global drinks intel.

FOR THE GLOBAL DRINKS EXECUTIVE | MARCH 2025



OUR ESG AWARDS RETURN

WHY THE GLOBAL DRINKS INDUSTRY MUST STAY THE COURSE ON ENVIRONMENTAL SUSTAINABILITY AND ETHICAL GOVERNANCE

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50 mL SPARKLING WATER
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COMMENT

Joe Bates

The political landscape may be changing dramatically, but the arguments underpinning the ESG movement remain compelling

The speed of corporate America's retreat from supporting DEI (diversity, equity and inclusion) programmes since Donald Trump became US president for the second time has been breathtaking. Among the household names that have reportedly pulled back from diversity initiatives include Google, McDonald's, Harley-Davidson, Walmart, and in the drinks world, Jack Daniel's owner Brown-Forman and Canadian-American brewing giant Molson Coors.

In addition to anti-DEI lobbying by shareholders, US corporations' rethink on their DEI programmes also springs from one of Trump's more eye-catching executive orders. It directed federal agencies to identify and investigate large companies and institutions for potential violations of antidiscrimination laws. The order could lead to increased scrutiny, enforcement actions and financial risk, especially for publicly traded corporations.

While DEI initiatives face headwinds, the broader ESG movement — encompassing environmental sustainability and ethical governance — continues to gain momentum, driven by consumer demand and corporate responsibility.

Of course, Trump has also firmly placed the sustainability movement in his sights. On his first day back in office, the president made headlines by pulling out of the Paris Agreement for the second time, claiming it was an unfair deal. He also scrapped the country's Green Deal, cut funding for clean energy programmes,



Image: iStock.com/Megane Adam

and declared a national energy emergency to boost fossil fuel production.

Despite political shifts, many companies are doubling down on sustainability commitments, aware that consumers actively seek out and are willing to pay more for eco-conscious brands. Only last month, Rémy Cointreau-owned US whiskey producer Westland Distillery announced it had been awarded B Corp Certification. The Seattle-based brand vows to be "thoughtful" in every aspect of its business, working to help preserve the rare indigenous oak trees in the Pacific Northwest, for instance, as well as reducing production process emissions.

Drinks packaging is another area where sustainability remains a top priority, as this month's feature on wine packaging illustrates (see p42). For spirits, glass bottles rank only second to the energy intensive distillation process in terms of their carbon footprint and are the single largest culprit for wine. As a result, alternative formats such as cans, kegs and boxes are rapidly gaining ground.

Another sign of the drinks industry's commitment to sustainability is the rise of closed-loop distribution firm EcoSpirits. Turn to page 52 to read Olly Wehring's interview with CEO & founder Paul Gabie, whose steadfast commitment to eliminate single-use glass in the drinks industry has meant trying to "reshape" every stage of the distillery-to-bar supply chain.

Global Drinks Intel remains committed to showcasing beverage alcohol companies going the extra mile to become more environmentally friendly, sustainable and, yes, equitably run too. We believe it isn't 'woke' to want to run your company with employees hired from all walks of life — it's just sound business sense.

We believe that recognising and celebrating these efforts is essential to driving progress. That's why this year's ESG Awards are bigger and better than ever (see p13). We're introducing two new merit levels: a gold medal for companies that come close to winning their category, and a silver medal to honour those making commendable efforts. Additionally, awards will be given to both large corporations and smaller brand owners where applicable.

Does your company lead the way in sustainability, innovation or ethical practices? Enter the *Global Drinks Intel ESG Awards 2025* and showcase your commitment to a better, more responsible industry. The future belongs to those who shape it — be part of the change today. GDI



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News briefs

Catch up quickly on the global drinks stories that matter

COMPANY RESULTS

Carlsberg posted a near-2.5% increase in sales from 2024 to DKK75,011m (US$10.46bn). Sales came in flat in the three months to the end of December.

Diageo returned to the black in the first half of its current financial year as sales in the six months to the end of December came in up by 1% to US$10.9bn.

Last year marked a 5% rise in sales for **Heineken**, reaching EUR35.96bn (US$37.5bn). Sales in the closing quarter of the year increased 4.7% to EUR7.47bn.

A slight lift in sales from the second half of last year has failed to offset the near-20% tumble recorded by champagne group **Lanson-BCC** in H1. Full-year sales fell 6% to EUR255.4m.

Moët Hennessy posted an 8% sales fall for 2024 to EUR5.86bn following "post-Covid normalisation of demand" for the champagne and cognac categories that commenced in 2023.

Fourth-quarter sales declined 1.9% to US$2.74bn for **Molson Coors Beverage Co**. For full-year 2024, top-line sales stood flat (-0.6%) at $11.63bn.

Pernod Ricard reported its latest results earlier than expected, prompted by a switch of its near-term guidance to a decline in sales. Top-line in six months to end of December decreased by 4% to EUR6.18bn.

The fiscal third quarter for **Rémy Cointreau** saw sales sink 21.5% to EUR254.1m. The company now expects its full-year sales for fiscal 2025 to finish down by almost 20%.

The parent company of **Suntory Global Spirits** posted a 1% lift in sales from its combined alcohol businesses for full-year 2024, to JPY1,055.7bn (US$6.87bn).

Treasury Wine Estates has chosen not to proceed with a consolidation of its lower-end portfolio, bringing an end to its intention to sell off its 'commercial' brands. Sales from six months to end of December increased 5.1% to AUD1.54bn (US$970m).

Listed champagne, port and wine group **Vranken Pommery Monopole** has posted a 10.5% slide in sales from the 12 months of last year, reaching EUR302.9m.

GENERAL NEWS

Trade association **SpiritsEurope** is on the hunt for a new director general as Ulrich Adam lines up his departure.

China reclaimed the throne as the biggest export market for Australia's wine producers last year, according to figures from trade association **Wine Australia**.

The **World Brewing Alliance** has revealed that the beer industry delivered US$878bn to the global gross domestic product in 2023, representing 0.8% of the total figure.

The **World Health Organization** joined the US surgeon general in a call for mandatory cancer warning labels on alcohol products.

India cut its tariff rate on bourbon imports from the US with immediate effect from 150% to 100%.

Data from the **Scotch Whisky Association** shows the total shipments of scotch abroad saw a near-4% rise in volumes to 109m nine-litre cases in 2024, while a decline of the same percentage was recorded in value to GBP5.4bn (US$6.7bn).

US sales of spirits in 2024 slipped 1.1%, while volumes rose 1.1%, according to the **Distilled Spirits Council of the US**.

MERGERS & ACQUISITIONS

Diageo has agreed to sell its majority stake in Guinness Ghana Breweries to Castel Group in Africa for a fee of US$81m.

Whyte & Mackay owner **Emperador** made a move in mezcal, purchasing a majority holding in producer and brand owner Los Danzantes through its Mexican joint venture.

Molson Coors Beverage Co has acquired a minority stake in UK-based mixer business Fever-Tree. The Coors Light and Miller Lite brand owner will pay GBP71m (US$88m) for an 8.5% share in Fever-Tree.



Carlsberg's Somersby Zero claims to be the first alcohol-free cider without sugar or calories

Pernod Ricard purchased the remaining shares of South African distiller Inverroche, marking the arrival of the group's "first wholly-owned African spirits brand".

OTHER COMPANY NEWS

Campari Group began an "organisational restructuring" process that will include a review of its current employee base, potentially cutting its workforce "by 10%".

Carlsberg will invest a total of INR6bn (US$69m) on the Mysuru brewery in the southern state of Karnataka in India. The Tuborg brewer is also debuting a non-alcoholic extension of its Somersby Cider brand, claiming the 0.0% ABV product is the first alcohol-free cider with no sugar or calories.

Diageo is set to spend US$415m on the construction of a manufacturing and warehousing facility in the US, specifically in Montgomery, Alabama.

Molson Coors committed to a GBP10m spend on its Aspall Cyder brand in the UK.

Pernod Ricard's portfolio consolidation efforts could be stretching to include one of its GH Mumm Champagne brand, according to a report.

Stoli Group has commenced searches for a new CFO and CEO for the group's North America division.

Suntory Global Spirits has started operations at its standalone commercial business in the UK. The division, named Suntory Global Spirits UK, is now directly responsible for the sales, marketing and distribution of the group's full portfolio in the UK. GDI

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

NEXT MONTH IN GLOBAL DRINKS INTEL...

THE APAC ISSUE

Our April edition examines the current state of play for liqueurs outside of Europe, as well as Asian and luxury spirits in the Asia-Pacific region. There's also analysis of the latest developments in Japan's spirits market and a preview of ProWine Tokyo — including a look at the stands not to miss at the international trade fair for wine & spirits.



Illustrations: iStock.com/zashooter

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CATEGORY TRENDS

Fabio Molinaro

High-alcohol drinks are making a comeback… as sophisticated tipples for experimental consumers

The rising popularity of high-alcohol drinks is seeing the category evolve from the fringes of subculture to become a sophisticated tipple of the bold and experimental consumer.

The drinks category has increasingly diversified, catering to softer tastes to become more inclusive and universally appealing. But, perhaps as a result, the palate is losing its edge. Best-selling spirits have adapted to this new accessible taste, embracing trends like healthy low-alcohol options and a more mindful drinking culture.

Yet, as the mainstream flavour profile grows softer, a new niche is emerging — one that craves intensity and authenticity. These aren't heavy drinkers, but discerning, curious and demanding individuals in search of uncompromising quality and a truly sensorial journey. They seek bold, complex flavours that challenge the palate and tell stories of craftsmanship and excellence.

The spirits market is undergoing a major expansion. Sales have nearly caught up with wine, fuelled by the rising demand for premium products and the booming cocktail culture. Whisky, rum and brandy are seeing significant growth, driven by shifting consumer preferences toward high-quality artisanal spirits, cutting-edge mixology innovations that produce complex, sophisticated cocktails, and the global rise of once-locally confined spirits.

In this landscape, high-proof spirits branding must strike a delicate balance.



On the one hand, it must reassure consumers about quality — at such high alcohol levels, distillery expertise is critical to delivering a refined, balanced experience, never extreme for its own sake.

On the other, it must evoke discovery and exclusivity, appealing to those who seek bold, unconventional thrills. Success in this sector isn't just about product attributes; it's about crafting a distinctive identity that captivates those who see drinking as an exploration and an adventure.

Bugatti is a perfect example of this mindset — not only does it sell fast, luxurious cars, but it creates masterpieces for those who chase the extraordinary. Likewise, high-proof spirits brands must speak to those eager to push beyond conventional taste boundaries, delivering an experience that stands apart.

Several brands illustrate how strategic branding can redefine perception. Everclear, once notorious for its 95% ABV, has repositioned itself as a premium cocktail ingredient, emphasising purity and versatility. Pernod Absinthe (left) turned its bohemian allure into a sophisticated premium story, blending heritage with refined aesthetics. Stroh Rum, at 80% ABV, leaned into its Austrian cultural roots, while Bruichladdich X4+1 tapped into the craft whisky trend, combining minimalist design with artisanal craftsmanship. Balkan 176° Vodka built its identity on challenge and resilience, leveraging aggressive branding and a raw, brutalist aesthetic.

The future of high-proof spirits lies not in alcohol percentage alone, but in delivering a complete experience. Heritage and brand storytelling will be key to forging deep emotional connections with consumers. Quality and craftsmanship will define credibility and prestige, and a sense of adventure will attract those seeking authenticity, intensity and uniqueness.

In an increasingly homogenised market, success will belong to those who inspire exploration and discovery — offering an experience that simply cannot be found anywhere else. GDI

Fabio Molinaro is creative director & partner at brand advisory and design studio Robilant. ***www.robilant.it***



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Glenmorangie CEO 'confident' Ford campaign will draw new whisky fans

Scotch brand Glenmorangie has pulled out all the stops with a major three-year campaign starring Hollywood icon Harrison Ford. **Kristiane Sherry** hears from CEO Caspar MacRae at its launch



Glenmorangie's off-script style series follows 82-year-old Harrison Ford as he decides to go to Scotland

Glenmorangie broke the internet. It certainly felt like that the day the news broke that Hollywood A-lister Harrison Ford was the new face of the single malt scotch whisky brand. Across social media, whisky forums and in conversation, the new partnership at the forefront of the industry. Consumers seemed enthused too.

The campaign itself is wildly ambitious. A series of 12 episodic short films directed by actor and filmmaker Joel Edgerton, the action is filmed on location at the Glenmorangie Distillery in Tain, at nearby Ardross Castle — made famous by TV show *The Traitors* — and in the Scottish countryside.

Named 'Once Upon a Time in Scotland', formats include online video, connected TV, out-of-home, experiential, PR and social media. The first six episodes were released on 28 January; the rest will follow this year.

The storyline sees Ford taking his own "fantastic journey of discovery", according to Glenmorangie Company president & CEO Caspar MacRae, playing a "slightly exaggerated" version of himself as he heads to Scotland to film a campaign for the brand.

"It's been brilliant to see the response globally," MacRae commented post-launch. "People seem to have really enjoyed the first episodes, watching Harrison discover the people, places and craft behind Glenmorangie with his trademark humour."

As for the *Indiana Jones* actor himself, he "loved" working with the distillery team. "The process of filming was full of unanticipated joys, little unexpected moments," Ford revealed. "It's a tribute to Glenmorangie's sensibilities that they let us be less than totally serious. What Joel has produced has a certain charm to it, because it's unpretentious and just amusing."

The intention, MacRae stressed, was to entertain while enabling whisky lovers to understand more about how Glenmorangie is made. "I think we've achieved that, and look forward to it rolling out in our key markets in the coming weeks," he said.

'Too early to say' if star power will improve W&S revenue

Glenmorangie parent LVMH released its 2024 full-year financial results the same day the campaign launched. They did not make comfortable reading for its wine and spirits arm. While total group sales crept up 1% on an organic basis, wine and spirits fell 8%. This worsened for cognac and spirits, which saw revenues plummet 14%.

Has MacRae noted an immediate uptick for the brand in the wake of the launch?

"It's too early to say," he said. "The goal of this campaign is to reach more whisky lovers globally, helping them to discover Glenmorangie and Scotland. Based on the initial response, we're confident that we're making progress on doing just that."

While there has been some criticism of the launch — most notably that the kilt Ford wears is made by English streetwear brand Palace — the narrative focuses on a bold new direction for the brand. Introducing 'Once Upon A Time in Scotland', MacRae explained the messaging was now tailored towards existing whisky drinkers, rather than newcomers.

"We wanted to make sure that as well as bringing people into the category, we were talking to people who already have a love for single malt scotch or really good whiskies," he said. "We want to take them much deeper. So if [previous campaign] 'It's Kind of Delicious and Wonderful' was an introduction to the category, [with this] we wanted to take people into Scotland, to show them our wonderful Highland home."

There is a focus on the real team at the distillery throughout the films, and MacRae is keen to stress authenticity as a key dynamic of this approach — especially when it comes to Ford.

"He's immensely authentic," MacRae said of the actor. "And I mean authentic in two ways. First of all, he is very picky about who he partners with, in any regard. You won't find a lot of adverts that Harrison has done before, and that's because he has to have a genuine passion or interest for the product in the category. He's a genuine whisky lover; he really is super-passionate about this."

Then there's his broad appeal. "He may mean different things to different people. He may be Han Solo to one, Indiana Jones to another. To a new generation, he's going to be the Red Hulk in the *Captain America* movie. He's still incredibly active as an actor and incredibly aspirational for consumers."

'Once Upon a Time in Scotland' is part of a three-year campaign with the star, so there's a long road ahead — and plenty of time to see if his A-list touch will contribute to a change of fortunes for LVMH's wine and spirits division. GDI



CATEGORY TRENDS

Brandy Rand

Why 'adult non-alcoholic' (ANA) is the category the drinks industry should all be talking about

I've spent close to a decade in the data and business intelligence space. If you're like me and have gone gleefully deep in a spreadsheet analysing numbers, you'll agree categorisation is king. We need systematic order to understand trends in data.

But across the broader beverage category, it's become complicated. Why? The standard nomenclature we use is largely based on intra-category convention, meaning our perspective is limited to what we define within our known category.

Where this gets confusing is between alcoholic and non-alcoholic beverages. The blurring of lines between beverages (and brands) has accelerated, creating a bunch of products that defy conventional categorisation.

And what we call this new breed of beverages is important because: one, we all need to be talking about the same thing; and two, we need to accurately measure the growth and scale of said thing.

As someone who loves logical taxonomy and spends a lot of time talking about beverage trends, I've seen many attempts within the data industry to define these new beverages under a myriad of terms. While I believe the various data companies will all eventually get there (hopefully with some consistency), there's one simple naming convention we need to all start using: adult non-alcoholic (ANA).



This defines the fast-growing category of non-alcoholic drinks that are meant to taste like or substitute alcohol. The problem with calling this segment 'non-alcoholic' (NA) — which seems to be the global norm — is that NA has two meanings depending on where you sit.

If I'm in the alcohol industry, I use NA to talk about dealcoholised beer, wine, spirits or ready-to-drink cocktails (some that contain functional ingredients like adaptogens). That's within the context of alcohol.

But if I'm in the soft drink industry, I would consider myself non-alcoholic too. And most data sources also subcategorize coffee, milk, water, energy drinks, etc, all under non-alcoholic beverages.

While there is, and will continue to be, debate on how THC, CBD and other functional beverages fit within ANA, it's worth the industry starting from a place of alignment on the broader definition.

When I see stats about NA on social media tied to a post about zero-proof cocktails, for instance, a lot of them are sizably wrong because they are talking about traditional NA, not the new ANA segment. The confusion is real. This doesn't help founders raise money or distributors and retailers realise the actual potential of the category. If we don't define it, we can't sell it so people understand it.

The way I see it, this new crop of alcohol-free beverages that are meant to replace the flavour or function of traditional alcohol are targeted to adults, are often premium (compared with soft drinks or water), and sit squarely between two established beverage categories: alcohol (beer, wine and spirits) and non-alcohol (water, juice, soda, tea, etc).

Most important, ANA is stealing share from alcoholic and traditional non-alcoholic beverages, because people are looking for alternatives to both.

So let's call this global multibillion-dollar category ANA to better define its emerging categorisation, track its growth and forecast its bright future. GDI

Brandy Rand spent seven years with IWSR, rising to the role of global chief strategy officer. She is now CEO of ThirstWell, offering strategic advisory and business intelligence for the beverage industry. ***www.thirstwell.com***



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New products

Take stock with our roundup of the latest drinks launches

Cocchi Savoy Dry Vermouth di Torino

The Cocchi Vermouth brand has partnered with bartenders at The Savoy for 11 years, resulting in this third exclusive extension for the London hotel.

- Vermouth di Torino Superiore, with 50% Piedmont wine; 17% ABV.
- Available exclusively at bars in The Savoy hotel in London.
- SRP not disclosed, limited to 2,000 bottles.



Image: Justin de Souza

Chicas Divertidas

US rapper Megan Thee Stallion has founded tequila brand Chicas Divertidas, the bottles for which "feature cuts and grooves inspired by the agave plant and gradient hues of orange, pink, red and purple".

- Tequila, blanco and reposado, produced at Casa Centinela; both 40% ABV.
- Available online to US consumers for pre-order, as well as in limited quantities at selected off-premise operators in the country.
- The blanco iteration has an SRP of US$70 per 70cl, the reposado is priced at US$80 per 70cl.



Jameson Triple Triple Chestnut Edition

Pernod Ricard's Jameson follows up its first Triple Triple release, which was a global travel retail exclusive.

- Irish whiskey, matured in a combination of ex-bourbon, ex-oloroso sherry and chestnut; 40% ABV.
- Available in Canada, Ireland, Poland, South Africa, the UK and the US, "soon to come to Japan and India".
- SRP of US$29 per 75cl bottle.



Molson Coors Beverage Co's Simply Spiked Bold

Simply Spiked Bold contains 5% fruit juice and is 3% stronger in terms of ABV compared to the core line.

- Vodka-based RTDs, Signature Lemonade and Cherry Limeade variants; both 8% ABV.
- Available in 16oz (47.3cl) and 24oz (71cl) cans in convenience stores across the US.
- SRP of US$3.99 per 24oz can.

Skyy Martinis Cosmo and Espresso

Campari Group has bolstered the Skyy Vodka line-up in the US with two premix martini cocktails.

- RTDs, premix cocktails, both contain Skyy Vodka as their base spirit; Cosmo contains triple sec, Espresso features coffee liqueur; both 20% ABV.
- Available in all US markets since late last month.
- SRPs of US$9.99 in 37.5cl bottles.





Isle of Raasay Third Edition

The latest release from brand owner R&B Distillers' producer uses its "signature" six-cask maturation process.

- Scotch, single malt, Islands. No age statement, matured in ex-rye, ex-bordeaux red wine and new chinkapin oak casks; 61.6% ABV (cask strength).
- Available since 25 February via the company's online shop, to the UK and US.
- SRP of GBP65 (US$81.25) per 70cl bottle, 5,500 bottles available. »



Green River Kentucky Straight Wheated Single Barrel Bourbon



» This Kentucky straight bourbon from Green River Distilling Co has a mash bill of 70% local corn, 21% wheat and 9% malted barley.

- American whiskey, bourbon, Kentucky. Matured for a minimum of five years; between 55% and 65.5% ABV.
- Available since February to US to on and off-premise operators, who can select their own barrel at the Green River distillery. A limited — unspecified — quantity of bottles also on sale through selected off-premise outlets in Kentucky.
- SRP of US$59.99 per 75cl bottle.

Battle of Iwo Jima, 80th Anniversary Edition



Heritage Distilling Co's latest whiskey is the second in the company's Salute Series, with 10% of the expression's gross profits going to the Marine Raider Foundation.

- American whiskey, straight bourbon, Washington. Matured for five years in new American oak; 52.5% ABV.
- Released late January in the US, available online for domestic delivery except to Alaska, Hawaii, Michigan, South Dakota and Utah.
- SRP of $95 per 75cl bottle, limited to 2,200 units.

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

Ardbeg Eureka

The latest iteration from Moët Hennessy's Islay-based Ardbeg marks the 25th anniversary of its 200,000-strong Ardbeg Committee members club, which is open to consumers worldwide.

- Scotch whisky, single malt, Islands, no age statement. Contains whisky aged in ex-pedro ximénez sherry and ex-bourbon; 52.2% ABV.
- On sale online since mid-February for global delivery, as well as through select off-premise operators.
- In the US, SRP of US$84.99 per 75cl bottle. Available in limited — albeit unspecified — quantities.

Patrón El Alto

The Bacardí-owned tequila blend has been aged in 11 barrel varieties to achieve "a refined taste profile".

- Tequila, Jalisco. Blend of reposado, añejo and extra añejo; aged in primarily American and French oak; 40% ABV.
- Available since last month in the US, Australia, South Africa, France, Spain and the UK.
- In the UK, SRP of GBP190 (US$234.47) per 70cl bottle.





