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Refreshed packaging honours both tradition and modern trends, see p26–27

Pernod Ricard unveils bold new look for Altos Tequila

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The travel retail issue

PLUS

Why the right backers bring more than the biggest cheque to drinks startups

Truth, lies and data: the comfortable reality about how research can mislead us

Interviews with AB InBev, Pernod Ricard, Intagulf, Harding+, Tipple & Fluxion Advisors

China's beverage alcohol industry faces up to new market realities in a post-pandemic world

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COMMENT

Joe Bates

External knocks aside, the travel retail drinks business needs to acknowledge its customers are changing

This month's TFWA World Exhibition & Conference (28 September–2 October, see preview p66) comes at a time of significant global upheaval for travel retail, luckily a business channel that has long been well-versed at coping with external shocks.

Geopolitical tensions, tit-for-tat tariffs, a cost of living squeeze in many markets and shifting spending behaviour among Chinese travellers have all proved destabilising factors. Yet demand for air travel has continued to grow unabated. Airports Council International forecasts 9.9bn people will catch a flight this year, almost a 5% increase from 2024.

This year the travel retail sector has also been given a timely reminder that unexpected regulatory changes can cause massive headaches. Cognac houses have been unable to resupply Chinese duty-free stores since last December due to a long anti-dumping investigation into EU brandy by the country's authorities.

The ban has had a sobering effect on the travel retail sales results of cognac-owning multinationals, such as Pernod Ricard (Martell) and Rémy Cointreau (Rémy Martin).

Thankfully, an end to the crisis is near. Following China's conclusion of its investigation into EU-made brandy in July, major cognac houses secured an exemption from tariffs after agreeing to minimum levies.

Given the normalisation of business, Pernod Ricard has said it expects supplies to the travel retail channel to resume in the fourth quarter of the year. With cognac accounting for the lion's share of liquor



Illustration: iStock.com/Nadia Bormotova

sales at China Duty Free Group, the country's biggest travel retailer, the end of the ban cannot come soon enough.

A broader pattern noted by retailers and suppliers is that average spend levels are down on previous years even though traffic numbers are up.

In this light, travel retail's continuing obsession with premiumisation is looking a little antiquated, although pockets of premiumisation still remain, especially in emerging categories such as tequila (see p29), but also vodka and single malt whisky.

As IWSR points out, spending in the channel has become "cautious and value-driven", with shoppers prioritising "value and unique travel experiences". Travel retailers are having to work harder than before to convert browsers into shoppers as passenger mixes evolve, bringing with them brand-new shopping behaviours.

Scotch whisky remains the bedrock of travel retail liquor sales, but as Richard Woodard explores on p18, its pre-eminence is now under challenge as whiskies from other countries increasingly eat into its market share. In particular, Indian whisky brands, such as Rampur and Indri, are fast expanding their duty-free distribution outside the country as outbound Indian international travel booms.

The same pattern is also observable with wine, as Henry Mathieu points out on p35. Champagne remains a symbol of luxury in many travel retail stores, but a growing number of travellers are turning to alternative sparkling wines that offer quality and versatility at more accessible price points. As a result, sparkling wine enjoyed travel retail sales growth of 6% in 2024, while champagne saw a 3% year-on-year decline.

These shifts have much to do with the emerging Gen Z cohort, which now accounts for 40% of global travellers. The sector needs to do a much better job of appealing to this tech-savvy, eco-conscious and experience-driven group.

As our resident marketing columnist, Chris Tyas, points out in his excellent column on the dangers of relying too much on research (see p14), this generation's complicated relationship with alcohol has been misunderstood.

It transpires that many younger LDA consumers *are* re-engaging with alcohol, but they are cash-strapped. Is it any surprise, then, that many Gen Z travellers walk past the duty-free aisles when the dominant message remains one of luxury, exclusivity and premiumisation? GDI



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News briefs

Catch up quickly on the global drinks stories that matter

FINANCIAL RESULTS

AB InBev put in an improved showing with its Q2 2025 results, boosted by continued growth for the company's "megabrands", especially Corona which grew 7% outside its domestic market. The 3% revenue gain helped the brewing giant to post a 2.3% first-half sales increase.

The Boston Beer Co reported a 1.5% rise from the three months to the end of June. Last year saw Q1's top-line increase undone by a decline in Q2.

Campari Group returned to top-line growth in the second quarter, as anticipated, with sales up 3.5%, leaving revenues for the six months to the end of June essentially flat at EUR1.53bn (US$1.79bn).

A fourth-quarter sales dip left **Diageo** to record a 1.7% revenue increase in the year to the end of June as the Johnnie Walker owner battled continued challenging trading conditions in a number of regions.

Heineken followed a lacklustre Q1 performance with a solid set of numbers for Q2 as sales rose 3.3%. Declines in Europe and the Americas were more than offset by robust gains in Africa & Middle East and Asia-Pacific.



Corona boosted AB InBev's Q2 results with 7.7% growth outside its domestic market

Moët Hennessy reported a promising top-line performance in its most recent quarter, with the company's sales deceleration rate starting to slow. The company, part of the LVMH luxury goods conglomerate, followed the first quarter's 9% fall in sales with a 4% dip during the three months to the end of June.

Molson Coors Beverage Co lowered its full-year guidance for the second quarter running after sales for the three-month period ending 30 June dipped by 2.6%.

Proximo Spirits booked a fourth consecutive quarter of declining sales with the latest three-month period in line with the first quarter of the current calendar year. The dip of 6.4% in sales from the three months to the end of June followed Q1's fall of 6.9% on the corresponding period a year earlier.

Rémy Cointreau posted a near-6% Q1 sales increase versus the corresponding three months in 2024.

Treasury Wine Estates surpassed its pre-pandemic annual sales — finally — booking a 6% top-line lift from the 12 months to the end of June. Twelve-month volumes were down by 2.7% on the corresponding period to the end of June 2024.

Viña Concha y Toro overcame difficult trading conditions in a number of markets to post a 3.2% rise in second-quarter revenues, driven by value gains as volumes remained relatively static.

William Grant & Sons reported a 6.5% drop in revenue for its financial 2024, falling to GBP1.83bn (US$2.46bn). The privately-owned company said the decline compared to 2023 is "in line with market trends" which included the "continuation of significant destocking".

COMPANY NEWS

The Boston Beer Co CEO Michael Spillane stepped down from the role this month to focus on "important personal matters".

BrewDog is set to shutter ten on-premise outlets in the UK as part of a "rationalisation of our bar footprint", including its flagship bar in Scotland.



Former Diageo CFO Deirdre Mahlan has re-embraced the role on an interim basis

English wine group **Chapel Down** revealed that its chair of the board, Martin Glenn, stepped down from the role in September. The company's largest shareholder, Michael Spencer, has assumed the position, having been a non-executive director since 2023.

Diageo named Deirdre Mahlan, a former chief financial officer of the business, as interim CFO following Nik Jhangiani's recent move into the interim CEO role. Mahlan previously served as Diageo's CFO from 2010 to 2015.

Diageo also increased the target of its current cost-saving initiative by a further 25%, but stopped short of detailing how many jobs will be cut. Jhangiani insisted the initiative is as much about reinvestment and capability-building as it is about efficiency.

Rémy Cointreau appointed former Suntory Global Spirits (then Beam Suntory) North America president Jessica Spence to its board of directors.

MERGERS & ACQUISITIONS

Constellation Brands sold its Copper & Kings American brandy label to Kentucky-based Bourdon Spirits Co.

Pernod Ricard sold off two more of its non-core spirits brands, Clontarf and Knappogue Castle, to Dublin-based Cobblestone Brands.

Pernod Ricard also agreed to sell its Imperial Blue Whisky to India's Tilaknagar Industries, following recent speculation around a possible deal.

Rémy Cointreau acquired a minority holding in non-alcoholic spirits brand JNPR. Neither party disclosed the size of the stake nor the sum paid.

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SUSTAINABILITY MATTERS

Rosie Davenport

Now is the time for drinks brands to evolve ESG from an ambition to a competitive advantage



As the ESG (environmental, social and governance) landscape evolves, big promises are out and proof, action and shared value creation are very much in.

This new order has emerged as a consequence of expectations from key stakeholders, most crucially, investors wanting to see thorough evaluations of business risk and consumers eschewing brands failing to meet their ethical expectations.

For drinks companies, the message is clear: evolve your ESG strategy, or risk falling behind. Here are the five ESG trends now defining the future of the drinks sector and how brands are rising to meet them.

1. From commitments to measurable impact

Net zero targets and responsible sourcing pledges are no longer enough. Everyone in a company's value chain expects clear language and tangible results: litres of water saved, tonnes of carbon avoided, waste diverted from landfill. The shift is from ambition to accountability.

Companies are also becoming more realistic in their targets and focusing on the issues they can influence and have the most significant negative impacts.

For drinks brands, this trend means ESG must be embedded into core KPIs, supply chain metrics and investor reporting.

2. Packaging as a platform for sustainability and innovation

Packaging remains one of the most visible — and environmentally intensive — aspects of the drinks industry. Pressure is mounting to reduce materials, increase recyclability and rethink the way products are marketed and delivered to consumers.

As a result, companies are trialling lightweight bottles, reusable systems and digital labelling (QR codes) to communicate provenance, health data and environmental impact. This trend will be at the heart of the industry for some time, so we can expect more pilots and ideas. Increased innovation will also bring cost savings and early adopters are already setting the pace with governments signalling they are ready to support disruptors.

The big test will come down to behavioural change among consumers and how fast they buy into new formats, recycling programmes and circular reuse systems.

3. Responsible drinking and health as a social ESG priority

Social impact is rapidly gaining traction as a core ESG pillar beyond workforce, labour rights and diversity. In the drinks industry, how companies address alcohol-related harm, promote moderation and respond to health-conscious consumers is becoming a major differentiator.

Building on initiatives that would once have fallen under corporate social responsibility (CSR), there is a renewed global effort to promote responsible marketing, underage drinking prevention and increased availability of no/low options. All of these areas align with growing consumer expectations for ethical, inclusive brands.

As more consumers shift toward wellness and transparency, drinks companies are repositioning ESG to include social responsibility, as well as environmental metrics. Expect further investment in health-led innovation and big-name brand spin-offs.

4. Supply chain transparency and regenerative sourcing

Consumers and investors increasingly expect companies to understand and influence their supply chains, from field to glass. With agriculture contributing a significant share of industry emissions, regenerative agriculture, ethical sourcing and Scope 3 emissions reduction are now front and centre.

Sustainability linked finance and ESG-driven procurement policies are accelerating this shift. There is an emphasis on traceable and ethically sourced products. At the same time, companies are implementing social enterprise principles to safeguard workers. Those with complex international supply chains and farmers thousands of miles away are grappling with how best to manage this challenge.

The winners will be those truly engaged at every stage of the supply chain network who are then able to communicate best practice, secure supply and authentically use it as a positive brand differentiator.

5. Anti-greenwashing and the rise of ESG assurance

As ESG gains prominence, so too does the risk of overpromising. The EU Green Claims Directive and similar regulations are raising the bar: companies must now provide independent evidence to support environmental claims, or face reputational and legal consequences.

This is prompting a wider shift towards audited data, verified reporting and simpler language in corporate communications. Investors are asking for more detailed, standardised disclosures. Consumers also want claims they can trust. In response, drinks companies are tightening internal review processes, involving legal and compliance teams earlier and increasingly engaging third-party ESG assessors.

A sector in transition

The drinks industry is not unique in grappling with how to respond to the changing demands of ESG with an eye on measurable progress, cross-functional integration and strategic clarity.

There is a clear acknowledgement that there's still work to do. Scope 3 emission tracking is incomplete across much of the sector. Meanwhile, social ESG remains underreported and many sustainability initiatives still lack the transparency required to build long-term trust.

While companies get to grips with the 'how', a powerful 'why' is emerging with the leading lights using ESG to innovate, connect with conscious consumers and align with financial and investor expectations.

Now is the time for drinks brands to evolve ESG from an ambition to a competitive advantage by ensuring that what's said publicly matches what's happening behind the scenes. GDI

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

Illustration: iStock.com/EirenZ

How Milestone Beverages cracked India

Milestone Beverages HK has found success in India by targeting value-led categories like entry-level bourbon and tequila, but MD **Joe Milner** says there's more to come, including a premium push with Japanese whisky and a new American single malt





Milestone Beverages HK's portfolio features Stateless Bourbon (left) and Onikishi Japanese Whisky, while its partner brands include Conciere Santoro Tequila

India is fast emerging as the global spirits industry's most exciting market. Among the nimble companies making waves there is Hong Kong-based Milestone Beverages HK, a brand incubator with a sharp focus on accessible yet aspirational spirits. In just three years, the company has gained meaningful traction in North India, according to founder & managing director Joe Milner.

"Distribution is always the priority," says the former Diageo, Pernod Ricard and Constellation Brands executive. "I can imagine there are a lot of people trying to crack India, but they don't know how; they don't have the contacts, or maybe they don't have the right portfolio. However, we've managed to make it work."



Joe Milner: 'Scotch whisky in India is a bit of a bloodbath'

Taking the path less trodden

In India, where import duties remain high, regulations vary dramatically between states, and local tastes traditionally skew towards brown spirits, Milestone Beverages has chosen to follow a different path.

"Scotch whisky in India is a bit of a bloodbath," Milner claims. "I now say let the big boys fight it out." Instead, the company has zeroed in on entry-level bourbon and tequila, two relatively small but fast-growing segments often overlooked by multinationals.

Sales of tequila in India have tripled since the pandemic and the Mexican spirit is now the fastest-growing spirits category in the country, according to *The Economic Times*. The potential for bourbon is also enormous: despite brown spirits accounting for around 95% of spirits sales in the country, bourbon sales totalled less than US$9m in 2024.

Milestone's premium push

Consequently, Milestone's Stateless Bourbon brand is front and centre of its India strategy. "[US President] Trump and [India's Prime Minister] Modi agreed to reduce the tariff on bourbon from 150% to 100%, which has made a huge difference," Milner reflects.

Milestone's own accessibly priced tequila brand, Segundo, is another priority. "We're half the price of Cuervo, for example," Milner says. "If buyers are struggling, it's a bit of a no-brainer." The company also distributes tequila brands Los Cabos and Conciere Santoro, both produced by California's LeVecke Corporation.

But value is only part of the picture. Milestone is also developing a premium side to its India business. Its Onikishi Japanese Whisky is positioned as a high-quality offering for the duty-free market, and its latest innovation, Stateless American Single Malt, is being developed with an eye on the premium brown spirits segment.

Local connections key

In a country where compliance is challenging and ever-changing, the importance of a local partner cannot be overstated. "You need to have someone professional," says Milner. "Someone who understands how they do business, can get over regulatory requirements and solve hiccups along the supply chain."

Milestone works closely with Rukn Luthra, formerly a senior executive at Rémy Cointreau, Pernod Ricard and E&J Gallo. "He works as our sales advisor in the market, connects the dots and helps us out," says Milner. "With him, it's been a fantastic relationship. We're concentrating on tier-one cities and perhaps Bangalore will be next — we're very focused."

Smart, simple and scalable

Milner believes the next big step for Milestone in India lies in local bottling. "We're trying to crack the bourbon bulk market," he says. "We've been trying to figure out how we can import bourbon into the market — whether it's actually blended with Indian spirit or done as a bottled-in-India strategy. I just think there's a huge opportunity in this space."

Milestone's core strategy — value-led but premium-leaning, off-trade focused and built around efficiency — is starting to deliver real results. "Within the context of our small business, people are reordering," says Milner. "There's a lot of excitement."

For those hoping to follow in Milestone's footsteps, Milner has some advice: "You need to have the right partners, with cash, and the right product, but the secret really is the entry-level prices, which many people can't do."

Looking ahead, Milestone's goals are clear. "In five years, I'd like to be doing about 50,000 cases a year [in India]," Milner says.

Milestone's progress in India's evolving spirits sector proves that smart positioning, strong local ties and a focus on value can crack even the most complex markets. GDI

New products

Take stock with our roundup of the latest drinks launches



Laphroaig The Wall Collection Rope Edition 39yo

Suntory Global Spirits has released the second — and final — bottling in Laphroaig's The Wall limited series. The Rope Edition comes in a hand-painted bottle featuring artwork designed by UK-based illustrator & ceramicist Laura Carlin.

- Scotch whisky, single malt, Islands (Islay); 39yo. Aged in ex-oloroso sherry European oak, then finished for an unspecified period in ex-pedro ximénez sherry European oak; 42.4% ABV.
- Released at the end of August in markets including the UK through spirits specialists in the country's off-premise channel.
- In the UK, SRP of GBP4,950 (US$6,675) per unit, limited to 200 numbered bottles.



Atlas London Dry Gin

Singapore bar Atlas has released a namesake gin, created with cocktail serves in mind.

- Gin, London Dry. Botanical mix led by juniper and joined by coriander seed, orris and angelica root, as well as lavender and roasted almonds; 47% ABV.
- Available since mid-August at Atlas Bar in the city state, as well as online for worldwide delivery.
- SRP of SGD98 (US$76) per 50cl bottle. Also on sale in a "curated set" that features "tonic pairing, garnishes, bottled cocktails and recipe cards" at SGD138.

Flor de Caña Coco

This release from Compañía Licorera de Nicaragua's rum brand is based on its 4yo blanco expression.

- Rum-based liqueur; coconut-flavoured; 17% ABV.
- Available on Amazon from September, rolling out across multi-channels afterwards.
- SRP of GBP20 (US$27) per 70cl bottle.



Rebel Butter Pecan Cream Liqueur

Luxco's Rebel wheated mash bill bourbon brand is being augmented with a pecan-flavoured liqueur extension.

- Liqueur; American whiskey base (Kentucky straight bourbon), blended with cream; 15% ABV.
- On sale since late August in the US.
- SRP of US$19.99 per 75cl bottle.



