IWSR

exploration — product packaging and shelf display are the No.1 touchpoints that impact a consumer’s decision,” the company says, citing a Kantar study.

Sustainability as standard

Sustainability is increasingly influencing RTD strategy, from packaging to logistics.

Clonakilty Distillery made a key decision to can its Japanese RTDs locally. “To save on emissions, we shipped the whiskey and gin in bulk to Japan and had it canned locally,” says Scully.

At LMB, recyclability is prioritised. “We have decided to give priority to the can format, 100% endlessly recyclable,” Habbouse confirms. The company positions sustainability as a core value: “As a family-owned company with a long-term mindset, sustainability has always been at the heart of our development.”

Global Brands is likewise adapting, says Chapman. “We committed a long while ago to using 100% rPET bottles for our VK range,” he says. “This is something we’re proud to have stood by, despite a hefty commercial cost.” He also points to domestic sourcing for ethanol as a means to lower emissions.

A category with staying power

Though some macroeconomic indicators and category trends are showing mixed signals, RTDs appear to be bucking the trend. “Despite the overall beverage market currently underperforming, demand for RTD beverages remains strong and shows notable resilience,” notes Chapman.

Diageo puts this down to the format’s versatility and reach. “RTDs appeal across demographics,” says its spokesperson, while their “relevance to wider trends means demand is expected to continue growing”.

Scully agrees: “There is little doubt the RTD category is growing and here to stay.” **GDI**

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Global Brands eyes European & Asian markets as its RTD brands boom

VK and Hooch producer **Global Brands** is to expand its distribution footprint in Europe and Asia after surging international demand for its ready-to-drink brands

Global Brands, the independent drinks producer behind leading ready-to-drink (RTD) brands VK, Hooch and Reef, as well as canned cocktail brands, All Shook Up, be. and Gather, is exploring further international distribution routes for its portfolio in response to strong consumer demand.

The alcoholic RTD sector is the only major alcohol category to record volume growth last year, with IWSR data showing a 2% volume rise globally. In turn, Global Brands reported increased demand for its brands across the globe.

Australia, Bahrain and Cameroon are among the markets driving volume growth for the UK-based drinks producer, with VK sales at an all-time high – VK's total export sales are up by 20% in the moving annual total (MAT) to April 2025.

Global Brands is also experiencing large growth in the UAE with its Franklin & Sons tonic water and mixers brand, thanks to winning high-profile accounts such as the exclusive Atlantis Resorts in Dubai. Now, the drinks producer is looking to further this success in the UAE, with a focus on retail listings and high-energy venues for its RTD brands.

Meanwhile, its canned cocktail brand, All Shook Up, is experiencing success across Europe, where Global Brands is replicating its listings in Tesco UK and the Republic of Ireland to expand across retail in multiple markets



Keith Beattie: 'We wanted to take Global Brands truly global and it's this vision which has driven the international expansion of the company to now export to over 67 countries and counting'

including Spain and the Czech Republic.

It's this global success which resulted in Global Brands receiving The King's Award for Enterprise: International Trade in 2024.

The boom in RTDs is credited to factors such as rising urbanisation, with growing city populations often associated with increasingly busy lifestyles, generating demand for quick and convenient formats.

Now, with IWSR predicting the global RTD category will grow by 12% in volume between 2022 and 2027 to reach US\$40bn

across ten key markets, Global Brands plans to target further international expansion, with its sights set specifically on Asian and European markets.

Keith Beattie, the company's international sales director, explains: "What started as a man with a vision when Steve Perez founded Global Brands in 1997, has developed into global production and distribution of award-winning drinks.

"When Global Brands was given its name, it was with a clear vision in mind: to enhance moments one drink at a time, no matter who you're with or where you are. We wanted to take Global Brands truly global and it's this vision which has driven the international expansion of the company to now export to over 67 countries and counting."

Vodka-based RTDs lead the way

IWSR data shows that vodka-based RTD variants, such as VK and Hooch, are set to lead the way for spirits-based RTD growth, with vodka's "versatility and approachable flavour profile" cited as the driving force. »



Gather and be. RTD cocktail brands on sale in supermarkets in Malta

» Indeed, the drinks industry analyst believes this is the reason vodka surpassed tequila as the leading RTD spirit base three years ago.

This presents an increasing opportunity for RTD producers to cater to the growing demand for vodka-based RTDs. In fact, Beattie reveals that Global Brands is in “advanced talks” with partners in South Korea, Australia and the US to enter into those three key markets, and is also seeking to replicate its international success in other regions.

Adapting RTDs for local markets

As Global Brands sets its sights on further international growth, it has been working with international distribution and licensing partners to adapt its flavour profiles, ingredients and sourcing based on local requirements and preferences, to set its brands up for success in each region.

With plans to launch Hooch into South Korea and South-East Asia, Global Brands has begun efforts to localise the drinks recipe, using regional influences.

In Australia, the producer has been working with its licensing partner, Mandatory Drinks, to reimagine its iconic 1990s vodka lemonade brand, Hooch, for consumers Down Under. The new product comes in a 44cl can, has a higher ABV of 4% and is made using locally sourced ingredients to appeal to Australian consumers.

Working with the Global Brands team to bring Hooch to Australia has been “a truly exceptional experience”, according to Mandatory Drinks co-founder Mark Collins.

“For us, these partnerships are as much about the people and the support behind the scenes as they are about the product itself,” he says. “Global Brands has facilitated seamless business interactions, demonstrating remarkable flexibility, agility and quick decision-making.

“They are very well-resourced regarding sales collateral, and have maintained open and transparent communication about product information. We feel genuinely privileged to collaborate with Global Brands and are excited to share some fantastic liquids with the Australasia market”.

Global Brands is also in advanced talks to bring Hooch back to the US market, where the alcoholic lemonade RTD brand once enjoyed sales of more than 1m cases a year, before the brand’s previous owners removed it from the market.

In light of the recent US tariffs, Beattie notes that moving to local production is



VK and Amigos Tequila Flavoured Beer on display in a Northern Cyprus supermarket

key to staying competitive and meeting market demand quickly. Therefore, with “big plans for 2026”, the producer is working with its US partners to unlock this potential, while working on a locally produced liquid to bring Hooch back stateside.

Eyeing up European expansion

With work well underway to bring Global Brands to South Korea, Australia and the US, the drinks producer is turning its attention to markets closer to home — such as Spain, Italy and the Nordic countries — where consumer demand for RTDs and canned cocktails is increasing.

Data from Grand View Research shows that the Spanish RTD cocktail market currently accounts for 2.6% of the global market, but is expected to reach US\$180.6m by 2030, growing at a CAGR of 13.9% from 2025–30. Within this, spirit-based RTDs were identified as the most lucrative type segment, registering the fastest growth during the forecast period.

In nearby Italy, CGA by NIQ’s *Consumer Pulse Report* found 26% of consumers have bought RTDs in bars and restaurants over the last six months, while another 49% are open to trying them. This shows huge untapped potential for the category there, says Beattie, if bars are able to attract consumers with products of the right quality and value.

The CGA by NIQ report also found more than a third (35%) of Italian consumers report an increase in the availability of RTDs over the last 12 months, with RTDs now close to overtaking neat spirits as

the second most popular spirits serve behind cocktails.

Further north in the Nordic region, Denmark is experiencing a trend towards premiumisation, with consumers increasingly willing to spend more for drinks made with high-quality ingredients.

Beattie says the focus on drinking better is “undeniably due to evolving taste preferences” and is contributing towards a growing demand for premium drinks options, such as canned cocktails, in the Nordics.

Growing demand in Asia

Beattie reveals that Global Brands is also exploring opportunities in other Asian markets such as China, Japan and India.

While the US remains the largest RTD market, IWSR predicts Japan will be the market which adds the most volume over the next few years, led by the growth of flavoured alcoholic beverages (FABs).

Last year, Japan’s alcoholic RTD market was valued at \$7.07bn, with Markets & Data forecasting it will reach \$12.06bn by 2032, with a CAGR of 6.9%. The analyst attributes the growth to several factors, such as the increasing appeal of social gatherings and parties, the rise of cocktails-at-home and an increasing consumer preference for easily accessible, reasonably priced and convenient alcoholic beverages.

Similarly in China, the demand for FABs is set to see the market become a significant player in the RTD category. Tropical and fruit-flavoured beverages are becoming increasingly popular, driven by preferences for Western culture, according to Market Research Future, and as the country sees a growing middle class population, combined with an urbanisation trend, current estimations suggest China’s RTD alcoholic RTD market will grow from \$4.02bn in 2024 to \$10.23bn by 2035.

Partner opportunities

With all the data seemingly pointing in one direction for international RTD markets, combined with Global Brands’ existing experience and success overseas, the drinks producer has announced it is on the hunt for new distribution and licensing partners across Europe and Asian markets.

Those interested in discussing how to bring drinks RTD brands — such as VK and Hooch, or any of Global Brands’ canned cocktail brands — to international markets, should get in touch with the team at enquiries@globalbrands.co.uk

No/low and agave rare bright spots as tax hikes stymie UK beverage market

The UK remains a strategic European market with pockets of dynamic growth, but regulatory burdens, high taxes and a stubborn cost of living crisis are taking their toll. By **Joe Bates**

The UK alcoholic beverage market is starting to resemble a worn-out punching bag. A flurry of hefty blows — such as rising prices, the cost of living crisis, a hike in alcohol duties and a shrinking hospitality sector (more than 1,000 pubs closed last year) — have left the world's third-largest alcoholic beverage market by value reeling.

Amid the turbulence, the no/low-alcohol category stands out as a welcome bright spot. Driven by Gen Z preferences, IWSR projects a robust CAGR of 19% for this segment over the next three years.

Agave spirits are also gaining momentum. More than one in ten cocktails served in the UK now features tequila, with the margarita rising to become the nation's ninth most popular cocktail, according to research from French syrup brand Monin.

Regulatory pressures weigh heavy

The UK government's introduction of a strength-based alcohol duty system in August 2023 — accompanied by the largest tax increase in the sector in half a century — continues to draw the ire of industry leaders.

A further set of changes in February 2025, including the end of an “easement period” for certain wine categories and a general 3.65% duty increase on non-draught alcohol, have added further strain.

“The government continues to claim that the tax hikes are part of their big plan to plug the black hole in the public finances, but a series of record-breaking tax levies are doing the exact opposite,” says Mike Beale, chief executive of the UK's Wine and Spirit Trade Association (WSTA), highlighting a GBP209m (US\$283m) decline in alcohol tax receipts over the last nine months of 2024.

“It is estimated that some of the major retailers will be facing millions of pounds in losses,” he adds. “This will have a knock-on effect on producers and distributors who will also find their profits plundered.” Further complicating matters is the Ex-



Pubs have been a part of British life for centuries, but soaring costs forced more than 1,000 publicans to close their doors in the UK last year; another 300 turned their taps off in the first three months of 2025

KEY TAKEAWAYS

- UK consumers continue to invest in premium spirits, especially tequila and single malt.
- The rise of low/no-alcohol and functional soft drinks is reshaping product development.
- The UK hospitality sector is shrinking — more than 1,000 pubs went out of business in 2024.
- EPR fees, alcohol duty hikes and packaging reform are escalating costs across the supply chain.

tended Producer Responsibility (EPR) scheme, which came into effect in April 2025. This environmental initiative imposes significant packaging waste fees on suppliers, with glass recycling now nearly seven times more expensive than plastic.

“EPR is an inflationary new tax that's being implemented before it's properly finished and shares a similar fiendish complexity with the big recent hikes in wine duty,” says David Gates, CEO of wine retailer Laithwaites.