The Heart Cut #12

Single cask bottling specialist The Heart Cut has partnered with Nc'nean Distillery for its first scotch whisky, the 12th release in its portfolio to date.

- Scotch whisky, single malt, Highlands. No age statement, finished for an unspecified period in ex-madeira wine; 54% ABV.
- Released in the UK in mid-February, available online for domestic delivery.
- SRP of GBP63 (US$78) per 70cl bottle, limited to 391 units. GDI



The categories

Sustainable Spirits Product of the Year

This award examines the overall sustainability of individual products in the spirits category. Whether they are organic, made from sustainably produced materials, bottled in lightweight/recycled/reusable packaging, carbon neutral or linked to environmental and/or social projects, these products clearly demonstrate their sustainable credentials.

Sustainable Wine Product of the Year

This award examines the overall sustainability of individual products in the wine category. Whether they are organic, made from sustainably produced materials, bottled in lightweight/recycled/reusable packaging, carbon neutral or linked to environmental and/or social projects, these products clearly demonstrate their sustainable credentials.

Alexander Smith Grand Prix Award for ESG Spirits Producer of the Year

This category highlights companies demonstrating their commitment to implementing ESG through innovative best business practices that improve their carbon footprint and have a positive impact on the environment and society. Improvements in any area of day-to-day operations will be considered, from the overarching governance, the sourcing of raw materials, methods of production and transportation, use of renewable energy, better water/waste/sanitation management and community/social initiatives.

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GDI *is extending its ESG Awards to include two new tiers of merit: gold and silver medals*

GDI expands ESG Awards for 2025

The Global Drinks Intel ESG Awards — which raise awareness and reward the achievements of beverage alcohol companies and brands leading the way in environmental, social and governance activities — are back. And this year they are set to be bigger and better than ever before

At a time when DEI policies are increasingly being called into question, especially in the US, there is a danger of anything ESG (environmental, social and governance) becoming swept into the same debate. But to be environmentally friendly, to be sustainably driven and to seek to run your company equitably isn't 'woke'. It makes sense commercially and deserves recognition.

To younger consumers, ESG credentials really matter. They matter in choosing brands. They matter to a generation concerned about their future — both Gen Zers and Millennials show an increasing willingness to support brands and companies that actively seek to protect the planet and society. They matter, because fundamentally, they are right.

To reinforce this, and in light of the sheer quality of past entries, *GDI* is extending its ESG Awards in 2025 to include two new tiers of merit: a gold medal for those companies and brands that are very close to winning their respective categories, and a silver medal for those whose efforts deserve recognition. In addition, where relevant, awards will be given to both the very largest companies and smaller brand owners.

At TFWA Cannes in September 2024, companies whose innovative approaches to ESG caught the eye of the awards' independent panel of experienced judges included: ADM Group (for Guinness), Australian Vintage, Avolta, Brockmans Gin, Bruichladdich Distillery, Champagne Telmont, Conrad Distillery, Diageo, International Alliance for Responsible Drinking, Sxollie Cider, The Boatyard Distillery, Tequila Komos and Waterford Distillery (full results at **GDIesgawards.com**).

GDI chief operating officer & marketing director Kate Wake-Walker says the 2025 competition is shaping up to be the "biggest and best yet". She adds: "From the beginning, our goal has been to highlight the efforts of those excelling in these crucial areas, while also sharing best practices with companies that are just starting their ESG journeys."

Entries for the Global Drinks Intel ESG Awards 2025 open on 1 March. For more details, visit **GDIesgawards.com**

ENVIRONMENTAL
SOCIAL
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ESG AWARDS

global drinks intel.

Entries for the Global Drinks Intel ESG Awards 2025 open Saturday, 1 March 2025. Results will be published in the November issue of *Global Drinks Intel Magazine,* as well as online.

In each category, there will be a category champion, as well as gold medal and silver medal winners. To recognise both large and small companies, more than one category winner may be chosen. Winners may publicise their award, provided the year of the award is mentioned, for up to three years following.

HOW TO ENTER

1. Visit GDIesgawards.com
2. Select the awards you wish to enter.
3. Create an account.
4. Pay for your company's entries.
5. Submit written entries/case studies/ send samples for judging. Full details at GDIesgawards.com

Deadline for entries is 6pm GMT on Friday 1 August 2025. The fee is GBP195 (US$246) per entry for the first three entries. Additional entries are GBP155 each. For the Global Drinks Intel ESG Awards 2025, the judging panel will accept entries showing ESG steps taken over the past 24 months. The awards will be announced on Monday, 29 September 2025. Email queries to esgawards@drinks-intel.com

Best Sustainability Marketing Campaign

» There's doing a good thing and then there's telling a good story about doing the good thing. As businesses battle against charges of greenwashing, the most effective counterargument is in the strong marketing of initiatives. The most resonant sustainability activations in the consumer's eye will be recognised in this category.

Water Preservation Achievement of the Year

Reduction of water usage and conservation of water resources is key in demonstrating environmental stewardship within the global drinks industry. This award will acknowledge those companies that have done the most to increase water use efficiency and improve water quality by avoiding pollution and/or protecting water-related ecosystems.

Greenhouse Gas Reduction Achievements of the Year

Global warming because of human-induced release of greenhouse gases is resulting in unprecedented global climate change impacts. Not only is it imperative emissions are reduced, but global climate goals will only be achieved if carbon capture is implemented to achieve net zero targets. This award acknowledges those companies that have done the most to adapt their practices and influence their supply chain and consumers to reduce greenhouse gas emissions (Scope 3) through verifiable actions and/or implement or support carbon capture projects.

Waste Reduction Achievement of the Year

Waste generation and poor waste management practices cause air pollution, water and soil contamination. This award will acknowledge those companies that have done the most to take steps to avoid and reduce the generation of waste. Where waste cannot be avoided, recovery of materials and recycling waste into usable products should be implemented.

Green Packaging Initiative of the Year

When it comes to packaging and closures, beverage companies have been working to introduce changes that chime more closely with consumer demand for cleaner, greener and more environmentally and socially accepted products. This category recognises innovation to either avoid, reduce or completely reuse the material for packaging and closure, while limiting its impact on the environment and being socially responsible.

Biodiversity Achievement of the Year

Giving back to the planet has become a cornerstone for many industries, not least for the drinks industry, which is so reliant on natural resources. This category recognises the importance of biodiversity and initiatives that do good for the natural environment. Whether by enhancing and restoring ecosystems, adopting nature friendly production practices, responsible sourcing of raw materials and/or supporting environmental initiatives focused on biodiversity protection and restoration.

Best Responsible Drinking/Alcohol Harm Reduction Initiative

Drinking to excess causes damage not only to individuals' health, but also to society more widely. 'Drink less but better' has morphed into actively encouraging moderation, and this category recognises those brands/companies that have made this part of their ethos.

Social Achievement of the Year

Here, we examine companies' efforts to make their organisation more representative of the society they serve. Providing support to minorities — both internally and externally — to attain gender balance, promoting equality in the workplace and supporting local community initiatives are of high relevance to the consumer.

Best Global Travel Retail Sustainable Product

This category highlights the travel retail products that boast the strongest sustainable credentials, whether they are organic, made from sustainably produced materials, bottled in lightweight/recycled/reusable packaging, carbon neutral or linked to environmental and/or social projects.

Global Travel Retail ESG Champion 2025 — Brand Owner

This category is dedicated to those companies — whether producer or operator (airport, in-flight or ferry/ cruise) — that in their global travel retail activities have gone above and beyond to exercise and promote their environmental, social and governance achievements and capabilities.

Global Travel Retail ESG Champion 2025 — Operator

This category is dedicated to companies — whether producer or operator (airport, in-flight or ferry/cruise) — that in their global travel retail activities have gone above and beyond to exercise and promote their environmental social and governance achievements and capabilities. GDI

ESG roundup

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



Carlsberg has achieved a 76% collection and recycling rate for its bottles and cans

ENVIRONMENTAL

In **South Korea**, **Anheuser-Busch InBev**'s OB Beer division signed a recycling agreement with local authorities in Cheongju, where one of its breweries is located. OB will establish an organic cooperative recycling system with city officials, to improve the local environment and promote recycling projects. OB already has an annual waste battery collection drive, which will now be promoted every year in Cheongju.

Brown-Forman unveiled a new 100% recycled bottle for its Woodford Reserve 5cl release in **the US** as part of its commitment to sustainability and carbon footprint reduction. Designed for the global travel retail channel, the new bottles are produced using advanced resin materials and will initially launch through Delta Airlines.

Carlsberg published its combined annual report for 2024, revealing impressive progress on ESG targets that include a 3% reduction in relative value chain emissions since 2022, and a 76% collection and recycling rate for its bottles and cans. Meanwhile in **the EU**, the group published a new report, 'Sowing Change', urging EU leaders to take swift action to accelerate the shift to regenerative agriculture. The report outlines six recommendations to transform European agriculture, providing a roadmap to overcome barriers and accelerate progress.

Kirin announced plans to switch its Hokkaido Chitose brewery in **Japan** from fossil fuels to green hydrogen in 2026. The demonstration project will use steam derived from green hydrogen sourced from solar power throughout the steam-intensive brewing process. The pilot is part of Kirin's long-term goal of net zero greenhouse gas (GHG) emissions across its entire value chain by 2050.

In **France**, **Moët Hennessy** partnered with maritime transportation startup Neoline to pioneer a sail-powered cargo shipping solution. The *Neoliner Origin* will begin sailing between France and the US from July, transporting 20 containers of Hennessy Cognac every month with 80%–90% fewer carbon emissions than a conventional ship.

SOCIAL

Carlsberg partnered with driver safety app Brightmile in **Asia** to help drivers recognise risky driving behaviours. Around 2,000 drivers logged over 17m km of journeys through the app, reducing speeding events by 48% in Vietnam compared with 2023, and cutting distraction-related events by 54% in Hong Kong and 48% in Malaysia. Carlsberg plans to expand the use of Brightmile to more regions as part of its commitment to road safety.

Diageo's global underage drinking prevention programme 'Smashed' is celebrating its 20th anniversary in **the UK** with its largest secondary school tour to date. In 2023–24, the campaign reached over 80,000 students with its interactive theatrical initiative and has educated around 580,000 students nationwide, and 5.5m globally.

In **Canada**, **Molson Coors Beverage Co** partnered with the Metrolinx public transport agency to offer free rides home to basketball fans in Toronto after the big game between the Toronto Raptors and the Chicago Bulls at the end of January. This was the first time Molson Coors brought its free post-game rides initiative to the city, empowering attendees to prioritise safety and make responsible choices.

Pernod Ricard worked in partnership to develop the United Nations Institute for Training & Research's (UNITAR) global 'Autosobriety Training Programme to Prevent Drink-Driving' in **Vietnam**. The initiative uses online road safety training for drivers and public awareness campaigns to contribute to the UN Sustainable Development Goal (SDG) and UN Global Performance Target for Road Safety targets of reducing traffic deaths and injuries by half by 2030. The brand owner successfully piloted the programme with UNITAR in Vietnam in 2023 and expanded operations last year. A total of 5,225 drivers have already participated in the training course.

Meanwhile, in **South Korea**, **Pernod Ricard** also launched a new 'Safe Return' responsible drinking campaign in entertainment zones around the country, to discourage drink-driving after the Lunar New Year holiday.

GOVERNANCE

Also in **South Korea, AB InBev**'s OB Beer earned 'Best Employer' recognition for a fourth consecutive year. The global HR evaluation organisation Top Employers Institute also awarded OB with the highest score among domestic companies, the division's second consecutive appearance.

Finally, **Carlsberg** featured in the list of Forbes' 2024 World's Best Employers, marking the group's fourth consecutive year of recognition at an international level. GDI

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



GLOBAL DRINKS INTEL ESG AWARDS 2025

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MARKETING TRENDS

Chris Tyas

The best storytelling and absolute authenticity power the best — and most effective — drinks campaigns

While doing Dry January this year, it occurred to me as I sipped on my non-alcoholic beer, tried matcha tea and generally did my best to be healthy: drinks brands of all sizes have a lot to learn from upstart brands — specifically from newer, challenger drinks brand founders.

Let me explain.

Much of my downtime at the start of this year involved discovering and sampling new and interesting non-alcoholic drinks. As I started to look into them it struck me that a large number of founders were making their personal stories the face of their brand. What was more remarkable was the success they were achieving. Truly impressive.

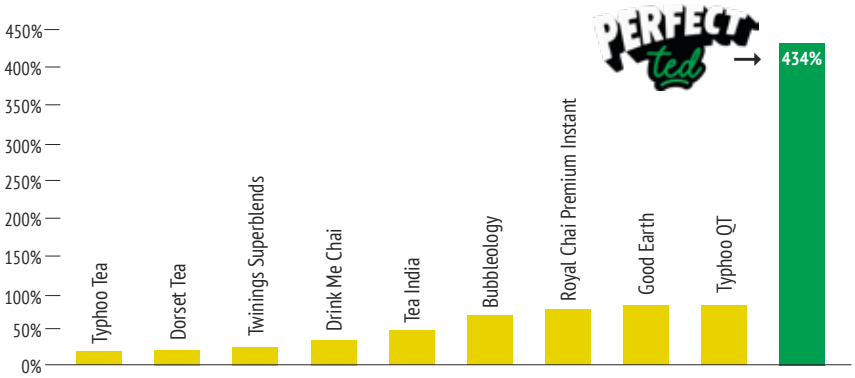
One is PerfectTed which, since launching in 2021 and appearing on *Dragons' Den,* then growing sales by 434% in 2024 (way ahead of its closest competition, including Typhoo QT), is now the UK's fastest-growing tea and matcha brand, according to North Star/Circana (see chart below).

Another is non-alc beer brand Days, which last year achieved a 283% increase in sales (see chart bottom); that's three-times the growth of its rivals' beer brands and 14 times the growth of its category.

In the case of PerfectTed, founders Marisa Poster, Teddie Levenfiche and Levi Levenfiche leverage their friendship and journey — which includes the trials and tribulations of being a startup — and the sincerity with which they tell their story are central to the PerfectTed brand.

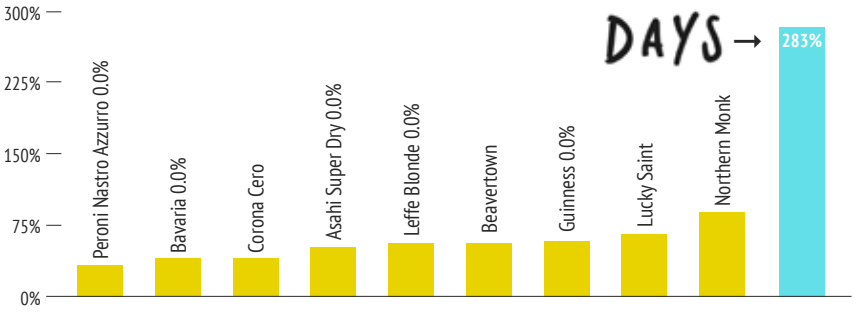
Meanwhile, Days founders Mike Gammell and Duncan Keith are equally forward-facing. Their personal stories underpin their 'Scotland born and brewed' proposition and are central to the brand, its positioning, tone of voice and marketing strategy.

Top 10 UK Tea & Matcha Brands Major Multiples/Value Sales



Source: North Star powered by Circana; major multiples/value sales WE 5/11/24 vs prior year; brands over GBP500,000 (US$620,000) annualised sales

Top 10 UK No/Low Beer Brands Grocery % Retail Sales Value, Year on Year



Source: Nielsen data to WE 10/08/24; % RSV growth; L12W total grocery/brands with greater than GBP50,000 RSV 12wks to 12/08/24

For smaller upcoming businesses and challengers, a founder's personal brand is their product's brand. This means that the founder's personal story is central and makes the brand totally authentic. As PerfectTed and Days' success goes to show, authenticity is now a key consumer want.

The moral is simple: you don't have to be big or famous to tell compelling and engaging stories — so long as the story you have to tell is good enough.

Now let's consider the difference in approach among many of the larger and more mature drinks brands with a bigger marketing budget and resources, sales targets and shareholders to satisfy. How many of these larger brands tell great stories with authenticity that makes them compelling and engaging? The answer, I believe, is not a lot.

Take Heineken's 'Open your world' campaign strategy, which ran for seven years from 2011. This was all about how 'you must cross your border' to progress in life. While the concept worked for Heineken for a while, the campaign's success was undermined by its vagueness and inauthenticity.

In other categories, a softening of the corporate brand and growing focus on the 'personal' is becoming apparent — take Facebook founder Mark Zuckerberg's recent ditching of his jeans and hoodie uniform for designer T-shirts and gold chains.

My point is that big drinks brands could learn a lot from startups and how they use authentic storytelling, showing the wins and near misses to capture the attention of consumers. As founders exit, larger holding companies are left as custodian of the brand, but many fail to really understand and connect with the story, let alone tell it well. Without a strong human and authentic brand at their heart, their message is simply diluted.

As PerfectTed and Days show, get it right and growth can be considerably impressive. GDI

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

On our radar

Five drinks campaigns that leave the January blues behind

Harrison Ford (see p9) isn't the only A-lister lending the drinks industry a little star power to kick-start the year. These campaigns caught our attention for their creativity, humour and allure



'Guao Guao' Desperados

The latest Desperados spot cleverly taps into Gen Z and Gen Y culture by fusing music, digital engagement and bold branding. Featuring an exclusive track by Latin Grammy winner Ovy on the Drums, Heineken's 'The Beer with Latin Vibe' campaign ditches traditional advertising for immersive experiences, including AR filters and city-wide activations, ensuring a dynamic, culturally resonant global reach.



Slothing around Coors Light

It's a 'Case of the Mondays' for Coors Light's latest campaign which features haphazard sloths to tackle post-Super Bowl sluggishness. Released for the Big Game on 9 February by Molson Coors Beverage Co, the 30-second ad introduces limited-edition Mondays Light packs in Canada and the US, aligning perfectly with "possibly the worst Monday of the year".

Unbearable company Bear Fight



Next Century Spirits launched its first major marketing push for Bear Fight American Whiskey, starring *Suits* actor Gabriel Macht in the 'What's Your Bear Fight?' campaign. The ads, including six and 15-second spots, highlight Macht's role as both actor and stakeholder, as he proceeds to be wiped out by a dress-up grizzly. With *Family Guy* creator Seth MacFarlane among the brand's investors, the campaign positions Bear Fight as a bold, distinctive whiskey choice.

Other David Stella Artois

US actor Matt Damon appears as the 'Other David', ex-international footballer David Beckham's long-lost brother, in this Stella Artois ad, which blends humour and celebrity status to elevate the lager's premium appeal. Debuting during Super Bowl LIX, the playful spot kicked off a year-long, multichannel push for the Anheuser-Busch InBev brand across TV, digital and retail.





Sip & Escape Ketel One & Tanqueray

Ketel One Vodka and Tanqueray Gin bring *The White Lotus* to life with 'Sip into The White Lotus', a cinematic campaign in partnership with Max and HBO. Featuring a short film starring Patrick Schwarzenegger, Diageo's campaign blends storytelling and bespoke cocktails inspired by Thailand. With immersive events and exclusive drinks, it's a toast to indulgence and intrigue. GDI



Ukrainian vodka Nemiroff furthered its ambition of becoming a top five vodka last year by entering several new markets, including Australia, Canada and India

Clean and versatile. Why vodka will ride out Europe's economic storm

Vodka sales may be flat across most of Europe, but producers' increasing focus on provenance, sustainability and flavour is playing to consumer expectations and maintaining premiumisation. **Jaq Bayles** reports

No spirits are exempt from the fallout of the faltering economy across Europe, but some have a stronger immune system than others. Vodka, the second-largest category on the continent after flavoured spirits, may be flat at best right now, but there are reasons for continued confidence.

The versatile spirit benefits from being relatively resilient compared with other categories in all markets, according to IWSR head of research for EMEA Daniel Mettyear. This is in part due to vodka's increasing popularity with Gen Z drinkers and as a base for lower-ABV RTDs, which enables it to tap into the moderate drinking trend.

In some markets, adds Mettyear, vodka "benefits from a perception of being a 'clean', lower-calorie option. It is also an increasingly popular base for spritzers — a growing category".

Vodka also has a relatively low price point, which helps it remain strong as a category in the face of low consumer confidence due to the cost of living crisis.

The premiumisation trend has slowed due to the economic climate in most European markets, observes Mettyear, although "super-premium brands are still experiencing some strong growth in some markets, but from a much smaller base".

Top-end producers remain confident in premiumisation, but believe vodka needs to respond to its evolution to stay ahead of rivals such as tequila and RTDs.

Stock Spirits Group chief marketing officer Nicolas Mazuranic is among this cohort. "Premiumisation continues to thrive despite economic challenges, though the concept has evolved," he says.

"Consumers are increasingly valuing brand authenticity, storytelling and quality over price alone. Brands that »

Top 5 takeaways

- Vodka is the second-biggest spirits category in Europe (behind flavoured spirits) and is flat or slightly declining in all but one of its top five European markets.
- Sustainability is increasingly under the spotlight with initiatives such as refill pouches and paper bottles finding favour.
- Flavours continue to be a driver, particularly for younger consumers.
- Premiumisation has slowed in most markets. Super-premium brands are still experiencing strong growth in some markets, but from a much smaller base.
- Vodka is increasingly popular with Gen Z drinkers, often as a mixer, and is a popular base for RTDs.

Poliakov



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» provide added value, whether through heritage, unique production methods or innovative designs, are winning in this space.

"This environment raises the bar for producers as understanding and adapting to consumer preferences becomes increasingly critical. At Stock, we take pride in having built robust brands that align with these new consumer demands, delivering both high-quality products and meaningful narratives that resonate with audiences seeking more than just a label."

Nemiroff chief executive Yuriy Sorochynskiy agrees. "The trend of premiumisation is significantly reshaping the vodka market," he says. "While overall vodka consumption may be declining, this trend is primarily affecting the lower-priced segments. In contrast, the premium and ultra-premium segments are experiencing robust growth, especially in Europe, which remains a strategic focus for us over the next few years."

But others — including Tito's Handmade Vodka managing director, international John McDonnell — note that, while premiumisation remains relevant and strong, price sensitivity has increased.

"In this current economy, consumers aren't spending EUR50-plus (US$52-plus) any longer for a bottle; they're trading down," says McDonnell, "and they're discovering that they can find just as much — if not more — taste and quality in an affordable spirit like Tito's.

"Also, the cost of dining out has become so expensive that people aren't drinking two or three cocktails when they go to a restaurant these days, they're drinking just one."