Beam's Pin Bottle

A "personal favourite" of Jim Beam's, the pin-shaped bottle (from ten-pin bowling) contains a limited-edition expression of the Suntory Global Spirits-owned bourbon brand.

- American whiskey, bourbon, Kentucky; 8yo; 43.4% ABV.
- On sale since 23 August ("Jim Beam Day", according to Suntory), exclusively from the James B Beam Distilling Co distillery in Clermont, Kentucky.
- SRP of US$99.99 per 75cl bottle; available in limited — albeit unspecified — quantities. »





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Maker's Mark Cellar Aged 2025

» The third annual expression in the Cellar Aged series from the Suntory Global Spirits-owned brand leans heavily — 74% — on 11yo bourbon, which is joined by 13yo (10%) and 14yo (16%) liquid.

- American whiskey, bourbon, Kentucky. Comprises a blend of 11yo, 13yo and 14yo Maker's Mark; 56.45% ABV.
- Debuts in Germany, the US and "select" global travel retail accounts from September, prior to wider roll-out later this year and early next to markets including Australia, Japan and the UK.
- In the US, SRP of US$175 per bottle, in limited — albeit unspecified — quantities.



The Dalmore Portfolio Series 2

Whyte & Mackay's second edition of The Dalmore Portfolio Series for global travel retail comprises three bottlings, including this iteration at US$952.50.

- Scotch whisky, single malt, Highlands, no age statements. Three bottlings — No.1, No.2 and No.3 — finished in ex-bordeaux wine casks (46.8% ABV), ex-châteauneuf-du-pape (46% ABV) and ex-bordeaux cabernet sauvignon (49.7%), respectively.
- Debuting in Singapore Changi Airport with Lotte Duty Free on 1 September ahead of wider international GTR roll-out.
- SRPs of US$635 for No.1 (3,595 units), $952.50 for No.2 (1,596 units) and $1,270 for No.3 (1,014 units).

High West Bottled in Bond Straight Bourbon Whiskey

The liquid comprises a "high-rye mash bill" featuring a mash bill of 36% rye and 64% non-GMO yellow corn.

- American whiskey, bourbon. Aged four years and five months in a federally bonded warehouse; 50% ABV.
- Available in the US at select retailers and began shipping to 35 states online since the start of August.
- SRP of US$79.99 per 75cl bottle.



Glen Scotia 12yo

Boasting Glen Scotia's new brand identity, complete with bold royal blue and chalk white packaging, the 12yo will be the fifth aged iteration in the Loch Lomond Group-owned distillery's core range.

- Scotch whisky, single malt, Campbeltown; 12yo, aged in first-fill ex-bourbon; 46% ABV.
- On sale since mid-August online for worldwide delivery, as well as through UK spirits specialist The Whisky Shop.
- SRP of GBP45 (US$60) per 70cl bottle.



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



Aviation American Gin Wrexham AFC Limited Edition

The launch spotlights Aviation's ties with the Welsh soccer club, which is co-owned by brand co-founder Ryan Reynolds. The *Deadpool* star retained an interest in the gin brand when it was acquired by Diageo in 2020.

- American gin; contains the same liquid as original release; 42% ABV.
- Available now at selected off-premise operators in the US, as well as online for domestic delivery and at the brand's distillery in Portland, Oregon.
- SRP of around US$40 per 75cl bottle (same price as the original Aviation American Gin).



Glenmorangie The Altus 25yo

Taking its name from the Latin word for 'high', Altus becomes the third iteration in the Moët Hennessy brand's core range, alongside Original 12yo and Infinita 18yo.

- Scotch whisky, single malt, Highland; 25yo. Comprises whisky matured in ex-bourbon mixed with whisky that has been finished for an unspecified period in ex-madeira wine barrels; 43% ABV.
- On sale since mid-August from spirits specialist operators in the off-premise channel (markets not confirmed), as well as online for worldwide delivery.
- In the UK, SRP of GBP550 (US$739) per 70cl bottle.

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MARKETING TRENDS

Chris Tyas

Truth, lies and data: the comfortable reality about how research can mislead us



Sprite's 'Hurts Real Good' not only taps into Gen Z's passion for spicy, but into its pursuit of thrilling sensations

It's tempting to think you need *all* the research before you can make the right business decisions. That you must push the boundaries of consumer understanding and mine at the coalface of in-depth knowledge.

But if you're the kind of business exec who thinks you can never have enough research, think again. Too much research really can be counterproductive. And if you let it drive all your thinking about consumers, there's a risk you'll end up blind to what's really going on.

Take the latest results from Bevtrac, IWSR's longitudinal consumer sentiment tracker covering 15 of the world's leading markets, which shows that younger LDA consumers are re-engaging with alcohol.

Recalled alcohol consumption among LDA Gen Zers has risen to "similar levels of participation seen in the population as a whole in most markets", the findings show. Gen Z's alcohol consumption has increased in the last two years, with the proportion of those drinking rising from 66% to 73% in the top 15 markets.

The trend is especially strong in the US, where participation rates among Gen Z consumers rose from 46% to 70%. There has also been robust growth in the UK (up from 66% to 76%), India (60% to 70%) and Australia (61% to 83%).

Further research published by Rabobank in April supports this notion, with data showing that Gen Z's drinking is actually on par with previous generations when you look at the share of disposable income spent on alcohol.

For years we've told Gen Z was abandoning alcohol, with the cohort renamed 'Gen Sensible', 'Gen Moderation', 'Gen Sober Curious' and so on…

This received wisdom was built on two things: countless studies showing younger age groups drinking less alcohol over the past five to ten years, and a rapid rise in sales of no/low-alcohol drinks over the same period. But it seems that correlation does not equal causation. Turns out Gen Zers were just broke.

There are many examples of drinks brands that by over-focusing on the data and under-focusing on context — the circumstance driving consumers to do what they do — ending up allowing themselves to be misled.



Take Coca-Cola's decision to reformulate in the mid-1980s. In blind taste tests, 'New Coke' (pictured left) performed well. Once in the market, however, it flopped — in part due to the emotional connection drinkers had with the old recipe, in part because when drinkers consumed more than the 2.5cl micro-serving used in tests, the new taste started to pall.

In contrast, Red Bull taste tested poorly pre-launch and consumers expressed scepticism about claims about its energy-giving benefits. Rather than go with the data and give up, however, taste concerns were overcome by a carefully cultivated anti-corporate positioning.

Likewise, Monster overcame research indicating consumer concerns at launch that its positioning was overly edgy, aggressive and even confusing by building a solid following among subcultures, and today it rivals Red Bull globally.

My point is that while valuable, research considered in isolation can mislead. Instead, you must get to grips with the context and to do that you must work hard to understand the *why* of consumer behaviour.

'Hurts Real Good', a new global positioning campaign by Sprite launched in early July, is a timely case in point.

This immersive initiative integrates global brand partnerships, talent collaborations and festival experiences to showcase how Sprite's lemon-lime fizz is the perfect partner for the bold, spicy food today's Gen Zers are passionate about.

Research told Sprite that spicy food over-indexed with this group. In fact, 50% of this group actively seek it out.

But they didn't stop there. Instead, they thought beyond the data to the context behind it, building an entire campaign platform about what that signifies socially and culturally: a passion and demand for thrilling sensations.

Marketing research has always provided invaluable insights into customer needs, preferences and behaviours, as well as market trends and the competitive landscape. And it always will.

But the key to brand success lies not in the raw data, but in the insights extracted from them that guide strategic decisions and actions, and power the most effective marketing strategies and campaigns. GDI

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

On our radar

With high-profile celebrity and sports collaborations, these five drinks campaigns are bringing the heat



Rapper's delight D'Ussé

Bacardí is spotlighting D'Ussé Cognac with its new 'D'Ussé Friday' push fronted by rapper Latto and artist Ravyn Lenae. Centred on the VSOP Magnum Edition, the move blends digital content, regional events and a signature D'Ussé peach lemonade cocktail, encouraging fans to toast life's wins with a bold 'victory pour'.



Goal time Buchanan's

Diageo is gearing up Buchanan's Whisky for the FIFA World Cup with its 'Buchamión' campaign. Teaming up with soccer commentator Andrés Cantor, the brand is rolling out a speaker-packed mobile truck, live events across US host cities and a goal-celebration contest offering fans tickets and prizes ahead of the 2026 tournament hosted by Canada, Mexico and the US.

Cold dunk Coors Light

Coors Light is teaming up with American National Football League star Patrick Mahomes once again, this time with a frosty twist. Their fourth collaboration introduces 'The Patrick Plunge' — an ice bath shaped like Mahomes' head. Fans can experience the plunge in person in Kansas City, or buy miniature cooler versions online. With proceeds benefiting charity, the playful push blends cold refreshment with a good cause.





One for all Hornitos

As it celebrates its 75th anniversary, Hornitos Tequila is championing inclusivity with its US campaign 'The Tequila de Todos'. Launching this summer, the push spans media, digital, partnerships and live activations. A playful 15-second spot highlights diverse, unexpected partygoers — underscoring Hornitos' message that great tequila, and great moments, are truly for everyone.

Flavour first 21Seeds

Diageo's 21Seeds Tequila is turning up the flavour with its new 'Flavor, For Real' campaign. Rolling out nationwide across the US, the push spans digital, social and in-store displays complete with margarita activations in partnership with prebiotic soda brand Poppi. It's a fresh, playful pairing designed to spotlight 21Seeds' infused tequila in vibrant, real-life moments.



Q&A

with Pernod Ricard global innovation director **Mathieu Deslandes**



Mathieu Deslandes started his career with Pernod Ricard three decades ago and has worn many hats since — including marketing director for prestige brands at Chivas Brothers. He became innovation director in 2023. 'It's very complex,' he tells **Olly Wehring**, 'but being creative is also really exciting'

You started in your current position in late 2023. I've been with Pernod Ricard for more than 30 years — I've only ever worked for Pernod Ricard! In the past, we had three innovation hubs: one for Asia, another for Europe and one for the Americas. Eighteen months ago we moved away from that regional approach and the group has been trying to find a good organisation for innovation, which isn't easy. There's a lot of complexity in innovation, because you're trying to create something that doesn't exist.

As an industry, around 50% of all innovation comes from the US, based on the consumer appetite for innovation and the industry's frequency of launch. Consequently, that's where I'm based with some of my team. Some other members are in Europe and some are in Asia, and we also have team members based where the products are made, so we're able to interact with the people making the liquid.

With innovation, there are two dynamics that are constantly at play — one is based on markets, the other is based on brands. With the markets, what happens in the US is very different to what happens in China. Then there's what you're trying to achieve from a brand perspective — what do you want the brand to say globally? You need to find a centre of gravity between the two.

'If you as a company don't propose your vision of the future, then you won't be able to play a leading role in shaping the future'

For the last 12 months we've been working on extracting value from the full organisation of Pernod Ricard. Ideas can come from anywhere; you need to have rigour and discipline to assess them and select the right ones. It's very complex, but being creative is also really exciting. Besides, sometimes the best innovation comes from an accident.

How do you feel the priority of innovation as a growth driver has developed? There's certainly more fragmentation in our industry nowadays, not only among the big players, but also from newcomers. The number of SKUs in the scotch whisky category, for example, is completely different today to, say, 30 years ago.

There are two fundamental aspects to innovation: there's bringing something new to the consumer, and there's bringing a level of modernity to your brand. If your brand doesn't come up with new things regularly, then it will become dated, even to someone who hasn't bought it before. The size of innovation today is important, but the main challenge — particularly in spirits — is that the definition of innovation is very different to different people. It can mean something that is a super breakthrough, which may not sell but has an exciting story to tell, and it can also mean something boring, like another age statement. It's not one against the other. After all, the breakthrough of today could be the mainstream of tomorrow.

If you as a company don't propose your vision of the future, then you won't be able to play a leading role in shaping the future.

What's your favourite example of a breakthrough product that has gone mainstream? I'd say the journey of non-alc. When you look at the size of non-alc today, you could conclude that innovation in this area isn't worth it. But if you look at its growth, then you'd be stupid not to start today. While most spirits-based innovations are going to be bigger than non-alc, you should absolutely not stop working on non-alc, because there's doing things now for now and there's doing things now for tomorrow.

You make innovation sound like there are no wrong decisions. Well, it's not so easy. I've »

» been a brand marketing director before and, under our new structure, they're no longer as involved in a brand's innovation. It's not about what a brand marketing director thinks, which was usually too brand-centric and not business-centric; it's now about taking all the insights and digesting them to come up with something that's true.

As in any corporate organisation, the ego is a challenge — you still have to deal with it. Marketing directors play a very important role; they have the most information and are the most passionate about their brand. I speak to them on a weekly basis to understand their challenges and propose solutions.

But innovation is all about getting alignment, which in physics, requires two points — in this case, it's brand and market. If you involve a third point, it gets very difficult. At the same time, because I've done the marketing director job before, I have a good track record and I feel really strongly about the value of collaboration.

Year one has been challenging and exciting. I think — and hope — that year two will be easier!

What impact does an economic downturn have internally on the resources and the level of priority given to innovation? It's more about concentrating on what can deliver at scale. Overall, you need to be more creative in a declining market. What matters most to me is to be better than the market. I remember when whisky in France was declining and Ballantine's had only 5% market share. That's indicative of the moment when you need to be better than your competition.

If there's a negative market dynamic, it's about how much you can compensate. You need to have as part of your road map something that's about tomorrow, as well as something that's about more longer-term, because changes need to be anticipated.

Is gaining market share the definition of success for innovation, then? Market share gain means you're doing better than the others. The effect of bringing something to market that appeals to a new moment of consumption, or increases consumer penetration, is certainly a KPI. Then, there's the level of contribution to the mother brand.

Most of the time, the biggest challenge is the brief. Innovation can't do everything — you need to choose. I'm obsessed with simplicity, which to me is 80% of success. Marketing people are keener on complexity; they believe that if something is simple, then it won't add value.

Success for me is market share gain and developing the brand.

'People live longer between 25 and 85 than they live between 18 and 25. I would rather be the leader in 25 to 85 than in 18 to 25'

What's the consumer age range that you focus your work on? There are many consumer behaviours that take effect when you are older — that also applies to category selection. You may start buying single malt when you're 40 years old, and that's not because you discovered it when you were younger in a nightclub in Ibiza. It's not true that you need to do things between 18 and 25 and that will work forever.

And, sometimes it's the opposite. What you drank as a student may not appeal to you as you become more sophisticated and your lifestyle changes. There is often an open-mindedness to newness.

In innovation, some projects are for the new generation, some are for trading up existing consumers, and some are for introducing older consumers to new experiences. Being obsessed with one demographic isn't the only way forward.

Is focusing on generational trends a smaller part of this puzzle? Because of the complexity of innovation, there are so many parts of the puzzle. There's an element of generations, but for many of our brands, there isn't one generational target. When we do innovation for Absolut, it's much wider, with multiple geographies and target groups, as well as male and female. Our scale would be too limited if we focused just on the Gen Z aspect. The generational aspect is more about how to activate the innovation rather than the innovation itself.

People live longer between 25 and 85 than they live between 18 and 25. I would rather be the leader in 25 to 85 than in 18 to 25. It's true that a consumer's first connection to a brand may happen in a nightclub, so it's part of the journey, but it's not the only part.

What keeps you awake at night? When we're trying to frame the issue and align everybody, but we don't come up with a solution or the right concept. Sometimes, despite your best efforts and methodology, it doesn't resonate with the consumer. There's always an element of the unknown.

Even today, with all the new tools available to you? Well, we did some work with ChatGPT, for example, and to get something really good at the end, you need to input a good selection of information. If you rely on information that's too broad, then the outcomes are very poor and complex — you don't get the simplicity that you need.

So far, we have a good portfolio of innovation to come. Internally, there is high-level satisfaction for what's coming up. But certainly, in the last 12 months at some point in trying to find the right new thing for Absolut, I was being kept awake at night. Once you find it, it seems so obvious that you start to think, 'Why didn't I think about that before?' GDI

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





Recent Absolut innovations include an industry-first paper-based cap and bottle duo (left) and the launch of a 5% ABV RTD with Sprite



The 'Celebrate India' zone with Ospree Duty Free at Mumbai Airport (see p24) is one of a series of Radico Khaitan activations at key Indian airports

Shifting tastes reshape the brown spirits landscape in travel retail

From whiskies of all origins to cognacs, rums and tequilas, premium brown spirits remain a vital — and increasingly diverse — driver of sales in the key global travel retail channel. **Richard Woodard** reports

Whisky, cognac and brandy, as well as aged rum and tequila, have long been the mainstay of spirits trading in global travel retail. But where scotch and cognac once dominated, other categories are now making inroads as consumers increasingly demand more choice — and the regions driving channel growth are evolving too.

"Brown spirits have always been the bedrock of the spirits industry, and with so much heavy investment and innovation in this space, I can only see a steady trajectory in the future," says Joe Milner, managing director of Milestone Beverages HK, owner of Onikishi Japanese Whisky, which Milner says has seen "huge success" in the channel.

Turning to regional trends, he adds: "Right now, it's all about India, and the market is looking to be our biggest globally in the coming years. We are working with several importers and looking to gain traction in the duty-free space in the market. Most of the mature markets, like the UK, Japan [and] Australia, have really been underperforming."

You don't have to tell Sanjeev Banga, president, international business at Radico Khaitan, about the appetite of Indian travellers for high-end brown spirits. He describes travel retail as a "very significant channel" for the company, encompassing healthy sales growth and expansion into newer airports.

"Indians are now one of the fastest-growing international travelling communities, and big spenders," Banga says. "Outbound travel has already exceeded pre-pandemic levels. The Indian diaspora is our biggest brand ambassador, as they feel very proud to see Indian luxury brands competing with the best in the world.



Onikishi has seen 'huge success' in global travel retail and now has its sights set on India

"They not only carry these brands for self-consumption, but also for gifting. Also, increasing availability of our brands in high-end on-trade outlets in various key cities across the world has allowed mainstream customers to taste our brands, and they find it convenient to buy at airports during their travels."