“Combine them both with the chancellor's increase in national insurance [tax on earnings and self-employment profits], and our family wine business is left facing an extra GBP10m in taxes year on year.”

Beyond regulatory challenges, busi-



Pantalones launched in the UK off-trade in May

nesses continue to grapple with broader economic headwinds. “Inflation has increased our cost of goods and put pressure on margins,” says Howard Davies, co-founder & director of Devon-based Salcombe Distilling Co.

“Wherever we can, we have tried to drive further efficiency in our supply chain process to try to counter the impact of inflation. Nonetheless, we did have to increase some of our pricing at the beginning of 2025. It just isn't possible to continually try to absorb inflation.”

Tequila trumps gin & vodka

Agave spirits is one of the few categories finding consistent favour with UK consumers. Tequila-based cocktails are increasingly ➤

» popular, often replacing vodka and gin.

“Tequila continues to benefit from consumer curiosity and trade-up behaviour, especially among younger legal-age drinkers who are exploring more refined, high-integrity spirits,” says Gareth Williams, global brand director at Pantalones Tequila, an organic label co-founded by US actor Matthew McConaughey that launched in the UK off-trade in May.

Williams notes that the brand’s approach aligns with multiple consumer trends: organic production, clean-label spirits and mindful drinking. “We believe this positioning will only grow in importance and it continues to guide our innovation roadmap and communication tone,” he says.

Meanwhile, Stock Spirits Group, the owner of mainstream brand Sierra Tequila, expanded its UK presence this year with the acquisition of The Drinks Company, an independent importer and distributor. The move has helped bring UK distribution in-house.

“It also improves our return on investment, which means we can commit more to the brand over time,” says a company spokesperson. “Sierra is already a market leader in the off-trade, and we see that as a strong foundation to build from, both for Sierra and for expanding our wider portfolio.”



Picoso Spicy Soda is cut with UK scotch bonnets

No/low shows staying power

The non-alcoholic category continues to thrive in the UK on-trade, with CGA by NIQ reporting sales surpassing GBP4.6bn in the 12 months to February 2025. Almost half (46%) of British consumers now opt for an alc-free drink when out, with a third doing so more frequently than a year ago.

Availability, a long-standing issue for the category, appears to be improving too. According to Monin’s *Autumn/Winter Drinks Trends* report, 55% of consumers report now seeing non-alcoholic cocktails on menus.

Tom Bowerman-Wake, co-founder of spicy soda brand Picoso, sees a generational shift. “There’s a rightful move away from a binge-drinking mentality to flavour-fo-

UK free trade deals ‘a win-win all round’

May 2025 saw a landmark moment for UK trade policy, with the government agreeing three bilateral free trade agreements (FTAs): a limited FTA with the US, a more comprehensive deal with India and a post-Brexit trade reset with the EU.

Most industry attention has focused on the potential benefits of the India deal for UK whisky and gin producers targeting India. But Ipe Jacob, principal co-founder of Maharaja Drinks, an importer and distributor of craft Indian drinks brands, also sees opportunity for Indian brands eyeing the UK. “Unfettered by tradition and blessed with faster maturation, [Indian brands] are set to race forward,” Jacob says. “Free trade is a win-win all round.”

He adds that while smoother logistics are not yet in place, momentum is building. “The agreed reductions are a sensible first step. There is further to go — non-tariff barriers deserve a mention too — but freer trade will ineluctably lead to greater consumer exposure and choice.”

Maharaja’s UK-imported range includes gins, fruit wines and kombuchas, with feni (a traditional Goan spirit), vermouths and liqueurs due later this year. “Feedback suggests coffees, kombuchas and gins have been particularly nice surprises for many,” he notes.

EU-based brands, too, are cautiously optimistic. Poland’s Stock Spirits Group is taking a measured approach to the EU–UK reset, but expects to see fewer border checks and less paperwork, both welcome developments.

“Doing business in Northern Ireland isn’t as easy as we’d like, but on the positive side, we continue to import our goods and market them effectively across the UK,” a spokesperson adds. “Any improvement in efficiency or reduction in bureaucracy is welcome.”

cused drinking,” he says. Picoso, launched earlier this year with spicy lime and mango variants, features UK-grown scotch bonnets, Mexican habaneros, electrolytes and natural agave.

Now stocked in Selfridges and upscale on-trade venues like Circe’s Rooftop in London, Picoso offers what Bowerman-Wake calls “cocktail-quality spicy drinks for all drinking habits, without the hassle”. A fashion collaboration and new multipacks are slated for this summer.

Whisky faces mixed fortunes

Whisky producers across the UK have not been immune to recent pressures. According to Statista, UK whisky consumption reached 47.3m litres in 2024 — down 16% from 2019. Some producers have responded by scaling back: Welsh distiller Penderyn paused production at its Swansea facility last year, for instance, while Brown-Forman mothballed Glenglassaugh, its Highlands distillery, in January.

Yet not all brands are struggling. Whyte & Mackay, for instance, continues to see success across its core portfolio: The Dalmore, Isle of Jura, Fettercairn and Tamnavulin.

Kieran Healey-Ryder, head of whisky discovery, points to enduring demand at the luxury end of the market, citing the six-bottle Fettercairn 200th Anniversary Collection (GBP100,000) launched last year, and the third and latest edition of The Dalmore Luminary Collection, produced in collaboration with architect Ben Dobbin, which went for auction in May.

At more accessible price points, supermarkets remain a crucial channel for Whyte &



Fettercairn’s 200th Anniversary Collection

Mackay, Healey-Ryder insists. He also sees a significant growth in localism: “Consumers are sticking with their retailer of convenience or on-trade place of convenience more than they did pre-Covid,” he says.

This shift, he argues, benefits local specialist bottle shops, especially those that offer deep product knowledge and storytelling, providing a strong platform for provenance-driven brands like Isle of Jura and Fettercairn.

Still a strategic European market

Regulatory pressures and inflationary costs demand continuous adaptation and efficiency from businesses. Yet for many drinks companies active in the UK, with its upscale on-trade in London and key cities, the country remains a lodestar European market.

Echoing broader sentiment, the Stock Spirits spokesperson says the UK remains core to its European strategy.

“It’s one of Europe’s largest spirits markets, projected at US\$17.7bn by 2025 [Statista], and its dynamic consumer environment and strong trade channels provide insights and opportunities that directly support our broader European ambitions.” **GDI**

Q&A with Rabobank VP of beverage research **Bourcard Nesin**

Rabobank's recent report — *The Real Reasons Generation Z is Drinking Less Alcohol* — was deemed so important, it was published free of charge. **Olly Wehring** speaks to its author, VP of beverage research Bourcard Nesin, to discover more

Your research challenged some very negative perceptions about the future for beverage alcohol. I love that people are finding optimism in my research, but I don't see it as an optimistic report. A lot of the industry fear has been based on not understanding why young people are drinking less and being unsatisfied with the explanations that were available to them. The encouraging element of what I wrote is that these seem like better explanations — at least we know what we're dealing with.

There's reasonable concern about the impact that current trends will have on beverage alcohol volume sales and categories, but at least a brand can identify its challenges.

What methodology did you use? I come from an academic background and don't consider all surveys to be created equal — a lot of private survey and research institutions don't ask good questions. When I look at government survey research, there's a bunch of PhD scientists working tirelessly to create valid survey instruments in which the questions they're asking are getting well-calibrated answers.

I used mostly US government data from the National Survey of Drug Use and Health, which has been running for many decades. I also used Bureau of Labor Statistics data on spending to figure out not just whether young people are drinking less, but which young people and why.

Any good industry observer needs to ask a lot more questions before they start creating complex models. That's one of the big errors in our industry. You need to ask a lot more questions and spend a lot less time sorting through numbers that aren't actually answering those questions.

The general perception about younger LDA



Bourcard Nesin: 'The industry needs to make a distinction between life stage and generational change'

consumers is around their prioritisation of health & wellness and the environment. I think young people earnestly care about the environment, but that's on a relative basis; more than half of America voted for Donald Trump, and they included a fairly large share of young people. We can't say all young people care about any one issue, because it doesn't apply to the totality of that group.

There's probably a pretty significant gender gap on how much they care about sustainability, the same as there's a racial or ethnic gap.

On health & wellness, one of the things that inspired this report was that, as young people are so healthy and resilient, it never made sense to me that they would say they care about health. When I was 25, I didn't think about my health at all! You can drink a bunch of alcohol at 25 and feel fine the next day. Why are these people caring about health? It never made sense to me as the sole explanation for what's happening.

And it's not social media: people have always been under pressure to be beautiful. It doesn't make sense that it would be so astronomically different than it was a few years ago. At the same time, you can say you care about sustainability, but nobody buys sus-

'The health thing is greatly exaggerated and can strategically confuse companies as to what products young people want'

tainable products that cost more. There's so much emphasis on these trends that we have inevitably gone way too far down that road.

That plays out in the way young people drink. We think that young people are sober curious, but in reality they tend to drink once or twice a week and they drink because they're partying. As people age and they have money to spend on alcohol, not as an intoxicant but as a way to relax at the end of the day or as a pairing with a meal, they drink more often per week, but they drink less in each sitting.

The health thing is greatly exaggerated and can strategically confuse companies as to what actual products young people want.

As an economist, I feel you need to think about the difference between 'stated' preference and 'revealed' preference — what they tell a survey person and what they actually buy in the store. >>

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» Today, young people, in the US at least, are far more likely to be obese than they were 20 years ago. So when they say they care about health, is it because they're healthier or because they have a health problem that they're trying to address?

I've increasingly leaned towards the latter. But their behaviour doesn't reflect that, because they're young people and their brains aren't fully formed yet, nor do they have the money to get the support they need.

Could the headline to your research have been 'Young people are young people'? The industry needs to make a distinction between life stage and generational change. On life stage, young people have always been poor, they've always drunk alcohol to party and they've never really liked the taste of alcohol. These are things the industry easily forgets.

Most of the people building brands and marketing to this group are in their 50s — they forget what it was like to be young.

That said, young people are behaving differently to how young people behaved 25 years ago. We can't say age is the problem, because they're drinking less than previous generations did at the same age.

A lot of that has to do with fundamental changes in what it means to be a kid. Underage drinking, for example, is no longer a part of culture, not because of a rejection of alcohol as a dangerous thing, but because of the loss of privacy during childhood.

There's also a demographic change that's taking place where women are more likely to be college graduates. Having a college degree is the most important driver of alcohol consumption from a demographic perspective, so women are becoming a larger share of the drinking population.

Then there's ethnicity — in the US, Baby Boomers were 72% White, while Gen Z is

50% White. Fundamentally, White people drink more than any other group and they're a smaller share of the population. Therefore, that's a big part of the change that's driven by demographics.

For a beverage alcohol company, when they say they need to do a better job of marketing to young people, they first need to understand what a young person is today.

How do you account for the growth of no/low alcohol? Older people than Gen Z! The people that are drinking alcohol-free beer are those who have a lot of experience drinking regular beer. The reasons that young people drink aren't relevant to a no-alcohol beverage. The mistake that's being made is thinking young people want a premium experience with less alcohol. Their concept of healthy is 'no sugar', but they still want it to be boozy.

The actual demographic that would be interested in a no/low-alcohol product is probably someone in their 30s or 40s, who is putting on weight and is aware of how much harder it is to put a kid to bed when you're tired because you had a beer with dinner. Is a 20yo who can't afford to buy rice going to spend their money on a no-alcohol beer that costs twice as much as regular beer?

Are brand owners self-sacrificing by focusing on 'drink less, but drink better' at the expense of younger LDA consumers? That's probably true in some categories. Wine is a good example of a category that hasn't done a great job of exciting young consumers.