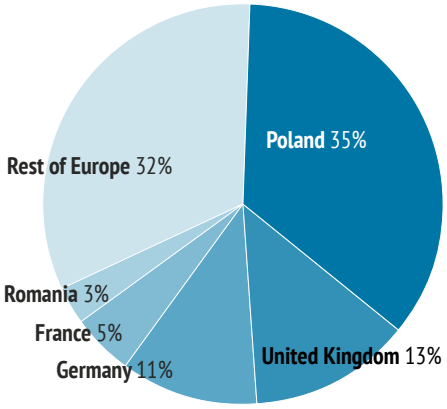




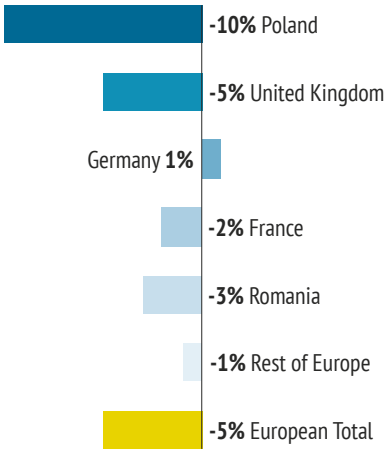
Stock Spirits Group's Żołądkowa de Luxe (left) is marketed as 'The Honest Vodka' in the brand's new German campaign. Liviko's vodka portfolio includes premium small-batch brand Hõbe (right)

Top 5 European Vodka Markets

Market Share (Vol) 2023



Chg Vol 2022–23



Source: IWSR. Note: May be small differences due to rounding



Consumers 'trading down' are discovering just as much — if not more — taste and quality in an affordable spirit like Tito's, says the company's MD, international John McDonnell

Gloria Hallaste, export marketing specialist at Liviko, sees some consumers still willing to trade up, but thinks "the premium-plus segment is facing greater pricing regarding value for money".

She adds: "Consumers in this category are looking for authenticity, transparency in production and high-quality ingredients. Sustainability is also playing an increasingly important role in purchasing decisions, with buyers favouring brands that demonstrate a commitment to environmentally responsible production methods." »

Sustainability credentials

» Hallaste's point about sustainability having become an important issue for many consumers is picked up on by most commentators, and many brands are keen to showcase their credentials.

However, the sustainability focus often occurs behind the scenes, in the likes of Poliakov's commitment to local bottling in France and Spain, Liviko's increase in the percentage of recycled glass used in its locally sourced bottles, or Nemiroff's investment in a biogas plant to support the Ukrainian government's reforms on industrial pollution and the adoption of eco-friendly technologies.

But more tangible examples of sustainability for consumers, retailers and the on-trade can also be found across Europe — for example, in Absolut's paper bottles and Sapling's refill pouch and tree-planting initiative.

With Donald Trump in the White House, the operating landscape for all things environmental is changing dramatically — not just in the US, but further afield as well. Last month, for example, it was revealed that France was considering trying to kill the EU's Corporate Sustainability Reporting Directive — a piece of legislation that requires companies to report on their environmental impact.

Despite this climate-hostile political environment, Sapling Spirits co-founder Ivo Devereux says that sustainability is increasingly important to consumers across Europe, with many actively seeking brands that align with their values.



Not only does London-based B Corp-certified producer Sapling Spirits offer 70cl refill pouches that can be returned by post, last year it launched 5cl aluminium bottles to be sold on Virgin Atlantic flights

"People are more aware than ever of their environmental impact and are making conscious choices to support businesses that prioritise sustainability," she says. "As a climate-positive brand, we're proud to be at the forefront of this movement, offering products that not only taste great, but also contribute to a greener future.

"Our refill pouch has been incredibly well received so far. Customers love the convenience, reduced packaging waste, and lower carbon footprint compared to traditional bottles. It's a simple yet effective way for people to enjoy premium spirits while making a more sustainable choice."

Devereux believes brands are becoming more aware of the impact their products are having on the planet. "When creating a product in the 2020s, it's hard to avoid at least wondering what impact your product might have on the world around you.

"Once you have had that thought it's then hard not to act on it. Having said that, sustainability is part of our product DNA, so we would be naïve to think other companies are focusing on this as much as we are." [Winemakers are also adopting refill pouches, see p42.]



Currently under construction, Nemiroff's new biogas plant will replace 6.8m cubic metres of natural gas annually, reducing carbon emissions by 5.5 tonnes per year when it begins production in 2026

Flavour initiatives

Another important driver of vodka in Europe is that of flavours, "especially for attracting new customers", says IWSR's Mettyear, who points out that "in the UK, flavoured gin drinkers often switch to flavoured vodka". Although, he adds, flavour is "not as important" a force as it has been in recent years.

But Maéva Fonsino, international senior brand manager at Poliakov Vodka owner La Martiniquaise-Bardinet, believes the flavoured sector is essential. "Flavour innovation in vodka plays a key role in the evolution of this category, especially in Europe, where the market is strongly influenced by consumer trends." »

» She thinks that this year vodka consumers will be looking for fresh and exotic fruit flavours, which are "very trendy, especially among young consumers".

More complex flavours like ginger, mint, cinnamon and lavender are also gaining popularity, adds Fonsino. "These flavours add a touch of sophistication and are often used in trendy cocktails, such as the moscow mule or spiced cocktails," she says.

"Reinvented classic flavours" such as lemon and vanilla are also gaining traction. "Lemon-based vodkas can be enhanced with a hint of ginger or herbs for a more dynamic taste," says Fonsino.

Poliakov offers a range of flavoured vodkas blended with natural flavourings, including green apple, cranberry, lemon, strawberry and a popular cherry variant.

UK-based Dutch Barn Vodka, which is made with apples as its base, has also found favour with the springtime stone fruit — founder & chairman Chris Fraser says the brand's Black Cherry version is its most popular flavour.

"We were already producing an exceptional cherry vodka liqueur that customers loved, so we knew we had a great base to develop the amazing Black Cherry," he says.

"Cherry is a flavour that is still growing in demand, and the versatility of our Black Cherry means it can be enjoyed with something simple like cola or lemonade, but it can also elevate an incredible cherry old fashioned when paired with a great bourbon."



Despite declines in the flavoured vodka category in some markets, Nemiroff's The Inked Collection — which includes Bold Orange (left) — continues to perform strongly

Dutch Barn Black Cherry was launched alongside Balinese Vanilla and Mediterranean Citrus last November. Fraser finds vanilla and citrus "have an all-year, almost universal demand, but others vary between cities, countries and continents".

Flavoured vodka, he adds, is benefiting from consumers' gin fatigue. "People are discovering that the skill of crafting a high-quality flavoured vodka properly is similar to premium gins, but without the constant presence of juniper."



Both Poliakov (left) and Dutch Barn have found success with cherry-flavoured variants. Dutch Barn founder & chairman Chris Fraser says 'cherry is a flavour that is still growing in demand'

Co-owned by comedian Ricky Gervais, Dutch Barn is established across markets in Sweden, Iceland and Belgium, and is working on launching in Germany, Finland, the Netherlands and Portugal soon.

Nemiroff's Sorochynskiy notes declining trends in the flavoured vodka category in the UK and Benelux, but says: "We achieved nearly half of our premium portfolio with flavoured The Inked Collection, while the overall market share of flavoured vodka in these regions is twice lower.

"This underscores the strong positive reception of our flavoured offerings and the feedback we consistently hear from consumers — bold, rich flavours and natural ingredients are key factors driving their choice."

In Nemiroff's domestic Ukrainian market, he finds in the premium vodka segment that berry flavours lead, accounting for 55% of flavoured vodkas.

"This reflects local preferences rooted in traditional liqueurs, and it's where products like Nemiroff The Inked Collection Wild Cranberry shine. Citrus flavours follow, making up 22%, driven by the premium image of citrus fruits and their versatile use in simple cocktails. Our Bold Orange meets that demand perfectly."

Whether it's through flavours, sustainability or its appeal to quality-minded consumers, vodka continues to keep pace with contemporary trends and prove its versatility in a changing spirits landscape. **GDI**

Vodka roundup

Five brands creating a buzz this month



From AI campaigns and creative collabs, to unique NPD and line extensions, vodka brand activity across Europe continues apace. Here are just a few of the recent developments that caught our eye

Sexy Fish Vodka collab

UK spirits maker Hawkridge Distillers has collaborated on a premium vodka with upmarket Japanese restaurant and bar Sexy Fish. Double-distilled, triple-filtered and finished with a "touch of honey", Sexy Fish Vodka joins an own-label line-up that includes collaborations with Ki No Bi Gin and Chichibu Distillery. It is only available from Sexy Fish London, Manchester and Miami.



Loyal Vodka trio

A unique infusion of electrolytes is used enhance the flavour profiles of a trio of ultra-premium releases from Welsh brand Loyal Vodka. The three friends behind the Cardiff-based brand say they are committed to zero additives, preservatives, artificial sweeteners or colourings across the range, which includes Cherry & Vanilla and Pineapple & Raspberry flavour variants alongside Loyal Original.

Żubrówka explores its wild side with AI

Bison run wild as a city is transformed into a lush forest "full of magic and untamed energy" in a new AI-powered video from Polish vodka brand Żubrówka. The 45-second film, created by Swedish studio Black Eye Media, spotlights Żubrówka's signature serve, apple żu, and is part of the brand's 'Explore the Wild Side' campaign in partnership with distributor Paragon Brands. Żubrówka described the film as an example of "how AI can become the key to unlocking endless layers of creativity".



Absolut expands RTS and RTD cocktails

Swedish vodka brand Absolut has expanded its RTS and RTD ranges to capitalise on "new trending vodka cocktails". The Pernod Ricard-owned brand has added 20% ABV Classic Cosmopolitan and Espresso Martini to its bottled RTS line-up. Meanwhile, the Absolut Ocean Spray RTD line-up sees new fruit-forward flavours with Vodka White Cran-Peach and Vodka Cran-Mango in cans (both 4.5% ABV).



Sapling Regenerative Climate Positive Vodka

UK-based Sapling Spirits Regenerative Vodka is made from organic wheat grown within one mile of the distillery and farmed using regenerative practices which focus on rebuilding soil health, enhancing biodiversity and capturing carbon from the atmosphere to produce carbon-negative vodka. Sapling co-founder Ivo Devereux calls the vodka "a brilliant balance of sustainability, sophistication and simplicity". GDI





Dolf van den Brink: 'In the end, it's about the consumer. Them choosing our brands makes me super-proud'

Q&A *with Heineken CEO Dolf van den Brink*

Heineken saw sales climb 5% in 2024, with premium and non-alc drinks driving the Dutch brewer's blockbuster results. CEO Dolf van den Brink tells **Olly Wehring** there's more to come: 'We're certainly not where we want to be yet — we're more hungry'

Sales growth of any kind in today's trading environment is to be applauded, so you must be very pleased with last year's 5% rise. I'm very happy with the results. Volume is the ultimate yardstick of whether the consumers are with you. Having volume growth across all four regions is very important. We saw our mainstream beer volumes at slightly under 2%, premium — where we are the global market leader — up 5%, the Heineken brand grew 9% and Heineken 0.0, where we are also the global market leader, up 10%. The quality and consistency of our volumes makes me proud.

Then there's getting all the financials right — 5% organic revenue growth and 8.3% profit growth — supported by a major step-up in investments; our marketing expenses, for example, were up double digits. We've also increased our digital technology investments, and we're building three new greenfield breweries in Brazil, Mexico and Dubai.

In the end, it's about the consumer. Seeing them choosing our brands, in particular our premium and 0.0 brands, makes me super-proud.

There must be a fly in the ointment somewhere. When you have a global footprint, there's always macroeconomic disruption. It's great to get the volume growth, but when you have hyperinflation, like in Ethiopia, you have to work hard. I'm proud of the way the Nigeria team has dealt with the big currency devaluation there, but that's a theme you need to focus on. We need to get a better top-to-bottom-line hard currency conversion in some key markets — that has our attention.

We're not yet satisfied with the modest [volume] growth in Europe. We believe this category can and should grow more. After a couple of years of fierce price increases out of necessity — input and energy costs have been going up — we were deliberately moderate on our pricing last year, because we want to allow the consumer to catch up. That's happening now, but we need to continue along the path of moderate pricing and volume sequentially improving. That's what we're trying to do.

Key highlights *Heineken FY 2024*

- Sales in closing quarter of 2024 increased 4.7% to EUR7.47bn (US$7.71bn).
- Full year finished up 5% at EUR35.96bn, volumes rise by 1.6%.
- Brand Heineken climbed 8.8% in volume terms (beer volume +1.6%).
- Sales by value in Africa & Middle East leapt 24.5% in 2024, Europe dipped 1.5%.
- Heineken to launch two-year EUR1.5bn share buyback programme.
- The company anticipates continued volume and revenue growth for FY25.

What do you see as being the growth drivers in the medium to long term in a market as established as Europe with a brand as established as Heineken? I've been in the com- »

» pany for 27 years and almost five years as CEO. In that time, premium beer has kept growing, no matter what's happened.

In no/low-alcohol, we believe we were the first mover back in 2017, when we launched Heineken 0.0. We invested in a technological breakthrough that allowed us to make the 0.0 recipe, which I believe both friend and foe acknowledges was the first 0% ABV beer that tasted like the real thing. We didn't put it on a secondary brand, we gave it credibility by putting it on Heineken. We priced it in line with regular Heineken and we put our whole marketing machine behind it — our activity with Formula One is 100% dedicated to Heineken 0.0. We've also invested in making it socially acceptable.

When you do that for five to eight years in a row, the flywheel really turns. In 2024, Heineken 0.0 was up 10% and is by far the largest 0% beer on the planet. Since its launch, we've calculated the brand has captured 40%-plus of the absolute global growth of 0.0. That's about four times our fair share and we'll keep our pedal to the metal.

With our strategy of building the 0% category and continuing to invest in premium while taking better care of our big mainstream propositions — Kingfisher in India, Tecate in Mexico, Amstel in Brazil and South Africa — now we're really starting to get the balance right.



Launched in 2017, Heineken 0.0 was 'the first 0% ABV beer that tasted like the real thing'

Is there a worry you'll outgrow the 0% ABV beer segment and lose the driver of competition? I don't know if that would be a bad thing! I also don't think it's necessarily true. In the US, for example, Heineken 0.0 is the No.1 proposition, but there's a lot of competition — from big legacy brands to pure, native 0% ABV beers.

The more our competition invests, the faster this segment is going to grow. As long as we keep growing from already being in such an advantageous position, then that works for us.

I also believe that the cannibalisation is very low. It's really about developing new occasions: a Heineken consumer may want a regular Heineken on a Friday night, maybe on a Thursday. On a Monday night, or at lunch with colleagues, they can go for a Heineken 0.0.

You've talked in recent months about "materially stepping up" the group's marketing spend. Are these increases sustainable? If you want to grow, you need to invest in that growth. There has been so much disruption to the category by externalities, such as Covid-19 and the energy price shock in Europe. Not only do we need to allow consumers to catch up by moderating our pricing in some places for some time, we also need to invest in our brands and in our innovation.

In 2022, we had a huge step-up in marketing. We had to pause in 2023 because of everything that was going on, then there was a big step-up last year. In our outlook statement for this year, we've indicated that once again, we intend to grow our marketing expenses ahead of revenue.

We're really in an invest mode, but do it balanced, do it focused and do it consistently. Only doing this for one or two years in a category like beer doesn't make sense. Being a 160-year-old family company — we have the fifth generation of the Heineken family — we really are in a position to make these long-term investments.

What are your priority areas as CEO going forward? Well, we're certainly not where we want to be yet — we're more hungry. We still see a lot of opportunities. We want to make sure that not just Heineken grows; we want the category to be healthy and thriving all over the world, driven by innovation and the development of new segments.

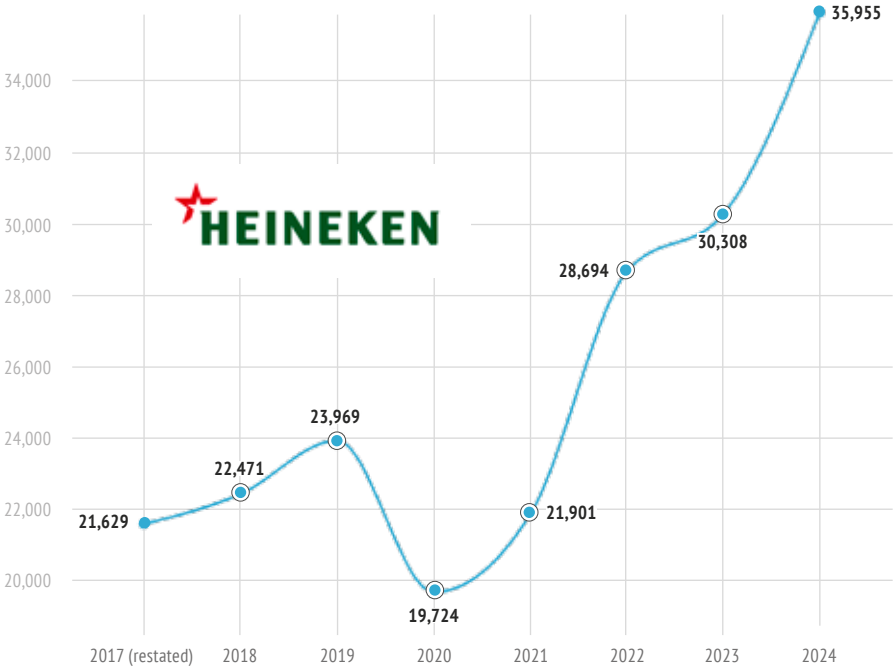
When you have the honour of leading such a legacy company, it's about preserving the magic and being a custodian of that magic, while transforming the company. That's what we're trying to do. I'm proud of how the company is coping with a lot of that while staying true to the essence of who we are.

There's something special about beer — it is different to other FMCGs; there's a craftsmanship side to brewing. I still personally go every year to the graduation of the new master brewers! This is not just a product — this is beer.

The same applies to brand-building. A lot of FMCGs are very functionally driven, but beer is very emotion-driven. So it's a different sort of brand-building. We're reinventing it to make it future-fit, but tapping into what has been special about it across all those generations. GDI

Full coverage of Heineken's full-year 2024 results is available to subscribers. To join them, visit ***www.drinks-intel.com/subscribe***

Heineken Sales 2017–24 EURm



Source: Heineken 2024 full-year results/Global Drinks Intel



Cab Ron's 'product innovation and quality' are helping it to maintain momentum, with iDrinks recently taking on the brand's distribution in Hungary

'All it takes is one successful premium brand to become a household name'

Economic pressures and competition from rival categories have slowed rum's momentum in Europe — but positive underlying consumer trends are making brand owners bullish about the future. **Richard Woodard** reports

In January, Diageo announced the sale of Venezuelan rum Cacique to Bardinet SA, following last year's disposal of Pampero, another Venezuelan rum, to Gruppo Montenegro — which itself came a few months after the company's acquisition of Philippines-based Don Papa.

This rum merry-go-round suggests a category in transition, with Don Papa's super-premium positioning and Filipino provenance winning out over Pampero and Cacique's more accessible pricing.

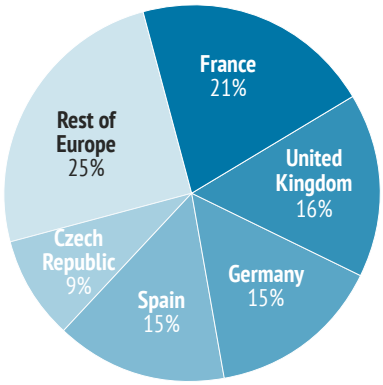
As Don Papa makes inroads in Germany, Czechia and Spain, IWSR projections suggest super-premium-plus rum volumes will grow at a CAGR of 3.9% between 2025 and 2028, compared with the 2.9% CAGR growth predicted for super-premium-plus spirits as a whole.

"While the European rum market has faced challenges in recent years, particularly due to economic factors impacting consumer spending, the premium and super-premium segments have shown resilience," says David Palacios, global PR manager, emerging brands, at Brown-Forman, owner of Diplomático.

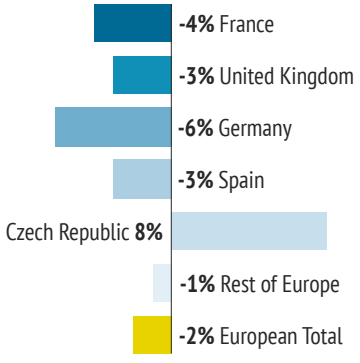
"Despite a decline in overall volumes in key markets like the UK and Germany, there are still significant opportunities for growth, especially in regions like Spain, where rum consumption has increased."

Palacios also highlights competition from other spirits categories such as tequila, with brand owners turning their attention to Europe as the agave boom cools in the US. "Additionally, there has been a shift in consumer demand towards more diverse and unique drinking experiences, challenging the broader rum category to keep up with evolving tastes and preferences."

Top 5 European Rum Markets
Market Share (Vol) 2023



Chg Vol 2022–23



Source: IWSR. Note: May be small differences due to rounding

Geopolitical fallout

For Manuel Villa, founder & CEO of Qantima Group, owner of Cab Ron, "geopolitical movements and lower purchasing power" are to blame for consumption declines across Europe, although he is swift to add that Cab Ron's "product innovation and quality" are enabling it to maintain momentum.

"We are developing the brand from Portugal to Poland, and now the markets that are doing best for us are Spain and Germany," Villa says. "We see that this year, if the economy recovers in Europe, the brand will grow a lot throughout the continent."

The focus is on Cab Ron's premium triple oak range, involving maturation in oloroso, bourbon and Pedro Ximénez casks, and more limited editions are set to follow this year. Meanwhile, iDrinks has recently taken on the brand's distribution in Hungary, »



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» following a launch at speakeasy Hotsy Totsy in Budapest.

The experience of Navy Island Rum Company, owner of the Navy Island, Belizean Blue (see p32) and 1731 Fine & Rare brands, reflects the category's recent trajectory. "We introduced Navy Island XO in Europe in 2016 and, since then, we experienced substantial growth each year until the end of 2022," says company director Jacco Kroon. "In 2023, our sales volume declined slightly, and the decline continued in 2024.

"However, we have compensated for the decline in sales by launching novelties under Belizean Blue, our second rum brand, and by entering the duty-free and travel-retail market. Overall, we are quite pleased with where we stand today."

For Kroon, it is the more expensive rums that are coming under pressure thanks to consumer caution, whereas mid-range products are proving more resilient, as they "strike a balance between quality and affordability".

'Nuanced picture'

It's a mixed picture full of local variation. Filippo Maria Olivi di Briana, founder & CEO of Paraguayan rum El Supremo, says: "The current landscape presents both challenges and exciting opportunities. While some reports highlight volume declines in key markets, our experience at El Supremo Rum suggests a more nuanced picture.

"While mass-market rums are facing declines, the premium and super-premium segments are showing resilience and even growth. This polarisation reflects a shift in consumer priorities. Today's drinkers are more discerning, seeking authenticity, quality and unique experiences."