'Clear shift' in consumer demand

The incursion of brands like Rampur, Jaisalmer and Kohinoor from Radico Khaitan reflects the evolution of the GTR channel, and of the broader spirits market that underpins it. While overall GTR volumes for brown spirits remain well below their pre-pandemic high, according to IWSR data, sales of US, Irish, Japanese and Indian whiskies, plus gold tequila, have all improved over that timescale (see p20). Scotch and cognac may have recovered to a great extent, but their share of GTR volumes has inevitably dropped in this evolving landscape.

"While scotch and cognac have traditionally dominated the brown spirits landscape in GTR — much like in domestic »

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» markets in Europe [scotch] and Asia [cognac] — we're now seeing a clear shift," says Salvador Blanco, managing director GTR for Heaven Hill Brands, owner of Elijah Craig Bourbon and Ocho Tequila. "In domestic channels, super-premium American whiskey has shown sustained growth, and we anticipate this momentum will increasingly extend into GTR as consumer demand and awareness catches up."

Reposado tequila, Blanco suggests, represents an "especially compelling" growth opportunity. He explains: "As international travellers become more familiar with the category, discovery and education are driving demand for sipping tequilas.

"This creates an ideal environment to introduce differentiated tequila brands that elevate the retailer's assortment and appeal to consumers seeking authenticity, craftsmanship and premium experiences."

Heaven Hill is a relative newcomer to the channel — its GTR division was only established earlier this year (see p22) — but fellow US spirits business Brown-Forman has had a strong focus on travel retail for decades.

That bore fruit in 2024, with the company's premium-plus GTR whisky sales growing by 8% (IWSR data) — ahead of the category, and mainly driven by Jack Daniel's, Woodford Reserve and the scotch portfolio led by The Glendronach.

Andrew Watson, marketing director, Brown-Forman GTR, India, Middle East, Africa & EurAsia, ticks off an impressive list of travel retail value gains last year: Jack Daniel's Tennessee Whiskey up 12%, supported by the brand's Single Barrel 100 Proof and American Single Malt expressions; Woodford Reserve 24%; and Ron Diplomático 10%.



Heaven Hill Brands launched its GTR division earlier this year and will start channel activations shortly

KEY TAKEAWAYS

- Brown spirits remain the bedrock of spirits sales in GTR, with India emerging as a key destination.
- As Indian consumers travel more, they are increasingly influential ambassadors for the country's products, buoyed by national pride.
- GTR brown spirits sales remain below their pre-pandemic peak, but non-scotch whisky and gold tequila have made gains at the expense of scotch and cognac.
- Sales reflect growing consumer demand for a more diverse range of products in the category and the response of retailers to satisfy that demand.
- Opportunities persist for scotch whisky and cognac brand owners with the right product mix and marketing approach in the channel.

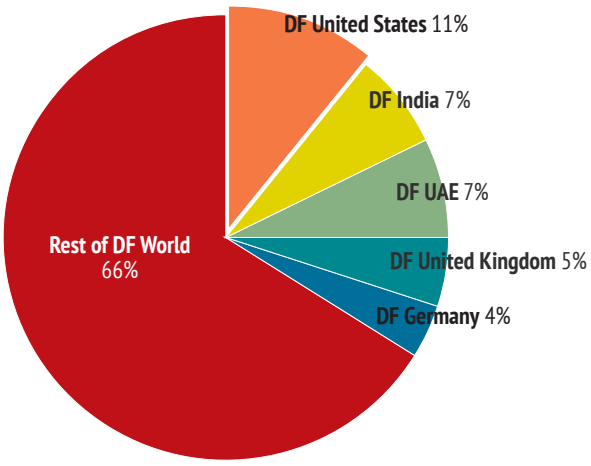
Echoing Blanco, Watson says: "Suppliers and retailers are adapting to the diversification of global consumer tastes and a 'less but better' approach, opting for fewer higher-quality spirits for personal indulgence or gifting. The modern whisky drinker is increasingly diverse and more open to new experiences and ways of drinking, opening the door to categories beyond traditional scotch."

At Bacardí, the company sees travel retail as "a huge opportunity" for Patrón, already the leading super-premium tequila in GTR. "Our latest prestige innovation, Patrón El Alto, has huge category-evolving potential and, since its launch in 2024, has already become the No.2 prestige-plus tequila in GTR, commanding 29.3% market share," says Bacardí GTR marketing director Darragh Ryan.

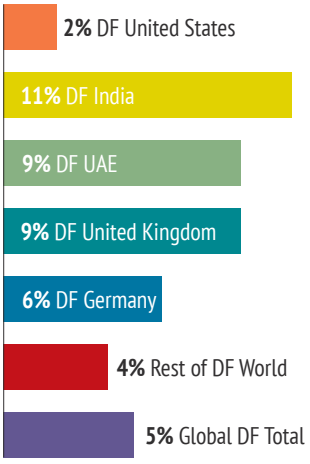
"In H1 2025, its dramatic entrance into India and Europe, two priority growth »

DATA DROP

Total Brown Spirits in Travel Retail: Top 5 Markets Market Share (Vol) 2024



Chg Vol 2023–24



Leading Brown Spirits in Travel Retail Chg Vol 2023–24



Source: IWSR. DF = Duty Free. Brown spirits comprise: gold tequila, gold & spiced rum, cognac, armagnac & other brandies, scotch, US whiskey & other whiskies. Figures rounded to the nearest whole number


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'Not Your Classic Whisky': Bruichladdich rolled out an exclusive scotch range in travel retail

» markets, has been supported by impactful, culturally relevant activations, blending digital and physical shopper engagement with elevated gifting solutions."

Consumer interest in scotch and cognac 'remains robust'

All this talk of increasing diversity sounds like bad news for brand owners playing in the heartlands of scotch and cognac, but Pernod Ricard and Rémy Cointreau don't appear to be over-concerned. "The landscape in GTR is evolving, but consumer interest remains robust across the high-end whisky and cognac categories," says Alice Hoffmann, marketing director GTR at Rémy Cointreau.

Rémy Martin Cognac continues to surf limited-edition products, such as its Louis XIII Lunar New Year and Hong Kong Edition Victoria Harbour coffrets. Single malt scotch Bruichladdich has been positioned as 'Not Your Classic Whisky', including an exclusive GTR range and Bruichladdich Organic Barley 16yo, a channel exclusive launched at Singapore Changi Airport with Lotte Duty Free and now being rolled out across Asia-Pacific hubs.

"From our standpoint, super and ultra-premium tiers are growing across most categories," says a spokesperson for Pernod Ricard GTR. "The last year brought many challenges, for sure, and the battle for share in scotch single malts was intense."



An 18% rise saw The Glenlivet become the No.1 malt whisky in travel retail by volume in 2024

Intense it may have been, but The Glenlivet emerged as the No.1 malt whisky in travel retail by volume (IWSR data), thanks to an 18% rise in 2024, making it the fastest-growing brand ahead of Glenfiddich, The Macallan and Glenmorangie.

Growth was fuelled by The Glenlivet's Distiller's Reserve, 12yo and Founder's Reserve SKUs, boosted by channel exclusives The Caskmaker and The Groundbreaker. GTR exclusives also buoyed fellow single malt Aberlour with a three-strong collection: 13yo Double Cask Matured, 16yo Double Charred Selection and Suthainn Double Sherry Cask Solera.

But Pernod isn't blind to the opportunities offered by non-scotch whiskies and other brown spirits, including Jameson, which has a new Triple Triple expression in Jameson Triple Triple Marsala Cask Edition.

Meanwhile, Rae Gibson, Pernod Ricard GTR director power brands & emerging categories, describes Bumbu Rum as offering "a very exciting opportunity" for the company. Since its launch in 2023, the brand has enjoyed "incredible success" in Europe, becoming the world's fastest-growing super-premium rum. Now, Pernod hopes to achieve full distribution across the Americas in the coming months.



Pernod Ricard's Chivas Brothers released a GTR-exclusive trio of Aberlour single malts in March

New brands, fresh trends, innovative activations and exciting new destinations: premium-and-above brown spirits in global travel retail may be evolving and diversifying more quickly than ever before, but the category remains a vibrant driving force for the channel. GDI

Destination GTR: La Martiniquaise and Heaven Hill make determined progress

Drinks companies are increasingly prioritising global travel retail, lured by its potential to drive high-value sales and its status as an international shop window for their products.

In 2019, La Martiniquaise-Bardinet ranked as the 20th biggest operator in the channel (IWSR data), but had ascended to 13th spot by 2024, and international marketing manager Constance Descamps is determined to enter the top 10 after identifying GTR as a strategic channel for the company's flagship brands. She says La Martiniquaise's GTR sales doubled between 2021 and 2024, with further growth of 10% predicted for 2025 on the back of new listings and organic growth.

Scotch is increasingly vital to this expansion, and the company is now the fifth-largest scotch brand owner in GTR (and third in UAE GTR, behind only Diageo and Chivas Brothers). The portfolio includes blends Label 5, Cutty Sark and Sir Edward's, plus single malt Glen Moray, with Label 5 now ranked third in UAE GTR behind Johnnie Walker and Chivas; and Glen Moray ranked second there, behind The Glenlivet.

Meanwhile, Heaven Hill Brands launched its GTR division earlier this year, marking what division managing director Salvador Blanco calls "a significant milestone" in its international growth strategy. The owner of Elijah Craig Bourbon and Ocho Tequila plans to start channel activations shortly, with duty-free exclusives to follow.

"These launches are designed to offer differentiated, premium expressions tailored specifically for the GTR channel, bringing unique value to travellers and reinforcing our commitment to innovation and differentiation in the category," says Blanco.



La Martiniquaise-Bardinet's Label 5 Scotch Whisky is now third in UAE travel retail



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Brown spirits roundup

Five recent product launches and initiatives reflecting the breadth of the travel retail landscape



The Chuan moves into global travel retail

Pernod Ricard's Chinese whisky, The Chuan, has been gradually introduced into travel retail markets via China Duty Free Group. The Chuan Pure Malt Whisky Travel Exclusive Edition, bottled at 48.6% ABV, is made using European and single-harvest Chinese barley, and aged in cask types from three continents, including rare single-source Chinese Single Oak.



Rémy Martin XO x Anish Kapoor

Rémy Martin Cognac has collaborated with contemporary artist Anish Kapoor on a limited-edition Rémy Martin XO decanter and an exclusive artwork. Activations supporting the launch began in May at the West Kowloon High Speed Rail Link Station, in partnership with Avolta, and in Hong Kong International Airport, in collaboration with China Duty Free Group.



House of Suntory's Hainan first

Suntory Global Spirits has opened its first House of Suntory free-standing boutique in partnership with China Duty Free Group in Hainan's Haikou International Duty Free Shopping Complex. Said to have been inspired by Japanese art and culture, the store is divided into four areas and stocks rare luxury expressions from Yamazaki, Hakushu and Hibiki.

Patrón partners with Ushuaïa

Bacardí-owned Patrón Tequila celebrated its partnership with nightclub Ushuaïa Ibiza during the peak summer travel period in Europe, running an omnichannel campaign at UK and Spanish airports for Patrón El Alto, with purchasers having the chance to win a two-night stay at Ushuaïa Ibiza Beach Hotel, including backstage access to ANTS party nights.





Kohinoor Rum showcased in Mumbai

The vibrant culture of India was brought to life at Ospree Duty Free in Mumbai Airport with the launch of Radico Khaitan's Kohinoor Indian Dark Rum — including a life-size camel, puppet shows, hands-on pottery and authentic matka kulfi. Additional activations are held regularly at airports including Dubai, New Delhi, Sydney and Bangalore.


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The redesigned label avoids clichéd imagery to reflect a modern, on-trend Mexico that changes the perspective consumers have of the country

New look for Altos Tequila emphasises its Mexican heritage and artisanal roots

Pernod Ricard has unveiled refreshed packaging for **Altos Tequila** that aims to increase shelf visibility and consumer appeal. Inspired by hand-painted street signs, the new bottle is 'more Mexican, but Mexican in a different way'

Tequila's status as the most dynamic and exciting spirits category on the planet is evolving as it matures, with steady growth in the US now supplemented by a rising number of high-potential markets around the world.

"The US is definitely still our key market — it's where we make most of our volume for the brand," reports Luisa Jiménez, global senior brand manager at Pernod Ricard's House of Tequila, who has overseen the revamp of the company's Altos Tequila brand. "But we're seeing very good performances outside the US — the UK is our second-biggest priority, and then there are Australia, Canada and Italy. More and more markets are coming through."

Indeed, Altos' sales outside the US increased by 16% in the most recent fiscal year (12 months to 30 June 2025). "And that's at a time when spirits are not in the best moment," points out Jiménez. "We're gaining a lot of relevance and interest in other markets not known for tequila enthusiasts."

And the main reason behind this expansion? "Mexico," says Jiménez. "Mexico is on-trend, Mexico is hot right now." She cites the rising numbers of Mexican restaurants springing up around the world — not so much the mainstream, typical *taquerias* of the past, but higher-end venues showing a new side to Mexican cuisine. "That's a perfect match with Altos, because we leverage a lot with food, and we leverage also with cocktails."

Altos was famously created 15 years ago by mixologists Dré Masso and the late Henry Besant, and the brand has been a bartender favourite ever since, regularly winning awards as the most favoured base for a great margarita or paloma.

"Altos was launched as a tequila from bartenders to bartenders," says Jiménez. "We are still well-positioned in that sense. We have maintained our quality, and 100% agave tequila has gained in importance in all markets."

But even the most successful and popular brand has to evolve if it is to continue to thrive. This year sees a notable revamp of Altos' packaging, with a clean, bold new label and bottle, while retaining the same liquid that has proved so popular with bartenders and consumers around the world.

"The first aim is to stand out," explains Jiménez. "We love our previous version, with the iconic hammering effect, but if you see it on a shelf, it doesn't stand out." In today's cluttered marketplace — not only with tequila, but across the broader spirits landscape — that can be a problem.

With the new design, Jiménez believes, bartenders and consumers alike "can see what Altos is all about" — an approach that extends to the messaging on the label, emphasising the brand's core qualities »

» and eliminating anything esoteric or extraneous. "There were a lot of messages and information on the label that might not mean a lot to consumers," she says. "So we identified which messages are most important to bartenders and consumers."

Key messages include Altos' artisanal production methods and its origins in the tequila highlands of Jalisco province, Los Altos, where Jiménez says the terroir is "very different" to that of valley tequilas. "That's something we are looking to explore more to communicate to consumers," she adds.

But perhaps the most notable feature of the new design is the Altos logo — a bold, blue banner that clearly distinguishes the brand from the competition. "The logo is the most important change," Jiménez explains. "To pass from an almost transparent logo to a big, blue, visible one — it's definitely the biggest change."

The fresh look is inspired by Mexico's *rótulos* — hand-painted street signs known for their expressive character and typography, advertising everything from street food to upcoming concerts. "It's something that you can find anywhere and everywhere," says Jiménez. "On the walls around Mexico City, with all these different fonts.

"We love the characteristics behind the *rótulo* style, because of course it's Mexican, but we don't have a school of *rótulistas* — you either inherit it from your family or you learn to do it. It doesn't have any guidelines. *Rótulos* are expressive, free and flexible, and they're also real, imperfect and made by hand — colourful and playful."

The parallels with Altos' underlying ethos were clear: stemming from the tequila's creation by Masso and Besant, and their detailed specifications of the artisanal processes that would make a tequila with the right character to be perfect in cocktails, while also being enjoyable consumed neat. Another key aspect of Altos is sustainability. As with the old packaging, the new bottle uses recycled glass, but now includes 3% post-consumer recycled (PCR) material, and is 5.6% lighter, further reducing CO2 emissions. "Altos has always been well-known for its sustainability initiatives, and it was important also to put it on our pack," says Jiménez.

However confident the company was that its new look for Altos would be a success in the market, gaining feedback from consumers and bartenders was a vital part of the process, which in its entirety took two years, encompassing four stages.

"We discussed it first with bartenders," explains Jiménez. "The bartender community is the one that knows Altos best and has known Altos for longest. From that, we understood what was important for them." The research compared the new bottle with the old look, alongside Altos' main rivals, with a clear conclusion: the new design outperformed both the old one and the competition.

What is more, the research found that the new bottle increased purchase intent among consumers by 30% — a number that Jiménez describes as "very high, surprising and a great result".

The global roll-out of the new Altos bottle began with the US during August this year, rolling out to other markets over the next several months, including Australia and Canada from September, and the UK from January 2026. The next fiscal year (to June 2026) will be one of transition as stocks are depleted in different markets around the world.

As the new design takes root in bars and stores, activations and a new global marketing campaign will support it, aligning Altos' visual identity to the look of the new bottle, tweaking the communication strategy and working on experiential activities — with a particular investment in 'last three feet' across the US on and off-trade.

In particular, Jiménez wants people to "get their hands dirty", get involved and delve into tequila knowledge, but also to embrace an experimental approach. "We will be trying to motivate consumers to awaken their inner maker," she explains.

Through all of this, the one aspect of Altos that has not changed is the tequila itself. "The liquid is the king," says Jiménez. "The cover is super-important, but what you have inside is most important. Our liquid is very well-known and we're confident that when you try it, you're going to like it.

"It was never about changing the liquid — we are eager to communicate the quality and the artisanal processes it's known for even more. That's super-important for this moment of transition, to let consumers and bartenders know that the liquid will be exactly the same."

What are her hopes for Altos' revamp? "I think our new pack will help us stand out on the shelves," she says. "Not only the pack, but the new visual identity and the new positioning. I think it's going to help us stand out more in a very cluttered category.

"I also think the bottle preserves some craft credentials that we are already known for, including the 'hammered' look and the wooden lid, but it helps us communicate better some key messages from the brand."