In the US, we've seen incredible innovation in making alcohol more interesting to a diverse audience, such as hard seltzer. Historically, women have been alienated from the beer category — there wasn't anything 'sessionable' for women 25 years ago. Then hard seltzer came along; not bitter, no misogynistic baggage and zero sugar.

The amazing thing was that hard seltzer also delighted young men. We tend to internalise the idea that women are more self-conscious, but men are just as likely to be on a diet as women. Men also don't want to feel bloated and want to look hot on the beach at summer. Identity is a very fluid thing.

When it comes to prioritising premiumisation, young women today make just as much money as young men do, if not more. And it's still the case that women drink half as much as men do volume-wise. That doesn't mean they're going to spend half as much.

So it does make sense to offer more pre-

mium products to women, but do a better job of targeting them.

The fact that women are becoming a larger share of the drinking population is one of the clearest drivers of premiumisation.

So a brand owner that's prioritising premiumisation should prioritise female consumers? Yes — and it's very important how you do that. That doesn't mean you need to create products that are pink. It means you need to thoughtfully represent women's experiences in your advertising. The only way you can do that is by having more women make your advertising.

That sounds like quite a challenge to this most traditional of industries. I don't want to tell a senior manager at a beverage alcohol company that there's a moral or ethical imperative to hire a more diverse workforce, because I don't think they'll do it.

[In the same vein], I don't think telling somebody that climate change is important is going to make them change their behaviour if it costs them more money.

Companies don't make changes unless it hurts their bottom line. Period.

It's going to be impossible to market to young people without being able to speak specifically to their experiences and their values. The easiest, fastest, most economical and effective way to do that is to hire young people that look like the audience you're trying to market to. As with hard seltzer — created with women in mind, but that also delighted men — the insights that that process creates is the most interesting thing for your traditional target audience.

My job as an analyst is to help companies make more money sustainably. Hiring people that look like the audience you're trying to market to is probably the least utilised yet most effective way to do that.

The wine industry, for example, has to convince Asian, Black and Latino consumers, who don't have strong wine-drinking traditions, to get into wine. That's a daunting task. But I've met just one Latino marketer in the wine business in my entire career.

How are you going to speak to that audience if you don't know what their life experience is? For a wine company, I would say hire somebody who's 25, knows how to use TikTok and hand them the reins. It can't be as boring as what you've been doing so far! **GDI**

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

Bourcard also co-hosts Rabobank's highly rated beverage industry podcast Liquid Assets





Casa Azul moves production site

US tequila brand owner Casa Azul is “upgrading production” by relocating 2.5km to the La Roca distillery in Jalisco. The transition sees the company leave the Las Américas distillery, which was founded by tequila producer Alvaro Montes, who also founded La Roca.

Sogevinus becomes Kopke Group

Portugal’s Sogevinus Fine Wines has changed its name to Kopke Group, in recognition of its oldest port brand. The privately-owned business said its brands, including Barros, Burmester, Cálem, Kopke, Quinta da Boavista, São Luiz and Velhotes, will maintain their “own unique identity” under its new name.

New look for Chouffe Beer in UK

Belgium’s Duvel Moortgat updated the look of its Chouffe brand in the UK, led by the beer’s recently released Chouffe Session extension. The tap badge for the 4% ABV Belgian blond, released to “meet growing demand for flavourful, lower-ABV options”, features a “more expressive Marcel” – the brand’s gnome figure.

‘Times tough for independent brewers’ as UK numbers fall

The number of breweries in the UK continues to decline, with 136 fewer in the country at the end of March than a year earlier.

Research from the Society of Independent Brewers and Associates (SIBA) shows that the number of active breweries stood at 1,641 as of 31 March, furthering the decline reported at the beginning of the year by the trade association. The ‘Brewery Tracker’ noted that Wales was the only UK region in the green in the 12-month period, albeit only gaining one brewery.

The south-east of England saw the biggest drop with a net closure rate of 38,

while the Midlands lost 33 breweries, Scotland 11 and Northern Ireland six.

“Times are incredibly tough for independent breweries, and while the price of a pint in pubs may be rising for drinkers, the price brewers are paid for their beer actually dropped over the last 12 months,” said SIBA CEO Andy Slee.

“What is desperately needed is a lower tax burden for pubs, lower direct taxes for brewers and greater access for independent breweries to sell to pubs in their area — many of whom are currently controlled by global beer supply.”

Loch Lomond Group purchases The New York Distilling Co

Scotch producer Loch Lomond Group has expanded into the US whiskey market by acquiring The New York Distilling Co. Financial terms were not disclosed for the deal, which it said would “enhance and diversify” its portfolio. The New York Distilling Co produces a range of American spirits brands including Jaywalk Rye Whiskey, Mister Katz Rock & Rye and Dorothy Parker Gin.

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100ml SPARKLING WATER
8ml WATERMELON PURÉE
1 WATERMELON SLICE, GARNISH

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My advice? ‘Get your family on board, launch early, then push funding later’

Huib van Bockel quit a high-profile job with Red Bull to create his own natural energy drink, Tenzing. Nine years on and Heineken UK has just bought a minority stake in the brand.

Interview by **Olly Wehring**

What was your journey to setting up Tenzing? I was always intrigued by the marketing and creative side. After I finished university in Holland, I started my career at Unilever, which at the time was *the* marketing place to go to. I was there for six years, but I missed the creative side. Then I moved to MTV, when it was still cool. That taught me a lot about the social media side.

After that, I started my own direct-to-consumer business in socks, before moving to Red Bull for eight years as the head of marketing for the UK, Europe and the Netherlands. Even though I’d sold my sock business, because I was enjoying Red Bull so much, I still wanted to start my own business again one day.

I was always very stubborn — I would never agree with my boss on anything — that’s a good sign that you want to be an entrepreneur. At the same time, as you get older, you realise those brands you’re managing will be totally fine without you.

Another urge for me was that while I loved the Red Bull brand, I grew disenchanted with the category, which was filled with artificial ingredients, high sugar and high calories. I felt it was possible to create something that is fully natural with no junk in it. So I thought I’d give it a go, and that was around ten years ago.

What else led to the creation of the brand?

When I started, people were beginning to worry about things like artificial ingredients and high sugar levels. Tenzing was really the first natural energy drink that was also low in calories. Now, they’re all over the place. The trend was there, but the category hadn’t really started yet. I knew energy drinks really well; it was more about starting a new [sub]category within it.

Could you not have done this within Red Bull? I did put some ideas forward inter-



Huib van Bockel: ‘We scaled down on what we would spend as a family. That was a clever thing to do’

nally, but I had the urge to try to do something myself.

If you try to change the recipe of an established brand, you risk losing some of your business. I don’t believe the CEO of Coca-Cola, for example, wants to make people as obese as possible, but companies like that end up being stuck with these old products — they can’t change them.

The beauty of innovation for people like me is that you can just start again from the latest science.

How did you settle on the product that became Tenzing? The key was to source everything from nature; after that, it was about the sugar level. Pretty much every soft drink has 11g of sugar. I reached out to professors and nutritional doctors, who told me the perfect isotonic level of sugar is 4.5g — you don’t get the huge spike and the crash afterwards.

The scariest thing in launching this business was that none of the flavour houses felt that removing so much sugar —

‘I was always very stubborn — I would never agree with my boss on anything — that’s a good sign that you want to be an entrepreneur’

and not replacing it with anything — was commercially viable. Thankfully, I found one that did want to do it, and it’s turned out to be one of our biggest assets.

I was travelling in Asia and found that in the Himalayas, they drink a really strong tea with salt, which has the triple hit of natural caffeine, vitamin C and electrolytes. That became the basis both of our recipe and of the brand name [from Nepalese Sherpa Tenzing Norgay].

I didn’t need permission from the family of Tenzing Norgay for the trademark — Tenzing is still a common name in that neck of the woods, but I went out there >>

» and met the family anyway. I got their blessing and I still speak to one of his sons every other week or so. It's great to be on this adventure with them.

What was the funding journey for the business? I realised this was going to be a long journey. My first point of call was my wife, with the news that I was probably not going to take a salary for two years — it ended up being four. We moved to a smaller house and scaled down on what we would spend as a family. Looking back, that was a really clever thing to do.

I got a bit of a side gig by writing a book on marketing and giving talks — all that money went directly to Tenzing. I spent nothing; I worked from hotel lobbies for about four years and did everything myself for about a-year-and-a-half and learned as I went along. Then I slowly started hiring, mainly graduates just out of university. The costs then weren't that high — one or two salaries and the inventory. We focused on getting into retailers and sampling a lot.

Another great move, looking back, was that we had just one SKU, so we didn't have too much inventory.

We got some funding in from a Thai business, which was great, but we bought them out last year, as they wanted to focus more on Thailand. Now, we have the Heineken funding.

Is familial support a requirement for a startup? For me it was. If you're single, then it doesn't matter! We went from two salaries to one, so we had to cut back. If you have to cut back on your finances, you have to get your family involved and take them along on the journey.

Was your ambition for the business to get a partner like Heineken involved? Anyone who starts their own business is either extremely naïve or extremely overconfident. It's a lot harder than anyone thinks. In the UK, for example, there are 45,000 independent convenience stores, and Red Bull and Monster are in all of them. To compete at that level, you really need some proper backing. That's what I was looking around for.

Heineken's a really good match — they really believe in brand-building and they have a long-term view on this. You feel a family ethos in there of wanting to build something over generations. Heineken's also all about using natural ingredients and they have an amazing footprint.



Huib van Bockel (right) with Jamling Tenzing Norgay, the son of Nepalese sherpa Tenzing Norgay, who, with New Zealander Sir Edmund Hillary, completed the first successful summit of Mount Everest in 1953

This is their first investment into energy drinks in the UK, so it's really important for them to make this work too.

How did the conversation come about? We reached out to have an initial chat over a beer. From there, it became a proper process where you make sure you've found the best partner that can help take the brand the furthest and create a great partnership.

What advice would you give to a startup today? I have so much! I first pitched the rough idea to my wife with a little PowerPoint presentation; that was my first port of call. In my early research into the mistakes people make when they launch their business, I came across an article in the *Harvard Business Review* that said, 'Go to market early'. I targeted some companies and universities where I could test Tenzing. That provided feedback, but what was really interesting is that they all said they would take it on once it was finished. Not only was I testing the market, I was also getting my foot in the door with these companies and universities. They ended up being my only sales outlets for about a year. Looking back, I should have done that way broader; people love the idea of co-creating.

The other thing I'd recommend is to make sure you get some runway where you don't have to immediately look for funding — maybe don't get any funding at all. It's such a beast. So check your product in-market, then prove your product in-market. That makes it way easier if, and

'Anyone who starts their own business is either extremely naïve or extremely overconfident. It's a lot harder than anyone thinks'

when, you get funding. Get your family on board, launch early and then try to push funding later.

And don't underestimate the journey of an owned business. You have to be the most resilient person, because it's going to be tough; it's hard work and a lot of insecurity. The day-to-day life at Red Bull was more fun, but this has given me a deeper sense of fulfilment. It's much like having kids — a big responsibility with a lot of worry, but you feel fulfilled in a deeper way.

What's next for you? We're still fully independent. I'm fully committed to keep going and I'm really excited about that. The key bit is that we'll learn from each other and they'll help us in the convenience channel. There's a funding aspect to it that allows us to drive campaigns for the years to come.

Do you see a full takeover in the offing? Potentially. Nothing is confirmed in that regard, but that would be one of the options. **GDI**

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

‘Be bold or be ignored’: leveraging marketing on a budget

Beverage startups don’t need a big PR spend to make a big impact – just bold ideas, sharp strategy and a brand that speaks louder than the competition. **Henry Mathieu** reports

Start with story, not spend

“You won’t outspend Diageo or Pernod, so out-think them,” says Vas Art, head of marketing at OhBev Agency. Before placing a single ad or printing a single label, founders must get crystal clear on their brand.