Diplomático still sees 'significant opportunities' for growth in Europe, citing Spain as a target market

Top 5 takeaways

- Rum has faced headwinds across Europe since the end of 2022, thanks mainly to negative macroeconomic trends impacting consumers' purchasing power.
- However, opportunities persist, with some brand owners highlighting positivity in Central and Eastern Europe, as well as at higher price points.
- Others suggest that higher-end rums are facing greater pressure in the current environment, while more affordable mid-range rums are more resilient.
- Product innovation continues at a high pace, with launches ranging from rum RTDs, rum-based liqueurs and limited-edition products with unusual cask finishes.
- Despite short-term pressures, most brand owners are optimistic for rum's future, highlighting its great diversity and consumer curiosity to explore the category.



Navy Island tackled a 'slight decline' in sales with extensions to its Belizean Blue brand



Premium and super-premium segments are 'showing resilience and even growth', says El Supremo (left). La Martiniquaise's liqueur brand Rivière du Mât L'Onctueux targets the flavoured rum trend

At La Martiniquaise, international marketing manager Constance Descamps reports: "We are seeing a slowdown in the rhum agricole category linked more to the economic situation and the drop in purchasing power, which is resulting in a shift towards more accessible rums in terms of price."

But, she adds, there is still strong interest in rum from bartenders and cocktail lovers. "We are seeing this in particular at the various trade fairs, where we have the opportunity to offer tastings of our finest vintages with Saint James, as well as cocktails on tap, which work just as well as each other and allow us to reach a wide audience."

The company plans celebrations this year to commemorate Saint James's 260th anniversary, and is surfing the flavoured rum trend through its Rivière du Mât brand, including two new rum-based liqueurs under the L'Onctueux banner.

Breakthrough brands

For all the challenges, there are success stories too. In the first half of the company's fiscal year, Sovereign Brands' Bumbu grew by 87% in Western Europe, and by 64% in Eastern Europe. "The growth is »

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Bacardí's 'Do What Moves You' campaign features Camila Cabello (left). Both Bacardí and Havana Club (right) are active in the RTD sector

» coming from big markets like France, the UK, Germany and Spain — where we have doubled our business — but also from small markets like Switzerland, Slovakia, Hungary and Bulgaria," says Brett Berish, Sovereign Brands president & CEO.

"Places like Slovenia, Poland and Romania are contributing major volume for us — and none of these are places with an established rum-drinking culture. Globally, Bumbu is Pernod Ricard's fastest-growing brand in the world today."

At Island Rum Brands, owner of Black Tears Dry Spiced and La Progresiva, commercial & marketing director Helena Zakmane is just as bullish. "As our brands are still small, but up-and-coming, we keep seeing demand growth, especially in the markets that we defined as strategic," she reports. "Our sales in the UK increased by 44% in 2024 versus the prior year, and we've been the fastest-growing premium spiced rum in the multiple grocery channel with Black Tears Dry Spiced for about 14 months now and continuing, according to Nielsen data."

Nonetheless, channel difficulties — most notably the multiple bar closures caused by the end of state aid for the hospitality sector — have led the company to pivot its marketing strategy towards the off-trade.

From RTDs to high-end NPD

With a greater exposure to retail comes a demand for a different product mix, including rum liqueurs, like those offered by Rivière du Mât, and RTDs. This year sees the debut of a Bacardí & Coke RTD (inset), as a result of a partnership between the rum giant and The Coca-Cola Company.

"We are anticipating that this collaboration will open up the category and the Bacardí & Coke to a new generation of RTD consumers," says Tjalling Simoons, Bacardí brand director for Europe.



The company is also launching a coconut-and-pineapple-flavoured RTD called Bacardí Tropical Breeze in April and, more broadly, is continuing cultural associations, particularly those involving festivals and nightlife, while its global collaboration with singer-songwriter Camila Cabello will garner a strong TV presence as part of Bacardí's 'Do What Moves You' campaign.

"Like many industries, the economic slowdown has created challenging times for spirits," says Simoons. "However, there are always opportunities for growth."

Pernod Ricard's Havana Club is another brand active in the RTD segment through products such as Havana Club Mango & Lime, Havana Club Tropical Mojito and Havana Club Raspberry Daiquiri — while at the same time bolstering its high-end offering with the revamp of its Icónica Collection, which takes in Havana Club Selección de Maestros, Havana Club Gran Reserva Añejo 15 Años and Havana Club Máximo Extra Añejo.

Highlighting a "dark rum comeback" in Spain and a white rum buzz in Poland, Havana Club CEO Christian Barré says: "We continue to see a surge in demand across Europe. While overall rum volumes have seen some fluctuations, the category is far from slowing down, with premiumisation driving strong value for us within the continent."

For Barré, rum has now established itself "as a fashionable and credible alternative to high-end classics, such as scotch whisky and cognac". He adds: "The rise of premium and super-premium rum isn't just about what's in the glass, but the story behind it — consumers want more than a great spirit, they are curious about provenance and heritage."

This sense of an ever more exploratory and discerning consumer base is also confirmed by Navy Island Rum Company's Kroon, Brown-Forman's Palacios and El Supremo's Olivi di Briana — and this trend will clearly be key to rum's future.

Sovereign Brands' Berish says: "I do believe rum will be the next big spirits category to have a renaissance, the same way categories like vodka, gin and tequila have — all these categories were historically dominated by low-end, high-volume products and experienced a 'premiumisation' effect in recent years.

"All it takes is one successful, premium brand to become a household name and lift the whole category's reputation." GDI





Both Island Rum Brands' Black Tears (left) and Sovereign Brands' Bumbu report solid growth

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Rum roundup

Five brands creating a buzz this month

The diversity of the rum category is illustrated by the current wave of product innovation sweeping through the industry, including Fairtrade-certified products, single cask offerings and luxury aged rums



Belizean Blue Fairtrade certification

Navy Island Rum Company's Belizean Blue Signature Blend is now Fairtrade-certified, with the Fairtrade mark added to its bottle label and gift tube. The rum's blend has also been tweaked, making it slightly sweeter. Meanwhile, two limited-edition rums are imminent: Navy Island PX Sherry Cask this spring, and Navy Island Sauternes Cask Finish in the autumn.





Andrés Brugal Edition 02

Edrington-owned Dominican rum Brugal has unveiled Andrés Brugal Edition 02, a 41.5% ABV rum blended from four ex-bourbon casks by fifth-generation *maestra ronera* Jassil Villanueva Quintana. Released as a tribute to Brugal founder Andrés Brugal Montaner and marking the role of the US in the rum's development, only 416 bottles are available worldwide, priced at GBP2,420 (US$3,050) each.



El Supremo 18yo

Paraguayan rum El Supremo is set to launch its new 18yo expression at ProWein in Germany in March (see show preview p64), which founder & CEO Filippo Maria Olivi di Briana says is already resonating with cognac and whisky enthusiasts. The company is also planning triple cask-matured and limited-edition expressions — and will launch El Supremo 25yo at the end of the year.



Saint James Single Cask 2003

Martinique rhum agricole Saint James has a new single cask rum from the dry vintage of 2003, which has given the spirit "a beautiful intensity", according to Marc Sassier, oenologist & production manager. Aged for 18 years, the La Martiniquaise-owned rum is limited to 1,750 bottles, at a strength of 42.3% ABV.

Havana Club Tributo 2025

Joining Havana Club's prestige range this spring is Havana Club Tributo 2025, a EUR450 (US$471) rum finished in Redbreast Single Pot Still Irish Whiskey casks. Available from early April in over 20 markets, most of them in Europe, only 2,967 individually numbered bottles are available, packaged in an FSC-certified luxury gift box. GDI



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Lorenzo Fornari: 'I had no experience of the spirits industry whatsoever. I started from zero six years ago'

5 MINS

Solaro Capri Gin founder Lorenzo Fornari

Taking its name from the Monte Solaro mountain on the Italian island of Capri, the Solaro Gin brand leans heavily into its provenance, with a sustainable twist. Founder Lorenzo Fornari explains the approach to **Olly Wehring**

What's your background? I'm an Italian national, but grew up in the US and have lived in London for around four years. I come from a completely different professional background, which is technology and innovation in satellite telecommunications.

I've long had a passion for everything artisanal — there are many artists in my family. I was always very frustrated seeing generations of artisans in Italy who weren't transmitting their knowledge to new generations. Statistics from the Italian government show the country has lost around 22% of all its artisans in the last decade. This is never going to come back — it's gone forever. I wanted to do something about it.

That's how I came to create the ceramic bottle first for Solaro with local artisans in Capri. Each bottle takes a week to make. Then I had to decide what to put in it. I was making limoncello from the lemon trees around our family's house in Capri. The 'eureka' moment came when I was having a gin-and-tonic prepared by my uncle with botanicals from our garden.

Do you have any previous experience in the alcohol industry? None whatsoever. I started from zero around six years ago, but my cousin, Eugenio Litta Modignani, founded Tovaritch! Vodka from a family recipe over 25 years ago and has been a great help. I always saw how much he enjoys working in the spirits industry.

I'm rather proud of where I've gotten to; it's confirmed my feelings about this industry. I love going to trade fairs and meeting the people behind amazing brands.

When did Solaro launch? The first prototypes were finished mid-2021. I visited 12 high-end hotels, bars and restaurants in Capri, hoping at least one would like it. Eleven of the 12 took it right away — our first batch of 500 bottles sold out in two weeks.

What's the scale of the brand today? We're very much in the brand-building phase. We have distribution agreements in Italy and Germany, while I've been going door to door here in London. Solaro sells around 2,000 bottles a year. While that's exceeded my expectations, I'm not content with that.



I found that some businesses wanted to just buy the bottle to have on their shelves, so I came up with a refill system for the on-trade in aluminium bottles, which are also made in Italy. Now I can go to bars and offer them a couple of ceramic bottles, then go with the refill system. Late last year, I secured an agreement with a restaurant group to stock Solaro as the flagship luxury gin in its chain of Italian restaurants in the UK. At first they said the concept was too expensive, but they're very happy with the refill business model.

Solaro is really helping artisans in a very tangible way, which is what I set out to do. At the same time, the business plan is great and the brand's starting to win awards.

Are you focusing solely on the on-premise? Yes. Solaro is a one-man operation. I've recently undertaken some fundraising; I have a young family, so I really need help to take this to the next level.

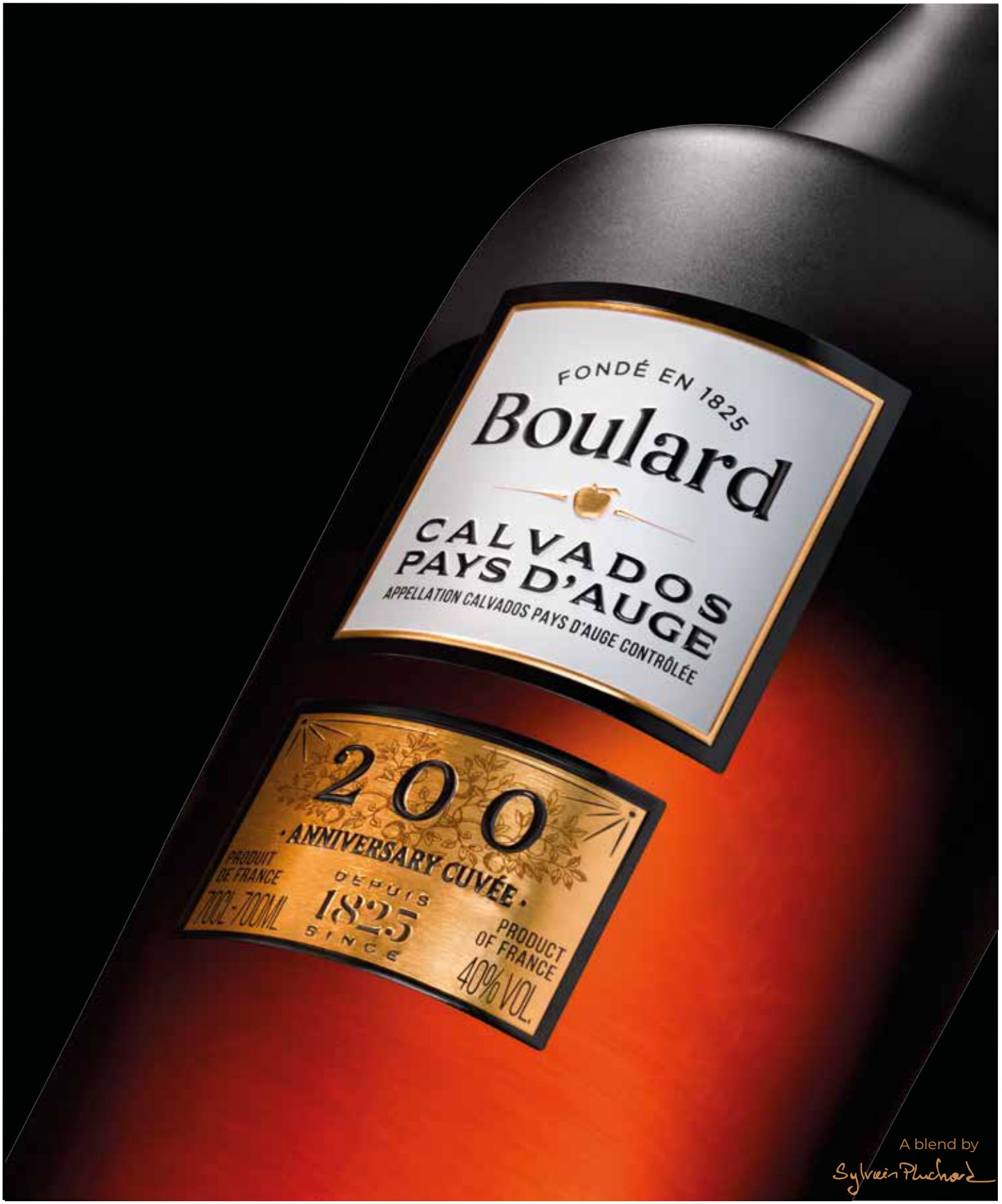
What was your initial perception of the alcohol industry? I knew that the industry was absolutely ruthless, so I concluded that my only approach was to create something ultra-niche with little volume and to be very nimble. When I had this idea, I was convinced I was on to something. I got great advice on creating a foundation from some spirits industry consultants in Italy — I wouldn't be here without them.

Does being ultra-niche and ultra-premium provide immunity from the headwinds affecting the wider gin category? The short answer is yes. Anything that is luxury is rather immune to the costs of goods going up or down by 1%. If it's going to cost more per bottle, I absorb that. In the UK, a 70cl bottle retails for GBP120 (US$147). If a consumer is price-sensitive, Solaro isn't for them. The future business model is shifting and will be more price-sensitive — the aluminium refills are GBP36 per 50cl bottle [and] I'll be looking to add a glass bottle version.

Who do you have in mind as Solaro's main competitor? The most similar to what we're doing is Procera Gin from Africa; the same philosophy but from a different continent!

Where do you see Solaro in five years? I'm afraid I'm a horrible, horrible optimist! The brand will take off; I'll get the funding that allows me to set the foundation for distribution in places where luxury plays — markets like the US, the Middle East and Asia.

Solaro isn't just about gin; there is a plan to do other spirits from Italy [with] a bit of a twist. Because it's about artisanal, I have another two verticals I want to go into. One is experiential, setting up a small distillery in Capri. The other is luxury accessories that fit around the brand — I've built an incredible network of Italian artisans. That's the long-term strategy. GDI



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Ferrari Trento reports that prosecco is 'experiencing significant growth in low-cost options', but the high-end segment is facing challenges

Prosecco continues to outperform other sparkling wines in Europe

Europe's sparkling wine industry remains bullish about premiumising star performer prosecco, despite economic uncertainty. **Henry Mathieu** reports

Buffeted mercilessly by climate change and shifting consumer habits, as well as geopolitical and macroeconomic uncertainty, sparkling wine production in the European Union fell in 2023, but there was one consistent bright spot — prosecco.

The Italian wine topped EU bubbly production and exports in 2023, according to Eurostat, surpassing even champagne.

Overall, EU sparkling wine production in 2023 was down 8% year on year, with around 1,496bn litres of liquid produced compared with 1,624bn in 2022. The top producing countries were Italy (638m litres), France (312m), Germany (263m), Spain (206m) and Portugal (25m).

The EU exported 600m litres of sparkling wine to non-EU countries (-8% vs 2022). Italy's prosecco topped Eurostat's export table, capturing nearly half the market with 638m litres (44%), followed by sparkling wine from fresh grapes (17%), French champagne (15%) and Spanish cava (10%).

Prosecco's strong showing continued into 2024 with a 7% year-on-year increase in its number of bottlings, according to the Consorzio di Tutela Prosecco DOC. The Consorzio says 660m bottles of prosecco DOC with an estimated market value of EUR3.6bn (US$3.8bn) were produced in 2024, the highest figure recorded.

Prosecco's premium problem

For sparkling wine giant Henkell Freixenet, prosecco's rise marks one of the "very strong trends" in the segment, according to head of communications Vanessa Lehmann. "We still see great interest and potential for this [prosecco] category in many markets, such as the continued growth in the US, the UK, Germany and France, to name a few," she says.

"Prosecco has always represented a quality driven category, with different quality levels and strictly regulated production. Provenance and authenticity are important to consumers, and quality can still command a premium price."

Nevertheless, looking at prosecco over the years, the challenge of maintaining premium value amid economic pressures is evident. Matteo Lunelli, CEO of Gruppo Lunelli and its Ferrari Trento Sparkling Wine brand, claims that prosecco is "experiencing significant growth in the low-cost options, while the high-end segment suffers the decrease in purchasing power due to inflation, as well as geopolitical and macroeconomic uncertainty".

Lunelli notes the difference between markets — Switzerland, he points out, has performed well for Ferrari Trento, whereas »

Top 3 takeaways

- EU sparkling wine production in 2023 was down 8% year on year, as were exports to non-EU countries.
- Prosecco topped EU bubbly production and exports in 2023, but now faces balancing premiumisation with affordability in an uncertain economic climate.
- Sparkling winemakers capitalising on rise of no/low as way to reach sought-after Gen Z and tackle the Boomer-centric category's generational issue.



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» the UK has "seen a decline due to the challenging economic situation".

Despite the economic headwinds, prosecco producers remain bullish about the potential of premiumisation. Several recent high-end releases aim to match the premium nature typically associated with champagne. Bottles of Bottega's newly launched Prosecco Premium Vintage Collection cost up to EUR250 (US$262) each, for example.



Responsive NPD is helping give prosecco the upper hand on other sparkling wine categories, according to Henkell Freixenet's Lehmann. Mionetto Prosecco achieved "significant growth in 2024" partly as a "result of the launch of innovative products such as Mionetto 0.0% and Mionetto Aperitivo with and without alcohol" (below), which capitalise on the rise of no/low, she says.

Can no/low sparkling tackle wine's generational issue?

That the wine industry is grappling with a generational issue is well documented — Boomers love the stuff, but younger LDA consumers not so much. With Gen Z the biggest consumers of no/low alternatives — 46% of UK 25 to 34-year-olds consider themselves "an occasional or regular drinker of alcohol alternatives", according to a recent Portman Group study — sparkling winemakers spy an opportunity.

"The no/low category is becoming an important reality in the panorama of wine offer, because it is appreciated mainly by young consumers," says Bottega president Sandro Bottega. The company's launch of Bottega 0 Rosé and Bottega 0 White three years ago, he adds, has been a key point of attraction for younger LDA consumers.



Perlino believes marketing around affordable luxury will draw younger LDA consumers

Lehmann and Lunelli both concur that the no/low sparkling wine market is not a threat to the rest of sparkling wine, but will help draw in sought-after Gen Z consumers.

With regards the alcohol-free segment, Lehmann believes "the focus is not on the alcohol, but on the *occasion*". She says: "No/low are not just consumed as alternatives to traditional alcoholic beverages; they create entirely new consumption occasions and expand the range of drinking experiences."

Lunelli adds: "As wine producers, we're constantly monitoring changes in consumer preferences, and the rise of the no/low category is certainly one of the most notable trends in recent years. That said, we see this as an evolution rather than a concern — sparkling wine is not going to be very much affected as a category, as generally it has a lower alcohol content than red wine."

Bottega says the ritual and occasion associated with sparkling wine makes no/low versions more viable than still wine alternatives, due to consumers' "affinity with effervescent drinks".

Younger consumers are being introduced to the sparkling wine category through alternative routes as well. Perlino marketing manager Elena Branda believes that social media, influencer marketing, playful branding, celebrity collaborations, experiential events and digital engagement are key.

She adds that capitalising on the idea of "affordable luxury" will help increase brand awareness among younger LDA consumers.

Perhaps these tactics combined with sparkling wine's no/low NPD will solve the broader industry's generational crisis. GDI

Rise of rosé, and crémant's quiet ascent

Rosé sparkling wine has become a mainstay, both as a standalone beverage and in cocktails. Pink or rosé prosecco was given the go-ahead by the Prosecco DOC consortium in 2020, meaning that producers could start making and selling pink fizz under the prosecco label — provided they stick to a set of rules relating to production and style.

Perlino embraced the change and released Perlino Prosecco DOC Rosé Dry Millesimato.

"We strongly believe in the product," Perlino marketing manager Elena Branda says, adding that she has seen lots of opportunity for growth in "new innovative cocktails" with prosecco rosé as well, such as a lychee spritz.

Ferrari Trento, on the other hand, has been producing sparkling rosé since 1969, with four different iterations on offer. "Currently, our focus is on vineyard investments to further enhance the quality of our mountain pinot noir, the key variety for our rosés," says Matteo Lunelli, CEO of brand owner Gruppo Lunelli. "We believe that the traditional method rosé is not merely a passing trend but a lasting movement, driven in part by its remarkable versatility in food pairings, which is one of the key reasons behind its rising popularity."



He adds that the rosé prosecco trend has stabilised after an initial boom, but still sees "some potential to grow".

Bottega's two offerings — Il Vino dei Poeti Prosecco DOC Rosé and Bottega Pink Gold Prosecco DOC Rosé (left) — have also "recorded a progressive adjustment", according to the company's president Sandro Bottega.

Another variant to keep an eye on is crémant, according to Henkell Freixenet's head of communications Vanessa Lehmann, who says global crémant consumption volume increased by 3.2% in 2023. "Being the code for 'French sparkling wine made in the traditional champagne method but outside the champagne region', crémant is a style of wine that's similar to champagne but affordable and therefore especially attractive for everyone longing for a top premium sparkling experience," she says.

Since the Covid pandemic, Lunelli says people are more open to exploring new options, which has led to an uptake in crémant consumption alongside alternatives like British sparkling wine.

"As more people embrace sparkling wines from different regions, the market is becoming more dynamic, offering exciting choices beyond the traditional champagne dominance," he says.