It is also, Jiménez believes, bringing some much-needed colour to a category that has, in her view, become rather monochromatic and dominated by black-and-white imagery. "That's not really Mexico," she says. "If I ask you to give me one colour for Mexico, you would never say black."

Altos' new bottle, she concludes, is "more Mexican, but Mexican in a different way". No longer the tired, clichéd imagery of mariachi, sombreros and piñatas: "A Mexico that's on-trend, that changes the perspective that consumers have of Mexico — more modern, with the characteristics that are important for our country.

"Altos brings this combination of tradition with modernity, and we can find that in several ways: the process — some of that is traditional and has been done for the past 500 years, but there are some new processes too. We have UK bartenders involved in the story, but also our *Maestro Tequilero*, Jesús Hernández, who is a traditional Mexican guy. And the new pack as well: it has more modern elements, but some traditional cues too." GDI



The new bold blue Altos logo is 'definitely the biggest' and 'most important change'

Q&A Venezuelan rum Cacique starts a new chapter with La Martiniquaise-Bardinet

Leading French spirits producer **La Martiniquaise-Bardinet** has set about reviving the legacy of Venezuelan rum brand Cacique since acquiring it from Diageo. Spain CEO Jean-Paul Bouyat and Spain global brand director for Cacique Patrizia Damiani reveal how



Patrizia, you started your career on the Cacique brand years ago in Venezuela. What's it like returning to it now, in a very different role and market?

Patrizia Damiani: Cacique was — and still is — a beloved brand in Venezuela. There's real brand love in the home country that has endured through the years. Translating that to Spain, where the brand pioneered the development of the dark rum category in the early 2000s, I see strong awareness, a positive image and distinctiveness. That consistent strength is something we're going to leverage. It's a very distinctive brand with a clear, authentic origin, and that has stayed intact.

How does Cacique fit into LMB's wider rum portfolio in Spain, particularly given the presence of the established Negrita brand?

Jean-Paul Bouyat: La Martiniquaise-Bardinet is now the second-biggest rum player in Spain with these two brands. In Spain, Cacique falls into the standard segment, retailing around EUR14 [US$16.44] per bottle. It sits above Negrita, which is a value brand at around EUR9.50. So they're not exactly fighting for the same space, they're complementary. Cacique 500, for instance, plays in the premium segment, and we're looking to develop more aged expressions in the future, like Cacique Leyenda and Cacique Antiguo.

Damiani: Yes, there's some convergence between the two brands, but each brand owns its unique territory and segment. Together, Negrita and Cacique form a powerful duo: Negrita often serves as the gateway to the category, before consumers progress to Cacique Añejo and ultimately to Cacique 500, our premium expression. As consumers mature in their rum journey, we want to accompany them with different offers. There's a lot of synergy in that.



Hidden gems: Cacique Añejo and Cacique 500

What are the marketing priorities for Cacique?

Damiani: This is very much a transitional year for the brand. We acquired the IP and the brand itself, but we want to go much further in terms of brand platform and marketing assets. So we're going back to the foundation — refining the brand positioning, understanding what Cacique stands for in consumers' minds, and what territory it can own authentically. That will drive everything from communication to visual identity.

We like to call Cacique a 'hidden gem.' It's a strong brand with quality and heritage, but it needs to reconnect with consumers. That's the exciting part — rebuilding the brand with a solid strategic base.

How are you approaching distribution strategy in the on and off-trade channels?

Damiani: We're starting from a strong base — Cacique already has more than 70% penetration in the on-trade. It's also well-positioned in the off-trade, which has helped the brand remain resilient despite limited investment in recent years. Our focus now is maintaining those existing accounts while identifying selective growth opportunities. We're also segmenting by product — Cacique Añejo for broader reach, and Cacique 500 for more premium venues where it already has strong traction.

Innovation is a hot topic in spirits. After LMB's recent Negrita RTD launch, is Cacique heading in a similar direction?



Revitalising Cacique: Jean-Paul Bouyat (top) and Patrizia Damiani

Bouyat: There's certainly opportunity, but pricing is a key challenge. In Spain, RTDs cost over EUR2, while beer sells for under EUR1. That's a big gap. Young consumers prefer mixed spirits over beer, but not if it's twice the price. For RTDs to grow here, prices need to align more closely with beer.

Damiani: We're building the brand from the ground up, so portfolio strategy and innovation pipeline will follow. But we're not rushing it. It's about doing it right and staying true to the brand.

What excites you most about Cacique's future in Spain and beyond?

Damiani: For me, it's the rare chance to revitalise a brand that already holds a strong place in consumers' minds. There's heritage, there's connection — it just needs to be made relevant again. And personally, as a Venezuelan who started on this brand, it means a lot.

Bouyat: Cacique is a hidden gem, not just for its image but for its liquid. The distillery in Venezuela has pot stills, five-column stills — real depth and quality. I've been in this industry for more than 40 years, and it's rare to find brands with such authenticity and strong roots. That's why we're investing. And being a family-owned company, we can do that with humility and focus — not chasing share prices, just building for the long term. GDI



Image: Hong Jang Hyun

DJ & fashion designer Peggy Gou said of her collaboration with Don Julio: 'I wanted to create a bottle that stops you in your tracks the moment you see it'

Tequila leads growth of high-end white spirits in global travel retail

Tequila continues to show a clean pair of heels to other white spirits categories in global travel retail, growing almost 10% in 2024, according to IWSR data. It was the fastest growth rate recorded in the channel by any white spirit (see charts p30).

From a comparatively small base, the Mexican spirit is gaining traction beyond North America, thanks to growing consumer demand and investment in high-profile airport activations by leading players.

Many have sought star power to stand out in an increasingly crowded channel, collaborating with music stars and celebrities to boost their presence and resonate with younger LDA travellers who remain the engine driving the wider tequila category.

The agave-based spirit may be leaving other white spirits categories in travel retail in its wake, but high-end vodka is also gaining ground. **Joe Bates** reports

A prime example was Diageo Global Travel's collaboration with South Korean DJ & fashion designer Peggy Gou, which resulted in the release of a limited-edition Don Julio bottle, Don Julio 194구.

The bottle was launched in GTR in April, with Gou, a trailblazer for Asian women in electronic music and owner of her own fashion label called Kirin, visiting "luxury hotspot cities" to meet travellers and sign bottles at several airports, including Dubai, London Heathrow and Singapore Changi. Don Julio is now the top-selling tequila in GTR, with brand promotions in the channel heavily leaning towards popular cocktails.

"Consumers are rapidly becoming more knowledgeable about the category and its excellent versatility when it comes to cocktails and tequila-based drinks," says Diageo Global Travel managing director Andrew Cowan. "For example, this summer Don Julio is running a travel retail campaign across Europe and the Americas to educate consumers on how to create a paloma or margarita, two hugely popular cocktails."

KEY TAKEAWAYS

- Celebrity collaborations, airport activations and rising global consumer demand have made tequila the fastest-growing white spirit in travel retail.
- Premium vodka remains resilient, with high-end releases like Grey Goose Altius and Lex by Nemiroff boosting value growth in GTR despite overall category stagnation.
- Gin shows mixed fortunes in travel retail, growing in non-traditional markets but losing shelf space in UK airports.
- White rum lags behind, stuck in the standard tier, while premiumisation successes highlight tequila and vodka's ability to command higher prices.



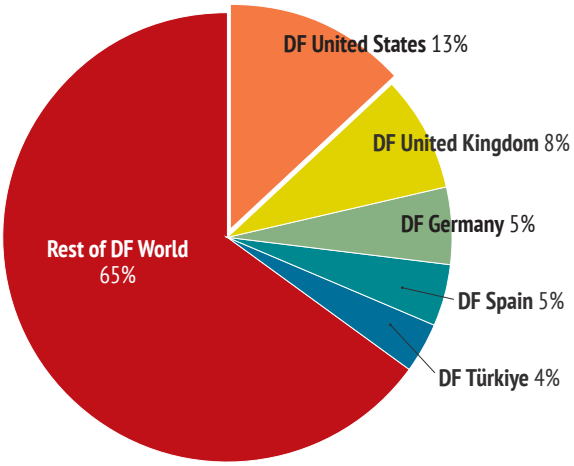
Bacardí Global Travel Retail has teamed up with Ushuaïa Ibiza for its Patrón El Alto campaign

Patrón El Alto heads to Ibiza

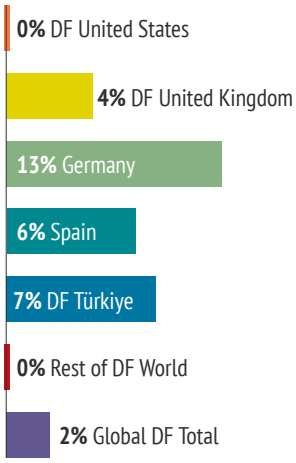
Bacardí Global Travel Retail has also been leveraging its connections in the music world, rolling out high-impact omnichannel, Ibiza-focused marketing campaigns at UK and Spanish airports to promote Patrón El Alto, a prestige expression blending extra añejo, añejo and reposado tequilas aged in 11 different types of barrels.

A central element of the campaign was a collaboration with Ushuaïa Ibiza, one of »

Total White Spirits in Travel Retail: Top 5 Markets Market Share (Vol) 2024



Chg Vol 2023–24



Leading White Spirits in Travel Retail Chg Vol 2023–24



Source: IWSR. DF = Duty Free. White spirits comprise: blanco tequila, white rum, gin (including flavoured), vodka (including flavoured) and genever. Figures rounded to the nearest whole number

» Ibiza's most famous clubs, known for its daytime parties, VIP zones and ability to attract the world's top DJs. Besides tastings, the airport promotions in the UK and Spain included prize draws, giving travellers the chance to win return flights and a two-night stay at the Ushuaïa Ibiza Beach Hotel during the 2026 season.

High-end vodka shows resilience

The overall traditional vodka category in GTR remained flat in 2024, with sales growth nudging up only 0.3%; the once-vibrant flavoured subcategory did a little better, increasing 2.4%. The higher-price tiers, however, performed much better, with the premium-plus sector growing 16% in value terms and 10% in volume.

A series of eye-catching new high-end releases helped keep the category's profile in travel retail high this year. In July, Bacardí GTR unveiled Grey Goose Altius, an ultra-premium release chilled and filtered at "glacial temperatures of -24°C". Available at selected airports and onboard cruise lines, the vodka's launch was supported by a multiphase marketing campaign targeting every stage of the traveller journey.

The Absolut Haring Artist-Edition bottle, released 40 years after the late American pop & street artist collaborated with the Pernod Ricard-owned vodka brand, also launched in travel retail in July.

Pernod Ricard GTR VP global marketing Liya Zhang says the release follows "the incredible reception" given to last year's Absolut Warhol travel retail launch, and describes Haring as "a visionary whose work resonates deeply with today's travellers".

Lex by Nemiroff wins bumper Heinemann listing

Ukrainian vodka brand Nemiroff's premiumisation plans for its eponymous vodka brand received a welcome boost in May via a new partnership with Gebr Heinemann to expand the travel retail distribution footprint of its ultra-premium Lex by Nemiroff expression across the German travel retailer's wide-reaching airport network, which spans Germany, Poland, Lithuania, Bulgaria, Azerbaijan, Romania and Türkiye.

"Lex by Nemiroff enters Heinemann's elite portfolio as a hero SKU, reinforcing our positioning across Europe and the CIS," says a Nemiroff spokesperson. "It's a natural fit for both sides: Heinemann values innovation with impact, and we're delivering just that."

Meanwhile, Mont Blanc Vodka, a high-end French brand made with Angeac-Champagne water and 100% French wheat, and owned by the Spanish firm Alvisa, has developed a truly global presence in travel retail over the past few years, underlining the growing demand for higher-priced vodkas in travel retail. It now boasts listings at airports in Israel, Egypt, Armenia, Romania, Cyprus and Türkiye, among others.

"Our ambition is to work with all big and local operators," says a company spokesperson. "Our focus is to build the fruitful cooperation with our partners, but the main idea is to deliver new product to the customers. We are quite sure that currently travellers need new products which are authentic, exclusive and [offer] value.

Mont Blanc Vodka Voyage, released to mark the 250th anniversary of the first voyage around the world under the French flag, is particularly suited to the travel retail sector for obvious reasons, the spokesperson notes. "We also have a very attractive and trendy botanical collection, Mont Blanc Vodka Cucumber & Mint and Mont Blanc Vodka Grapefruit & Rose." »





Grey Goose Altius launch at Dubai Duty Free (left). Mont Blanc display at Ben Gurion Airport in Israel

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Tito's reports travel retail growth despite Canadian boycott

» The World Travel & Tourism Council estimates President Donald Trump's 'America First' policies will cost the US economy US$12.5bn this year. Global air bookings to the country were down 11% between May and July, according to Tourism Economics.

The group forecasts an 8.2% drop in international overnight arrivals to the US for 2025. With the country proving the biggest travel retail market for white spirits last year, accounting for over 13% of total sales, this marked drop in international arrivals could spell trouble for the entire category.

The fallout from Canada has been steepest, with visitation in July down 25.2% year on year, driven by a 28% plunge in land crossings. The huge drop-off in Canadians visiting the US is not the only effect the worsening political tensions between the neighbours is having on the GTR channel.

John McDonnell, managing director, international at Tito's Handmade Vodka, reveals that one of the biggest challenges faced by the brand this year was the withdrawal of American products by some Canadian travel retailers.

The boycott — in direct retaliation to Trump's tariffs on imports — reflects a growing 'Buy Canadian' movement in the country, which imported nearly $350bn of products from the US in 2024 and was its largest trading partner.

Despite this setback, there have been bright spots for Tito's in GTR. McDonnell reports that in other regions, the brand saw a double-digit increase in travel retail sales in over the first half of 2025.

"We've opened more outlets and increased our offerings of different sizes within stores," he notes. "We're very excited too that Lagardère [Travel Retail] has recently begun listing Tito's."



Edinburgh Gin launched The Tropics at its airport boutique in Scotland in August

Has gin lost its GTR fizz? Airport retailers heavily reduce SKUs

The outlook for high-end gin in GTR is mixed as the spirit continues to face headwinds in its biggest markets.

On the plus side, the overall category grew 4% in volume terms last year (see chart p30), with sales value rising considerably faster (+7%), driven by increased demand in much smaller, non-traditional gin markets such as China, Brazil, Japan and Argentina.

Elsewhere, the picture is more unsettling, with any growth coming from the standard-and-below price tiers, driven by multi-purchase offers. Concerningly, travel retailers in traditional gin markets, such as the UK, have been cutting the size of their gin offers in response to shifting purchase patterns.

"Retailers in UK airports have cut back heavily," confirms IWSR senior insights manager GTR Charlotte Reid. "One contact told me recently they have reduced their gin ranges from 40 to just 20 SKUs."

The UK remains Edinburgh Gin's "biggest market by far", says William Ovens, head of GTR at brand owner Ian Macleod Distillers. But he does note an uptick in sales in US travel retail on the back of a strong domestic performance.

Sales of flavoured gin have dipped slightly, Ovens concedes, but adds that "robust sales" of the brand's two core expressions, Classic and Seaside, have more than offset this decline. The Scottish brand has also been extending its GTR footprint.

"We are delighted that Edinburgh Gin — Classic and Rhubarb & Ginger Full Strength — was listed earlier this year by Lagardère across 14 of their key airports in Europe," Ovens says. "In addition, Edinburgh Gin Rhubarb & Ginger was listed in British Airways, and we are very much enjoying this partnership with this leading global airline."

In August, Ian Macleod unveiled the second exclusive Edinburgh Gin Traveller's Collection expression for its Edinburgh Airport boutique, which is run in partnership with Avolta-owned World Duty Free. The Tropics claims to be inspired by the "abundance of vibrant botanicals in the tropics". Priced at GBP29.90 (US$40.08), it includes cardamom, green peppercorns, galangal, cinnamon and bird's eye chilli among its ingredients.

White rum stuck in standard mode

White rum could do with taking a leaf from tequila's book with regards to premiumisation. According to IWSR's Reid, an overwhelming 98% of rum volume and value currently sits in the standard price tier in GTR, much of it the market-leading Bacardí Carta Blanca.

This is a sad indictment of the category's progress given the channel's proven ability to persuade shoppers to trade up to more expensive purchases. But the lack of high-end rums in GTR reflects the subcategory's wider domestic failure to premiumise.

"For the category to begin to premiumise, there needs to be a clear price ladder for consumers to understand what they are paying more for," says Reid. "Before it can begin to premiumise, rum needs to communicate craftsmanship, heritage and merchandising rules in the same way whisky has."

If white rum does feature in an airport activation, it tends to be part of a wider promotion where older, aged expressions are the main focus. A case in point was Campari Group Travel Retail's unveiling of an "elevated" boutique experience at its branded Appleton Estate Rum shop at Montego Bay's Sangster Airport in Jamaica in August.

The prime focus was squarely on Appleton Estate's range of premium aged dark rums, but there was space for the new Wray & Nephew 200th limited-edition collection as the company's famous overproof white rum, a bartenders' favourite, celebrates its bicentennial. The collection comprises three different bottle labels, two of them (black and green) exclusive to travel retail. GDI

Tito's Handmade Vodka promotion at JFK International Airport in New York



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White spirits roundup

Four high-profile launches keeping top-end white spirits front and centre in global travel retail



Lind & Lime unveils GTR exclusive

Tight margins and stiff competition from deep-pocketed multinational rivals makes travel retail a tough nut to crack, but Scottish craft distiller Lind & Lime has gained traction in the channel, releasing its first GTR exclusive in June. Bergamotto di Calabria marks the debut of The Grand Voyage, a GTR limited series exploring "remarkable citrus varieties from around the world". Described as a "taste of Calabria" that offers "bright, floral notes from fresh bergamot peel", the expression launched at major UK airports, including Edinburgh, Glasgow, London Gatwick, London Stansted, Aberdeen and Prestwick, before being rolled out to additional airports across the UK.