“Codify your verbal (story, tone, core ideology) and visual (logo, palette, imagery) fundamentals,” Art advises. A well-developed brand book turns every future decision, from email design to event signage, into a cohesive extension of your identity, not a disconnected one-off.

This clarity sets the stage for consistency, a key currency when your budget is tight. “Run every move through the brand book filter: does this look, sound and feel unmistakably us?” Art adds. If the answer’s no, cut it and redeploy resources where they matter more.

Own your niche – nail local first

In the rush to grow, it’s tempting to aim wide. But for lean brands, focus is power. “Be everything to everyone and you will appeal to no-one,” warns Tom Khan-Lavin, CEO of YesMore Drinks Marketing Agency. “On a tight budget, precision is paramount.”

He suggests zeroing in on your niche, then concentrating your efforts in your own backyard. “Dominate your home turf first,” he says. “Build a strong, loyal following in your immediate geographical area. Leveraging local events, community groups and independent retailers will provide a solid base before attempting wider expansion.”

Word of mouth, when cultivated locally, can be more powerful and more sustainable than paid ads.



‘Every brand has a compelling story,’ says YesMore CEO Tom Khan-Lavin, whose recent work with US craft distiller Gypsy Spirits reflected the free-spirited and adventurous ethos of its Michigan founders

Maximise high-impact, low-cost channels

One of the most effective (and affordable) marketing tools available? Email.

“Email marketing remains one of the most powerful and cost-effective tools in your arsenal,” says Khan-Lavin. He stresses building your list from day one and nurturing it with real value – behind-the-scenes content, invites to tastings, early access to products – not just hard sells.

Khan-Lavin also recommends experimenting with WhatsApp marketing, but with even more care. “Be even less salesy there,” he notes, suggesting a tone that’s conversational and community focused.

Earned media is another high-impact, low-cost opportunity. Rather than investing in expensive ad space, startups should focus on crafting stories that pique journalist interest. “Every brand has a compelling story – whether it’s your founder’s passion, unique ingredients, sustainable practices or a quirky brand origin,” says Khan-Lavin.

Pitch these stories to relevant publications, local outlets and podcasts. Build genuine relationships, offer samples and insights, and position your brand as one worth talking about.

Amplify every win

When you do get a win, whether it’s a piece of PR, an award or a high-profile stockist, don’t let it sit in a silo.

“A key strategy for tight budgets is to amplify every win across all your marketing channels,” says Khan-Lavin. Share it in your newsletter, pin it to your homepage, highlight it on social media and

work it into your sales and investor decks, he adds.

Even with the regulatory considerations around reusing press quotes, there are creative ways to keep the momentum going.

“Don’t just list your awards,” Khan-Lavin adds. “Feature them prominently on your packaging, in all communications, and integrate them into your ongoing PR outreach.” This kind of content reuse is one of the smartest ways to multiply the return on your effort.

Collaborate, simplify & systemise

Strategic collaborations offer another way to extend reach without draining resources.

“Look for non-competing brands that share your target demographic,” suggests Khan-Lavin. Local food brands, lifestyle products or even tourism groups make great partners for co-hosted events, tasting drops or cross-promotions.

When it comes to resourcing your marketing, Art advises avoiding the “patchwork” approach of disparate freelancers. “One lean in-house specialist with real beverage experience can stretch budgets further,” he says. This person can oversee messaging, manage campaigns and pull in external help only when it’s truly needed.

Finally, Khan-Lavin highlights a crucial, often-overlooked step: documentation.

“Measure everything you can,” he advises, “and meticulously document your ways of working, processes and templates.” Not only does this help optimise your current efforts, but it also sets the stage for scale when you’re ready to bring in new team members or agencies. **GDI**



Five lessons from a drinkpreneur

Hattiers Rum CEO Philip Everett-Lyons

From *Doctor Who* prop master to B Corp-certified rum founder, Philip Everett-Lyons has built Hattiers Rum into a standout British brand and will soon close a GBP1m (US\$1.3m) funding round. Interview by **Henry Mathieu**

Competitors can become collaborators

One of the most unexpected lessons Hattiers Rum founder & CEO Philip Everett-Lyons has learned is that competition doesn't need to mean isolation. In fact, some of the most valuable industry insights have come from those traditionally considered rivals.

"Your competitors very often become collaborators," he says. "I've never come at this from an angle of sharp elbows... not talking about volumes we sell. That collaboration helps us navigate — it's like our extended network."

In a move that might raise eyebrows in other industries, Everett-Lyons hosted a lunch for UK rum producers simply to share experiences and strategies. "We just chewed the fat — what's hard, what's easy, where we're winning," he explains. "They're not rivals. They're fellow drinks entrepreneurs navigating the same tides."

Everett-Lyons points out that informal networks, such as group chats among founders, have also been vital in trading supplier tips and market insights. "All these are just shortcuts to your goals," he says.

Fundraising is brutal & vital

Scaling a spirits brand requires capital, and acquiring it demands a particular kind of endurance. Everett-Lyons describes the process in stark terms: "Raising capital in the drinks space is rarely quick. It's never easy, but it is essential."

He stresses that storytelling and stamina are just as critical as spreadsheets and pitch decks. "Most brands trip up not because they don't have the product or the passion, they just run out of cash," he says.

Fundraising is a time-consuming, high-stakes endeavour that often falls to the founder. "It's a full-time job, not a side hustle," Everett-Lyons says.

Hattiers has now reached a point where it's bringing in a corporate finance team to



Philip Everett-Lyons: If sustainability is 'not in your DNA now, you're building on borrowed time'

allow him to focus on strategic growth. Even in this high-stakes area, collaboration with competitors has proved fruitful. "We've had competitors who've pointed us in the direction of potential investors," he reveals, highlighting again the power of openness within the category.

Celebrate the small wins, always

In an industry obsessed with momentum and milestones, it can be easy to overlook the smaller victories, but doing so is a mistake, according to Everett-Lyons.

"It's easy to get caught up in the 'OK, tick, what's next?' mindset," he says. "But those small wins — a new distribution deal, an award, a glowing mention — they matter."

Rather than simply noting achievements in passing, Hattiers makes a point of celebrating them. "We open a bottle of champagne and mark the moment. These are the things that fuel the next leg of the journey."

This mentality also reinforces morale across the team and strengthens brand culture. "Small wins stack up. If you don't take the time to recognise them, you risk burning out before you ever break through."

Luxury is earned, not claimed

As the spirits market becomes increasingly crowded with so-called 'premium' brands,

Everett-Lyons is clear: real luxury cannot be self-declared. It must be earned through experience, consistency and trust.

"If I put 'premium gin' on a label, what does that mean to a consumer?" he asks. "It's a claimed price point, not a proven one."

Hattiers — sold in the UK in 'upmarket' retailers Waitrose, Fortnum & Mason, Harvey Nichols and Daylesford Organic, among others — has built its reputation through the quality of its product and the relationships it has fostered with trade partners. "Let your customers and the trade decide where you sit in the market," he advises. "They'll tell you — eventually."

Earning the trust of bartenders, retailers and discerning drinkers requires time and a clear commitment to quality. "You might sacrifice short-term revenue by walking away from certain listings or opportunities," Everett-Lyons says, "but you protect your brand's long-term positioning."

Sustainability is now a baseline

As the UK's first B Corp rum, Hattiers has long been vocal about sustainability. But Everett-Lyons now argues that the conversation needs to evolve. "Sustainability is no longer a USP. It's the minimum," he states. "Responsibility isn't a badge — it's a starting point."

The challenge now is embedding sustainable practices authentically while still delivering on quality, profitability and growth. "Our customers already know we're a sustainable brand. Now they want to know: what else?" Everett-Lyons explains.

Hattiers is adjusting its messaging accordingly, focusing more on product storytelling, cocktail versatility and sourcing decisions, while maintaining its B Corp commitments in the background. "It's not about shouting the loudest anymore," says the CEO. "It's about embedding responsibility into every decision — from packaging to logistics to blend selection — and letting that consistency speak for itself."

In Everett-Lyons' view, brands that treat sustainability as a marketing angle rather than a core value will eventually be left behind. "It's not a trend — it's the new baseline," he says. "And if it's not in your DNA now, you're building on borrowed time." **GDI**

IWSR: India to spearhead new era of market growth

Beverage alcohol brand owners are shifting focus to emerging markets amid rising sales in countries such as India, Brazil, Mexico, South Africa and Turkey.

But it is India that will lead the pack over the next decade, according to IWSR.

In 2024, the country added 6% in total beverage alcohol (TBA) volume and 9% in value, driven mainly by beer and whisky.

This made it the world's key growth market in a tough year that saw global TBA volumes shrink by 1% (although value rose by 1%, a gain of US\$8.5bn).

In its first-ever ten-year forecast, IWSR predicts \$34bn beverage alcohol growth across key markets by 2034. It believes India will be responsible for almost half of this.

"Beverage alcohol growth momentum has decisively shifted towards developing markets, with India likely to be the biggest engine of growth for the next decade, followed by Brazil and Mexico," says IWSR research & operations COO Emily Neill.

"As well as becoming the world's biggest

market for bottled scotch by 2027, India is expected to become the world's third most valuable TBA market behind China and the US by 2032, eclipsing the UK."

India's alcohol market reached just under \$40bn last year, and IWSR expects it will continue to outpace global demand and top \$50bn by 2031.

IWSR forecasts that the largest contributors to value growth over the next decade will be four developing markets — India, Brazil, Mexico and South Africa — with expected incremental growth of \$28bn.

China is an exception among developing markets and is forecast to decline due to demographics and ongoing structural impacts in the local, lower-priced end of beer and spirits. Some developed markets are also expected to shrink, with Germany, the US and the UK set to contract by \$6bn.

IWSR's forecast comes hot on the heels of a study from Kearney that found spirits will lead India's duty-free surge to 2030 (see *Global Drinks Intel June Magazine* p47).

Jägermeister debuts 'Orange Era' in Frankfurt

Mast-Jägermeister unveiled the first in a series of global travel retail activations for its new herbal liqueur, Jägermeister Orange, at Frankfurt Airport in Germany in June.

Jägermeister Orange (33% ABV), a sweeter, fruit-forward version of the original herbal liqueur, launched in GTR in April.

"The Orange Era' campaign aims to "drive awareness, trial, recruitment and conversion by engaging international travellers, in particular Gen Z", with pop-ups powered by music and selfie opportunities. The Frankfurt

installation, in partnership with Frankfurt Airport Retail (FAR) and travel retailer Gebr Heinemann, features an orange phone booth offering a digital experience where customers can select an animated background and take a snapshot to share on social media.

Gebr Heinemann head of spirits buying Manuel Schilling described the activation as "playful and immersive" at the launch event attended by *Global Drinks Intel*.

"The Orange Era is a great example of how strong collaboration between brand, retailer and airport brings a spectacular assortment to life," he said.

The Frankfurt activation will run for eight weeks until the end of July. FAR managing director Gordana Schiel said: "Jägermeister is an important partner [and our] close co-operation has been characterised by outstanding marketing activities for years."

Activations will also roll out to airports in Europe, Brazil and Asia, including India. Meanwhile, the orange variant is this year entering domestic markets, including Germany, Austria, Croatia, Hungary, Slovenia, South Africa, Turkey and Norway.



Suntory Time at Changi Airport

Lotte partners with Suntory at Changi

Lotte Duty Free and Singapore's Changi Airport have teamed up with Suntory Global Spirits for a trio of experiential activations showcasing Japanese spirits and Maker's Mark Whiskey across several terminals at the Asian hub.