Stock Spirits targets no/low opportunity

Stock Spirits believes there is a gap in the market for affordable, high-quality no/low-alcohol products, such as the company's new **Limoncè Aperitivo**



Limoncè Aperitivo: One of the most important pieces of NPD for Stock Spirits in its history

Stock Spirits is on a mission to expand its foothold into the fast-growing no/low-alcohol category. The Warsaw-based group is spearheading this effort with the launch of Limoncè Aperitivo, a refreshing lower-alcohol alternative designed to capitalise on the soaring popularity of the spritz serve.

The launch of Limoncè Aperitivo is one of the most important pieces of NPD for Stock Spirits in its history, according to Stock Spirits chief marketing officer Nicolas Mazuranic. It underlines the group's ambition to stay ahead of consumer trends while furthering its aim to become the leading player in the mainstream spirits sector by 2027.

Seizing the mainstream no/low opportunity

The global no/low category is forecast to grow at a healthy CAGR of 4% over the next three years in ten key markets worldwide, according to IWSR. Mazuranic says this trend is fuelled by changing consumer preferences, particularly among younger generations.

"More and more consumers are choosing to reduce alcohol consumption or adopt a 'flexi-sober' lifestyle, alternating between alcoholic and non-alcoholic drinks," he explains. "Gen Z, in particular, is driving this trend, with up to 40% of them across Europe either abstaining from alcohol or significantly reducing their intake."

Recognising this shift, Stock Spirits is strategically positioning itself to meet consumer demand for high-quality but affordable no/low options. "Many non-alcoholic spirits today are premium-priced at EUR30-40 (US$31–42) per bottle, leaving a gap in the market for accessible alternatives," Mazuranic adds. "Our goal is to provide great-tasting, high-quality products at a competitive price point."

Limoncè Aperitivo: A new spin on the spritz experience

At the forefront of Stock Spirits' no/low expansion is Limoncè Aperitivo, a contemporary take on the classic Italian spritz made with Sicilian lemons.

Unlike traditional limoncello, which is high in sugar and alcohol, Limoncè Aperitivo features a lower 14.8% ABV, over 30% less sugar, and natural lemon juice, creating a light, refreshing spirit drink designed for easy mixing with prosecco and soda.

With such a significant launch, Stock Spirits is rolling out a robust marketing strategy to support Limoncè Aperitivo.

A comprehensive media campaign, developed in collaboration with Milan-based agency Robilant, a specialist in aperitif culture, will run across digital and social media platforms from March onwards.

Expanding portfolio: Sierra RTDs and Finsbury 0.0

Beyond Limoncè Aperitivo, Stock Spirits has been rolling out its new Finsbury 0.0 Alcohol Free Gin (right) in Germany.

"Germany is one of the most dynamic no/low markets in Europe," Mazuranic notes. "Around 49% of Gen Z in Germany claim they don't drink alcohol — a figure that has doubled in the last decade."

Meanwhile, in the buoyant tequila sector, the company is expanding its range of low-ABV, ready-to-drink (RTD) offerings with the release of two new Sierra Tequila cocktails: Sierra Lime Margarita and Sierra Strawberry Margarita (below). Initially launching in Germany this April, a targeted roll-out in other selected European markets will follow.



"RTDs have been hugely successful for us in the Czech Republic and Slovakia, where we're market leaders," Mazuranic says. "We're now bringing this expertise to Germany with the Sierra RTD range."

The next chapter

This bold foray into the no/low segment represents the next phase of Stock Spirits' expansion strategy. Following a 2024 filled with acquisitions and category diversification — including the acquisition of French distribution firm Dugas and the launch of Clan Campbell Whisky across European markets — the company is now honing its focus on the aperitif and no/low categories.

While Stock Spirits remains tight-lipped on specific sales targets, the company is confident that its strategic entry into the no/low space will drive growth and consumer engagement. "We're committed to making high-quality, accessible, no/low options mainstream," Mazuranic concludes. "This is just the beginning." GDI

Evolving drinking habits shake up spirits in Spain

While traditional categories like gin and brandy face hurdles in Spain, other spirits are coming to the fore in a market still dominated by the on-premise. **Joe Bates** reports



Image: iStock.com/Unaihuizi Photography

Nightlife has changed, with consumers shunning the nightlife scene to socialise on terraces and rooftops

If key economic indicators were cast-iron guarantees of success, the spirits market in Spain would be in rude health.

Driven by a boom in tourism, as well as thriving financial services and technology sectors, the country's GDP grew 3.2% last year, outpacing the likes of Germany, France and the UK. Even inflation, once as high as 11% in 2022, is now under control, falling to 2.8% in the last quarter of 2024.

Despite the country's strong headline economic figures, IWSR predicts that total beverage alcohol volumes in Spain will grow at a paltry CAGR of 1% over the next three years, with spirits forecast to remain flat at 0% over the same period.

"While the top-line figures are remarkably positive in Spain, if you dig a little deeper, you will find that confidence and spending are under pressure as consumers struggle with cost of living issues, particularly housing and rents, which is a major action point for the government in 2025," says IWSR research director Dan Mettyear.



Tequila brand Peligro Catrina has expanded with high-end reposado and cristalino expressions

On a more positive note, Mettyear says after a post-Covid boom and subsequent correction, the Spanish spirits market is entering a period of relative stability. "While the gin boom has largely peaked, and brandy is in long-term decline, whisky and rum are expected to stabilise. The strong growth areas are in agave-based spirits and spirit aperitifs," he notes.

Tequila thrives as brandy strives

Spanish consumers' views on tequila are certainly changing rapidly. Traditionally viewed as a shot-based drink, tequila is increasingly seen as a premium cocktail ingredient, according to Seville-based Andalusí Beverages deputy international director Juanjo Pou Soto. The company's growing Peligro Catrina Tequila line now includes high-end reposado and cristalino expressions, as well as a cream-based variant.

Things are not going quite as well for brandy. Echoing Mettyear's downbeat assessment, Christian Visalli, spirits global managing director at brandy and wine producer Familia Torres, describes trading conditions in Spain as "challenging".

He adds: "Consumers' habits are changing. There is fierce competition with non-spirits alternatives, and we have seen the start of a slowdown of the premiumisation trend."

Top 3 takeaways

- Cost of living pressures and shifting preferences among younger LDA consumers transforming spirits market.
- Premiumisation and NPD present new growth opportunities for declining categories such as brandy and gin, but strongest growth areas agave-based spirits and spirit aperitifs.
- Rise of no/low-alcohol spirits and day-oriented consumption occasions in the on-premise.

Adding to brandy's woes is a drop in all-important tourist spending. Visalli says that although Spain drew a record 94m holidaymakers last year, levels of spending declined, a trend noticeable in key tourist destinations such as the Canary Islands.

Despite this hurdle, Visalli says Familia Torres managed to buck the trend of the otherwise moribund brandy category.

"We are really proud our portfolio of brandy brands managed to outpace the category results in 2024, meaning that we are gaining share, especially with our flagship brand Torres 10, for which we have focused our efforts on the off-trade channel and kept leveraging our strong on-trade distribution."

Similarly, Zamora Group, the owner of spirits such as Licor 43 Liqueur, Villa Massa Limoncello and Martin Miller's Gin, »

» also managed to prosper in its home market despite the market headwinds.

"We actually managed to gain market share in five of our six priority markets in Iberia," says cluster director Iberia Carlos Gallego. "We consolidated our position as the sixth fastest-growing operator in Spain, at a time when the large multinationals are suffering.

"We put this down to Zamora's agility and strategy adjustment, our focus on execution, and our strong route-to-market and higher investment: all key in achieving the results we did."

New day-oriented occasions

The on-premise sector remains crucial in Spain, accounting for more than 75% of the country's alcoholic beverage market, according to Statista. However, the Covid pandemic led to lasting changes in consumer behaviour.

"Nightlife has changed," says Andalusí's Pou Souto. "Both young people [aged 18–30] and adults [30-plus] have replaced the disco and nightlife scene with drinking on terraces and rooftops." This shift has implications for the types of spirits consumed, with a growing interest in cocktails and premium offerings.

Adela de Jesus, national sales manager at sherry and brandy producer Williams & Humbert, has also picked up on this trend. "We are detecting new habits in the wine and distillate sector," she says. "The most important of these shifts have been rising health consciousness and the ongoing change from night to day-oriented drinking, what in Spain has come to be known as *tardeo*.

"It's a trend that was born as a consequence of the pandemic and that seems to be here to stay," she adds. "These have reduced the number of drinks per person and raised the prominence of beer, wine, vermouth and gin."

In the off-trade, private labels are consolidating and growing, particularly in the F&B sector. "It is not a great time for premiumisation in the off-trade and this is where traditional spirits and standard gins are suffering the most," Zamora's Gallego notes.

The rise of no/low spirits

The no/low-alcohol spirits category is gaining in Spain, driven by rising health consciousness and changing consumer preferences. According to IWSR's Mettyear, Spain is a leader in the no/low movement, particularly in the beer segment. "Wine and spirits are at an early stage of development, but are gaining good traction as companies invest and consumers begin to understand how and where these respective categories function," he explains.

On-premise opportunities

Sustainability is becoming increasingly important in the Spanish spirits market. Familia Torres has been a pioneer in this area with initiatives like its Torres Brandy Zero Challenge, which encourages sustainable business projects in the on-premise.

"This initiative gives the opportunity for on-trade professionals to present a project that could enable them to turn their existing business into a more sustainable one," Visalli explains. The competition's 2025 final will be held in Barcelona, with participants from 13 different countries.

One on-premise area with growth potential is experiential drinking, according to on-premise research consultancy CGA.

"Spanish consumers actively use social media to find new on-premise experiences, with 75% expressing a desire for unique or innovative offerings when visiting a venue," says solution lead for Spain/Western Europe Carmela Asinas.

However, there is still significant untapped potential, she says, as 70% of consumers have never been to an immersive or educational alcohol-related venue. GDI

Star performer: Spain's quality driven on-premise outperforms globally

The Spanish on-premise significantly outperformed both regional and global benchmarks, according to CGA's 2024 Reach Consumer Survey. Every week, 77% of Spaniards visit the on-premise, compared with 62% globally and only 57% in Western Europe, highlighting Spain's still-dynamic hospitality sector.

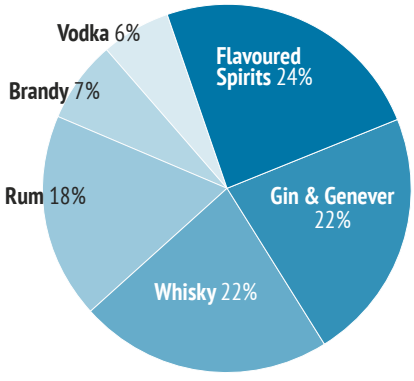
But this doesn't necessarily translate to alcohol consumption: while 75% of consumers say they enjoy going out, only 37% enjoy drinking alcohol. Moreover, more than one in five are practising mindful drinking, indicating a growing opportunity for no/low-alcohol drinks.

The country's cost of living crisis is making its presence felt, with 60% of consumers acknowledging a rise in the cost of living, up from 14% in 2023. Sixty-four per cent of on-premise venues have passed on cost increases to consumers at the same rate as inflation, but consumers still prioritise quality over price, with 44% saying quality is the main factor when choosing a drink. Beer continues to dominate, with 65% of Spanish consumers preferring it, followed by soft drinks (48%) and wine (38%).

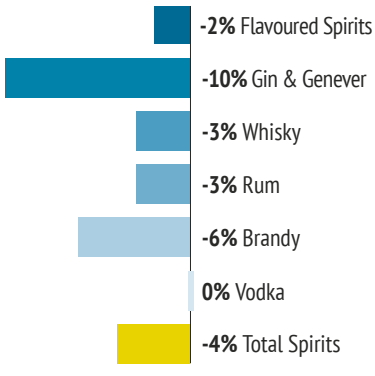
While beer and soft drinks are popular nationwide, other categories are highly regionalised, a point drinks marketers should keep top of mind when targeting the Spanish market. "Aperitif consumption is notably higher in Madrid (35% vs 30% for national average), signalling potential in the region for premium aperitifs or aperitif experiences, such as tapas pairings and happy hour promotions," explains Carmela Asinas, CGA solution lead for Spain/Western Europe.

She adds that Madrid leads the way for overall spirits consumption, with rum use particularly high. In contrast, vodka is the star in Barcelona, with 21% versus 14% across the country. "Cocktail consumption in Barcelona also far exceeds the national average (28% vs 15%), making it a dynamic market for mixology driven experiences and bartender advocacy," Asinas adds.

Top Spirits Categories in Spain
Market Share (Vol) 2023



Chg Vol 2022–23



Source: IWSR. Note: May be small differences due to rounding



Tread Softly: The magnum-sized 'bagnum' format has exploded in the Australian market, with more than 25 SKUs now available in major retailers

Beyond the bottle: Wine's quiet packaging transformation

New formats, AI technology and a drive to attract younger wine drinkers are shaking up the wine packaging scene, reports **Joe Bates**

The traditionally conservative world of wine packaging is undergoing a revolution. With wine sales and production dropping globally and the industry failing to connect with Millennial and Gen Z consumers, wineries are ripping up the rule book.

Standard 75cl glass bottles with classic, information-heavy labels remain a staple, but alternative packaging formats, eco-friendly innovations and AI-driven design strategies are emerging as gamechangers.

Wine kegs and the 'bagnum'

As consumers embrace new ways to enjoy wine beyond the standard 75cl bottle, formats like cans, bag-in-boxes and recycled PET bottles are gaining traction for their convenience and sustainability.

In terms of which format is gaining the upper hand, Jonathan Kleeman, a UK-based wine consultant & wine buyer at London's two Michelin-starred Restaurant Story, believes kegged wines have a bright future in the hospitality sector.

"Bag-in-box had its moment, but kegged wine is proving to be a much better alternative, especially for restaurants and bars," he says. "Kegs are recyclable, refillable hundreds of times, and significantly reduce transportation emissions."

While Kleeman throws shade on the familiar bag-in-box, Rowena Curlewis, the CEO & co-founder of wine design agency Denomination, points to the magnum-sized 'bagnum' format, the printed bladder of a bag-in-box minus the box, which was first introduced into the Australian market 18 months ago.

"The 1.5L format has exploded in that market with more than 25 SKUs now available in major retailers," Curlewis explains. "Convenience plays a key role in the bagnum's success, but so does moderation. With younger consumers typically more mindful about how much alcohol they consume, the ability to moderate without concern for wastage is important."

Curlewis also stresses the format's sustainability credentials, with a bagnum boasting seven times less CO2-per-litre emissions than a typical 540g glass bottle.

Think again about recycled PET

Plastic's reputation as a packaging material is in the mud. Yet Philip Cox, co-founder of Romanian wine label Cramele Recaș, says his company is making efforts to promote recycled and recyclable PET wine bottles as an alternative to "more environmentally unfriendly" glass bottles despite resistance from what he believes are change-averse industry "gatekeepers" like supermarket chains.

"I think PET products will become common for certain markets, such as airlines and outdoor catering at festivals and sports events, and online retail," he maintains. "I hope in the mid-term we can also start pushing them into brick-and-mortar retail."

Smaller bottles on the way up?

In January, the US Alcohol and Tobacco Tax and Trade Bureau (TTB) announced 13 new wine container sizes, allowing wine producers to use bottles ranging in size from 18cl up to 2.25L, a change the industry »

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Maison Wessman's Petit Cernin (left) comes in a linen-based T Green Gen Bottle, while Watermill Wines-owned Terra Organica was the first commercially sold prosecco to remove foil capsules

» had long been calling for. The move allows US suppliers to target a wider range of consumption occasions and align with international markets, opening up export opportunities.

Andrés Alvarado, marketing director at Chile's Monrandé Wine Group, argues a marked shift towards the smaller 18.7cl and 37.5cl bottle sizes is already underway, driven by people's desire to drink less but better, combined with ongoing cost of living and inflation pressures.

"Smaller formats are also more convenient for those wanting to avoid wasting wine from unfinished bottles," he observes. Alvarado adds that smaller bottles also reduce waste and cater to the growing demand for portable single-serve options for outdoor events or on-the-go occasions.

Producers planet-focused

The incoming Trump administration in the US might have heralded an increasingly global corporate pushback against ESG-oriented policies, but the wine industry, hyper-aware of the potentially ruinous impact of climate change, is holding firm.

"There's no excuse for packaging to not be sustainable," insists Richard Dennis, commercial director of UK-based wine agency Watermill Wines, the parent company of the vegan-friendly organic label Terra Organica. Dennis reveals the company's DOC Prosecco 75cl and DOC Prosecco Rosé 75cl wines were the first commercially sold proseccos to legally remove the foil capsules following the change in legislation at the end of 2023. The change will save 500kg of foil and reduce the brand's footprint by over 1,500kg of CO2 per year.

Meanwhile, French producer Maison Wessman has also embraced eco-friendly initiatives with the introduction of a linen-based alternative to glass known as a Green Gen Bottle or GGB — a bottle made from flax fibres with a food-grade rPET liner. "Sustainability is reshaping secondary packaging," says commercial & marketing director Emeric Capdevielle. "While luxury wine gift boxes remain relevant for prestige cuvées, we see a shift towards lighter, recyclable material."



Jonathan Kleeman: AI can be 'liberating'



Johanna Augustin: Many brands stuck in the past

Role of AI in design

Artificial intelligence (AI) is disrupting virtually every industry and the world of packaging design is no exception. From predictive analytics to rapid prototyping, AI tools are increasingly helping brands and their design agencies test packaging concepts before they hit the shelves.

Wine consultant Kleeman says AI is proving particularly liberating for smaller wine producers. "Hiring a graphic designer is expensive, and not every winemaker can afford it, but with AI-powered image generation, even someone with no design experience can play around with ideas, develop a logo, or refine their branding," he says.

Meanwhile, Wessman's Capdevielle says AI can be useful to scan social media and data sets to identify emerging wine packaging trends and analyse how consumers visually engage with different label designs, colours and typography through A/B testing and eye-tracking simulations.

Top 3 takeaways

- **Alternative formats: Wine is moving away from glass, with cans, bag-in-boxes and 'bagnums' offering convenience and sustainability.**
- **Eco-friendly focus: Sustainability is key, with recycled materials, lighter packaging and carbon-reducing initiatives becoming increasingly important.**
- **Modern image: AI and updated design strategies, including QR codes and casual labelling, are attracting younger consumers and simplifying the wine experience.**

Tackling wine's Gen Z problem

Perhaps the central challenge for winemakers is to make wine appealing for Millennial and Gen Z consumers, as study after study has shown these well-informed, discerning cohorts often prefer other alcoholic beverages or none at all. For Johanna Augustin, CEO of leading Swedish packaging agency Pond Design, too many wine brands are stuck in the past when it comes to their marketing approach.

"For too long, the story of 'we've made it this way for hundreds of years' has been the primary narrative," she says. "In contrast, younger consumers are drawn to brands that embrace experimentation and openly acknowledge that they don't have »



The 'beerification' of wine, such as TikTok hit La Vieille Ferme (left) and Pernod Ricard's Greasy Fingers, and pared-back labels, like these from Tutiac which feature QR codes, appeal to younger LDA consumers

» all the answers. Bringing consumers along for the journey fosters engagement."

Wine brands eager to engage with the generations are increasingly adopting less stuffy and more casual label designs, a trend embraced by wines such as France's La Vieille Ferme, which was playfully named the 'chicken wine' by fans and became a TikTok hit after introducing a limited-edition label.

Mariana Gates, strategy & culture executive at Manchester-based agency Love Design, refers to this trend as the 'beerification' of wine, citing examples such as Pernod Ricard's fast-food-oriented Greasy Fingers label. "Wine is beginning to move beyond the dining table," she maintains.

"While Gen Z are eating out more often than other generations, they are spending less on average, showing they are opting for more fast, casual and affordable options — so it's important for brands to start meeting them where they are."

At the same time, much of the stuffy nomenclature that is traditionally included on a wine bottle's front label, such as the varietal, appellation, vintage and tasting notes, are either included in a QR code or displayed less obviously on the back label.



Mariana Gates: 'Moving beyond the dining table'



Damien Malejacq: Tutiac has simplified its labels

"We've simplified the information on our labels," says Damien Malejacq, marketing & communications director at Bordeaux wine producer Tutiac. "Details like AOP classifications, soil types and vinification processes are available via a QR code linked to technical sheets, but are not highlighted on the labels to avoid being overly technical."

While a disruptive approach to packaging is an important part of the wine industry's push to reinvent itself for the younger generations, Fabio Molinaro, creative director at Italian design agency Robilant, makes the important point that it is only one part of a wider ecosystem around wine that needs to change.

"It's a misconception to think that a flashy, eye-catching package or chasing fleeting trends like individuality, convenience or sustainability will resolve the issue. Luxury, allure and status — along with individuality, convenience and sustainability — are just fragments of a much larger puzzle," he muses.

"What's truly needed is the ability to always keep in mind what wine represents at its core while having the courage to break free from outdated frameworks and craft entirely new narratives," he concludes. GDI

Sealing the future: Amorim's sparkling wine innovation

Greater sustainability and improved technical performance are the two themes driving the world's largest closure producer, Amorim Cork. The Portuguese firm's latest innovation, Spark One Xpür, a new micro-granulated cork stopper designed for sparkling wine, is laser-focused on that first preoccupation, according to co-CEO Christophe Fouquet.

"This innovative cork stopper combines high performance with sensorial neutrality, ensuring that the wine's sensory qualities are preserved while maintaining durability under intense pressure," Fouquet explains.



Christophe Fouquet: Spark One Xpür allows 'the wine's natural flavours to shine through'

"By eliminating undesired compounds, Spark One Xpür guarantees maximum sensory neutrality, allowing the wine's natural flavours to shine through."

At the core of this development is Xpür, a "CO2 supercritical fluid technology" that removes TCA (the compound responsible for cork taint), while reducing energy consumption and CO2 emissions compared with traditional methods. The process, says Fouquet, offers a more sustainable approach to cork production without compromising performance.

Amorim has also introduced Bee W, a bio-based beeswax coating for its natural cork stoppers. Composed of biopolymers, Bee W enhances oxygen control, contributing to more consistent bottle ageing while remaining sensorially neutral.

Beyond NPD, Fouquet says Amorim's ESG initiatives — which include planting 1m cork trees by 2030 — reflect its "broader commitment" to environmental responsibility, while supporting the cork industry's role in preserving biodiversity.

Age-old liqueur peels away from its niche role

No longer pigeon-holed as a digestif, thanks to the stratospheric rise of the spritz, limoncello is seeing big increases in global sales. But can it maintain the momentum, asks **Henry Mathieu**



Luxardo says limoncello has been transformed and is 'no longer just a dusty bottle in the back of a liquor cabinet'

Limoncello has finally managed to peel away from its traditional after-dinner shot occasion to tap into contemporary trends. And it is paying off — big time.