Generous Gin climbs airport sales rankings

When it comes to gin, La Martiniquaise-Bardinet is best known for Gibson's, France's best-selling gin. But the multinational has been busy promoting Generous, its super-premium gin produced in Cognac, at France's airports. The artisan range comprises: the "floral" Generous Gin Original; the "sweet" Generous Gin Organic; Generous Gin Purple, billed as the first gin with antioxidant-rich polyphenols and anthocyanins; and Generous Gin Azur, with elderberry, basil and violet. Generous has already climbed to become a top three seller in the gin category at Paris Charles de Gaulle, Nice and Paris Orly airports.

Jo Vodka gains global Avolta roll-out

British perfumer Jo Malone CBE launched super-premium Jo Vodka at 100 airports worldwide in July, in partnership with travel retailer Avolta and G&J Distillers master distiller Joanne Moore. Priced at GBP29.99 (US$40.23) and distributed in GTR by Quintessential Brands, the "luxury fusion" range comprises: 101 The Purist, described as "exceptionally smooth with a clean aroma"; 102 The Bohemian, with "citrus notes of bergamot, pomelo, bay leaf and yuzu"; and 103 The Artist, with "floral notes of rose, neroli, pink peppercorn and sencha". Malone said the vodka would feature in Avolta's 'Summer Drinks Club' across the UK and Europe, "offering travellers an exclusive and unique opportunity to experience the brand".



Gunpowder Gin Panda Conservation Edition launched at Dublin Airport

Drumshanbo Gunpowder Irish Gin unveiled its new Panda Conservation Edition at ARI-operated Dublin Airport Duty Free in a high-profile launch that was a highlight of the airport's wider Chinese New Year celebrations in January. Brand owner The Shed Distillery has signed an historic agreement with the Sichuan Green Foundation Giant Panda National Park in China to champion the welfare of the giant panda. Funds from sales of the release will support the local indigenous people who take care of them. The new release also marked a decade of the family-run distillery which now sells in over 100 countries and launched in China last year.



Sparkling wine gives champagne a run for its money in travel retail

Sparkling wine surges in GTR as brands embrace premiumisation, innovation and experience-led strategies to capture consumers beyond champagne's traditional stronghold. **Henry Mathieu** reports



Increasing numbers of consumers are taking up Della Vite's invitation to 'Cheat on Champagne' in GTR

As international passenger volumes return to pre-Covid-19 pandemic levels and consumer appetite for indulgence rises, fizz in all its guises is taking confident strides in global travel retail. From prosecco's youthful charm to the enduring prestige of champagne and the complexity of traditional method trentodoc, brand owners are seizing the opportunity to diversify portfolios, engage new audiences and premiumise.

With GTR acting as both a commercial channel and a brand-building theatre, producers are investing heavily in formats, experiences and visibility. Ramón Olivé, head of GTR sales at Henkell Freixenet, which owns both the Freixenet and Mionetto brands, sees the channel as a vital lever for growth. "Travel retail is a crucial channel for us, not only because of the sales it generates, but also due to the exposure it provides to our brands to international passengers," he explains.

Post-pandemic, sparkling wine's momentum appears stronger than ever. "We have since fully recovered our sales, currently surpassing 2019 levels," says Olivé. "Our diversified portfolio gives us the opportunity to react flexibly to trends, mitigate effects and preserve and generate growth to our business partners."

This resurgence is echoed by Sandro Bottega, president of Bottega SpA. "Our business in travel retail, except during the pandemic, has grown steadily over two decades. In the last four years, Bottega Gold Prosecco DOC, our flagship label, has constantly been on the top of the GTR sales."

Move away from champagne

The champagne category in travel retail has softened slightly, according to the latest IWSR data (see charts p36), with a 3% year-on-year decline between 2023 and 2024. The top five markets account for over half of all champagne sales in GTR, with UK duty free leading the charge (+2%, 14% share), followed closely by the UAE (-9%, 14%) and France, which posted a healthy 7% rise (13%). In contrast, sales in the US dropped sharply (-15%), while Germany recorded a more modest dip (-3%).

While champagne shows signs of deceleration, sparkling wine is enjoying robust growth, rising 6% globally in travel retail over the same period. The most significant driver was duty free Germany, up 8% and representing a 15% share of global sales. The UK followed at 9% (+1%), while Denmark and Spain posted mixed results — Spain up strongly at 16% and Denmark slightly down at 1%. Notably, the US again saw a 15% drop in this broader category.

These figures underline a broader shift in travel retail: while champagne remains a symbol of luxury, a growing number of travellers are turning to alternative sparkling wines that offer quality and versatility, often at more accessible price points.

Differentiation and discovery

Across the board, producers agree that GTR demands a distinct strategy to reflect the environment's dual role as retail and showcase.

"In travel retail, we adopt a highly curated approach that differs from our domestic strategy," explains Ferrari Trento president Matteo Lunelli. "We carefully select specific SKUs dedicated to this channel — compared with the domestic market, the travel retail offering is more focused and selective."

Henkell Freixenet takes a similar approach. "We adapt our portfolio and our activations for the travel retail channel [and] have GTR exclusives for the main brands of our portfolio," says Olivé, with limited editions, 1L bottles and twinpacks standard tools, alongside interactive activations. "Personalisation and interaction with our consumers are value assets at the time of taking the decision in the point of sales," he adds.

Rupert Firbank, travel retail sales director for Della Vite, a vegan prosecco brand founded by UK model Cara Delevingne and her sisters, highlights the opportunity for smaller but premium brands.

"Travel retail is a perfect place to showcase the quality of Della Vite to our target consumers in a premium retail environment," he says. "We have carried out a number of tasting activations so that passengers can experience for themselves the superb quality and be part of our cheeky 'Cheat on Champagne' campaign." »

KEY TAKEAWAYS

- Alternative sparkling wine (+6%) is outpacing champagne (-3%) in global travel retail.
- Premiumisation and innovation is driving visibility and sales across airport, cruise and airline channels.
- Brands are investing in experience-led engagement and tailored activations such as lounges and tastings.
- Europe is key, but producers expect future GTR growth in Asia-Pacific, the Middle East and the US.

» These initiatives are particularly valuable for introducing premium prosecco and traditional method sparklers to a customer base accustomed to prestige cues. As Lunelli puts it: "Travel retail is a high-profile space where we can showcase Ferrari alongside some of the world's top luxury brands. This positioning reinforces Ferrari Trento's image as a top-tier Italian brand and the authentic Italian luxury sparkling wine."

Engaging the gifting and experience economy

Beyond product formats, brands are finding success by creating experiences around sparkling wine. Ferrari Trento's flagship airport lounge, Ferrari Spazio Bollicine at Milano Malpensa Airport, exemplifies this. "It's a space where people can immerse themselves in the world of Ferrari Trento and truly experience the Italian art of living," says Lunelli. "It's not just about selling, but about creating an experience.

"Our activities extend well beyond airports — we are deeply engaged with both airlines and cruise lines," he adds. "A key example is our partnership with Costa Crociere [Cruises]. Additionally, we maintain a strong presence with MSC Cruises and are served in business class on ITA Airways."

Henkell Freixenet, too, is investing in cruises and new APAC listings. "We expect the cruise channel to grow exponentially over the next years — this is a good opportunity for both the F&B and the retail sector," says Olivé. "Henkell Freixenet achieved a listing of Freixenet on cruise ships in South Korea and a listing at Kazakhstan airports with Mionetto."

Trading up without pricing out

While prestige remains a driver of interest, brands are attuned to the need for value. "Premiumisation is still a trend in the channel, but some passengers are increasingly conscious about their spending," notes Olivé. "This is a good moment for other sparkling [non-champagne] categories: prosecco and crémant are growing in GTR."

Della Vite is actively carving out space between everyday prosecco and premium champagne. "Our focus is on performing a role in the category that allows travellers to buy a more upscale sparkling wine than standard proseccos and cavas, while not having to pay the more expensive prices of champagne," says Firbank. "Della Vite aims to deliver great quality at accessible prices."



Ferrari Trento is 'deeply engaged with both airlines and cruise lines'

Europe remains a stronghold for most producers. "Europe is performing, in general, very well together with the Middle East," says Olivé. Lunelli highlights Italy's Malpensa and Linate airports, calling them "both strategic and symbolic".

Outside Europe, opportunities abound. "We identify Asia-Pacific as brimming with potential for travel retail growth," says Olivé. Lunelli points to US hubs including Austin, Miami and New York as strongholds, with Tokyo's Narita Airport key for Japan.

Firbank, meanwhile, is eyeing further expansion in the Middle East after gaining traction in the UK. "Heathrow, Gatwick, Stansted and Luton have been strong for us, but places like Birmingham and Manchester also do very well," he says.

Outlook: a bright, bubbly future

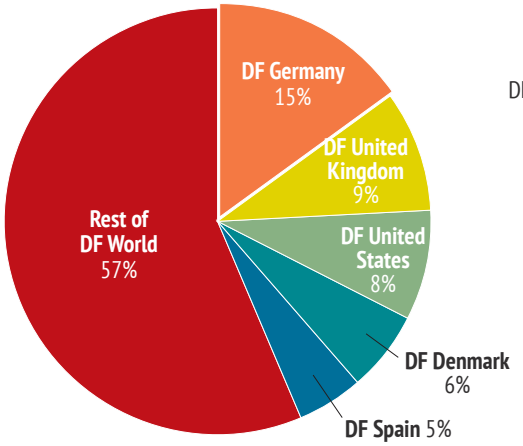
The outlook for sparkling wine in GTR remains effervescent. "The channel will continue to be relevant for the market," says Olivé. "We'll continue developing new SKUs and adapting the current ones to satisfy our consumer needs."

Lunelli believes travel retail will remain a long-term growth engine for the category: "We expect to grow steadily in terms of both distribution and revenue, in line with the projected growth of the key markets where our travel retail hubs are located."

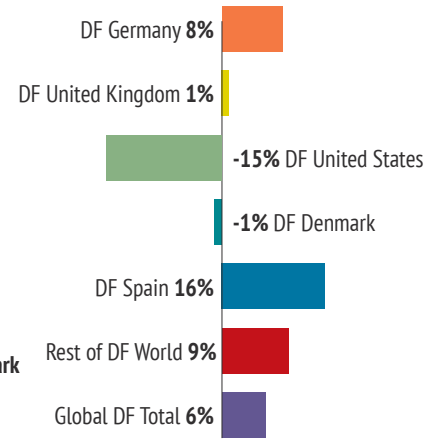
Firbank is also optimistic about Della Vite's prospects in the channel: "We feel that there is growth to be had for sparkling wines to capture those who would like something better, but either don't like champagne or don't want to pay champagne prices." GDI

Top 5 Markets for Sparkling Wine in Travel Retail

Market Share (Vol) 2024

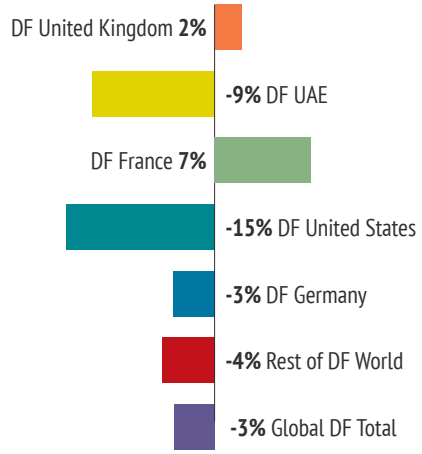


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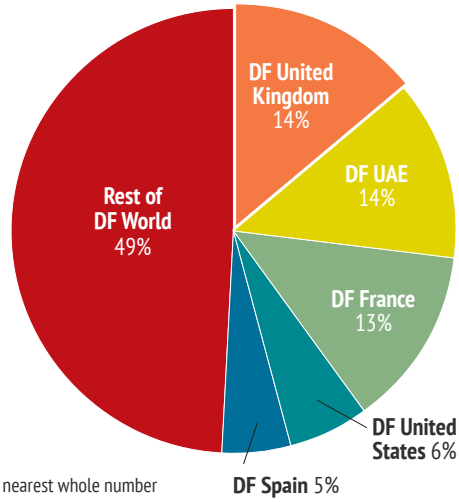


Top 5 Markets for Champagne in Travel Retail

Chg Vol 2023–24



Market Share (Vol) 2024



Source: IWSR. DF = Duty Free. Figures have been rounded to the nearest whole number

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Ouzo of Plomari Limited Edition 2025: the flood of visitors to Greece has had a 'direct and positive impact' on the brand's duty-free sales at airports

Boost for regional spirits as tourist numbers soar throughout Europe

Demand for authentic gifts and souvenirs is giving regional spirits a new lease of life in travel retail as international visitors flock to Europe. **Joe Bates** reports

Record tourist arrivals in Europe are boosting sales of regional spirits in travel retail as holidaymakers seek local gifts and souvenirs.

Europe welcomed a staggering 747m international travellers last year, according to the UN's World Tourism Barometer. This figure far surpasses any other global region, with more than 70% of visitors flocking to Southern and Western Europe, straining local resources and even sparking protests over 'overtourism'.

Countries on the Mediterranean are at the forefront: Olympics host France, the biggest international destination, last year received 100m international visitors, while second-ranked Spain had almost 94m — nearly double its own population.

The tourism surge has continued apace in 2025, with international arrivals across the continent rising 3.3% in Q2, compared with the same period last year, according to the European Travel Commission (ETC).

Rising costs are evident across all areas of the travel industry, yet the ETC forecasts tourism spending in Europe will be 13% higher in 2025 than in 2024.

This is good news for regional spirits producers, especially in travel retail, where brands are grasping the opportunity to double down on storytelling, exclusivity and immersive activations to target shoppers searching for authentic gifts.

Ouzo of Plomari thrives in boom

Ouzo, Greece's national spirit, is a prime example of this post-pandemic trend. Last year it welcomed over 40.7m visitors — a record figure that looks set to be broken again in 2025. The country's airports handled 10.3m travellers in the first half of the year, a 5.7% year-on-year increase.

"This strong momentum has had a direct and positive impact on duty-free sales of Ouzo of Plomari," remarks Eleni Papadopoulou, brand manager exports at Lesvos-based Plomari Distillery–Isidoros Arvanitis SA, the country's biggest ouzo producer. "Our brand is fully listed across all Greek airports and proudly holds the largest share of the entire spirits category, cementing its position as the undisputed leader in ouzo."

Travel retail, Papadopoulou emphasises, is not just a commercial channel but a "strategic image-building" platform that complements Plomari's export ambitions. The brand invests in a mix of promotional tactics, from traditional price-offs to brand ambassador-led education campaigns that spotlight the spirit's unique attributes, such as its "secret recipe" which uses more than 15 herbs and seeds from Lesvos.

Custom-designed displays, travel retail-exclusive packaging and an annual limited-edition bottle further enhance the brand's giftability and visibility. This year's limited release pays tribute to the Aegean's iconic wooden fishing boats, known as *kaikia*, with proceeds supporting the restoration of an historic vessel, *Sunray*, now on display at The World of Ouzo Museum in Plomari.

Papadopoulou reveals Plomari has been growing strongly at duty-free border shops, with sales in this channel up 40% this year. The company's premium offering, the triple-distilled Plomari Adolo, has performed particularly well in this setting, she notes. The brand's global presence also continues to grow, with listings in Türkiye, Israel, Dubai and German airports through its partnership with Gebr Heinemann. »

KEY TAKEAWAYS

- Record tourist arrivals in Europe – 747m in 2024 – are boosting sales of regional spirits.
- In-airport tastings and shop-in-shops aim to target demand for 'memorable experiences'.
- Consumers are trading up for premium expressions with strong heritage stories.
- There is a focus on travel retail exclusives and educational activations in areas of slower growth.

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Record year for Spanish brandy

» Spain's position as the world's second most visited country is fuelling strong momentum for Spanish brandy in travel retail, according to Familia Torres GTR director Bruno Teixeira. He says sales of the company's brandies are thriving at home and abroad.

"Within airport duty free, we've achieved consistent growth in major international hubs, especially in Europe and Asia," Teixeira reveals. "In terms of product, we experienced strong demand for flagship products such as Torres 10 and Torres 15, appealing to both returning and new travellers. We also noted resilience in premium segments, with higher-value SKUs outperforming expectations as travellers seek quality and authenticity."

Travellers are becoming more demanding, observes Teixeira, seeking exclusive prices and promotions involving special experiences. Consequently, Torres has introduced high-impact activations at major Spanish airports during the peak summer travel period (April–October) to increase visibility and build brand awareness.

"We also have immersive tasting experiences at Barcelona Airport, where we have a personalised shop-in-shop, allowing travellers to sample the range and learn about the brand's heritage," he adds. "Limited editions and gift packaging are also part of our strategy at select European airports, boosting both visibility and conversion rates."

Teixeira also reveals that in recent years Torres has introduced travel retail-exclusive expressions in select locations. "We have recently introduced two SKUs of our barrel series, Torres Brandy Double Barrel and Torres Brandy Smoked Barrel, in a 1L format," he says. "We have also developed innovative packaging formats, including premium gift boxes and travel-sized editions tailored for the channel."

These exclusive offerings have resonated with collectors and gift-oriented shoppers, according to Teixeira, and sales have exceeded the company's initial expectations, suggesting a strong ongoing demand for travel retail-exclusive expressions.

Grappa challenges expectations

Like Spain, Italy enjoyed a record-breaking 2024, attracting 65m international travellers, with more visitors from developing economies such as India and China. This year is set to be another huge one, with international visitor spending forecast to hit an all-time high of EUR60.4bn (US$70.3bn) up from EUR55.2bn in 2024, according to the World Travel & Tourism Council.

With its premium positioning and strong Italian identity, grappa has undoubtedly benefited from this upswell in tourism. Duty-free sales of Castagner Grappa have grown by 40% this year, according to Fabrizio Canal, CEO of the brand's exclusive travel retail distributor, Food Accademia.