The two 'Suntory Time' activations spotlight a curated line-up from the group's premium Japanese spirits portfolio, including Toki blended whisky, Roku Gin and Haku Vodka.

A key attraction is the recreation of Japan's famous *tachinomiya* standing bars, complete with neon street signage. Pop-up sampling carts at designated times draw attention to the activations which run in T1 and T2 until August.

The limited-edition Maker's Mark Wood Finishing City Series Singapore Edition is available to buy exclusively at Changi at the third activation in T4, also running until August.

As part of a broader GTR-only series featuring global cities like New York, Sydney and Frankfurt, the Singapore Edition honours the city's 60th year of independence with locally inspired design elements. Maker's Mark is a global priority brand for Suntory in both domestic and GTR markets.

Gusbourne takes flight with British Airways

English sparkling wine brand Gusbourne will be served on British Airways from July as the airline continues a programme to serve prestige English fizz started in April with products from Nyetimber and Digby.

From July to September, a 2016 and 2019 vintage of Gusbourne will be served in first and business cabins, respectively. The brand claims to be the No.1 English sparkling wine for export distribution (available in more than 35 countries), and No.2 for export volume sales. Its top three export markets are Norway, the US and Japan.



The e-commerce startup putting Black-owned spirits on the map

Charles Everett, founder of UrFriendCharles, has turned a TikTok hobby into a nationwide e-commerce business with a bold levelling-up agenda, writes **Joe Bates**

Walk into most liquor stores in America and shoppers will be met with shelves crowded with hundreds of spirits bottles. Yet typically less than 2% of the brands on sale will be Black-owned.

This imbalance drove one Washington DC-based content creator and drinks enthusiast to launch his own e-commerce platform dedicated exclusively to Black-owned spirits in April. Charles Everett's UrFriendCharles site combines curated shopping with cultural storytelling to help consumers discover and support under-represented entrepreneurs in the beverage industry.

For Everett, one of the biggest problems Black-owned brands face is a lack of visibility. "You walk into a liquor store and see hundreds of bottles, but how do you know which ones are Black-owned?" he asks.

"Most of these brands don't have big marketing budgets or celebrity endorsements. In a crowded market, that makes it hard for small names to stand out."

Levelling the playing field

Moreover, Everett maintains that a lot of the legacy alcohol brands in the US today were built on wealth tied to slavery or post-slavery economics.

"Meanwhile, today's Black entrepreneurs are creating something new," he insists. "Most don't have generational capital or major investors behind them. It's not a question of quality — the system just wasn't built with them in mind."

UrFriendCharles aims to "level the playing field". Everett says: "I wanted to spotlight these brands and give people a way to vote with their dollar."

"Because let's be real, the Kardashians or George Clooney aren't showing up to pour you a shot of their tequila, but Donta [Henson] from Los Hermanos 1978 Tequila? He's at tastings every weekend, meeting people face to face. That's what I want to amplify: real people, real products and real community impact."



Charles Everett: 'I want to amplify real people, real products and real community impact'

Why the odds are stacked against small and minority-owned drinks brands in the US

The three-tier US alcohol distribution system is "incredibly tough" for small and minority-owned spirits brands to compete effectively, argues UrFriendCharles founder Charles Everett.

"Alcohol can't go straight from the producer to the customer; it has to pass through a distributor and a retailer," he points out. "Big brands have full teams handling compliance, licensing and distribution. Most Black-owned brands don't. They're often self-funded, first-time entrepreneurs juggling legal hurdles and fees with limited resources."

Complying with a patchwork of state laws makes growing nationally a bureaucratic headache, Everett argues, and is a challenge alongside high licensing fees. "Pay-to-play shelf space is technically illegal, but is still a reality," he says.

"These rules might look neutral on paper, but the impact isn't," he continues. "Black-owned brands often start with less capital, fewer industry connections and almost no margin for error. In an industry where speed and visibility are everything, even small delays can stall growth."

Lockdown hobby grows into national platform

Everett, who previously worked in the supply chain sector and had no retail experience, discovered his passion for Black-owned spirits during the lockdowns of the Covid-19 years.

Scrolling through TikTok, he came across Brough Brothers, a Black-owned distillery based in Kentucky, which he wanted to try, but couldn't find locally.

His quest eventually took him to Black-owned spirits store Chat's Liquors in Wash-

ington DC, where the friendly owner introduced him to other spirits, such as Los Hermanos 1978 and Fou-Dré Vodka.

"That visit sparked something," Everett recalls. "I started collecting bottles. Anytime people came over, they'd ask, 'What is this? I've never seen it before.'"

"That curiosity turned into content," he continues. "I began posting on TikTok, then expanded to Instagram. What began as a personal hobby and a way to share my excitement about discovering something new, slowly grew into a following." »

Building a business from scratch

» UrFriendCharles.com ships to 44 states nationwide and features over 150 products, with ambitions to add a further 100 by the end of the year. However, just getting the platform to this stage hasn't been easy, according to Everett.

"One of the biggest challenges was going from very little web development experience to launching a fully functional e-commerce platform in just four months," he says. "I went all in, researching laws, interviewing developers and diving deep into YouTube University."

Most of the UrFriendCharles site was self-funded and self-built. "From product uploads to customer service systems, it's been a grind," Everett admits. "But it's also incredibly rewarding to know that every inch of the site reflects that effort."

Meeting brands where they are

UrFriendCharles doesn't operate like a traditional warehouse-based retailer. The platform integrates e-commerce functionality in a hybrid model.

"Sometimes, I'm working directly with brands that have their own online stores, so we embed buy buttons or use affiliate links," Everett explains. "Other listings are more like directories with no e-commerce, just links to help people find standout brands that deserve more attention."

"I've built the platform to meet brands where they are, whether they're fully scaled or just getting started."

In term of sales trends, American whiskey and bourbon lead the way, which Everett says is not a surprise.

"Rum's coming in strong as a close second," he reveals. "What did catch me off guard is how tequila hasn't taken off yet the way we expected. That might shift as I highlight it more and expand the line-up."

Everett is excited about the attention the non-alcoholic category is gaining. UrFriendCharles's selection includes: Mocktail Club Havana Twist, an RTD range of non-alc craft cocktails; Uncle Waithley's Caribbean Ginger Beer with Hibiscus, a small-batch product with natural ingredients created by mixologist Karl Franz Williams; and Herb & Orchid, an Asian pear and agave-flavoured sparkling de-alcoholised canned wine.

"There's real potential there," Everett says of the category, "especially for folks who want to be more intentional with what they're drinking."



Championing Black-owned brands: Victor, Bryson and Chris Yarbrough opened Brough Brothers Distillery in Kentucky in 2020; Los Hermanos 1978 Tequila CEO & co-founder Donta Henson (below)



Scaling with intention

Everett says he is determined that the platform will not become like "another liquor store", which is why the site boasts advanced tools that let users filter founders by six criteria: gender; graduates from Historically Black Colleges and Universities (HCBU); members of the Divine 9, a group of African American university fraternities and sororities; LGBTQ+; former armed forces; of Caribbean or African descent.

"We're a platform designed to spotlight under-represented founders, the real people behind the brands," Everett explains. "Our product pages focus on their stories, their hustle and their communities. We're also selective about celebrity-backed brands. Unless the founder is truly involved, we're not giving the spotlight to figureheads."

Further down the line, the platform will

launch 'Lil Charles', an AI-powered chatbot. "Ninety percent of the DMs I got were people asking: 'Where can I buy this? What should I try if I like [insert mainstream brand]?" Everett says.

Lil Charles will help bridge that gap. Tell the chatbot you love Diageo's Crown Royal Canadian Whisky, and it might steer you toward Du Nord Apple Liqueur or Uncle Nearest 1884. "It will be like having a knowledgeable friend in your pocket," Everett says.

Other Lil Charles features in the pipeline include wine suggestions, zero-proof bundles and cocktail recommendations.

Everett says he has no plans to become the next Total Wine & More or the biggest online retailer, but has ambitions to grow in a thoughtful and sustainable way.

"One of my bigger goals is launching a B2B marketplace, helping brands move beyond single-bottle sales into case and pallet sales for restaurants, bars, hotels and retailers," he says. "I also want to make it easier for people to find these brands locally and plug into in-person events like tastings, festivals and conferences."

While still in its infancy, UrFriendCharles is already growing fast, reveals Everett. "The response has been overwhelmingly positive," he says. "I've had dozens of brands reach out wanting to join the platform, and media outlets I've admired for years are now reaching out to me."

Everett wants to build the platform organically until it becomes investable and aims to build it into a trusted resource. "Whether someone's shopping online or standing in their local liquor store, phone in hand, looking up which Black-owned bottle to try next — I want this to be the place they turn to. If I can make that happen, I'm doing my job." **GDI**

Unlocking a summer of promise for on-premise venues in Europe

As consumer confidence improves and inflation begins to ease, new opportunities are opening up for the on-premise sector across Europe, CGA by NIQ's **George Argyropoulos** reports

Price and cost management were key drivers of consumer spending decisions in 2024. Consumers were paying more for less as inflation pushed up summer sales figures.

This challenging landscape has continued into summer 2025, and it's hard to argue that we aren't still living in uncertain times. Ongoing financial pressure on consumers, coupled with tariff-related chaos, continues to unsettle markets and create major challenges for businesses.

Yet, with inflation easing in recent months and forecast to stabilise around 2% later this year, consumer confidence is beginning to recover. In May, the Consumer Climate Indicator for the Euro Area rose 1.4 points to -15.2 from -16.6 in April. There has been promising unit recovery across the region too, with 81% of European markets reporting positive unit growth compared with the previous year.

Drinks experiences

In this largely resilient landscape, tourism presents one of the biggest opportunities for the on-premise sector during warmer months. Key tourism indicators in Europe have returned to pre-pandemic levels: nearly 500m nights are spent in tourist accommodations each year, many during the peak summer period of June to September.

People are significantly more inclined to treat themselves on holiday, according to an analysis of consumer behaviour during this period by CGA by NIQ's Global Reach survey. Only a small minority of holidaymakers avoid going out while on vacation, while more than a third go out once or twice, 35% on most days, and nearly one in five every day (see F&B chart p48).

This means that on-premise venues can expect increased footfall from travellers, along with the potential for repeat visits throughout their stay.

But that's not all: holidaymakers also tend to exhibit higher consumption rates — with 36% drinking more than usual —



The UEFA Women's Euro 2025 is expected to drive footfall and increased spending in the on-premise

and are more (56%) likely to pay extra for what they perceive to be a higher-quality drink. With more than one in four keen to try a drink that's new to them while on holiday, holidaymakers are also more open to experimentation, meaning this audience may offer significantly greater revenue potential than the average guest.

Beyond traditional on-premise venues, the growing interest in alcohol-related tourism presents even more opportunities for the sector. Drinks-focused travel is on the rise globally, with vineyards, breweries and distilleries emerging as popular destinations for both domestic and international holidaymakers (see 'Alcohol tourism' p48).

Beverage makers can capitalise on this opportunity by creating simple hospitality offerings, such as tastings or tours of their facilities. But it is not just producers who can benefit — the wider sector can get a share of the pie by organising alcohol-related experiences such as cocktail-making masterclasses or immersive educational events that allow participants to learn more about a beverage's production, consumption, history and cultural significance.

People aren't just interested in learning about a product, they want to leave with a meaningful memory, so businesses must focus on creating a memorable, engaging experience for their guests.

Summer of socialising

Summer creates the ideal setting for people to connect with loved ones, encouraging them to spend more during socially meaningful moments. In fact, CGA by NIQ's research found that 67% of European consumers plan to spend the same or more on socialising at gatherings with family and friends this year.