According to IWSR data, a decade ago more than two out of every three bottles of the Italian sunshine-yellow lemon liqueur were consumed in its home market; in 2023, more than 60% were exported.

Italy still holds the largest market share at 37% (see chart below), but Germany comes in next with 18% (a whopping 32% increase on 2022), followed by the US (11%), Spain (5%), the Netherlands (4%) and the UK (4%). Overall in 2023, limoncello volumes leapt by 14% year on year.

Perlino marketing manager Elena Branda says the category's most significant markets include "Italy, the US, the UK and Australia, with growing interest in Asia and Latin America". The no-alcohol segment is also seeing interest, she adds, particularly in the UK and US, where premiumisation and health-conscious drinking trends are driving demand.

Matteo Luxardo, export director at Luxardo, says of the category's transformation: "Limoncello is no longer just a dusty bottle in the back of a liquor cabinet. It is being redefined as a fresh, modern and high-quality spirit that fits into contemporary cocktail culture, social occasions and premium drinking experiences."

Even drinks giants like Pernod Ricard sought to capitalise on the limoncello trend last year, launching Ramazzotti Limoncello in Germany. The Jameson brand owner cited growth figures for the segment of 56% per year since 2022.

In October, Zamora completed an investment programme for its Italian limoncello brand Villa Massa that doubled production capabilities. The EUR2m (US$2.2m) spend was driven by Zamora's ambition to increase the brand's presence beyond its leading markets of the Netherlands and Portugal, as well as in the group's home country of Spain.

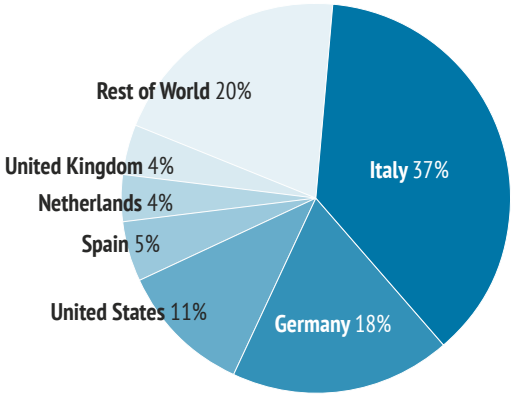
Spritz and shout

Of course, perhaps the most significant driver of growth in the limoncello category is the rise of cocktail culture and explosion of a certain ubiquitous serve made famous by another Italian liqueur.

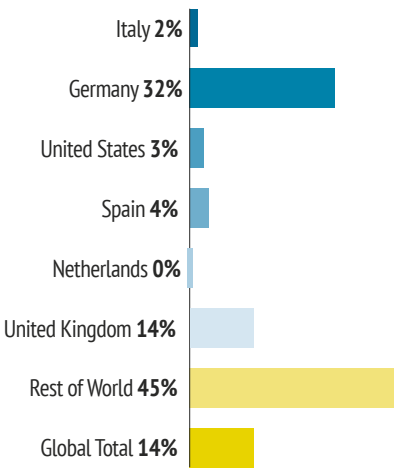
From the UK to Australia, limoncello spritz — the sweet-sharp lemon-flavoured liqueur, mixed with prosecco and soda water and served over ice — seems to be on »

Leading Limoncello Markets

Market Share (Vol) 2023



Chg Vol 2022–23



Source: IWSR. Note: May be small differences due to rounding


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» every summer drinks menu. Matteo says: "The surge in popularity of limoncello — particularly the limoncello spritz — can be attributed to several key factors: the aperitivo and spritz trend, social media, aesthetic appeal, changing consumer preferences and the nostalgia of a Mediterranean holiday."

Rossi d'Asiago CEO Nicola Dal Toso agrees the limoncello spritz is driving growth for the category. "Its popularity is attributed to its refreshing taste, occasion versatility, appealing to consumers looking for new, lighter and more approachable cocktails," he says.

It's the liqueur's approachability that may help the category make the most of the momentum as bars worldwide push variations of the spritz to capitalise on the rise of the Aperol and Campari serves.

The two red Italian bitter aperitifs do not have the broad appeal of limoncello, with its sweetness and easy-to-like lemon flavour offering a less acerbic alternative.

Then there's the little matter of limoncello packing more of a punch in a spritz than other variations. For example, limoncello is generally bottled at an ABV of 24%–32%; Aperol stands at 11% — another definite point of difference.

France's Marie Brizard Wine & Spirits is one producer looking to cash in on the success of the spritz. Brand manager Vanessa Grangier says: "In 2025, we're launching Marie Brizard Limoncello, which will complement our existing spritz range, including our Aperitivo. With this new limoncello, we continue to honour our tradition of excellence while embracing contemporary mixology trends."

Similarly, Perlino has "finalised the project with a limoncello spritz with an important chain in Mexico", according to Branda. The product, she adds, is ready to launch in its domestic Italian market.



Rossi d'Asiago Limoncello: 'Approachable cocktails'

Insta factor draws younger LDA consumers

As with many spirits categories, attracting younger consumers is critical for limoncello's continued growth. The liqueur's vibrant yellow hue and Instagrammable aesthetic have a critical role to play here, with digital engagement, social media marketing and collaborations with influencers essential in redefining the category's image.

Luxardo, for example, has focused on modernising its brand while maintaining authenticity. "By embracing digital platforms and innovating with cocktails and sustainability efforts, we are successfully capturing the younger market while maintaining our Italian heritage," says Matteo.

Digital marketing and social media campaigns have also been essential for Marie Brizard. Grangier explains that the company is "embracing this trend by positioning limoncello in fresh, contemporary serves to match evolving drinking habits.

Simply the zest

The growing preference for natural flavours is another factor driving limoncello's popularity. Consumers are increasingly gravitating towards citrus-based beverages, with flavours like yuzu, bergamot and grapefruit also rising in prominence.

However, this trend has also intensified competition. Citrus-flavoured ready-to-drink (RTD) products have surged, offering convenient alternatives that appeal to the same demographic.

One need not look far to see the trendiness of citrus flavours in the RTD world. Last year, Mark Anthony Brands, the beverage innovator behind White Claw Hard Seltzer, launched Lemada, a vodka lemonade RTD in the UK. Meanwhile, in Japan, Suntory -196 Double Lemon, which uses shochu as its base, has found success in several markets over the last year.

"Yes, the surge in citrus-flavoured RTDs is intensifying competition in the market," Luxardo's Matteo acknowledges. "The growing consumer demand for convenient, refreshing and flavourful drinks has led to a proliferation of citrus-infused RTDs, including those inspired by limoncello."

As well as Perlino's upcoming RTD launch, several limoncello producers are active in the space including as far afield as Australia, where ready-to-serve cocktail producer Curatif expanded its canned range with Limoncello Sour RTDs, made with Victorian lemons, late last year.

One big advantage limoncello has over other citrus-flavoured beverages its compelling backstory. The origins of the lemon-based liqueur remain a subject of debate, but one popular tale may hold the answer to another challenge facing the bright summery liqueur — how to extend consumption into the winter season.

The story goes that limoncello originated from a lemon-and-honey-based spirit created by 17th century monks to ward off the winter chill on the Sorrento Peninsula. Pernod Ricard's Ramazzotti is one brand linking into this origin tale by promoting winter serves in Germany — including a cinnamon-spiked limoncello spritz.

If this this age-old Italian category can convince consumers to reach for a little lemony sunshine in the depths of winter, who knows how far the spritz momentum can take it. GDI

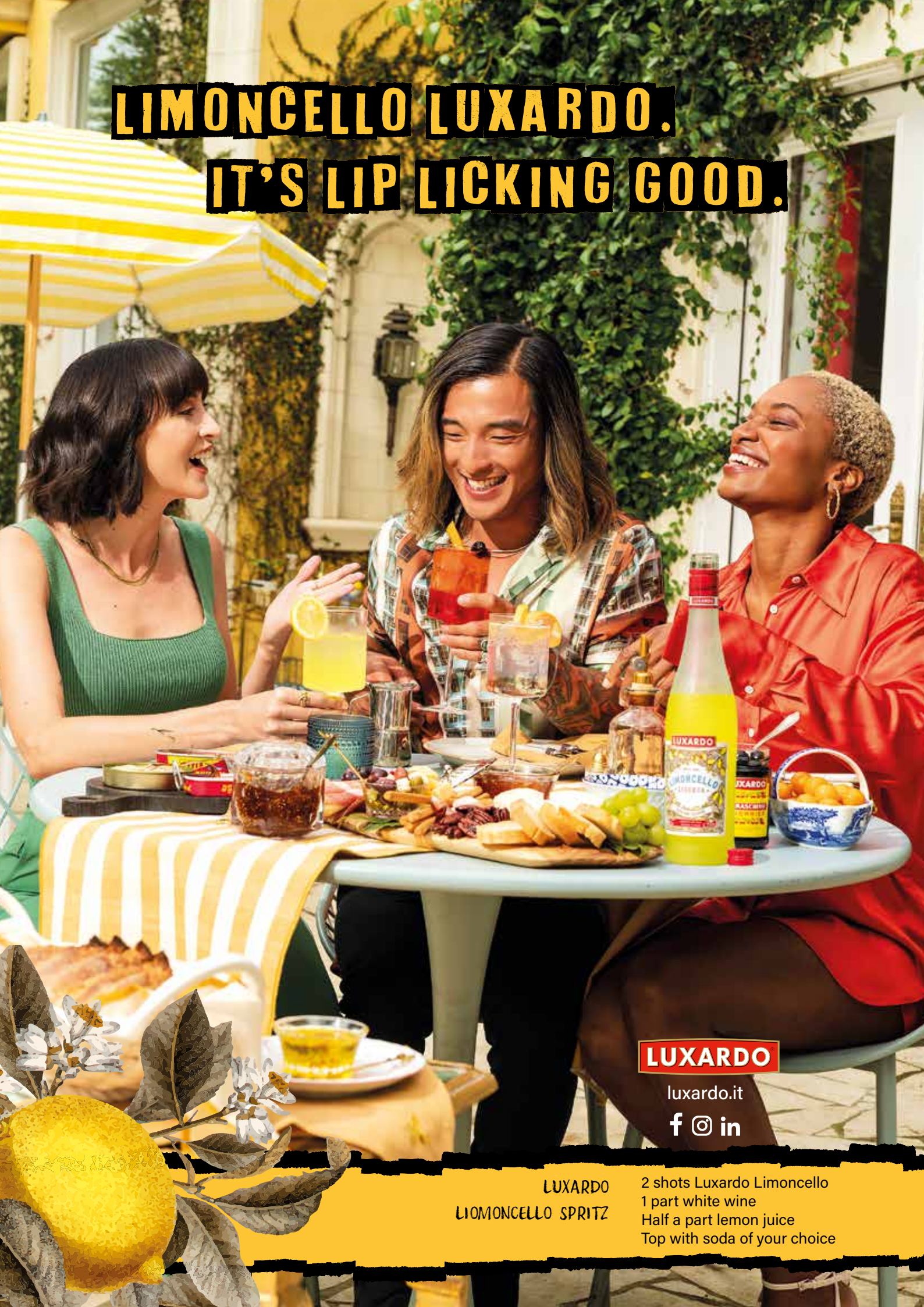
Top 3 takeaways

- In 2023, limoncello volumes leapt by 14% year on year. Italy still held the largest market (37%,), but Germany saw a 32% increase (18%).
- The unstoppable rise of the spritz is revolutionising the category, with the limoncello version of the serve propelling the liqueur into mainstream mixology.
- While Italy remains the heartland of limoncello, markets like the US, the UK and Australia are experiencing rapid growth, alongside increasing competition from citrus-flavoured RTDs.



Image: Studio Aylin Lajeh

Ramazzotti's cinnamon-spiked limoncello spritz


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2 shots Luxardo Limoncello
1 part white wine
Half a part lemon juice
Top with soda of your choice

King Henri Christophe Spirits strikes distribution deal in US

Haitian-based King Henri Christophe Spirits has signed a nationwide distribution agreement with Park Street Imports in the US. The recently founded distiller produces a base spirit in Haiti, before shipping it to the US for blending with 6yo and 12yo American whiskies. The first expression in the line-up, King Henri Christophe 6yo Aged Whiskey, will hit shelves across the US from April.

DrinksOne takes on Sake Ono for UK distribution

Japanese rice wine producer Sake Ono has struck a deal with beverage distributor DrinksOne Brands in the UK. Effective immediately, the distributor will handle Sake Ono's on-premise distribution in the country. Sake Ono's namesake brand launched last April with a Junmai Daiginjo blend.

Lochlea Distillery signs SipWell Brands as GTR partner

Scotland's Lochlea Distillery has appointed SipWell Brands as the global travel retail distribution affiliate for its single malt whiskies. The arrangement will see Lochlea launch a channel-exclusive release, named Roaming Barley. The company said the deal will "support the distillery's growth and awareness in international markets".

Cuban rums Black Tears, La Progresiva head to Germany

Island Rum Brands has boosted the reach of its two Cuban rum brands, with the roll-out of Black Tears Dry Spiced and La Progresiva to Germany. The privately-owned 13-year-old company has a production arrangement with the Cuban government for the pair, and has secured Karlsruhe-based Kammer-Kirsch as its distribution partner.

Titanic Distillers targets global markets after fresh investment

Northern Ireland-based Titanic Distillers is looking to bolster its international presence after securing a GBP5m (US$6.3m) investment from local fund manager Whiterock. The funding injection, which comprises an equity investment from Whiterock's Growth Capital Fund, will also see Whiterock take ownership of an unspecified minority shareholding in the company.

Keystone buys North Brewing amid UK acquisition spree

Private equity business Keystone Brewing Group has added another UK craft brewer to its roster as North Brewing Co has moved across for an undisclosed fee.

Keystone, which over the past couple of years has purchased four brewers, including Black Sheep Brewery, has taken on North Brewing from previous owner Vertical Drinks. North Brewing's facility in the northern English county of Yorkshire will remain operational, according to its new owner, with no job losses expected.

Almost exactly a year ago, the founder of Kirkstall Brewery, also in Yorkshire, set up Vertical Drinks to buy North Brewing, which at the time was on the verge of going into administration.

"We are delighted the North Brewing brand and beers will join the Keystone family," said Keystone CEO Mark Williams. "It is a true icon with a compelling reputation for innovation and high-quality beers, and we see enormous potential to build on its success to date, growing it nationally while preserving its original Yorkshire identity."



North Brewing Co has new ownership

Private equity firm Breal Group rebranded as Keystone Brewing Group following a number of acquisitions in the craft beer space in the past year. The latest acquisition marks another milestone in Keystone's growth plans to develop a GBP100m (US$126m) portfolio of brands.

North Brewing Co joins the Keystone family of beer and cider brands, which include Black Sheep, Purity, Brick, Brew By Numbers, Big Drop, Wolf Pack, Maison Sassy Cider and, most recently, the Magic Rock and Fourpure brands.

Satryna Tequila to expand market footprint in the US

Mexico-based Csatrina Holdings has lined up the expansion of its Satryna tequila and mezcal portfolio beyond its debut appearance in the US. The company, which is owned by Mexican and UK investors and was incorporated in the UK eight years ago, has recruited Arizona-based Edge Beverage to build on its existing presence in the US. At the same time, a "notable further roll-out" in the market, specifically to California, Florida, New York and Texas, has been lined up for the coming months through Park Street Imports.

India's ABD acquires Fullarton Distilleries

India-based Allied Blenders & Distillers (ABD) has confirmed its purchase of Fullarton Distilleries for an undisclosed fee.

The deal sees ABD, which claims to be India's third-biggest spirits company, gain control of brands including Woodburns Contemporary Indian Whisky, Pumori Small Batch Gin and Segredo Aldeia Rum. ABD said it is "strategically positioning itself to meet the evolving demands of India's super-premium and luxury spirits consumers".

Based in the western state of Goa, Fullarton's Woodburns brand is currently available in six unspecified states and union territories, with "expansion plans underway for other major markets", according to ABD. Pumori and Segredo Aldeia are present in the on-premise channel "in key markets such as Maharashtra and Goa".

"We recognise that the luxury segment is where we have a right to win," said ABD's MD Alok Gupta. "Acquiring these brands is a natural next step in our premiumisation strategy. This isn't just an acquisition; it demonstrates our deep understanding of where we can create the most value."

Headquartered in Mumbai, ABD produces whisky brands Officer's Choice and Sterling Reserve brands. The group launched an initial public offering last year. GDI


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‘Our mission? To eliminate single-use glass in the spirits industry’

EcoSpirits founder & CEO Paul Gabie stumbled on a ‘brilliantly simple’ idea: help spirits brands switch to reusable packaging. The hitch? It meant reshaping ‘every part of the value chain, all the way back to the distillery’. Interview by **Olly Wehring**



Paul Gabie: ‘The biggest challenge we’ve faced — and continue to face — is the level of complexity involved in such a revolutionary change to the supply chain’

How did you get where you are today? I’m Canadian originally and moved to Asia in late 2007. I missed the bars of New York and London, so I set up a bar, 28 HongKong Street, which became one of the world’s 50 best bars. Then I decided it would be easier to move into distribution than open more bars. Around a decade ago, I co-founded a business in Asia-Pacific called Proof & Co, which is a craft spirits distributor for markets including Singapore, Hong Kong, Australia, New Zealand and China.

One thing we learned from setting up a distributor at such a distance from where many spirits are produced was the length of the supply chain. When signing the cheques for freight-forwarding and warehousing, for example, we could see how much of the cost of spirits is in moving the product around the world and in storing it. When you hold a bottle of spirits in your hand, you realise very quickly that half or more of the weight is in the packaging itself. If it’s a popular spirit, you may pour through that bottle in less than an hour in a bar. The packaging is used once and then it’s gone.

Therein lay the idea of EcoSpirits, which was born in 2017. I’m the founder & CEO, who’s had an accidental move into technology.

It sounds like geography was the kernel for your idea. Absolutely. One of our oldest partners on the distribution side was Planteray Rum [formerly Plantation Rum], which is aged in France. We considered whether a competitively priced product for its quality like Planteray could be more affordable in markets such as Hong Kong and Singapore if there was a way to reduce the packaging costs and the logistics at such long distances. What if you could ship in bulk and then have reusable packaging at a local level?

At first, we thought this was a simple idea. We spent the first couple of months looking at the US and European markets to see what was out there in reusable packaging. We quickly realised there was nothing for premium spirits, so we set up an incubation project to trial something here in Singapore.

The idea of a reusable glass packaging system was a logical next step, and that’s what we embarked on with EcoSpirits.

How did the conversations go with premium spirits brand owners for whom a heavy glass bottle is a traditional premium sales cue? Having been involved in brand-building as distributors, we realised from the very beginning there were two conditions precedent to a successful technology that could overcome resistance from brand owners.

One was, we looked at many materials for packaging; we settled on glass, which has such a long tradition in spirits because of the fundamental trust the industry has in glass for having the highest performance in terms of flavour preservation. We had to produce a system that guarantees the spirit tastes just as it would if it was in a glass bottle.

The second is the retention of the consumer experience — the bottle carries the story of the brand and often carries decades of investment in that story. Our system was designed to cause as little disruption as possible to that experience. »

» We're in more than 3,000 outlets around the world now, and the consumer doesn't even know that EcoSpirits is operating; they're seeing the bottle poured in front of them, what they don't know is the whole supply chain between distillery and bar has been reshaped by EcoSpirits technology.

For the vast majority of time, our technology is invisible to the consumer. That's been essential in overcoming any resistance, because we can help brand owners to achieve their sustainability goals without putting the consumer experience at risk.

How did you source funding for launch? At the start, EcoSpirits was an incubation project within Proof & Co, so we were able to self-fund the first year of development and trial. We honestly never imagined EcoSpirits would get such a reception. We were trying to solve a problem that we had within spirits distribution.

Within six months, we realised we had a much bigger idea, so after a year we decided that rather than keep it within the larger company, we should spin it out as a specific packaging technology company. We have a good network in Singapore, where one of the leading technology venture capital firms, Wavemaker Partners, jumped at the opportunity to be EcoSpirits' capital partner. They came on board in 2020 with a small financing round of about US$1.5m that got us started. They helped us not only with capital, but also with expertise.

As EcoSpirits began to get this surprisingly warm reception, we were able to run a bigger Series A funding round in 2023 led by Closed Loop Partners, an institutional investor in New York. We also opened up the investment opportunity to some of our customer partners that were making longer-term commercial commitments to deploy and scale the technology. Pernod Ricard was the first with PR's capital venture division.

A few months ago, Rémy Cointreau launched a new venture capital fund, RC Ventures, and we were the launch investment for that vehicle. Both companies have made small but meaningful investments in EcoSpirits as we've grown. We'll keep that option open to other customers that are betting on the technology to drive their sustainability goals going forward.

I won't say it's been easy; fundraising is never as simple as it may seem, and it's become more difficult in the last year or two as technology markets have endured turbulent times. In hindsight, we wouldn't have had anything close to the momentum or the fundraising success we've had if we were trying to do this ten years ago. I don't think the industry would have been ready for it.

Any mistakes along the way? I get this question a lot! The idea of reusable packaging at a superficial level sounds brilliantly simple, and that's part of why people latch onto it. There's almost no one I ever meet who doesn't understand how it works.

The implementation and execution of circularity in an industry as global and as traditional as the spirits industry, however, is incredibly complex. When we started, I was overly focused on coming up with a nice-looking packaging solution. What we didn't realise is we essentially had to reshape every part of the value chain, all the



way back to the distillery: how spirits are packaged at source, transported, costed, imported, stored and processed locally.

We've had to set up a network of local processing centres, for example. Instead of just sending a bottle out and knowing it'll end up in a landfill or recycling, we have permanent assets that have to be stewarded and tracked for up to 15 years. That's led to a whole new software layer.

We work with Diageo, who have a lot of experience of this with Guinness — we've learned a lot together about how to apply that to spirits. Some of our other customers haven't had experience with a permanent reusable asset in their global accounting system and supply chain, so you can imagine the complexity we have to work through. Just the changes to the ERP systems in global companies can take six months.

The biggest challenge we've faced — and continue to face — is the level of complexity involved in such a revolutionary change to the supply chain.

How have you navigated having competing brand owners as co-investors? That's the crux of it. Our mission is to eliminate single-use glass in the spirits industry. That's an ambitious, multi-decade mission that we will not be the only catalyst for. To become universally successful, we can't end up working with just one player and be a captive technology or proprietary format. Look at the beer keg: no one beer company uses it to the advantage or disadvantage of others.

From the very beginning, we set a principle of EcoSpirits as an open-platform approach. We would not give priority or exclusivity to any customer in return for any commercial advantage. There is no place that EcoSpirits is in use that a brand partner would not be allowed to use it because some other major player is doing so.