Canal says tastings prove the most impactful promotional activity to drive sales within duty free, with consumers surprised at the smoothness and complexity of the spirit and dispelling any preconceived ideas about grappa being "harsh".

He argues: "Highlighting the versatility of grappa in mixology also resonates well with younger consumers. Gifting activations, such as premium packaging or limited editions, also drive strong sales, particularly in peak seasons."

Bottega SpA has likewise seen an uptick in grappa sales. Its offerings are sold in major Italian airports and at its branded prosecco bars in Rome and Venice. MD & owner Sandro Bottega observes that travel retail preferences vary by region and traveller profile, noting that aged grappas, such as Bottega Fragranze, often appeal to affluent travellers familiar with whisky or cognac, while fragrant single-variety grappas, like Alexander Prosecco, are preferred by younger LDA consumers, especially in Asia.

Veneto-based Poli Distillerie continues to see steady growth in the Italian travel retail market, buoyed by its artisanal approach and flagship Sarpa expression, which recently won a gold medal at the 2025 International Spirits Challenge in London. Yet the channel is not without its challenges, according to owner Jacopo Poli.

"We have faced challenges related to rising operating costs and growing competition in the travel retail sector," he concedes. "Our ability to maintain high-quality standards and to innovate in product presentation has been crucial in overcoming these difficulties."

Aquavit maker Anora steps up focus on Scandi airports

In contrast to Greece and Spain's buoyant travel sectors, Scandinavia's travel retail market is experiencing mixed fortunes. Despite rising tourist numbers to the wider region, key ferry routes, particularly between Sweden and Finland, have suffered from a decline in Russian passengers and the ongoing impact of economic pressures.



Castagner Amarone, Alexander Prosecco, Sarpa di Poli and Bottega Fragranze grappas

The ferry sector has traditionally played an outsize role in the region's travel retail business. According to figures from the European Travel Retail Confederation, sales onboard Nordic and Baltic ferries dipped more than 5% last year to EUR686.4m, still nearly 25% below pre-pandemic levels.

"It is true that we have observed a decline in passenger numbers and a lower average basket value in the ferry and cruise channel at the beginning of this year [2025]," says Saransh Verma, marketing manager GTR at Anora, the Helsinki-based spirits group and the owner of aquavit brands including Norway's Linie, Denmark's Aalborg and Sweden's O.P. Anderson.

Verma reveals Anora has stepped up its marketing activity at the region's airports. "Notably, we've introduced travel retail-exclusive aquavits specifically for this channel. Airports are not only important for driving sales, but also serve as a key platform to introduce the aquavit category to a broader, more international audience."

One such travel retail exclusive is Opland Smoky Finish, a Norwegian aquavit with a bold smoky flavour, matured for a minimum of three years in oloroso sherry »

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» casks which recently won two gold TREX medals in the Moodie Davitt Travel Retail Exclusive Awards. Bottled at 41.5% ABV in a 50cl bottle format, the expression is on sale at Oslo Airport for NOK419 (US$41).

In a region where domestic regulations prevent promotional sampling activities in many markets, travel retail's importance in allowing liquid-to-lips activations cannot be overstated. "We've been actively leveraging our 'World of Aquavit' platform, which showcases our most iconic aquavits through tasting bars at selected ferry terminals and airports," says Verma.

"We did a two-month activation at Copenhagen Airport, which featured tastings, simple cocktails and clear brand messaging designed to engage travellers and introduce them to the rich heritage of aquavit in an accessible way, which was a great success."

Vana Tallinn shows resilience onboard Baltic ferries

The travel retail environment in the Baltic states remains challenging. International arrivals in the region have risen this year, but numbers have not returned to pre-pandemic levels. Latvia saw a sizeable increase in visitors in H1 2025 (+16.3%), but numbers remained below 2019 levels for the same period (-11.9%). It was a similar story in Lithuania (+14.7% for H1 2025, -5.2% on 2019) and Estonia (+ 6.2% vs -11.2%).

Gloria Hallaste, marketing manager at Estonian spirits company Liviko, the producer of regional herbal liqueur Vana Tallinn, agrees that trading conditions have been tough. "It has been a challenging but steady year for Vana Tallinn in duty free," she notes. "The brand continues to perform well in its core Baltic and Scandinavian markets, but external factors have made an impact, notably the ongoing war in Ukraine, shifting travel routes, and increased price sensitivity due to inflation."

Hallaste argues that since the pandemic, travellers have become more choosy and price-conscious, but local authentic products like Vana Tallinn remain popular. "Consumers are looking for authenticity and meaningful connections with brands. Impulse buying still happens, but is increasingly driven by value, origin and uniqueness," she explains.



Vana Tallinn display wall on a Viking Line ferry

Bucking the regional trend, Hallaste says Vana Tallinn has been performing well onboard ferry lines this year, with a dedicated Vana Tallinn display wall introduced with Viking Line, one of Scandinavia's biggest ferry operators, at the start of the year. More widely, however, duty-free operators are tightening their listings, she notes, giving priority to larger brands with stronger marketing support.

"This puts additional pressure on niche premium products to prove their relevance and justify their price positioning," Hallaste reasons. GDI



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Regional roundup

Five regional spirits launches making waves in travel retail



Anora woos Gen Z

Anora hopes to recruit younger LDA consumers by introducing O.P. Anderson Amp Shot — an aquavit liqueur with notes of citrus, mint, gunpowder green tea and chilli — into regional travel retail. Anora marketing manager GTR Saransh Verma says Amp Shot is "designed to align with contemporary shot culture" and offers "a bold yet approachable flavour profile".

Underberg joins forces with Heinemann

German herbal liqueur brand Underberg joined forces with Gebr Heinemann to promote its Espresso Herbtini with a campaign at four European airports — Frankfurt, Düsseldorf, Hamburg and Copenhagen. The new premixed cocktail combines Underberg with espresso coffee to offer a herbal twist on the classic espresso martini cocktail.





Ricard opens Marseille TR shop-in-shop

Pernod Ricard GTR celebrated the Provençal roots of its historic Ricard Pastis brand by opening a shop-in-shop at Marseille Airport. Partnering with the airport's duty-free concessionaire, Lagardère Travel Retail, and designed in Ricard's signature yellow hues, the pop-up featured a wide range of Ricard bottle formats and branded merchandise.



China adapts to new market realities

Official banquets are out, convenient online deliveries are in. China's alcohol market is evolving to face the country's post-pandemic future in a changing world. **Joe Bates** investigates



Global spirits giants are betting big on China: Pernod Ricard launched The Chuan Pure Malt Whisky at the end of 2023, just over two years after its newly-built Emeishan distillery commenced operations

The beverage alcohol business in China continues to face headwinds on multiple fronts. Post-pandemic economic problems, rising trade barriers and the government's recent decision to impose a sweeping ban on alcohol at official meals, combined with the influence of a rapidly ageing and more health-conscious population, are dampening demand.

In fairness, there are growth opportunities too — whether it be China's dynamic, fast-growing e-commerce sector, the signs of life appearing in the premium-plus wine market, or the growing demand for imported white spirits and expanding domestic whisky production. Yet the country's overall direction of travel is concerning: IWSR data show total beverage alcohol sales fell 5% in 2024, with all major drinks categories reporting declines (see chart p45).

Recent results from major drinks multinationals have reflected the difficult conditions. In its Q3 results for the 2025 financial year, Pernod Ricard said sales in China were down 5% and described the "macro context" as very "challenging". In its Q1 2025–26 results, Rémy Cointreau reported overall sales in China were "down low to mid-single digits", but did highlight a 10% jump in direct e-commerce sales.

Government crackdown 2.0

In May this year, the Chinese government announced a crackdown on extravagance in public life, banning alcohol, luxury dishes and cigarettes from official meals. The move echoed the government's landmark decision in 2013 to curb official misconduct and restore public trust, targeting extravagance, corruption and excessive spending by public officials, a measure which had a significant impact on high-end wines and spirits.

"The 'alcohol ban' enacted in May for official banquets has made it even harder for alcohol businesses in the on-trade sector, especially high-end restaurants," says IWSR research director Shirley Zhu. "Chinese baijiu suffered the most, as it's the drink of choice for business banquets."

Zhu says baijiu producers responded by launching lower-ABV products and promoting on social media platforms such as Douyin (TikTok) to target younger consumers. "Recently, the restrictions have been loosened slightly, but this hasn't revived the consumption," she reveals.

Subramania Bhatt, founder & CEO of Singapore-based market research agency China Trading Desk, downplays the long-term disruption for baijiu producers, noting that government-linked consumption dropped from 40% of the market in 2011, to around 5% in 2023. "Major players like Moutai have less than 1% [of their] sales via government channels, signalling limited long-term risk, but intensified focus on private demand and branding," he explains.

EU brandy's Chinese nightmare

European Union-based brandy producers have had a torrid time exporting to China since last January, when the Chinese Ministry of Commerce (MOFCOM) began to investigate whether EU brandies were being sold in the Chinese domestic market at artificially low prices. In the West, the issue is widely perceived to be part of a wider trade disagreement between the EU and China over tariffs on Chinese electric vehicles.

In July, MOFCOM concluded that there was clear evidence of dumping, which the ministry insists has impacted China's own domestic brandy sector, a finding EU-based spirit trade associations dispute. The government introduced five-year anti-dumping tariffs of 32.2% on EU brandies, but major producers — including Rémy Cointreau, Moët Hennessy and Pernod Ricard — were able to secure a carve-out after agreeing to minimum pricing terms.

"We are confident that the companies that opted for a commitment to sell to China above a certain minimum price will see their business continue as normal, albeit in a market that remains very challenging," says Camus Cognac president Cyril Camus. "The ongoing disruptions in global trade are having an impact on business leaders' confidence, and therefore their propensity to buy and consume our premium cognacs."

IWSR's Zhu notes that EU brandies have also been facing other challenges in China, such as weak consumer sentiment, falling consumption and higher costs. "The anti-dumping investigation led to minimum price requirements for major brandy producers," she says. "Costs are rising and consumers are more price-sensitive, and this means margins are being squeezed.

"Grey market imports have always been an issue for luxury spirits, as there is a significant gap in prices with official products. The minimum pricing of EU brandies will only make that gap wider."

Marc Darroze, CEO of family-owned Darroze Armagnac, takes a more bullish view. "We were one of the companies that ful- »

» filled all the commitments demanded by the Chinese government, including the minimum prices charged by Darroze," he explains. "These prices correspond to the prices we charge on all our export markets."

Darroze says consumer interest in armagnac as a craft spirit within China continues to grow. "Our sales have risen sharply over the last five years, not least because we have found an importing partner who understands our specific characteristics."

Alcohol delivered double-click

The growth of e-commerce alcohol sales is one of the few bright spots within the Chinese market. According to IWSR, instant delivery platforms such as JD Now and Meituan are fuelling much of this digital growth, expanding their share of online sales from 2% to 6% in only five years.

"The [e-commerce] players are putting more effort into alcohol delivery to drive further growth of the platforms," says Zhu. "In major cities, consumers can place orders on apps and get their drinks delivered within 30 minutes. They can also order it with ice to mix drinks at home. Because of this convenience and affordability when compared to bars, they have become very popular and are gaining market share over other sales channels. JD.com has recently entered this space and is gaining traction fast.

Zhu argues the rise of instant delivery platforms is a sign of the market's traditional distribution network being disrupted, with the value chain becoming shorter and prices more transparent. "For brands, more than ever, they need to understand younger LDA-plus consumers, meet them where they are and create new occasions for their brands," she maintains.



Laizhou Single Malt

Chinese whisky ramps up

While exports of Scotch whisky to China fell 31% by value and 1.7% in volume last year, according to the Scotch Whisky Association, the country's fledgling domestic whisky industry is expanding rapidly — and catching the eye of overseas distillers.

In 2021, Pernod Ricard began production at The Chuan Malt Whisky Distillery in Emeishan, launching its first pure malt, The Chuan, in late 2023, while November 2024 saw the opening of Diageo's YunTuo Single Malt Whisky Distillery in Eryuan county, Yunnan province.

Last year also saw whisky production began at Guqi Distillery in Anhui province, a joint venture between Camus Cognac and Chinese baijiu maker Gujinggong. "By crafting world-class whisky with Chinese typicity, we will capitalise on the growing trends in whisky, premium spirits and local expressions," says Guqi Distillery general manager Ryan Camus. "We have just launched Guqi's single-cask programme, giving our customers a chance to own a unique whisky bottled with highly personalised packaging."

Among the crop of 100% Chinese-owned whisky distilleries, one of the largest is Laizhou in Qionglai, Sichuan — a province that produces 50% of China's baijiu. Owned by Shanghai Bacchus Liquor (Bairun), Laizhou has a huge production capacity (30.1m litres of pure alcohol a year), and is one of the few distilleries — alongside Diageo's Roseisle in Scotland and Nyetimber's The Lakes in England — that has pot still systems with both stainless steel and traditional copper tube condensers allowing it to produce a wide range of styles. Others, such as Holyland in Yunnan and Tianyoude in Qinghai, emphasise their Chinese heritage by making their whisky with local barley.

Fizz bucks downward trends

China's overall wine market has been struggling, linked to a declining consumption of favoured red wines during business occasions. Overall wine volumes dropped 7% last year, according to IWSR, but sparkling wine bucked the trend, growing 10% year on year. Shanghai remains a key market for fizz, with imports to the city up more than 59% last year, according to Wine Intelligence, due to on-trade demand increasing in luxury hotels and bars.

Encouragingly, Chinese Customs data from the first two months of 2025 also point to a wider recovery of China's wine market, with overall imports up 11.5% in volume and 54.2% in value year on year.

Several factors have contributed to this bump in imports. In March, the Chinese government lifted anti-dumping tariffs on Australian wine, leading this country of origin to enjoy a massive 6,882.5% uplift in the first two months of 2025.

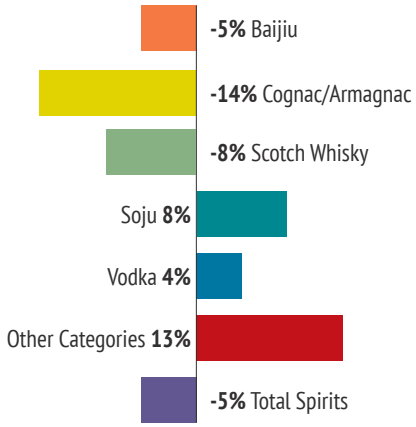
Meanwhile in June, private members' wine club 67 Pall Mall announced it will open a new venue in a 100-year-old French Renaissance-style garden mansion in Shanghai's upmarket Xuhui District next year. The 5,000-strong fine wine list will include wines from 40 countries, including a selection of homegrown Chinese wines.

Commenting on the challenges facing the wider wine market, Shanghai's 67 Pall Mall head of wine Jamie Feng says demand remains strong. "Wine is often described as 'recession-proof' and we've weathered many storms in the club's ten years," he says, alluding to the club's branches in London, Verbier, Switzerland and Singapore. "While there may be a more conservative outlook for wine in China, our sector of the wine world is still eager to drink great wine.

"The fine wine demand in Shanghai is reshaping," he adds. "It is shifting from public venues to private gatherings, from status-conscious purchases to progressively preferring impressive value, with further appetite for diversity. In terms of fine wine, Shanghai's market still remains active." GDI

DATA DROP

China: Top 5 Spirits Categories
Chg Vol 2023–24



Source: IWSR. Figures rounded to the nearest whole number

Key Takeaways

- Baijiu dominates the Chinese spirits market with a 99% share. Cognac/armagnac comes in at No.2, followed by scotch whisky, soju and vodka.
- China's beverage alcohol market is grappling with a 5% sales decline in 2024, driven by economic challenges, an ageing population and a new government ban on alcohol at official meals.
- E-commerce is a bright spot, with instant delivery platforms like JD Now and Meituan fuelling a rise in online alcohol sales.
- Domestic whisky production is surging, with distilleries like Pernod Ricard's The Chuan and Diageo's YunTuo tapping into demand for local spirits.
- Despite a 7% drop in overall wine volumes, sparkling wine imports jumped 59% last year.

5 MINS *with AB InBev global VP for Stella Artois Tim Ovadia*

Stella Artois has regained its focus, the brand's global VP Tim Ovadia tells **Olly Wehring**: 'We had a brand that people loved, but we needed to reconnect with what had made it a global success in the first place'

What's your role and remit? In layman's terms, I'm responsible for building and growing the Stella Artois brand around the world. I partner with over 20 markets and work with them on a daily basis. I've been doing this for seven years now.

Stella Artois is a brand I'd always admired — it's always been famous for creating some of the most iconic advertising in the world. So it's been really exciting to lead the next stage of growth and see the brand appeal to a new generation of beer drinkers.

What condition was Stella in when you assumed your position in 2019? We'd been focusing on too many things that weren't necessarily connected to what had made the brand famous in the first place. We had a brand that people loved, but we needed to reconnect with what had made it a global success in the first place. We needed to spend more time focusing on what the DNA of the brand was. Once we'd achieved that, we needed to simplify our strategy, our programme and our people to focus on delivering the things that resonated with consumers in the first place.

We all understand the complexity of the modern world and today's media landscape — how fragmented and confusing that can be, and how many different options we have open to us as marketers. What's most important is to understand what makes you successful and focus on doing a few things that matter, rather than fragmenting your effort and your time across too many things that don't necessarily move the dial.

That's easier said than done — amazing brands don't get built overnight. Stella is very much a brand that was built — and whose soul lives — in the on-premise. We had to reconnect with bars and pubs to get them to fall back in love with Stella and execute that in a way that we know consumers love. That took time.



Tim Ovadia: 'Stella is very much a brand that was built — and whose soul lives — in the on-premise'

What has been the direction of travel for the brand in a geographical sense over the last seven years? The simplest way to describe how we look at Stella's markets is we have original or legacy markets — like Belgium and the UK — where the brand is mature and developed. They're clearly still very important markets, because they're so large for us.