Weather, of course, plays a crucial role in determining how often people are willing to go out. Warm temperatures usually trigger a boost in social gatherings and impulse purchases, while rainfall tends to suppress on-the-go buying habits. This effect was evident in some European markets during Q1 2024, where rainy conditions coincided with a rise in online shopping and a decline in convenience store sales.

But the past few years have seen some of the warmest weather on record in Europe (with the three hottest years all occurring since 2020), and this summer is expected to continue that trend with widespread warmer-than-average conditions across much of the continent.

The likelihood of above-average temperatures is especially high in the UK, as well as in western-central and central-southern Europe, so businesses should be ready to capitalise on increased social gatherings and increased foot traffic. >>

Getting game ready

» While the weather always brings a degree of unpredictability, large-scale occasions, such as music festivals or sporting events like Wimbledon and the Tour de France, offer more certainty around when and where increased visitation is likely to occur.

During these times, the potential for incremental spending rises significantly, driven by heightened consumer engagement and increased discretionary spending, not just in retail, but in on-premise venues as well.

In the UK, 8.5m consumers have watched events — especially sports — in pubs and bars over the past six months. These consumers spend, on average, 36% more on drinking out per month than those who don't watch events. With competition for footfall as intense as ever, attracting sports fans presents a valuable trading advantage.

The UEFA Women's Euro 2025 is expected to be a particularly significant event this summer, as the competition is one that consumers like to follow closely and celebrate. The 2020 Italy vs England women's final was the most-watched TV event in the UK in 24 years and the most viewed in Italy since 2012, showing the reach and engagement such tournaments can generate.

This year's UEFA championship will be the first major football tournament to take place under truly 'normal' conditions since Covid-19: the 2021 Men's Euro was impacted by the pandemic, the 2022 World Cup was held in winter and last year's Men's Euro — while more conventional —

unfolded amid the cost of living crisis. With fewer external constraints this time, excitement is likely to run high, encouraging people to go out, gather and celebrate.

CGA by NIQ research demonstrates that revenue potential grows exponentially in cities hosting major events. During the London 2012 Olympics, sales in the capital saw a 5.3% uplift compared year on year, outpacing the national average increase of just 0.4%. Two years later, sales rose by 2% during the Football World Cup in Rio de Janeiro, compared to 1.6% in the rest of Brazil.

Shops located within 15 minutes of stadiums hosting the 2016 Euro Cup in France experienced a 2% increase in business, compared with other areas of the country. Similarly, two years ago during the Rugby World Cup, Paris saw a 1.6% uplift in sales over the previous year, while the rest of France recorded only a marginal increase.

Sales uplift varies

The challenge for venues lies in driving incremental spend as consumers continue to navigate a high cost of living. Many, though, have developed strategies to manage expenses while still rewarding themselves.

When it comes to the Euros, for instance, sales uplift can vary widely across countries, largely influenced by which national teams qualify and how far they progress in the tournament. The better a team performs, the more likely it is to generate consumer excitement and, in turn, boost sales in the team's home market.

CGA by NIQ's suite of research services combine to provide brands and operators with a holistic view of the European and British on-premise sector. OPUS is a nationally representative survey of on-premise users, designed to help you understand where and how to engage with your audience. Meanwhile, REACH illuminates eating and drinking behaviours, offering valuable global and in-market insights and benchmarking for targeted outreach. To learn more about CGA's capabilities across the European on-premise, visit www.cgastrategy.com

Another important factor is that in any major international football tournament, each team is only guaranteed three group-stage matches. Only those that perform well will advance to the knockout rounds and play more games.

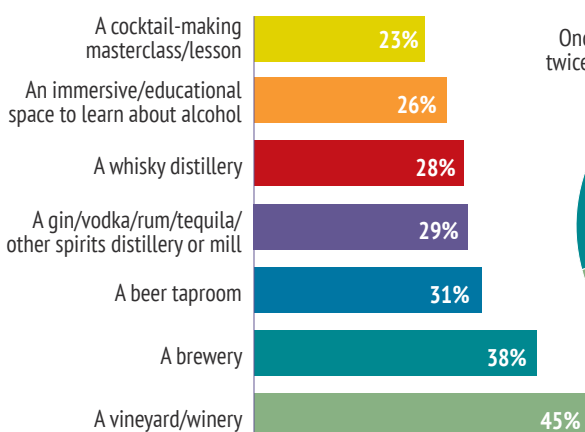
So for most markets, the peak of consumer excitement will likely occur at the very start of the competition, when all teams still have a shot at success. This makes the early stages a critical window of opportunity for businesses, and it is wise to front-load promotional efforts to capitalise on the initial wave of enthusiasm.

However, this summer holds opportunities for European markets well beyond major sporting events, with strong potential coming from drinks tourism, as well as increased socialising with friends and family.

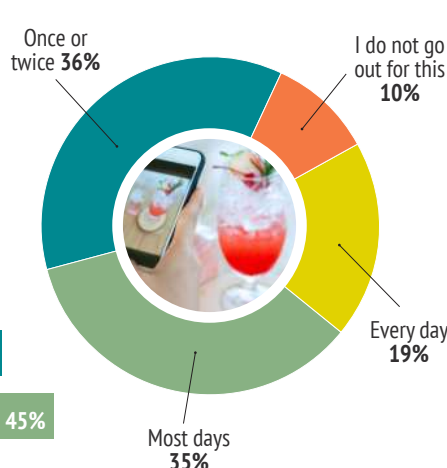
Brands, suppliers and operators simply need to come prepared, understanding their audience, their needs and behaviours to unlock these growth opportunities. **CDI**

DATA DROP

Alcohol tourism Visitation rates on domestic/international trips away from home



F&B How often do you typically go out to eat/drink while on holiday?



Key takeaways

- More than a third of holidaymakers (35%) visit food and beverage venues 'most days' they are away.
- Drinks-focused travel is on the rise, driven by growing demand for immersive experiences.
- US consumers who visit the on-premise to watch events spend 36% more on drinking out per month.
- London on-premise venues saw a 5.3% year-on-year sales uplift during the 2012 Olympics.
- 67% of European consumers plan to spend the 'same or more' socialising with family/friends this year.

Source: EU Insight: Seizing the Summer 2024, CGA by NIQ

Summer drinks opportunities in GTR

Cocktail capitals are well stocked to capture a slice of the lucrative summer drinks market, but GTR is missing a trick when it comes to the in-demand wine, RTD and no/low categories. Shelftrak MD **Garry Stasiulevicius** reports

As temperatures rise in the Northern Hemisphere and suitcases roll, so does the thirst for refreshing summer drinks.

From spritzes and rosés to cocktails-on-the-go, consumers are seeking lighter, brighter and more versatile drinking experiences. But while domestic markets are awash with innovation — from canned cocktails to low-alcohol botanical blends — global travel retail tells a different story.

Shelftrak's latest global data snapshot across key airports offers a striking view: some categories flourish, while others, especially RTDs and no/low alcohol, remain woefully under-represented. So where can holidaymakers find the best summer drinks fix? And where might they leave thirsty?

Europe & Asia: for cocktail lovers

If your cocktail base of choice is gin, vodka or tequila, Europe and Asia stand out as the best-stocked regions.

Gin, a key ingredient in many classics from negronis to gin spritzes, boasts 429 unique SKUs in Europe and 334 in Asia, dwarfing the Americas (118) and MENA (the Middle East & North Africa, 145). Amsterdam and Frankfurt lead the charge, with over 100 unique gin SKUs each.

Vodka, another versatile cocktail staple, follows a similar trend: 208 unique SKUs in Europe, 163 in Asia and 165 in MENA.

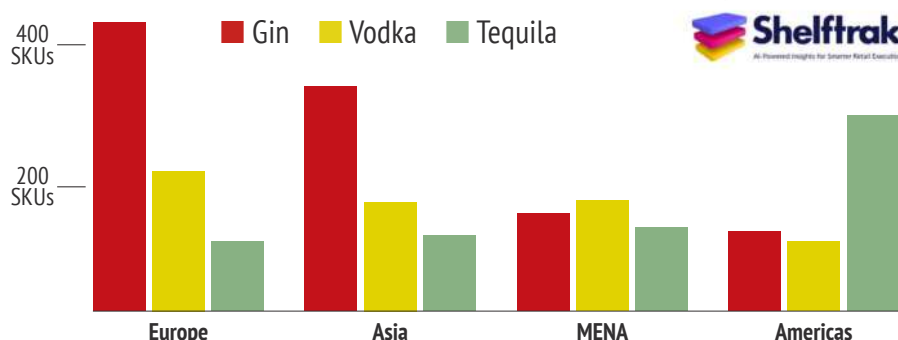
Tequila, which generally has more voice than substance in travel retail, could become the star of summer thanks to margaritas and palomas. The product dominates in the Americas with a staggering 292 unique SKUs, nearly triple that of Europe (104). Cancun alone accounts for 187 tequila SKUs.

The deep ranges in white spirits suggest that Europe and Asia are best placed to tap into global cocktail trends, with major airports in the regions offering travellers genuine mixability.

Rosé & prosecco: supporting role

No summer drinks plan would be complete without rosé and prosecco, the darlings of sun-drenched aperitivos. Rosé is most ac-

Cocktail Base Spirits Regional Assortment – No. of Unique SKUs



Source: Shelftrak Q4 2024

cessible in Europe (53 unique SKUs) and MENA (54 SKUs). Dubai's 38-SKU offering makes it a standout, while Oslo, Paris and Delhi also deliver. Prosecco shows a similar pattern: 36 SKUs in Europe compared with 18 in the Americas and Asia. Dubai and Frankfurt lead here again.

However, given their association with summer socialising, the relative scarcity of both in travel retail at this time of year is surprising. As well as summer drinking, these products lend themselves to gifting and spontaneous celebration. The current range size suggests an untapped opportunity in many terminals.

The big miss: RTDs & no/low

Despite booming demand in domestic markets, both the RTD and no/low-alcohol categories are glaringly underdeveloped in travel retail.

Globally, RTD offerings are scarce, peaking at just 26 SKUs in Europe and barely reaching double digits elsewhere (ten in Asia, nine in Americas, six in MENA). For travellers looking for portable, premixed cocktails, this is a missed opportunity. Only Barcelona (13 SKUs) shows any real traction.

The no/low-alcohol trend is even more underwhelming. MENA, where cultural factors make non-alcoholic options essential, has just two unique SKUs in the region. Europe fares better with 40 (led by Frankfurt and Copenhagen), but the overall availability lags far behind shopper expectations.

This disconnect signals a deeper issue: travel retail is not translating domestic demand into shelf execution. For categories that appeal to wellness-conscious, younger and often more experimental consumers, this is a strategic blind spot.

What shoppers see — and don't

Shelftrak's data reveals more than just SKU counts, it paints a picture of what travellers actually experience at shelf level.

In gin, Sydney, Singapore Changi and Amsterdam deliver standout assortments; tequila finds its mecca in Cancun and New York; and vodka has the largest presence in Dubai, Delhi and Singapore.

But walk through most airport stores and you'll struggle to find grab-and-go cocktails, low-alcohol options or decent sparkling wine ranges prominently positioned for the season. The execution gap is clear: launches and formats exist, but they aren't matched by consistent, strategic shelf visibility across markets.

Execution over exclusivity

As summer peaks and traveller volumes climb, there's a clear opportunity for brands and retailers alike:

■ **Reassess the range, space and visibility of RTDs and no/low.** These aren't niche trends — they're reshaping the drinks landscape.

■ **Build mixability into merchandising.** Highlight how spirits, mixers and sparkling wines can work together across zones.