To their credit, that principle was accepted by our major customers early on. They realised that this would be of great benefit to the industry and the planet overall and not, like some innovations, one to keep closed and captive. Our goal is to remain an independent company and become something that's a standard format.

How is EcoSpirits performing at the moment? Business right now is turbulent for all of our customers, but the level of commitment to deploy and grow this technology has been unwavering. We're in one of those down cycles, certainly. There are a lot of shifts in consumption patterns that we're all still trying to figure out. Politics is also shifting globally.

I've been reassured by the level of commitment our customers have to progress toward their 2030 goals [as part of the United Nations' '2030 Agenda for Sustainable Development']. Despite the difficult capital and earnings environment, we've not had a single partner cancel or put its EcoSpirits projects on hold.

What's the best piece of advice you've received? We have an independent board member who's a tech guru, and his warning was that the complexity of being a small, external innovation partner to big global companies — and the time it takes to introduce innovation at this level — should never be underestimated. And that's been true.

We've ended up with very deep partnerships with our customers. But I don't think for them, or for us, it's been as easy or fast as we might have expected at the outset. I wish I'd known that at the very beginning. GDI


Image: iStock.com/Golubovy

Startups should leverage readily available tools like their smartphones for content creation

'Treat your brand's social as you would your own'

Social media is an essential tool for any drinks startup looking to build brand awareness, engage with consumers and drive sales. **Henry Mathieu** asks marketing experts the best way to utilise it on a tight budget

Prioritise authentic content

Consumers engage most with brands that feel personal and relatable. According to Tom Khan-Lavin, co-founder of drinks marketing agency YesMore, high production values are nice, but not essential in the beginning.

"It's better to do something than nothing," he says. "Focus on authenticity and genuine connection. Leverage readily available tools like your smartphone for content creation." He suggests brands start small, use templates and gradually improve production quality as time and budget allow.

High-Proof Creative founder Karen Locke echoes this sentiment: "Humans love rhythm, so posting content consistently can help with engagement. Organic engagement takes time, but if you can find the right people who will engage and follow your brand — it's worth the effort."

Engage, don't just broadcast

A mistake some startups make is treating social media as a one-way advertising platform. The Social Element new business coordinator Kim Brown emphasises the importance of interaction: "Be human, treat your brand's social as you would your own — spreading joy, inspiration and a sense of community."

Khan-Lavin agrees that engagement should be a key focus. "Social media is a dialogue, not a monologue," he says. "Think two-way conversation over one-way broadcast. Actively listen to your audience, participate in relevant conversations via comments, hashtags and trending content."

Be smart about influencer collabs

Influencer marketing is a powerful way to amplify reach, but it's also becoming increasingly expensive. Tim Simmons, founder of UK aperitif startup Sipello, is sceptical about blindly paying influencers without ensuring authenticity (see interview p55).

YesMore's Khan-Lavin suggests an alternative approach. "Invest your time in identifying influencers who genuinely connect with your brand and its values," he recommends. "Offer them product, exclusive experiences and build long-term partnerships. Value exchange is key here." Rather than paying hefty fees for single posts, Khan-Lavin advises developing long-term relationships that feel natural and credible.

Creativity over consistency

While consistency matters, content needs to stand out. Vas Art, head of marketing at Canada-based OhBev Agency, urges brands to embrace bold creativity.

"You're competing with all kinds of content in consumers' feeds — not just rival beverage brands," he says. "If your content is merely 'good,' it risks getting buried. It needs to be dramatically different."

He cites the example of Tito's Handmade Vodka, which has adopted the tagline 'vodka for dog people' and cleverly integrates pets into its Instagram feed, making it unique and shareable.

Art also cautions against relying solely on social media. "It's easy to feel pressured to go all-in on social, but remember that platforms throttle organic reach unless you pay for ads," he says. "Some brands build healthy sales with minimal social presence by leveraging alternative channels — SEO, local media coverage, pop-ups and collaborations."

Lean into platform features

The Social Element's Brown suggests that brands should not only create original content, but also take advantage of platform-specific features.

"Be ready to react and jump in on trending moments — this is the best way to be social," she says. "Lean into the platform features! You don't need to create video or even visuals for every scenario."

Brown also highlights the importance of community engagement: "Spotlighting the consumer experience through user-generated content and rewarding those who advocate for you builds loyalty. Social media fosters community."

Invest in ads wisely

High-Proof's Locke emphasises that while organic social media efforts matter, paid advertising is essential. "Leveraging social channels on a tight budget can be tricky since most platforms are pay-to-play now. If your budget is small, I always recommend consistency and engagement."

Meanwhile, OhBev's Art warns against blindly pouring money into social ads without considering other options. "If you have US$1,000 earmarked for brand awareness in Los Angeles, you might get more value by sponsoring engaging local media content than through paid social ads."

Finding the right balance between paid and organic strategies is crucial for fledgling businesses operating on a limited budget.

YesMore's Khan-Lavin sums up: "Overall, marketing and advertising via social media — or any channel — is going to cost you in either time or money.

"So it's your job to decide which things you and your team can feasibly take on yourselves and then invest time into them, or prioritise which you outsource to experienced professionals." GDI

Five lessons from a drinkpreneur Sipello founder Tim Simmons

Starting and growing a drinks brand is an exhilarating but tough journey. Tim Simmons, founder of UK-based aperitif startup Sipello, is navigating this path first-hand. **Henry Mathieu** asked him what he's learned so far

Cash flow is king

One of the first and hardest lessons in launching a drinks brand is understanding cash flow and the gap between expectations and reality. Tim Simmons launched his gooseberry-led Sipello Aperitif with GBP80,000 (US$102,000) of his own funds in the middle of the Covid-19 pandemic.

"You have all these ideas of what you're going to do and how people are going to receive the product," says Simmons. "But the reality is that unless you come in with a few million quid in a marketing budget, it's going to be a very, very long slog."

Simmons stresses the importance of being selective with spending, as every opportunity comes with a cost. "You see a lot of similar-sized brands jumping at every opportunity — pop-ups, activations, festivals — and you only need two or three of those to not quite work in your favour, and financially, you're up against it." Being measured in financial decisions is crucial to survival in the industry, he emphasises.

Do your homework

Many new brands dive into the industry without fully understanding the competitive landscape. Simmons emphasises the importance of market research: "Not enough homework is done by brands on sizing the market, seeing how competitors are doing and, more importantly, why."

The former IWSR analyst targeted the trend for drinking less but better, tirelessly experimenting in the distillery and cycling over 700km in lockdown to hand-deliver samples of Sipello to dozens of leading bartenders for feedback. The process took two years and his dedication to refining the product for the on-premise paid off with multiple high-end listings in the channel.

Jumping into a trending category without a deep understanding can be a costly mistake. "By the time people realise something's booming, you're probably too late," Simmons explains. The key is to assess the market realistically, understand why a category is successful and determine if there's space for your brand to thrive.



Tim Simmons: 'Build locally and online'

Authenticity builds consumer trust

In an industry where misrepresentation can be rife, ensuring accuracy in how you portray your product is vital to building consumer trust. This is why authenticity is at the core of Sipello's brand identity.

Simmons believes that transparency in production methods and genuine connections to a product's origins are essential. "There's a lot of cultural appropriation in drinks — brands launching products with no real connection to them, just because they're trendy. Some start off well, but then plateau when the trend fades."

For Simmons, staying true to his product and its origins matters. "Sipello is all about the authenticity behind our ingredients and transparency in our production methods," he says. "We make it in Guildford [in England] and that local connection is important."

Build locally and choose wisely

Breaking into national retail can be difficult for niche drinks brands, so Simmons advises focusing on local networks. "Retailers won't take a punt on your product," he cautions. "They've got finite shelf space, and they're not particularly interested in 'new and niche'." Instead, he advocates for a balanced approach between local presence and online sales.

"If you're launching a drinks brand now, you have to build locally and online. Those are your two main channels," Simmons explains. Engaging with bars, restaurants and independent shops can help create a strong foundation before expanding further afield. "People want to support local entrepreneurs, so give them the opportunity to do so."

Be strategic about social media

In today's digital landscape, social media is an essential tool for drinks brands. However, Simmons warns against aimless posting. "If you're a brand and you're not putting money behind your ads, your posts are just sitting ducks. They're not really doing anything."

Paid advertising is key to making an impact. "Instagram is probably the easiest way to communicate with people who have chosen to hear from you," says Simmons. "But if you want your posts to work, you need to fund them." While platforms like TikTok have become powerful marketing tools, Simmons has been selective about where Sipello focuses its efforts. "I had in my head that TikTok was just for silly dances, so I never bothered. But I know a lot of brands swear by it now."

The use of influencers is another tricky area. "We get people with a couple of hundred thousand followers asking for GBP1,500 (US$1,890) for a single post. I'd rather just do it myself," Simmons says. Genuineness remains central to Sipello's approach, and forced partnerships don't align with that vision.

For aspiring drinkpreneurs, Simmons' experience underscores the importance of financial discipline, strategic planning, authenticity and targeted marketing.

"The biggest lesson?" he asks. "You have to go through it to learn it. You can't jump at every opportunity — follow what's true to your brand, and don't try to fit into everything." GDI

Dispatch helps ESG-focused brands enter Australian market

Dispatch Imports is shaking up Australia's spirits import and distribution model following its launch late last year. It has already built a portfolio of brands with strong ESG (environmental, social and governance) credentials, including the Seychellois Takamaka Rum, Supergay Vodka, Compass Box Whisky, Xamán Mezcal, Two Drifters Rum, Muyu Liqueur, Italy's Zoppi Distillery and Svitlo Vodka.

Core founders Aaron Shuttleworth and John O'Toole created the business with a deliberate focus on ESG. Shuttleworth told *Global Drinks Intel*: "The main importers/distributors in the market are owned by Australia's two biggest supermarket chains. We saw a gap for independent brands with a great story and ethics that have really strong credentials in major global markets. We will build them up here through the on-premise."

The company will initially focus on on-premise establishments in New South Wales and Victoria, before ramping up to national coverage of both the on-premise and off-trade by 2026.

Despite the "huge" barrier to entry for a new importer/distributor in the Australian market due, in part, to the third-highest alcohol excise tax in the world, Dispatch already has a portfolio of about eight brands to date, and expects to reach 15 this year. Additions in the coming month include Renais Gin, Ratafia Rossi and Tepozan Tequila.



Founders John O'Toole and Aaron Shuttleworth

Shuttleworth added: "Distribution is an old and crusty business, so we're looking to create some newness and dynamism in the Australian market.

"All the brands we've partnered with have all the pieces in place to mirror their success in other markets. Starting a new business is never without its challenges, but we're really excited."

Commenting on its entry to Australia, Bernard d'Offay, co-founder of Takamaka, said: "It's a market in which I believe Takamaka will thrive. It's taken a while to find the right partners. Our launch with Dispatch fills me with enthusiasm."

FDFA: Red tape hitting Canadian land border duty-free stores helps their US competitors

The Frontier Duty Free Association (FDFA) claims that land border duty-free stores in Canada are unable to compete with US retailers "due to unnecessary red tape, unfair regulations and misapplied policies".

In mid-February, following the publication of a report on the issue, the association called for urgent government action to remove regulatory burdens and safeguard the survival of these stores which are mostly run as small businesses. The wine and spirits category represents the single largest product segment at the borders, accounting for 37% of sales pre-pandemic (and 42% if the beer category is included), according to Canadian customs data.

Tania Lee, president of the FDFA, said: "Our businesses are at a distinct disadvantage due to domestic policies that are not similarly applied to US duty-free stores and US retailers. By taking immediate action to eliminate red tape and adjust regulations, our businesses could compete and thrive like our American counterparts."

During the pandemic, the Canada-US border was closed for 20 months and sales plummeted by 95%. While the border has reopened, cross-border travel has reduced and continues to be a drag on business. Moreover, the looming threat of Trump's tariffs "has already contributed to a decline in cross-border travel", according to the FDFA.

Penfolds Lunar New Year limited edition helps China re-entry

Australian luxury wine brand Penfolds went all out with a limited-edition Lunar New Year collection in travel retail to celebrate the Year of the Snake, supporting the Treasury Wine Estates brand's re-establishment in China following the removal of Chinese tariffs on Australian wine almost a year ago.

The company used the airports of Shanghai, Melbourne, Dubai, Hong Kong and Singapore to run high-profile promotions from the end of January and into February. The 'Celebrate Limitless Possibilities' campaign included a high-profile promotion space with Sunrise Duty Free at Shanghai Pudong Airport celebrating the return of Penfolds to Chinese consumers.



Penfolds' Lunar New Year collection

Each wine in the collection was presented in a bespoke Lunar New Year gift box, with intricate snake-scale motifs rendered in gold, red and blue — a design symbolic of prosperity, renewal and cultural connection. Among the offerings were the iconic Grange, the RWT Bin 798 Shiraz and the new Bin 389.

In a mid-February investor presentation from TWE, Penfolds was described as having delivered "an outstanding result", with strong growth in Bin and Icon portfolio shipments to Asia reflecting the re-establishment of the Australian Country of Origin portfolio in China. On China's retail channel, TWE said that Penfolds national distribution network was operational across 30 provinces and regions through 1H25, with "excellent progress" in bringing Penfolds' core portfolio into 10,000-plus outlets across liquor stores, retail and on-premise channels. GDI

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La Maison du Whisky: A philosophy of passion, exclusivity and expertise

Nearly 70 years young, La Maison du Whisky's business empire spans a dizzying range of channels and activities, but the company's many ventures share some common values, as **Joe Bates** discovers



La Maison du Whisky's Rue d'Anjou store is home to the world's largest collection of whisky – over 2,000

Few spirits retailers anywhere in the world can boast the incredible breadth of commercial interests of Paris-based La Maison du Whisky (LMDW). Besides its three Parisian retail outlets and a store in Singapore, the family-owned firm also boasts a thriving distribution arm, multiple online e-commerce platforms and a fine spirits auction joint venture with the online wine auction specialist iDealwine.

As if this weren't enough, LMDW has also organised the popular Whisky Live Paris show since 2004, an annual event which attracts 250 exhibitors and 22,500 visitors; a sister event has been running in Singapore since 2011. The company also publishes the *Whisky Magazine & Fine Spirits* magazine and runs a wide range of spirits training courses for people working in the French hospitality sector.

Finally, through La Maison & Velier, LDMW's partnership with Italian firm Velier, the company is involved directly in spirits production at Haiti's Distillerie de Port-au-Prince, which opened in 2018 and now makes the Providence Rum brand. La Maison & Velier also offers customers a range of bottlings from 30 small, often family-owned companies worldwide. The rum range is particularly extensive.

According to LMDW communications director Célia Ghesquiere, what ties all LMDW's disparate activities together is a unifying philosophy focused on passion, exclusivity and expertise. "This is reflected in our meticulous curation of products, strong partnerships with independent distilleries, and immersive retail and event experiences," she explains.

Humble origin, bright future

LMDW may now be a French institution, but the retailer's origins were much humbler. The company was founded as a spirits import business in 1956 by Algerian-born Georges Bénitah. He opened his first shop in Paris in 1961 at a time when most French customers were only aware of a handful of blended scotch whiskies. Undaunted he slowly began growing the store's range of single malt whiskies, forging relationships with distilleries, starting with Glen Grant.

By 1975, LMDW could boast four Parisian stores and only two years later, the retailer was offering its customers a diverse range of more than 150 whiskies from around the world, including 100 single malts. By 1989, the offer had grown to over 500 products, with the 1990s ushering in whiskies from Ireland, Japan and the US. Thierry Bénitah, George's son, became the company's new chief executive officer in 1995.

As the end of the decade neared, LMDW launched whisky.fr, the first website in France to sell whisky, the first of several subsequent e-commerce initiatives. The turn of the new millennium saw LMDW introduce Japanese whisky to France, becoming the exclusive distributor of Nikka (in 2007, the retailer became the Japanese whisky brand's Europe-wide distributor).

Evolving Parisian stores

Today, LMDW's flagship store at 20 Rue d'Anjou in the city's La Madeleine district boasts one of the world's largest selection of whiskies in the world, whether they be from Scotland, Japan, India or the US, over 2,000 in total. In the store's basement, the Islay Room stocks 150 peated whiskies from the island's distilleries, while the store's Collector's Room offers 700 rare bottles of scotch.



Bottle keep at Golden Promise on Rue Tiquetonne

In contrast, the three storey Odéon boutique switches the focus from scotch to a wide range of white spirits, rums and French whiskies. The store's second floor, R+1, is entirely dedicated to rum, stocking more than 450 varieties, including nearly 100 collectors' items from coveted names such as Bielle, Caroni, Demerara, Rhum Rhum and Silver Sea.

LMDW's most recent Parisian outlet opened on Rue Tiquetonne in 2021. It »







Clockwise from left: A pop-up for The Avant Gardists digital platform; whisky.fr homepage; this year's Créations Catalogue Foundations

» houses Golden Promise, a bar serving cocktails and collectors' whiskies, as well as ERH, a Franco-Japanese gourmet restaurant serving cocktails and collectors' whiskies. "Japanese whiskies, shochus and saké take pride of place in this cutting-edge lifestyle address," says Ghesquiere.

Adapting to changing tastes

In recent times, much of the French off-premise has proved challenging for spirits producers, with inflation impacting consumer spending. Yet Ghesquiere insists demand at LMDW's outlets for high-end spirits remains strong, with connoisseurs continuing to seek out rare and collectible bottlings. However, she says mid-tier brands are showing some price sensitivity.

In terms of specific category trends at LMDW, French whisky is expanding rapidly, gaining national and international recognition, with an increasing interest in terroir-driven expressions. "Whisky, rum and agave spirits are thriving, while categories like brandy and traditional liqueurs face slower growth due to shifting consumer preferences," Ghesquiere reveals.

Further afield, Ghesquiere says LMDW's Singapore operation is performing well. "The Singapore operation is growing steadily, with e-commerce and distribution showing the fastest growth due to rising demand for premium spirits in Asia, particularly in Singapore, but also in China, Korea, Vietnam, Malaysia," she notes.

An e-commerce pioneer

LMDW has successfully adapted to the digital age with ongoing enhancements to its e-commerce platform, whisky.fr, launched in 1997. According to Ghesquiere, recent upgrades have improved the user interface, added personalised recommendations and expanded product descriptions, making it a go-to source for whisky enthusiasts worldwide. The platform has become an invaluable tool for promoting the brands and products distributed by LMDW, particularly in the post-pandemic landscape. Every year, around 6m visitors log on to whisky.fr, browsing the 5,000-product assortment. With dozens of new releases added daily, the site receives more than 16,000 unique visitors per day and processes some 80,000 orders per year.

Since 2022, the site has also included The Avant Gardists (TAG), a digital platform dedicated to young brands and innovative distilleries. Since its inception, TAG has grown from having 30 to 160 partners and now offers over 500 references, including 300 of French origin.

"Exciting names gaining traction include French whisky makers like La Piautre, and the Italian gin brand Portofino, and also a large diversity of no/low spirits like Jardins, or French Bloom," says Ghesquiere.

In the three years TAG has been running, sales have reportedly grown by 150%, with over 150,000 bottles sold.

Educating and inspiring

Beyond retail and distribution, LMDW plays a crucial role in educating and informing the spirits community. Each year, the company publishes the *Créations Catalogue*, a meticulously curated selection of nearly 200 exceptional spirits spanning whisky, rum, cognac, armagnac, calvados and saké. The catalogue not only showcases exclusive releases, but also highlights collaborations with renowned artists and distilleries, offering collectors a deeper understanding of the craftsmanship behind each bottle.

The 2025 edition, *Foundations*, draws inspiration from the architectural heritage of the whisky world. It features archival plans, historical insights and artistic interpretations of distilleries shaped by legendary architect Charles Doig. Among the standout releases in the catalogue are the Rothes Glen Artists Collection, which pairs Laphroaig, Highland Park and The Macallan whiskies with the art of Nigerian artist Victor Ekpuk, and the Ex Libris Range featuring single cask releases from San Francisco craft distillery Old Potrero, inspired by the works of US writer Jack London.

Leading the way in sustainability

Sustainability remains a growing priority for many spirits retailers and LMDW is no exception. Last year, LMDW partnered with closed-loop distribution specialist EcoSpirits France to allow spirits to be delivered to stores via EcoSpirits' EcoTote format rather than glass bottles. Consumers can then fill their own bottles in-store, choosing from three sizes of specially branded reusable bottles: a 20cl tester size, 50cl or 70cl. [See *GDI*'s interview with the founder of EcoSpirits on p52.]

Compass Box Whisky, Christian Drouin Verger Sauvage Gin, Renegade Hope Rhum Agricole and Amorik Single Malt Whisky were among the initial spirits brands to sign up to the initiative, which was the first time EcoSpirits' closed-loop technology was made available to a European retailer. The system was initially installed at LMDW's Parisian outlets, before a wider roll-out to more than 100 LMDW-supplied outlets across France.

Ghesquiere reveals that by the end of the year, over 10,000 EcoTotes were sold through 150 horeca partners nationwide, the equivalent of more than 65,000 bottles of spirits saved.

As LMDW moves forward, its legacy remains firmly rooted in its founding principles: a relentless pursuit of quality, an eye for innovation and a commitment to enriching the whisky and spirits experience for connoisseurs worldwide. With new collaborations, expanded retail and online operations, and an ever-evolving product range, LMDW is poised to remain a beacon of excellence in the world of fine spirits retailing. GDI

Bars in 2035: Insights from the leaders shaping the industry

The number of bars in the on-premise has fallen, but the channel remains essential for a thriving drinks industry, according to a new report by CGA and SIP by Pernod Ricard. **Kevin Rozario** finds out more with an exclusive preview ahead of its launch

Technology and social trends, among many others, are changing the on-premise rapidly. Two-thirds of consumers have purchased specific drinks or food items based on their social media feeds, while 39% say they will choose a drink if they think it will look good in an online post.

In some quarters, this may be seen as negative, but it is also a reality that bartenders are having to adjust to. Such trends, accelerated by the Covid-19 pandemic, are impacting the bar scene globally. This prompted on-premise analyst CGA by NIQ and one of the world's largest drinks producers, Pernod Ricard, to delve deeper and uncover key insights from nine movers and shakers in the drinks world.

The roundtable event in Madrid was unprecedented. Chaired by both CGA and SIP by Pernod Ricard (the company's trade advocacy platform 'Share. Inspire. Pioneer.'), the final report was released in the same week as World Bartender Day and *Global Drinks Intel* had an exclusive preview.

Bars in 2035: Insights from the leaders combines data with qualitative views from nine highly influential individuals in the drinks sector. They included Anna Sebastian, formerly of The Savoy and The Langham, London, who went on to launch a consultancy business and the hard seltzer brand Served; Simone Caporale, familiar to many thanks to his Drinks Tube work with chef Jamie Oliver and co-founder of the liqueur range Muyu and Sips bar in Barcelona; and Priyanka Blah, founder of lifestyle platform The Dram Attic and South Asia chair for The World's 50 Best Bars.