Then we have growth or emerging markets for Stella, many of which surprise people. There's China, for example, as well as Brazil, Colombia, the US and South Africa.

In South Africa, the growth model has been very similar to the UK: built in the on-premise and positioned as a really premium brand. In five years, Stella's grown from being very small to being South Africa's largest premium draught beer. That's something we're really proud of.

In China, we have big plans to continue capitalising on the premiumisation trend in beer. The global platforms that we have for Stella — such as our partnership with David Beckham and our sponsorships of [The Championships] Wimbledon and the [Roland-Garros] French Open — are ways that will help us grow the brand in China.

How does provenance and brand heritage play with younger LDA drinkers, in your experience? In fairness, we do lean into our provenance in different parts of our marketing mix. In its packaging, for example, we reference Stella's heritage and history in a very big way.

One of the things that we know resonates very strongly with younger drinkers is the concept of being authentic. We position Stella's core brand purpose as being about the pursuit of genuine worth. This is a strength of Stella's when it comes to recruiting the next generation of drinkers.

Are you satisfied with the level of attention Stella Artois receives internally from AB InBev, compared with Corona, Budweiser and Michelob Ultra? I should get you to talk to my boss for me! We have incredible resources, so I'm certainly not concerned about that. Stella's grouped with Budweiser, Corona and Michelob Ultra as the group's global brands, because that's exactly what it is — a brand with global appeal and strong growth potential that we're betting on and investing in today and for the future.

As one of those four global brands, we have the absolute privilege to be able to tap into the incredible resource and execution capabilities of the AB InBev network.

What's really important is that each of our global brands has a very strategic and specific role to play. We want our growth to be sustainable and to do that, we need to have complementary propositions among those four brands. Stella's role is very clear: our mission is to be the No.1 premium draught beer in the world. That's a different mission to Budweiser's and Corona's, for example.

That focus also informs our innovation agenda and acts as a guiding light for the brand in the off-trade. One of our most successful innovations has been the Perfect-Draft machine — we've sold 120,000 in the UK. Another programme that has been developed along similar lines is Stella Signature, which we've just launched, allowing consumers to personalise a chalice glass for a moment that's worth more in their lives.

This is live in the US at the moment and we're looking to expand it further around the world. GDI

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

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Not so hot news: US beverage alcohol mid-summer temperature check

There is a lot of talk around the headwinds facing the alcohol industry, and in the US, some experts blame it on the weather. Circana's **Scott Scanlon** reports



Buoyed by Ultra and Ultra Zero, AB InBev's Michelob continues to lead the domestic beer subcategory

Circana, which measures retail performance across grocery, convenience and multi-outlet stores, has been watching 2025 shape up to be unfavourable as high hopes for summer sales left many in the alcohol industry feeling the burn.

Total beverage alcohol sales are down 3.3% in volume and 1.7% in dollar sales for the last 52 weeks ending 20 July. All major categories are facing declines, with numbers expected to drop even further in 2025.

Take a year of uncommon weather patterns and overlay macroeconomic concerns, consumer prioritisation of health and wellness, generational moderation, weight loss drugs and the continued unwinding of Covid-19 pandemic trends, and you have the perfect storm of factors making some wonder if 2025 is setting the stage for what is to come.

Weather has always been a controversial topic — some view it as an excuse masking larger trends at play. But uncommon snow in the Southern US (where many Northern consumers take respite over the winter months) early in year, followed by Midwest region rainstorms in spring and extreme heat in the South at the beginning of summer threw seasonal patterns off.

This impacted Memorial Day in May, viewed by many Americans as the unofficial start to summer, thwarting outdoor barbecue and picnic occasions that typically boost alcohol sales.



Double-digit growth: Constellation's Pacifico

The industry quickly turned to hopes of explosive Fourth of July holiday sales, but that holiday failed to deliver broad sweeping growth across all beverage alcohol categories.

Pockets of solid growth were evident, especially within the popular ready-to-drink (RTD) canned cocktail segment, which showed double-digit growth, up nearly 35% in volume and dollar sales over June and July (see chart p49).

Michelob, Busch Light & Pacifico standouts as beer struggles

Beer is down 3.3% in volume and 1.6% in dollar sales over the past year (see chart p49), with trends worsening over the summer. The category is dominated by the American super-premium subcategory, with Anheuser-Busch InBev's Michelob one of the major driving brands.

Michelob is not only capitalising on the strength of its top-selling lower-calorie, lower-carbohydrate Ultra, it also leaning into the no/low space with Michelob Ultra Zero. Launched in January, the 0% ABV variant has increased momentum for the brand, satisfying consumers choosing non-alcoholic products either to supplement alcohol occasions, or because they want to abstain from alcohol completely.

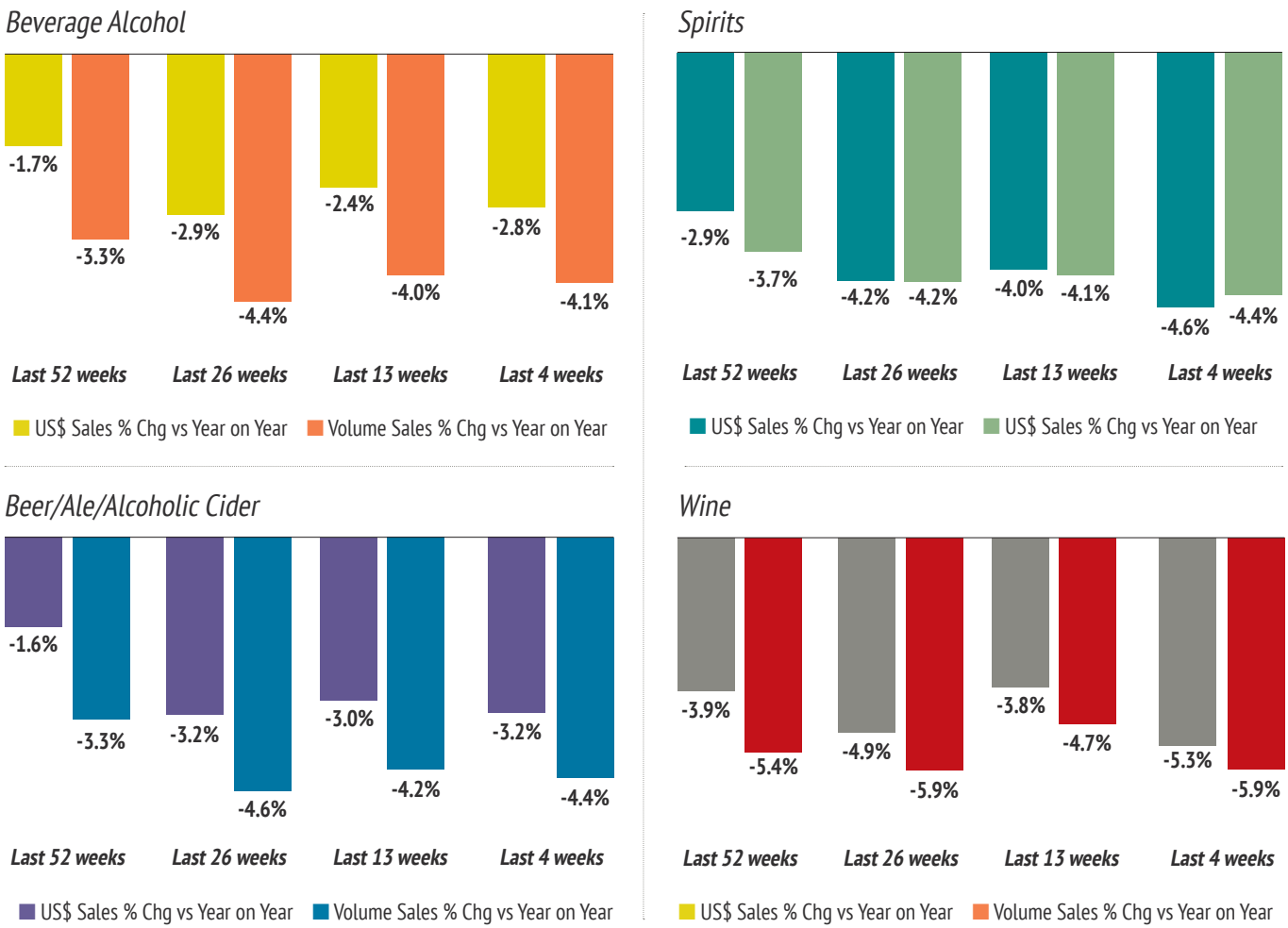
AB InBev's Busch Light brand has also been connecting with consumer need states at a value price point, but with an added twist of a limited-edition apple flavour. First launched in 2020 but discontinued two years later, Busch Light Apple returned to retail shelves in May after consumer lobbying. The innovation has dramatically lifted sales to further enhance the brand within the competitive top ten beer brands ranking.

The power of Constellation's Mexican import Pacifico is hard to ignore. Though the brand has yet to crack the top ten, it has grown double digits year on year, bucking negative trends faced by the overall category. Pacifico started as a West Coast brand, popular in California, but has broadened its appeal across the country, becoming a workhorse across the Constellation portfolio, which also stables top-performing Modelo and Corona in the US.

Another standout for beer has been Mark Anthony's Mike's Harder brand — actually a flavoured malt beverage (FMB), although categorised here under 'beer' — which continues to deliver consistent growth with a higher-ABV offering to challenge the rise of spirit-based canned cocktails.

Traditional hard seltzers have seen contraction over the past few years, down »

Sales Declines Across Beer, Wine & Spirits in US Multi-Outlets and Convenience Stores



Source: Circana Market Measurement Data week ending 13 July 2025

» 7.5% in volume during the last 52 weeks to mid-July (see chart p50).

While the beer category began the year softer than anticipated, positive signs emerged in early August which hopefully can translate to a more positive second half of the year and Labor Day holiday (1 September). Then all eyes will be on the start of the American football season — a big deal for beer brands.

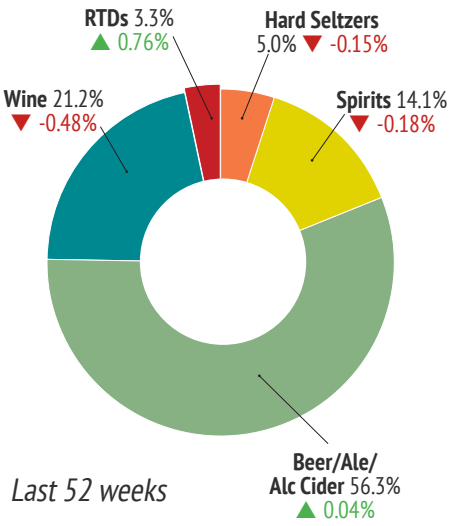
Spirits-based canned cocktails now driving category

The spirits category has slowed dramatically from a 20-year surge in popularity and is now being driven by canned cocktails. While Tito's Handmade Vodka often leads in overall volume, Gallo's successful spirit-based RTD High Noon accelerated beyond Tito's during the Fourth of July, propelling it to the top position.

Other RTD cocktail brands, such as BuzzBallz (acquired by Sazerac in 2022) and BeatBox also greatly outperformed key holiday occasions, showing strong consumer demand for flavour and convenience.

Outperformance of RTDs Increases Share of Beverage Alcohol

% of Beverage Alcohol US$ Sales



Source: Circana Market Measurement Data, WE 13 July 2025

These brands had astonishing triple-digit growth comps in 2024 and remain within spirits' top ten, challenging traditional category leaders like Crown Royal, Jack Daniel's, Jose Cuervo and Smirnoff.

Two brands, in particular, have been riding the wave of the fast-growing RTD vodka and tea segment of late. Boston Beer Company's Sun Cruiser and Stateside Vodka's Surfside saw explosive growth in 2025, accelerating to be top 25 brands across total spirits. At consistent triple-digit growth, it's likely both will crack top 15 status by the end of the year.

Most major suppliers have entered the RTD segment to balance portfolio slowdown across other areas. Without question, US consumers continue to be attracted to RTD innovation from known brands, as well as new ones.

In comparison to a year ago, consumers not only spent more on RTDs, but also bought more frequently (see chart left). The RTD category has tripled since 2018 and Circana forecasts it to reach nearly $11bn by year-end. Spirits-based canned cocktails provide a bright spot in an otherwise gloomy forecast for beverage alcohol. »

Josh and Decoy bright spots as wine continues decline

» The wine category continues as the laggard within alcohol, dropping 5.4% in volume and 3.9% in value over the last 52 weeks (see chart p49). The industry-old adage 'brands drive categories' has a kernel of truth, but even consistent outperformers across wine cannot make up for the precipitous drop in consumption as younger consumers gravitate to RTDs.

Josh, owned by Deutsch Family Wine & Spirits, remains the growth category leader, with bursts of outperformance during key holidays. The brand, which has a cultural cachet across social media, has at times challenged Gallo's Barefoot, which holds the top volume position. La Marca Prosecco (also owned by Gallo) has shown strength within the sparkling wine segment outside of just celebratory occasions, consistently gaining versus the year prior.

One wine brand to watch is Decoy, part of The Duckhorn Portfolio, which has delivered double-digit growth in the first half of 2025 and is on pace to continue the momentum through year-end. As a subcategory, boxed wine remains appealing to consumers with brands like Bota (Delicato Family Wines) and Black Box (Gallo) capitalising on the value-for-money trend emerging as uncertainty around the US economy continues.



One to watch: The Duckhorn Portfolio's Decoy



As well as leading the US non-alc charge, Athletic has partnered with Arsenal Football Club in the UK

Adult non-alc makes inroads

Even though adult non-alcoholic (ANA) products have just a 5% share of total beverage alcohol within Circana-tracked retail channels, the segment has undeniable momentum. Outside of RTDs, ANA is one of the few subcategories that is consistently growing and increasing relevance.

Appealing to a wide demographic of Americans focused on health and better living, ANA products have found a place among typical alcohol occasions. Large US retailer Total Wine & More has double its shelf space to accommodate more ANA brands over the past few years.

Led predominantly by zero-proof beer brands like Heineken 0.0, Guinness 0.0 and Athletic, the ANA category is taking shelf space across retail to meet growing demand. While non-alcoholic wine and spirits remain concentrated to a few brands, the beer category has seen increased innovation from name brands, craft brewers and even a celebrity-backed option like *Spider-Man* actor Tom Holland's Bero.

A watershed year?

2025 may be a year of reckoning for the US beverage alcohol industry. Retail data, which accounts for roughly 80% of sales, points to an overall downturn. However, certain brands and subcategories are bucking the trend, suggesting a shift in how — and what — consumers are drinking.

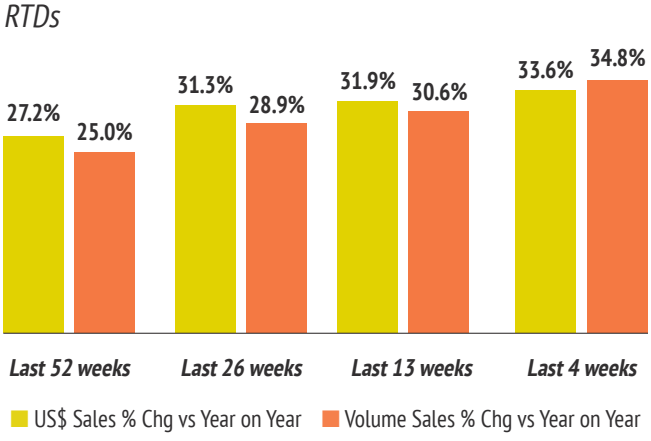
While many analysts have focused on a potential end to premiumisation due to inflation and negative consumer sentiment around the US economy, most higher-priced products have proven resilient.

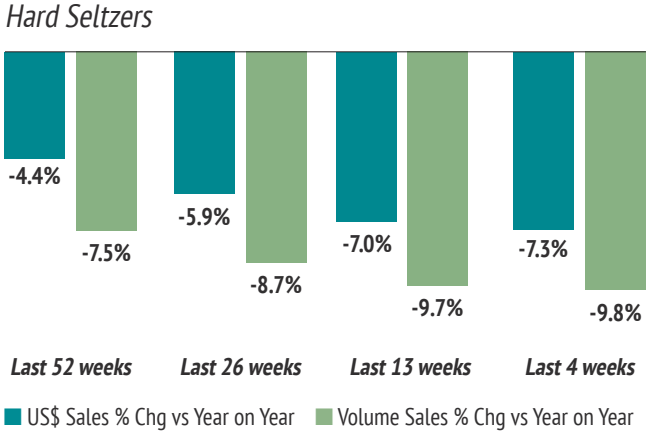
People are still drinking, perhaps at a more moderate and price-aware pace than in the last five years, and demand for out-of-home experiences is still paramount.

As Americans travel for end-of-summer vacations, there are hopes this may provide a much-needed boost for beverage alcohol — weather permitting. GDI

Scott Scanlon is EVP Beverage Alcohol at Circana, US. Circana (formerly IRI and NPD) is a leader in providing technology, AI and data to fast-moving consumer packaged goods companies, durables manufacturers and retailers seeking to optimise their businesses.
www.circana.com

RTDs Continue Strong Growth as Hard Seltzers Decline in US Multi-Outlet and Convenience Stores





Source: Circana Market Measurement Data week ending 13 July 2025



INDUSTRY INSIDER

Dale LaFlam

Why most beverage startups fail before they scale — especially in the diverse markets that make up the US

You have a great product, killer branding and maybe even a distributor who said 'yes'. You think you're in the game. But right now, you don't have a business — just a product and a hope it sells.

In my work advising early-stage beverage brands, I see the same story repeat itself. The two biggest misconceptions I come across are, first, that the faster a brand enters more accounts and more markets, the better. In fact, the faster you grow, the higher your chance of failure. And second, that brands underestimate the amount of capital needed to stay in the game. Growth is extremely expensive and most teams simply are not prepared for the financial weight of scaling — especially in the US.