■ **Celebrate occasions, not just SKUs.** Position rosé, prosecco and cocktails as part of a summer lifestyle, not just inventory.

In the race for shelf space, the airports that execute with intent and insight will win hearts and make it into shoppers' baskets. **GDI**

Shelftrak is an AI-driven high-performance commercial technology business transforming how brands and retailers monitor and optimise in-store execution across travel retail, global domestic markets and hospitality environments. Find out more at www.shelftrak.com



New York International Spirits Competition winners take a bow at BCB Brooklyn

The winners of the 16th annual New York International Spirits Competition were awarded their medals at a ceremony during BCB Brooklyn on 10 June.

Part of the International Beverage Competitions group, the NYISC accepts entries from more than 40 countries across a range of categories. What sets it apart is its focus on real-world market relevance: spirits are judged on price and packaging, as well as quality.

“Brands should be proud of all their wins — whether bronze or double gold — for all our judges are trade buyers,” said organiser Adam Levy, who added that many recipients were exhibiting at BCB and keen to put their medals on show.

“It is the best spirits show in the US,” he said, describing the mood at BCB as “a mix of optimism” — due to there being a lot of



Brother's Bond Whiskey co-founder & The Vampire Diaries actor Ian Somerhalder with NYISC organiser Adam Levy; Glendalough Distillery brand ambassador Crystal Chasse »



great new brands exhibiting — and concern over tariffs leaving “a lot of companies’ decisions in limbo”.

Awards given out at BCB included gold

and double gold medals, as well as individual ‘of the year’ winners from around the world. Below are this year’s double gold medal winners, arranged by category.

New York International Spirits Competition Double Gold Medal Winners 2025

Agave-Based

Brand Owner

Diageo
Diageo
Diageo
The Elevated Spirits Co
The Elevated Spirits Co
The Elevated Spirits Co
Lobos 1707 Tequila
Pernod Ricard
Pernod Ricard
Proximo Spirits
Proximo Spirits
Proximo Spirits
Proximo Spirits
Proximo Spirits
Proximo Spirits
Proximo Spirits

Brand

Casamigos Añejo
DeLeón Blanco
Don Julio 1942
Cierto Private Collection Reposado
Cierto Private Collection Extra Añejo
Cierto Reserve Collection Extra Añejo
Lobos 1707 Añejo
Del Maguey Chichicapa Single Village Mezcal
Del Maguey Tobalá Single Village Mezcal
1800 Blanco
1800 Cristalino
1800 Milenio
400 Conejos Espadín Mezcal
Creyente Tobalá Mezcal
Gran Centenario Cristalino
Gran Centenario Gallardo

American Whiskey

Brand Owner

15 Stars
15 Stars
1845 Distilling Co
Augusta Distillery
Bacardi
Bacardi
Bird Creek Whiskey
Brother's Bond Bourbon
Deutsch Family Wine & Spirits
Deutsch Family Wine & Spirits

Brand

Three Kings
Triple Cask II
Preemption Texas Straight Wheated Bourbon
Buckner's 17yo
Angel's Envy Kentucky Straight Bourbon Finished in Port Wine Barrels
Angel's Envy Kentucky Straight Bourbon Whiskey Finished in Caribbean Rum Casks
Small Batch Baroness/Full Pint
Brother's Bond Cask Strength Straight Bourbon
Redemption Ancients 18yo Bourbon
Bib & Tucker Small Batch 6yo Bourbon

Diageo

Diageo
Diageo
Garrison Brothers Distillery
Garrison Brothers Distillery
Grain & Barrel Spirits
Heaven Hill Brands
Heaven Hill Brands
Heaven Hill Brands
Heaven Hill Brands
Heaven Hill Brands
Heaven Hill Brands
Heaven Hill Brands
Heaven Hill Brands

Kirin Holdings America

Larrikin Bourbon Co
Moët Hennessy
Oaklore Distilling Co
Peg Leg Porker Spirits
Pernod Ricard
Proximo Spirits
Proximo Spirits
Sagamore Spirits
Seelbach's Private Reserve
Southern Star
Southern Star
Suntory Global Spirits
Tenmile Distillery
Uncle Nearest
Virginia Distillery Co

George Dickel Bourbon

Balcones Cataleja Vol 2
Balcones Texas '1' Single Malt
Garrison Brothers Cowboy 2024
Garrison Brothers Guadalupe
Chicken Cock Kentucky Straight Bourbon
FEW Bottled-In-Bond Bourbon Whiskey
Widow Jane Lucky 13 Bourbon
Widow Jane The Vaults Bourbon
Widow Jane Black Opal
Evan Williams Master Blend
Square 6 Wheated Bourbon
Elijah Craig Barrel Proof B524
Elijah Craig Grain to Glass Traditional Barrel Series
Kentucky Straight Wheated Bourbon
Four Roses Bourbon
Larrikin Single Barrel Rye
SirDavis
Oaklore Story Series Port Cask Finish Rye
Tennessee Straight Bourbon Whiskey
Jefferson's Ocean Aged At Sea Voyage 31 Bourbon
Stranahan's Mountain Angel 10yo
Stranahan's Mountain Angel 12yo
Sagamore Cask Strength Rye
Kentucky Straight Bourbon 15yo Batch 001 122 Proof
Southern Star Double Rye
Southern Star American Single Malt
Jim Beam Kentucky Straight Bourbon
Revolutionary Series #32 American Single Malt
Uncle Nearest 1856 Premium Aged Whiskey
Virginia Distillery Co Cabernet Cask Select »

JAPANESE BLENDED WHISKEY OF THE YEAR



JAPANESE WHISKY
SAKURA

GOLD MEDAL
95 POINTS

AWARDS NYISC



Collecting their NYISC awards: Charbay Distillery master distiller Marko Karakasevic with Adam Levy; Balcones Distilling blending master Garbiel Richarde and brand experience manager Alex Elrod; and Maggie's Farm Rum founder & master distiller Tim Russell



Proof and Wood founder Dave Schmier; Edmond's Honor team, including liquid curator Tracie Franklin (second from left); CleanCo PR & comms Stephen Schmitz

New York International Spirits Competition Gold Medal Winners 2025 *continued*

Armagnac & Brandy

Brand Owner

Kobrand
Vok Beverages

Brand

Larressingle XO Armagnac
Black Bottle XO Brandy

Cognac

Brand Owner

Bacardí
Campari Group
Campari Group
Maison Ansac
Maison Ansac
Societe Jacques Bollinger
Societe Jacques Bollinger

Brand

D'Ussé VSOP
Courvoisier VSOP
Courvoisier XO Royal
AE Dor No.8
AE Dor XO
Delamain Pléiade Domaine La Rambaudie
Delamain XXO Decanter

Mixers

Brand Owner

Fever-Tree
Fever-Tree
Fever-Tree
Fever-Tree

Brand

Fever-Tree Espresso Martini
Fever-Tree Ginger Ale
Fever-Tree Ginger Beer
Fever-Tree Indian Tonic

RTDs

Brand Owner

Diageo
Spirit of Gallo
Suntory Global Spirits
Via Carota Craft Cocktails

Brand

Smirnoff Smash Vodka Soda Raspberry Peach
Fisher Island Lemonade Original
On The Rocks Jalapeño Pineapple Margarita
Via Carota Negroni Spagliato

Rum

Brand Owner

Bacardí
Brugal
Dos Maderas

Brand

Bacardí Ocho
Brugal 1888
Dos Maderas Rum 5+5 PX

Non-American Whisky

Category

Australian

Canadian
Canadian
Canadian
Danish
Irish

Brand Owner

Vok Beverages

Diageo
Diageo
Proximo Spirits
Stauning Whisky
Glendalough Distillery

Brand

23rd Street
Distillery Single Malt
Crown Royal Reserve 12yo
Crown Royal 31yo
Pendleton Original
Stauning Rye
Glendalough 7yo Irish
Single Malt Mizunara Finish
Lagavulin Offerman Edition
Carribean Rum Cask Finish
Oban 14yo
The Glenrothes 18yo
Highland Park 15yo
Glen Moray 15yo
Ardbeg 10yo
Ardbeg Uigeadail
Glenmorangie Signet
Reserve
Glenmorangie The Infinita
18yo
Bruichladdich 18yo

Scotch Single Malt

Scotch Single Malt
Scotch Single Malt
Scotch Single Malt
Scotch Single Malt
Scotch Single Malt
Scotch Single Malt

Diageo

Diageo
Edrington
Edrington
La Martiniquaise-Bardinet
Moët Hennessy
Moët Hennessy
Moët Hennessy

Moët Hennessy
Rémy Cointreau

Liqueurs & Others

Category

Aperitif
Coffee Liqueur
Cream/Dairy Liqueur
Fruit Liqueur
Vodka
Vodka

Brand Owner

Gruppo Lucano
Fratelli Branca Distillerie
Pernod Ricard
Distillerie Merlet & Fils
Maspe/CEDC International
Moët Hennessy

Brand

Anniversario Limoncello
Borghetti
Kahlúa Dunkin Caramel Swirl
Merlet Trois Citrus
Soplica Hazelnut
Belvedere 10

Who won gold and individual awards at the NYISC this year? See the June edition of *Global Drinks Intel Magazine* or visit drinks-intel.com

THE GOLD STANDARD IN REALLY REAL TEQUILA.

Imagined in India. Born in Mexico. Rested in aged oak barrels for 6 months. What filters through is a pure distillation of the cultures, art, and emotions of the two countries, with a richer aroma, deeper flavor and a distinct oakiness. It's what won us Gold at the prestigious **New York International Spirits Competition 2025**. But our biggest award? That sigh escaping your lips after every first sip!





Amber Beverage Group Stands EM3-01, EM1-06

Latvian Amber Beverage Group has a wide portfolio including Moskovskaya Vodka and Cross Keys Gin. At BCB London, the group will spotlight its tequilas, Rooster Rojo and KAH (stand EM3-01), and recently acquired Writers' Tears Irish Whiskey (EM1-06). The tequila stand will showcase a range of serves, demonstrating the versatility and breadth of both brands. Meanwhile, Writers' Tears will reinterpret its 'Leave your mark' campaign.



Arbikie Distillery Stand QS7-03

Arbikie will showcase the "farm-to-bottle" ethos that permeates the entire production process — from crop germination to final bottling — at its single estate in Scotland. The brand champions sustainability and traceability, using home-grown ingredients and innovative practices such as regenerative farming, intercropping and renewable energy. Arbikie has installed a 1MW wind turbine and aims to become the world's first green hydrogen-powered distillery. Such innovative practices earned it an 'Excellence in Sustainability' award at the Scottish Whisky Awards.



Beehave Beverages Stand QS7-05

Beehave Beverages presents Beesou, a distinctive 11% ABV bitter honey aperitif made with ethically sourced British honey and natural botanicals. This serve stands out for its versatility — enjoyed neat, as a Beesou spritz or as a twist on classic

SHOW PREVIEW BAR CONVENT LONDON



Image: Tobacco Dock

RX Global's BCB London takes place at Tobacco Dock in Wapping from 30 June to 1 July

Don't miss these brands on show at BCB London

BCB makes its long-awaited London debut this month, replacing Imbibe Live on the drinks trade calendar. This is not just a rebrand — organised by RX Global, the team behind BCB shows in Berlin, Brooklyn, Singapore and São Paulo, the new event brings the successful format to a UK audience for the first time. Taking place at Tobacco Dock in Wapping from 30 June to 1 July, BCB London promises to put the on-trade at its core, with a dynamic mix of talks and intimate sessions. Three stages anchor the experience: the Main Stage for thought-leading panels and masterclasses; the Workshop Stage for hands-on sessions; and the Brand Stage, where new product launches take the spotlight. Got your ticket? Here's our pick of must-visit exhibitor stands

cocktails. B Corp-certified Beehave champions sustainability through plastic-free packaging, responsible ingredient sourcing and a mission-led commitment to protecting bee populations, offering bars a premium, all-natural option that combines flavour with purpose.

music, bringing a fresh energy to British spirits with products that are as unapologetic as they are memorable.