So what is the future of hospitality? Charlie Mitchell, head of insights & consumer research at CGA by NIQ, tells *GDI*: "This was an apt time to reflect on the sector. The last ten years have seen so much change; from the rise and fall of gin, »



Image: iStock.com/DGLimages

Over a third (39%) of consumers have chosen a drink because it will look good in an online post

Riding the social media wave

Social media exposure has significant positive value in the on-premise, according to global research from CGA's Reach programme.

More than 70% of consumers have visited a specific bar or similar venue after seeing it on social platforms like TikTok and Instagram, while two-thirds have purchased a specific drink or food item based on their online research.

On-premise users also like to post their eating and drinking experiences on social media, which means that aesthetics of both drinks and the bars themselves are important.

This is opening opportunities for new types of direct-to-consumer online engagement with bars, adding to bar staff's already heavy workloads. Supplier support will therefore be part of the mix.

"Bartenders have a great relationship with consumers, and brands want to be a part of it," explains Danil Nevsky, founder of Indie Bartender.

CGA by NIQ's *2024 Global Bartender Report* found that 42% of staff think brands with a strong social media presence are best placed to thrive, making it a growing channel for activations and education. Alex Kratena, co-founder of London bar Tayēr + Elementary, recalls: "Somebody made a TikTok video of one of our margaritas and for a year-and-a-half afterwards we had guests coming for that same drink."

Top takeaway: *Social media will be a key brand battleground in the years ahead, and bartenders will be at the heart of a new age of engagement*

The impact of influencers should not be overlooked. "There are people on TikTok and Instagram who none of us have heard of, but they influence more consumer behaviour than any of us," observes Nevskym in *Bars in 2035*.

Social media has also helped boost non-alcoholic and lighter drinks to the point where they should become mainstream in the next decade.

"No/low-alcohol drinks aren't just sold to teetotallers," says Indra Kantono, the co-founder of Jigger & Pony Group, which owns and operates seven venues in Singapore. "Growth is happening because brands have recognised there's a far bigger appeal."

The report at a glance



Social media rules — for now
Consumers' decision-making is increasingly being determined by social media to the point where online influencers can even make or break brands and venues. However, there is pushback, with some drinkers seeking out their own self-discovered in-person experiences.

Moderation driving non-alcoholic and lighter serves
The no/low-alcohol movement continues as wellbeing remains in vogue and bars and brands need to embrace the trend.

Global *and* local in the same sentence
Globalised drinks brands may have power, but consumers are also more focused on local products and sustainability. Combining the two is a win-win.

Alternatives to drinking on the up
Competition from cannabis and other forms of intoxication is increasing and changing the social landscape. Bars and brands must meet the same 'need states' to be competitive in this arena.

Bursting the industry bubble
Industry professionals can set and drive trends, but consumers are taking more control. Understanding the market will need a closer ear to the ground, not just rely on industry bigwigs.



Image: www.nineliveslbar.com

London's Nine Lives Bar serves mood-enhancing non-alc drinks alongside its alcoholic serves

Alternative mood boosters

While moderation is bringing new options to drinkers in the on-premise, so too is the consumer desire for mood-boosting or relaxing alternative forms of intoxication, such as nootropics drinks.

A growing range of alternatives to traditional alcohol intoxication is giving consumers more options, finds the *Bars in 2035* report. It showcases the example of legalised cannabis in some US states, where cannabis lounges and THC-infused beverages are emerging as alternatives to traditional alcoholic options.

However, rather than a direct competition to alcohol, the report suggests that alcohol and alternative forms of intoxication will be able to co-exist, giving examples of innovative venues that are already raising the bar when it comes to ways to liven moods and improve the spirits of guests.

The report showcases the Nine Lives Bar in London's Bermondsey where general manager William Campbell-Rowntree has developed a mood-enhancing non-alcoholic menu featuring nootropic ingredients with the aim of "enhancing mood and cognitive function" to align with the bar's mission to have "a positive influence on guests".

It is an example of what the report cites as a "new wave of interest in alternative mood-boosters". According to CGA by NIQ head of insights & consumer research Charlie Mitchell, the message to bars around the world is clear: "Showcasing the positive impacts of alcohol and celebrating the art of socialising and conviviality through responsible drinking will be critical."

The *Bars in 2035* report concludes that "alcoholic options can co-exist and even thrive, alongside alternative mood boosters, but brands should acknowledge the competition and update positioning accordingly".

Top takeaway: *Consumers are choosing from a growing range of options to raise their moods and boost relaxation — but there is room for everyone in the market*

» the contraction in the number of bars and clubs, and fundamental changes in how consumers interact with the sector. Things have moved from consumption to connection, which was one of the big themes of the report."

Two sides of the same coin

Social media pulls both ways. On the one hand, it can encourage the discovery of new bar venues and drive footfall, but it can also lead to people interacting only through their devices.

Mitchell says: "The roundtable showed how much polarisation there is. Some bars now have a no-phones policy to heighten a sense of connection, while others are deliberately designed to be Instagrammable. Both will continue to coexist."

In that vein of polarisation, consumers are also searching for familiar global brands that they trust, and cocktails they know, while also wanting "a taste of local" said Mitchell, adding: "An individual spark can set a venue apart."

For Roland Krupinski, head of global on-trade development at Pernod Ricard, one of the biggest takeaways from the Madrid sessions tied in with SIP's remit. "We discussed many things, but the one that's close to my heart is our ambition with SIP: thinking global, but living local," he says.

"We support local bars to leverage their experience and through SIP we want to be connected to them in each market more than ever. To do that we have to be mindful of what is truly important to them."

Listening and learning

To ensure these opinions at the industry coalface are heard, Pernod Ricard is going a step further. "As an outcome of this report, we will create a 'SIP Manifesto' capturing the key trends discussed by global hospitality leaders. This will help the industry grow and become better in all aspects of its work and in developing experiences for guests," says Krupinski.

The French drinks group's core message — *créateurs de convivialité* — resonates especially well with bartenders as this is »

» a vital element of what they do, and it comes to the fore in the report.

Krupinski adds: "Only the brands that really listen and give back to the industry will stay relevant. We need to be an active partner, especially when it comes to training needs, giving them inspiration in their careers to make hospitality a real job. This applies across the board from hotel F&B managers and bar owners to chefs and managers, as well as bartenders. Hospitality can create a lot of opportunities."

As a former bartender, CGA's consumer research manager Dylan Battick is highly attuned to the social needs of this sector and how they can vary by market. "There is a real work-life balance issue," he says.

"In India, for example, where the trade is starting to develop very fast, a lot of bartenders are working 60-plus hours a week. It means they can't experience the trade themselves, because they have no time."

This can impact engagement and learning, and can actively put people off the trade. "Brands are trying to address this by giving bartenders the means to gain experiences through things like sponsored 'industry nights' or individual grants to go to cocktail weeks," says Dylan. "These are critical elements to create environments where bartenders can enjoy their careers. Staff retention is already a concern following a big exodus during Covid."

Mitchell concludes: "The next ten years feel pivotal. The industry has always faced challenges, but they seem to be more frequent. What will always remain constant is the need to socialise and bars must step up to create those great hospitality experiences that are still craved by consumers." GDI



Image: iStock.com/Wirestock

End of the smoke and mirrors? Consumers are increasingly seeking simpler, good-value serves

Keeping it simple: The return of stripped-back, good-value drinks

Covid has a lot to answer for, including the rise of making cocktails at home and, in turn, the familiarity of no-frills mixed drinks. Could the wave of interest in complex cocktails be over?

"Consumers are starting to look for more simplistic bars, because they realise that cocktails don't always have to be fancy," comments Sara Moudoulaud, a celebrated mixologist at Bar Nouveau in Paris.

Ultra-premium serves are still popular, but many consumers now want more straightforward options. Covid gave them an appreciation of uncomplicated classics,which has remained since the hospitality sector reopened, according to the *Bars in 2035* report.

Value has become more of a driver and is manifesting in demand for simpler serves. While the luxury end of the drinks market continues to flourish, an unstable economic environment has put the brakes on consumer spending.

Top takeaway: *Covid lockdowns and economic pressures have pushed people back towards the familiarity of simple, well-made and good-value cocktails*

CGA by NIQ's research suggests that consumers still want to go out, but they are drinking less when they do so, with 25% of global consumers planning to drink fewer cocktails in the year ahead.

This has slowed the premiumisation trend, but doesn't mean that consumers are willing to sacrifice quality.

"Value for money doesn't necessarily mean cheap — just worth the price that is being paid," notes the report.

"Consumers are seeking high standards at fair prices — and if they don't get them, they have plenty of other bars and drinks categories to choose from."

Digital disconnect: Search for real-world connections

There is a paradox to deal with in the hospitality world: while social media can drive success (see p60), some consumers are switching off in search of real-world inspiration and deeper connections offline.

The role of social media is only going to grow — Instagram is now at 1.4bn active users and TikTok just topped 1bn. These platforms are overshadowing traditional advertising channels, and bartender influencers will become ever more important.

But the *Bars in 2035* report points to "a growing backlash" against social media.

Top takeaway: *As a backlash against digital culture deepens, bars and brands can help consumers establish more meaningful connections*

"We are starting to see venues, brands and consumers push back against the 'always-on' culture, and seeking to create refuges from the online world," it notes. "Momentum for this disconnection is going to build, and brands and venues that accommodate it can flourish".

As consumers scale back social feeds to protect their mental health and indulge in more 'real' experiences, smartphone bans in venues to protect people's privacy and allow them to relax are on the rise.

As one roundtable participant puts it: "There will be a need for bars where consumers can just enjoy the night without the pressure to take photos."

Bars and brands will have to deftly balance the online world and offline interactions; they are opposing but complementary and there will be demand for both in the decade ahead.

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A streamlined ProWein promises increased content with a focus on navigating future industry trends

ProSpirits returns bigger and better at Düsseldorf

With more spirits exhibitors and a new Business Forum, there is plenty to look forward to at the Düsseldorf trade fair from 16–18 March. It may be trimmed down this year (5,000 exhibitors, down from 5,400; 11 halls from 13), but organisers claim ProWein will more than make up for its size with increased content. From AI and TikTok to pricing trends and sustainability, this year's focus is on helping drinks businesses navigate the future — the new Business Forum will play a key role in this — and there's a packed programme of seminars, masterclasses and events running throughout. ProSpirits has been expanded after its successful debut last year and will feature up to 450 exhibitors from 56 countries. Here, we take a closer look at some of the companies hoping to make waves at ProWein 2025

BBC Spirits
H09 Hall 5

BBC Spirits will present its latest innovations and global growth strategy. The spotlight will be on Etsu Gin, a range of Japanese gins crafted with traditional techniques and modern precision, including new product developments. ProWein attendees will also get an exclusive first look at "upcoming product launches", expanding the company's premium portfolio. In addition, BBC Spirits will highlight its strategic market expansion, focusing on new partnerships and distribution growth in key international markets.



Clonakilty Distillery
J17 Hall 5

Ireland's Clonakilty Distillery will showcase its award-winning Single Pot Still Irish Whiskey, fully matured in ex-bourbon and Amontillado sherry casks — winner of double gold at the 2025 San Francisco World Whiskies Awards. The distillery will also present its range of blended whiskies uniquely crafted with Clonakilty Single Pot Still and premium Irish Grain Whiskey. Rooted in tradition and shaped by the wild Atlantic coast, Clonakilty says its whiskey embodies "a deep connection to the land, sustainable craftsmanship and a spirit of innovation passed down through nine generations of the Scully family".



Distell (Heineken Beverages SA)
B100 Hall 12

Visitors to this stand will gain insight into how innovation is shaping the future of wine. Heineken Beverages International (HBI) will showcase its commitment to sustainability and innovation alongside its diverse wine portfolio. Key highlights include the upcycling of cellar effluent water for irrigation, supporting regenerative farming, and hybrid vine planting, with Nederburg pioneering disease-resistant varieties in South Africa. HBI will also host an expert session with Andrea Freeborough on 10 March at 11am, exploring sustainable viticulture and water management strategies.





Diwisa
K44 Hall 5

Diwisa continues to expand its portfolio of premium Swiss spirits, with a balance of "tradition and innovation". At ProWein, it will unveil a refreshed design for Trojka Vodka & Liqueurs, offering a new visual identity for the well-known Swiss brand. Alongside this update, the distillery will present its latest craft spirits, including Goldwaecher Rye Whisky and Marito Aperitivo, a herbal-»

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» lemony spirit suited for spritz cocktails. Established brands such as Xellent will also be available for tasting.

Douglas Laing
A07 Hall 7

Glasgow-based Douglas Laing will showcase a selection of its premium scotch whiskies, highlighting its "remarkable regional malts" — a multi-award-winning range representing Scotland's whisky regions with six distinct bottlings, all non-chill-filtered and free from added colouring. In addition to the core line-up, the presentation will include limited editions, Strathearn Single Malt and highlights from the Specialist Selection, offering a "diverse exploration of craftsmanship and regional character".



El Supremo Rum
B31 Hall 7

On display for El Supremo will be El Supremo 18yo, aged for nearly two decades. This exceptional Paraguayan rum undergoes a unique "double-cask process" in Incienso Marrón and French oak, developing a rich profile of "deep berry notes, refined oak and delicate spice". As the most prestigious expression in the El Supremo range, the company says the 18yo "stands as a testament to the brand's dedication to tradition and innovation in premium rum-making."



Ferrari Trento
D68 Hall 16

Grupo Lunelli's Ferrari Trento will showcase its prestigious collection of Trentodoc sparkling wines. The stand will highlight their signature ranges, including the iconic Linea Classica, elegant Perlé and exceptional Gran Cuvée, offering a taste of Italian excellence and craftsmanship. Additionally, visitors can explore Linea Riserva, the aged cuvées and the exclusive limited-edition labels. With a focus on premium sparkling wines, Ferrari Trento invites attendees to "experience their legacy of creating its renowned bubbles".



Hardenberg-Wilthen
A35 Hall 5



With a 300-year distilling heritage, showcasing tradition is the order of the day at the Hardenberg-Wilthen stand. The distiller will highlight its Hardenberg Club Whiskey and Schwartzhog Kräuter Liqueur brands. The liqueur combines herbs, fruit, roots and vermouth for a "smooth, subtly citrus profile", ideal for cocktails like the brand's Schwartzhog mule. The Hardenberg Club Whiskey range — Triple Malt, Straight Wheat and Straight Rye — is crafted from estate-grown grains and aged in oak barrels, some over 250 years old.

Hayman's Gin
L35 Hall 5

Hayman's Gin Distillery will present its range of London Dry gins, including its new, distinctive gift-wrap collection which it first launched in World Duty Free stores late last year. With over five generations of expertise, the UK brand continues to



produce gin using its original family recipe. As a recognised name in the industry, Hayman's remains committed to tradition while introducing new developments. Visitors will have the opportunity to explore the latest updates and learn more about the brand's approach to gin production and innovation.

Henkell Freixenet
E10 Hall 4

German-Spanish alliance Henkell Freixenet, a major player in the world of sparkling wine, will showcase its diverse portfolio, including cava, prosecco, crémant, champagne and sparkling wines, alongside a selection of wine and spirits. This year, the spotlight is on its three global icon brands — Freixenet, Mionetto and Henkell — as well as Alfred Gratien Champagne and Gratien & Meyer Crémant. With a strong international presence, Henkell Freixenet bought out its distribution joint venture partner in Portugal last September.



John Distilleries
K46 Hall 5

Indian whisky maker John Distilleries is set to present its award-winning Paul John Single Malts, including Nirvana, flagship expressions Brilliance and Bold, Select Casks (Classic, Peated, PX, Oloroso) and Mithuna from the Zodiac series. Since their UK launch in 2012, the company says Paul John Single Malts have "garnered global »



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» acclaim, often compared to — and even surpassing — scotch whiskies, backed by numerous awards". The distiller's Big Banyan wines and Roulette Whisky will also be on display, showcasing the brand's commitment to "exceptional spirits and wines for a worldwide audience".

La Martiniquaise
A15 Hall 5



France's La Martiniquaise will showcase its diverse portfolio across five key areas: scotch whisky, mixology, craft from France, wine and brandy, and soft and no/low. The company will highlight innovative offerings such as Gibson's Italian Lemon Gin and Label 5 Original Citrus, which the company's Anne Ernould says is made from a "unique and balanced recipe, perfect for sharing with friends and aligned with our values of group power and inclusivity".

MacDuff International J46 Hall 5

MacDuff International will showcase its award-winning portfolio of premium scotch whisky, blending heritage and innovation. The collection includes blends like Islay Mist and Lauder's, alongside newer additions such as Waterproof Blended Malt and RyeLaw, a single-distillery Fife rye scotch launched in partnership with InchDairnie Distillery. Visitors can explore new releases, enjoy exclusive tastings and learn about MacDuff's commitment to craftsmanship and quality that has defined its place in the global whisky market since 1992.



Milestone Beverages
F10 Hall 5



Milestone Beverages will showcase its expanded Stateless US Whiskey range at the trade show, introducing new apple and peach flavoured whiskies alongside a 1L varietal. Inspired by the "dynamic nomads of America's modern circus", Stateless brings together "diverse influences to create a striking sensory experience". The latest additions aim to offer "fresh, dynamic flavours" while maintaining the brand's distinctive identity. Visitors can explore the full line-up and discover how Stateless continues to push boundaries in the category. »



Noblewood Spirits M17 Hall 5

» Noblewood Spirits will present the Beluga Vodka portfolio at ProWein 2025, highlighting the most premium expression in its range — Beluga Gold Line. This vodka undergoes a meticulous filtration process and a 90-day resting period to achieve its refined character. Packaged in an elegant leather box, it features individual numbering and a wax-sealed bottle, opened using a hammer and brush. Recognised for its exclusivity, Beluga Gold Line is served in select high-end venues worldwide.

Rossi d'Asiago D17 Hall 5

Rossi d'Asiago, distillers since 1868, will showcase its premium portfolio featuring brands Antica Sambuca, Volare Liqueurs for Cocktails, Kranebet Botanic Gin Liqueur, Rossi d'Asiago Limoncello and Grappa Culto. Known for its traditional distillation methods, the company "combines 150 years of heritage with innovation". Visitors to its stand will "experience the authentic Italian flavours of each product, explore new business partnerships and enjoy exclusive tastings in a welcoming, professional environment that highlights the unique identity" of Rossi d'Asiago's brands.





Spirit France M37 Hall 5

Spirit France will celebrate Boulard's 200th anniversary with a special limited-edition cuvée crafted from Calvados Pays d'Auge aged for at least 18 years, honouring the brand's founding year of 1825. Known for its role in creating the AOC Calvados Pays d'Auge, Boulard's flagship expressions like Grand Solage and VSOP have earned a global following. The company says the "new packaging reinvents elegance and tradition, featuring a striking gold and white design and a matte black neck, enhancing each expression's unique character with powerful visual impact". GDI





VIEW FROM THE ON-PREMISE

Charlie Mitchell

Can an AI-built strategy succeed in the on-premise or will an alternative EI master plan emerge?

We are living in an AI world, of that there is no doubt. We ask Siri and Alexa about the weather, we use ChatGPT to break down complex subjects into easy-to-understand snippets, and we even get personalised suggestions on which bar or restaurant will be best for us to visit based on previous outings. Yes, even our on-premise visits are becoming AI-generated.

But it is not just users of the on-premise who may benefit from the advantages of artificial intelligence. The directors, planners and marketers of drinks brands are also capitalising on machine learning and AI tools to enhance their strategies for the sector — and, indeed, every sector.

Recent research by APG Planning & Strategy on the impact of AI in marketing and sales suggested that 77% of strategists feel positively about the technology and 90% expect to use it more in future to support their planning and marketing activities. The main tasks it is employed for currently sit within relatively low-level chores — writing copy, translations and the like — but it is when asked about how strategists see the evolution of AI that it gets interesting.

The No.1 such activity? Building and enhancing data-based strategies.

Imagine a world in which the ideal strategy for your specific brand is automatically generated, giving you an ideal outlet target list, an ideal marketing plan, ideal campaigns and copy and an ideal value proposition with which to target ideal customers and consumers.

Except that won't happen. By nature, AI will deliver homogeneous outputs, based on machine learning, designed for efficiency and widespread preference, rather than addressing the needs of individual brands in what is a very specific, unique and complex on-premise world.

That is not to say that the sector won't benefit from increased adoption of AI; quite the opposite. From a strategy and planning perspective, AI will be a heavy-lifting tool on which specificities can be added and fine-tuned.

However, it is in other ways in which we may see AI disrupt and advance the sector. OpenAI CEO Sam Altman recently suggested that one of the secondary benefits of AI will be an evolution and increase in leisure time and, indeed, the increased desire to connect with other humans outside the work setting. Sounds like a cold pint down the pub to me…

If artificial intelligence does allow us more time to socialise with friends in the on-premise, capitalising on this also requires a strategy. I have long talked about the need for not an AI strategy in the sector, but an 'EI' strategy — yes, cheesily I have plotted those key needs and descriptors, critical to on-premise success and all starting with the letters 'E' or 'I'.

Put bluntly, the on-premise sector is all about **Experiences** and **Interactions** — regardless of any AI advancements, the hospitality sector is one which is delivered by, and experienced by, humans and it is human connections that go on to facilitate further connections between our brands and our consumers.

It is where we can **Educate** and **Inspire** our potential consumers through **Elevated** serves, with an impact stretching far beyond the physical world of the on-premise through social media content and the perfect **Instagram** snap of the perfectly served beverage. Indeed, the sector is one in which **Equity** is built and where long-term brand health is cemented.

The key to unlocking all of that EI benefit? It is of course **Execution**. There is arguably no other channel with such a level of operational and logistical complexity, rendering many a well-laid plan awry.

Be it wrestling the various tensions between distributors and venues, the listing agreements and non-compete clauses, or simply the ability to get products into the hands of bartenders and consumers, there are multiple hurdles to overcome to **Excel** in the sector.



Image: iStock.com/Khafizh Amrullah

What the on-premise needs is an EI strategy

Even when all of that is successfully navigated, pinpointing the perfect venues on the perfect occasions is also a challenge, requiring a level of detailed understanding and, of course, **Investment**. At times when every cent spent is scrutinised, an on-premise investment plan must be smart and must be strategic. It is likely that the return on any investment will not be imminent — this is not a channel where short-term rewards are prominent; instead, it is a long-term bet on your future brand health.

Underpinning all of that is **Insight**. Maybe one day that insight can be translated into a winning, tailored and differentiated strategy through AI, but not until there is a clear understanding of the sector EI strategy in place first. 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 available.*

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