Cantina Mexico Stand LG-05

Cantina Mexico brings together some of the most respected brands across the agave category. On show will be tequila, mezcal and raicilla from Fortaleza, Arette, El Tequileño, Don Fulano, Calle 23, La Venenosa and La Escondida. The collective aims to celebrate and educate on the history, craft and passion that goes into every drop of these unique agave spirits. Industry experts and producers from each brand will be on hand to explain the artisanal methods used in their production. >>

Doghouse Distillery Stand QS7-10

Doghouse Distillery, London's "only multicategory grain-to-bottle producer", invites visitors to sample its bold portfolio — including Baller Vodka, Doppelgänger Aperitivo, Debt Collector Moonshine and Renegade Gin. Headlining the stand is the "world's first" Chilli Bacon Vodka, alongside an exclusive preview of the distillery's soon-to-be-released whisky. Founded in Battersea in 2016, Doghouse blends a spirit of rebellion with a love of



DISCOVER OUR ARTISANAL JAPANESE PORTFOLIO AT BCB LONDON

Find us at
Stand EM2-01
30 JUN to 01 JUL



AKASHI SAKE BREWERY
KAIKYŌ DISTILLERY



MARUSSIA
Beverages UK

Please drink responsibly



Heaven Hill Stand GGC-01

» Heaven Hill brings two celebrated spirits to the fore at BCB London: Tequila Ocho and Elijah Craig Bourbon. Tequila Ocho, co-created by master distiller Carlos Camarena and agave authority Tomas Estes, is the world's first single-field tequila — crafted to showcase terroir and deliver a pure, agave-forward profile. Elijah Craig, named after the pioneer credited with introducing charred oak barrel ageing, offers award-winning bourbon that reflects the rich history and smooth complexity of American whiskey craftsmanship.



La Martiniquaise-Bardinet Stand GG-12

LMB-UK, the UK arm of La Martiniquaise-Bardinet, highlights a standout portfolio of award-winning brands. These include Marie Brizard, the “bartender’s favourite” liqueurs and syrups made with “100% natural flavours and no preservatives”; Saint James, the “world’s No.1 rum agricole” crafted from pure cane on Martinique; Glen Moray, the Speyside single malt known as “a cask explorer”; Cutty Sark, the blended scotch built for mixing; and Sobieski, the “multi-award-winning” Polish rye vodka celebrated for its smoothness and purity.



Marussia Beverages Stand EM2-01

Marussia Beverages UK brings the spirit of Japan to London with a curated showcase of Akashi-Tai Sake, Hatozaki Whisky and 135° East Gin. Visitors will experience an “immersive, flavour-filled experience”. Highlights include sparkling sake, aged whisky and live cocktail sessions exploring the versatility of Japanese ingredients. On

Monday (30 June) morning, sake expert Miho Komatsu will lead a traditional *kagami biraki* barrel-opening ceremony.



Noblewood Group Stand LG-03

Noblewood Group presents a “showcase of craftsmanship and innovation” across its premium spirits portfolio, with curated cocktails, guest bar takeovers and expert-led seminars. Highlights include the Beluga Gold Martini Station — serving the brand’s signature martini with black caviar — and daily “Liquid Luxury” sessions exploring how Beluga Gold Line Vodka delivers value in the luxury space. New to the portfolio is Oyster Fine de Claire Adriatic Gin, a debut release distilled with regional botanicals.

Sapling Spirits Stand QS1-06

Sapling Spirits will showcase its Climate Positive spirits range including vodka expressions made with regeneratively farmed wheat and flavoured with “wonky fruit” (Raspberry Vodka with Hibiscus), as well as its London Dry Gin. Available in 70cl bottles, 5L boxes (equivalent to 7.2 bottles), 70cl pouches and 5cl aluminium minis, the company’s planet-focused range is designed for the on-trade and beyond, with every bottle sold funding the planting of a tree.



Speciality Brands Stand EM2-05

Speciality’s stand will present a premium selection of spirits and bar staples: Cocchi Vermouth, Takamaka Rum, Michter’s Bourbon, Nikka Whisky, Black Tot Rum, Boatyard Distillery, Tapatio Tequila and Season Non-Alcoholic Cocktail Bitters. Guests can sample the full range, neat or in cocktails served by the ambassador team. Standout serves include manhattans made with Black Tot and martinis using Tapatio.



Stoelzle Stand EM3-02

Stoelzle presents a showcase of premium glass packaging, highlighting its partnership with Whitby Distillery, the family-run producer behind Whitby Gin and Whitby Rum. Visitors can sample Whitby’s award-winning spirits at the stand’s dedicated bar, served in bottles designed and produced by Stoelzle. Stoelzle will also display a range of bespoke designs, decorated bottles and its full standard collection — offering spirits brands a closer look at its capabilities across both custom and ready-to-use packaging solutions.

Tapi Group Stand GG-3A

Tapi Group’s premium closure solutions offer brand owners “tailored packaging that blends sustainability, innovation and craftsmanship”. Showcasing its Planet, Style and Craft collections, Tapi explores the creative potential of natural and recycled materials, while sister brand Delage presents its Extra, Exquis, Horizon and Origine ranges, designed for spirits, liqueurs and no/low segments. Together, they offer “functional beauty and storytelling power for established and emerging labels seeking distinctive, high-impact packaging that elevates their brand experience”.



The Lost Explorer Stand EMS-09

The Lost Explorer showcases its Espadín, Tobalá and Salmiana mezcals, alongside the debut of its new Blanco Tequila, crafted by master distiller Enrique de Colsa. The brand also partners with Lockdown Liquor to launch two premium ready-to-serve cocktails: a passionfruit margarita featuring the Blanco Tequila, and a barrel-aged negroni made with Espadín Mezcal. These join the acclaimed Mezcal Picante, creating a standout range of high-end on-trade RTDs, all of which can be sampled at the stand. **GDI**

Ready for
2030

Vinolok is the first glass closure certified as Ready to Recycle – verified by Veolia under the CERTIFY methodology.

This confirms that Vinolok already meets the EU's Packaging and Packaging Waste Regulation (PPWR) recyclability standards — years ahead of the 2030 deadline. vinolok.com/sustainability

BOHEMIAN GLASS CLOSURE





VIEW FROM THE ON-PREMISE

Charlie Mitchell

All hail the independents and the challengers — the lifeblood of a vibrant sector (even if the big boys don't recognise it)

I have racked up my fair share of years telling the story of the on-premise. Delving into what shapes the sector, how it is performing and who is driving it, I am well into my second decade of professionally analysing this weird and wonderful channel.

It's fair to say that it hasn't exactly been smooth sailing; there have been cost of living crises, global health pandemics, restrictions and mass closures of venues, and seemingly endless policy battles with governments that often result in the hospitality sector being shafted at any opportunity.

So why then, in a period of relative stability, is it so gloomy currently? Reading through industry commentary, one could be forgiven for thinking that hospitality is on its knees, that the innate urge to socialise has dissipated and that swathes of the global population have given up on eating and drinking out.

Yes, the industry is facing headwinds, and yes, economic pressures are yet to fully ease, but surely, if any sector that could and should have a feel-good factor about it, it is the sector that is designed to make people feel good.

My hypothesis on why there is so much pessimism around at the moment is that we have been invaded by a spreading infection of fun-sponges and mood-hoovers.

There is nothing quite as contagious as negativity and, for larger manufacturers in particular, it feels as though a doom cycle of gripes and moans has been firmly established within boardrooms as tough-to-swallow results are framed in the context of a dying sector.

Of course, in turn, that allows other big suppliers to frame their results in the same way, taking the heat off misfiring CEOs and failing strategies and placing the burden at the feet of the sector and the consumer, rather than the companies themselves.

With this melancholy environment comes an aversion to risk-taking, a lack



of investment and a self-perpetuating staleness which genuinely damages the prospects of what should be a vibrant and joyful sector.

However, a section of the market does exist where this trend is reversed, where infectious positivity is spurring on winning brands, driving revenue growth and giving consumers good times and reason for cheer.

Yes, the independents and the challenger beverage alcohol brands of this world continue to provide the antidote to the venomous negativity released by some of their larger, more established, competitors.

CGA by NIQ has partnered with the UK-based Kindred Spirits community, a group of 100 or so small and medium-sized beverage producers, led by Jack Orr-Ewing of the Duppy Rum Company, and set up to take collective learnings on how to win in both the retail and hospitality sectors, taking on what is often seen as a monopoly from larger manufacturers.

Running quarterly surveys with members, we've witnessed a collective can-do attitude, an enthusiastic sense of collective pride and, refreshingly, a bit more fun and light-heartedness.

This is more than just the naïve optimism of startup businesses. It's not just hype either, or the need to talk up business prospects in order to convince investors and raise capital — it's genuine optimism,

which, in turn, is fuelling growth. Yes, these manufacturers, with limited budgets, are outperforming the market. As a collective, they are growing sales in what is, at best, a flat market.

Indeed, 72% of CGA by NIQ's sample saw growth in 2024, with 48% reporting significant (10%–20%) or hyper (20%+) increases in sales.

Of course, it is from smaller bases, but the numbers are not insignificant when combined — forming a collective equivalent to many companies whose dreary financial statements match the tone in which they are presented.

Despite limited budgets and against established competition, these challenger brands are finding innovative ways to win, often using their closeness to the trade to spot and take advantage of opportunities in a nimble fashion that bigger suppliers could only dream of.

What's more, they resonate. Even if large suppliers are risk-averse, consumers are not, especially in on-premise environments and especially if encouraged by bartenders to trial new products.

CGA by NIQ's latest global study of bartenders finds that the No.1 influencer for bartenders when choosing which spirits brands to use is the availability of unique/interesting and smaller brands, while 69% of bar managers (those often making stocking decisions, let's not forget) say that they prefer less well-known brands that allow customers to explore new options than familiar ones.

The context matters, but so do the vibes. Maybe it's time for some of the larger-scale suppliers to take inspiration from the innovators. **GDI**

Charlie Mitchell is CGA by NIQ's global head of insight & consumer research.

His GDI columns provide perspective from the on-premise, based on the most up-to-date and definitive data. Email him at Charlie.Mitchell@nielseniq.com

LEADING THE WAY IN AMERICAN SINGLE MALT



We're incredibly proud to be named American Single Malt Distillery of the Year for the third year in a row, alongside our Texas 1 and Lineage Single Malt industry awards, but our work is just beginning. For over 15 years, we've been working to define what American Single Malt Whisky can and should be. Each win provides us with further inspiration to continue crafting innovative whiskies that push the future of this category forward.

PLEASE DRINK RESPONSIBLY.

BALCONES "1" TEXAS SINGLE MALT WHISKY. 53% ALC/VOL. BALCONES LINEAGE TEXAS SINGLE MALT WHISKY. 47% ALC/VOL. DISTILLED & BOTTLED AT BALCONES DISTILLING, WACO, TX.

NEW YORK INTERNATIONAL SPIRITS COMPETITION, TEXAS AMERICAN SINGLE MALT DISTILLERY OF THE YEAR, BALCONES DISTILLING, 2025. NEW YORK INTERNATIONAL SPIRITS COMPETITION, TEXAS 1, DOUBLE GOLD, 2025. NEW YORK INTERNATIONAL SPIRITS COMPETITION, LINEAGE, DOUBLE GOLD, 2024.

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