Growth eats cash

Most founders raise just enough to get to launch. But launch is not proof of concept. That only happens after you've sold through, supported your accounts and seen repeat movement. The bills come fast. Freight, production, inventory, tastings and in-store support all require cash and come before revenue.

Even brands with a 50% margin on paper quickly find out it's not enough. That might look good in theory, but if you sell through your entire production run, all it usually covers is the cost of making the next one. And that's before factoring in distributor cuts, chargebacks and promotional spend. Even at 60% margin, your cash disappears fast if you're not moving volume consistently.

Regional launch costs also vary widely in the US. Markets like New York and Los Angeles are expensive and saturated, with complex distributor networks and crowded shelves. Your capital must stretch further than you think.

Distribution does not equal traction

Getting picked up by a distributor is not the win it's often made out to be. It simply means your product is now available to



Illustration: iStock.com/StockDevil

be sold. Whether or not it moves is still entirely on you.

Only you will build your brand. That means being in the market, talking to buyers, walking stores, fixing placement and setting up tastings. In the US, some states allow you to self-distribute — California, Colorado, Washington and Oregon among them. If your product is eligible, this gives you margin, control and a chance to learn directly from the market.

If you're based outside the US, you'll likely need a local sales rep to execute that work. That's often a smarter move than rushing into a national distributor you can't support. Once your product hits the shelf, the countdown starts. If it doesn't move, it gets pulled — and you don't get a second shot.

Winning on-shelf is everything

The shelf is a battleground, not a trophy case. US shoppers begin making decisions from eight feet away. If your packaging doesn't stand out or communicate clearly, you've already lost. It's not about pretty — it's about presence. Premium, functional, familiar enough to belong, but distinct enough to break through.

Store employees and restaurant staff are your first real customers. If they're not excited about your product, no one else will be either. They're your front line, and education, sampling and incentives go further than you think.

Large chains like Walmart and Kroger require a completely different playbook — national inventory, broker coordination, resets and pricing systems that can bury early brands. If Total Wine & More is in your launch market and you're ready to support it locally, it can offer a helpful read on pull. But your best bet is to start with a smaller, regional chain in your focus market, where you can build relationships and influence staff directly.

Win your backyard first

One of the core strategies I push with clients is to win their backyard before anything else. More markets do not equal more success. You need to go deep, not wide. Focus allows you to control the story, fine-tune execution and adjust based on real feedback.

The best test-and-learn cities in the US are not the biggest. They're mid-size, cost-effective and full of curious consumers. Consider places like Tampa, St Petersburg, Nashville, Raleigh or Denver. Choose a city where you can support accounts, work closely with your rep and generate actual pull — not just placements.

Make sure the state laws work in your favour. Control states like Pennsylvania, Utah and Mississippi are slow, bureaucratic and difficult for new brands. They may make sense later, but not at launch.

A playbook that works

The upside here is that the same structure that breaks unprepared brands is also what rewards disciplined ones. Brands that move deliberately, stay focused and spend where it matters can and do succeed.

This is not about how many states you're in. It's about how many cases you're moving, consistently, over time. The US rewards those who understand unit economics, know their consumer, support their accounts and spend only where they can prove impact.

You don't need to be everywhere. You just need to be excellent where you are. GDI

Dale LaFlam is the founder of 5:30 Somewhere, a strategic advisory firm that helps emerging beverage brands become investor-ready with clear strategies, business plans and go-to-market playbooks.
www.530somewhere.com

Ellers Farm Distillery acquires Bramley & Gage, owner of 6 O'Clock Gin

Ellers Farm Distillery expanded its portfolio with the acquisition of Bristol-based Bramley & Gage, producer of the 6 O'Clock Gin brand. Financial details of the deal, which sees Ellers Farm take 100% ownership of the company, were not disclosed.

Founded in 1988, Bramley & Gage is best known for 6 O'Clock Gin, a premium brand with a core London Dry retailing at GBP39 (US$52) per 70cl bottle. The range also includes sloe gin, flavoured extensions and gin-and-tonic RTD cans. Alongside its gin portfolio, Bramley & Gage produces a wide range of liqueurs, including coffee, limoncello and amaretto.

The deal strengthens Ellers Farm's positioning in the premium spirits segment. The Yorkshire-based distillery is already known for Dutch Barn Vodka and Y-Gin, while also ageing its own English single malt whisky. Adding 6 O'Clock Gin provides a well-established brand with strong on and off-trade presence in the UK and export markets.



6 O'Clock Gin has joined the Ellers Farm portfolio

The acquisition follows a series of strategic moves by Ellers Farm to grow its profile both domestically and internationally. In 2022, it secured investment from comedian Ricky Gervais, who also fronted a marketing campaign for Dutch Barn Vodka last year.

More recently, in March 2025, Ellers Farm appointed US distributor Opici Wine & Spirits to import Dutch Barn Vodka into the US market.

Foxes Bow adds pouch pack to Irish whiskey line-up

Irish whiskey startup Foxes Bow released a pouch version in its domestic market. The namesake brand came into being in 2021, positioned as choosing to "eschew traditional visual codes" in order to give the Irish whiskey category "a fresh and dynamic identity".

In keeping with this approach, co-founder Alice Carroll, who previously spent six years with Pernod Ricard in Canada, announced details of the resealable 10cl pack size late last week.

Artisanal Spirits Co readies India franchise

The Artisanal Spirits Co, the parent company of whisky club the Scotch Malt Whisky Society, is set to launch a unit in India.

Having conducted a "review of potential partners|" in the country, the UK-headquartered business has signed a franchise agreement with PNM Tech Beverages to represent SMWS. Subject to label registration, the first shipment under the brand name is expected "in the coming months".

The move follows the platform's launch in Vietnam earlier this year and builds on previous expansions into Korea and Taiwan.

India, the world's largest market for scotch by volume, is expected to deliver "marginal returns initially", with Artisanal Spirits positioning for the "long-term opportunity" in the country.

The company also announced that Single Cask Nation — a whisky bottler it acquired last year — has commenced exports to Brazil, marking its second new market in a year after entering Denmark in late 2024.

Chief executive Andrew Dane said the moves reflect ASC's focus on "growing our global presence with entry into exciting new markets" and "developing new opportunities for Single Cask Nation" as it expands its whisky membership communities worldwide.

Origami Sake partners with Born Free USA

Snow Monkey, Origami Sake's ready-to-drink brand, has collaborated with wildlife conservation not-for-profit Born Free USA. Snow Monkey, which features Japanese macaque monkeys in its pack design, will roll out marketing activations supporting Born Free across social media, digital advertising, PR campaigns and consumer sampling.

Maspex acquires Romania's Purcari Wineries

Polish food and drinks business Maspex purchased Romania-based Purcari Wineries via a voluntary public takeover bid. More than 71% of shares were subscribed by existing shareholders during the public offer, according to BRD Groupe Société Générale, which acted as the intermediary.

Maison Ferrand appoints La Maison du Whisky in Singapore

Maison Ferrand selected the Asia-Pacific unit of French compatriot La Maison du Whisky to distribute its full portfolio in Singapore following the collapse of Proof & Co. The arrangement saw La Maison du Whisky Asia-Pacific assume responsibility for the likes of Citadelle Gin, Ferrand Cognac and Planteray Rum.

Adnams names permanent CFO

UK-based brewer and hospitality group Adnams appointed Andy Driscoll as CFO, succeeding interim funding director Robin Paul. Driscoll joined the Suffolk-based business on 1 September and become an executive board director. His previous roles include CFO positions at Constellation Cold Logistics, Valeo Foods UK and Kettle Foods.

Provi partners with Women of the Vine & Spirits

Online alcohol ordering platform Provi has joined Women of the Vine & Spirits as an "associate corporate member". The US-based B2B marketplace said the partnership would allow it to contribute to discussions around business development and inclusion. The tie-up will also feature a "digital trade marketing live chat series" in collaboration with the organisation, which champions women in beverage alcohol, promoting gender equality and leadership opportunities across the industry.

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‘From two guys in a shed to Diageo, we help alcohol brands sell D2C online’

Eoin Bara created Tipple to simplify cross-border direct-to-consumer online selling after hitting a brick wall with his own gin company. The CEO tells **Olly Wehring** he is building a global business and about to expand into the B2B space



Tipple CEO Eoin Bara: ‘A lot of people dive in headfirst with this romantic notion of making booze and think it’s going to be great. You really have to do the numbers beforehand’

What is Tipple and how does it work? We enable brands to be able to sell online. Things like tax and excise are incredibly difficult — especially cross-border. Tipple makes it simple. It’s a quick plug-in on platforms such as Shopify or WooCommerce that allows a brand to sell across a border compliantly. We handle all the VAT, the excise, the picking, the packing and the shipping.

How did you identify the problem that you felt Tipple could solve? I was solving this problem for myself: I had a distillery in Ireland and an Irish gin brand — the fourth-biggest in the country at one stage — called Mór. We had tourists coming to Ireland who really liked it and wanted to buy it in, say, Germany, but we didn’t have a distributor in Germany. If we were to sell online, then the shipping from Ireland was going to cost around GBP30 (US$40), and we had no way of paying the VAT or taxes in Germany. This was back in 2019.

When we went to look at warehouses in Germany, no one wanted to deal with us because we were too small to be interesting for them. Besides, it would have been crazy for us to have warehousing in every country. So we looked into how we could fulfil orders out of one warehouse, like Amazon does, and do cross-border. Now, that’s a way more difficult question.

It took us about two years to figure out how to do it, and when we did, I had to ask myself why I was making gin, when this was a much bigger problem that other people were having too. So that’s what I did. I sold off the gin brand and went all-in on this. So I was scratching my own itch.

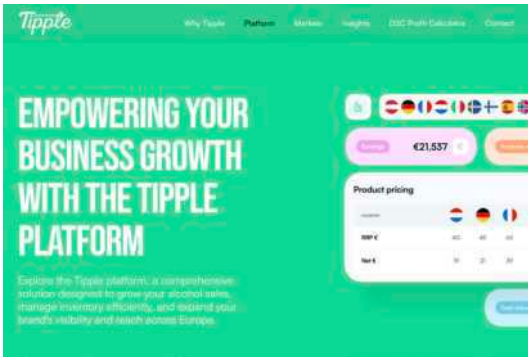
Is Tipple just for smaller brands? No. We do everything from two guys in a shed to Brown-Forman and Diageo — we do all sizes. Pricewise, the most expensive bottle we sell is GBP45,000 [US$60,477], so it’s the whole range.

How did you make the move from solving this problem for yourself to creating a platform in its own right? When we first thought about doing this for ourselves, we realised how much it was going to cost to set it up. Then, to make it viable, we needed the volumes to get the carrier prices down. The only way to do that was with scale and with multiple people. So we built it as an infrastructure from the start.

‘I really set out to solve the problems that I faced in the alcohol industry and direct-to-consumer was just the first one I came across’

As a brand owner, I’d seen this work in the US, but it didn’t exist in Europe. We needed to find warehouse partners, although it was quite difficult finding a bonded warehouse that could do pick and pack. We also needed to find tax partners who knew the taxes in their localities. Then we built the technology to automate the pulling of orders, the paying of taxes, the dispatch and then being able to track everything in one place.

I really set out to solve the problems that I faced in the alcohol industry and direct-to-consumer was just the first one I came across. »



» **Where is Tipple today?** We went to market in 2021 and today we have three warehouses in Europe — Amsterdam, Antwerp and Paris — one in the UK, and another one coming online in Ireland. We also have one in New Jersey, and another coming online in Sydney, Australia. We started working with Diageo in 2023, with Brown-Forman last year and with Au Vodka earlier this year.

I'm based in Tullamore in Ireland, and we have an office in Dublin, as well as staff in Portugal and Scotland. We're building a global business. Our headcount at the moment is at seven. As we launch our B2B product, there's going to be a big rise — we're probably going to hire another seven in the next three to four months, then probably another ten next year. It's going well.

Who initiates your conversations with the brand owners? A lot of this is inbound now, so people come to us. We do outbound as well, but it's easier when it's inbound because these people have a problem that they need to solve. We've found the larger customers come to us, because they're problem-aware; they saw a spike in e-commerce during the Covid-19 pandemic and recognise they need to take advantage of this.

What's hugely important about us for the large enterprise brands is that there's no brand interruption — you never really see us.

Before the tariffs, we were getting a lot of American brands wanting to come to Europe because they can make far more money. People are surprised at how much more margin they can make by selling direct versus selling through traditional routes.

Presumably you've made the offer of better margins your USP. Getting a distributor has become much more difficult since Covid, because they've become more risk-adverse — they want to see market demand. But, if you can't get a distributor to get into a market, how do you prove market demand? You can prove it through direct-to-consumer. We had a brand that ran a really good D2C campaign in Germany recently, which resulted in two distributors fighting over it. That's unheard of in the drinks industry.

What's your funding journey been? In 2022, we took on GBP400,000 from some 'angels', who included Des Traynor [co-founder of Intercom] and Adii Pienaar [co-founder of WooCommerce]. We used that money to build Tipple out to be more scalable. Then, last year, we raised GBP4m.

What's been the hardest part of the project so far? Here in Europe, the first thing is that brands aren't really aware that this can be done. The second is that they haven't counted D2C as a route-to-market. Everybody does D2C in the US because they have to, but they don't make money on it because it goes through the three-tier system.

Europe has been slower to see D2C as a possibility; they've been trying to sell direct through Amazon but in doing so, they're driving traffic to Amazon — they don't get the customer data and they don't get to remarket to them. By going direct, you 'acquire' your customer; you can build a relationship and get a really good lifetime value out of them.

That's been a mindset shift when we're talking to brands. All they cared about was selling bottles, but this way, you can sell your customer one bottle, then sell them a new release and keep them coming back.

How do you line up brand owners to stay with you for the longer term? We're very transparent from the start. We start with a 'discovery' call, where we see what they want to do. If it's a good fit, we'll move to a second 'P&L' call, where we show them very transparently how long they're going to be losing money for until they start making money. You have to invest in the market to get the volumes up in order for this to make sense.

From there, we basically act like an outsourced e-commerce manager; we'll have a call once a month and highlight what we see working for their brand across areas such as email marketing. We see it like a partnership where we try and help them. Our incentive is our commission, so when they're selling, we're making money. The incentives are aligned.

What's your exit strategy? There isn't one. The idea here is that we build the infrastructure for the alcohol industry. We started with D2C and now we're going into B2B, which is a beast of a thing. We have a unique way of doing it that should make it better for everybody; distributors can make more money, so can brands and so can the on-trade.

From a liquidity perspective, our next move would be an IPO rather than a trade sale. Our idea is to provide an independent infrastructure for everybody, not just for one large player. We don't want to keep anyone out of the market, we want to make it as easy to enter a market as one click.

Is your business model recession-proof? After 2008, we saw people cut down on going out but still buying a nice bottle of whisky or wine to help make life suck less because there was a recession going on. We're perfectly poised for that because we're the people who can supply that little luxury.

But then, we don't know until the tide has gone out — we could see consumer behaviour go completely the other way. If the cost of living keeps going up and taxes don't come down, then people aren't going to have the money to spend.

At the same time, we tax the logistics and underlying infrastructure. There's always going to be this money moving. With B2B, you still have to get the product to a store; you still have to enable all of this. We expect B2B will allow us to smooth out some of the seasonality and become properly recession-proof.

What advice would you give anyone starting out? Do the numbers! There are so many times that we speak to brands and they're selling the product for something like GBP40, but it costs GBP22 to make — that's a net margin of 5% or 6%, and that's a huge problem.

The other thing is to look at the trends. We're seeing quite a lot of taste exploration, for example, and people want to try things first. A lot of brands only have 70cl, which means a consumer has to commit GBP40–GBP50 to find out if it's good or not.

Also, invest in your branding. So many people cheap out on their label or they hire a bad designer. Consumers buy with their eyes first and then the taste keeps them coming back. First, you have to stand out on-shelf: you have to look at your product and where it's going to be.

A lot of people dive in headfirst with this romantic notion of making booze and think it's going to be great. You really have to do the numbers beforehand, and bear in mind everything's going to take you five times longer than you think it's going to. It's going to be way more competitive. GDI

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



Philip Everett-Lyons: 'Know who you are, know what you want, and only take on partners who can help you get there without compromising the very thing that makes you worth investing in'

The 'right backers bring more than the biggest cheque': funding spirits startups on a budget

In a tougher capital market, spirits startups need clarity, discipline and the right backers. Hattiers Rum founder Philip Everett-Lyons shares lessons for raising funds without losing direction. Interview by **Henry Mathieu**

Understand the funding landscape before you enter it

The capital environment has undergone a notable shift in recent years, according to Hattiers Rum founder Philip Everett-Lyons.

"Investor confidence is one of the biggest challenges in the current fundraising climate," he explains. "Investments that would have been signed off quickly five years ago now face extended scrutiny, tougher terms, or are being delayed altogether."

But this, he emphasises, is not a permanent state. "These conditions are cyclical. I fully expect the capital environment to rebound, with a gradual loosening over the next five years." That makes now a time for careful groundwork, ensuring your business is investable when confidence returns.

To that end, he recommends a staged fundraising approach. Starting with founder, family and friends (GBP0–250,000), the focus should be on developing product, securing regulatory approvals and launching the brand. With momentum, angel investors — ideally taking advantage of SEIS/EIS reliefs — can help scale distribution and prove repeat purchase. From there, growth equity can support national listings and senior hires, before later-stage venture or corporate backers fund large-scale expansion and, ultimately, exit.

"Each round must de-risk the business for the next," Everett-Lyons explains. "Early-stage investors buy into the story, while later-stage backers expect hard evidence of scalability and systems."

Don't chase every investor — or every opinion

Not every cheque is worth cashing. One of Everett-Lyons' central lessons is to avoid contorting your business to please every potential investor. "Each investor will have their own view on what the brand needs," he notes. "Feedback is invaluable, but don't contort your business to meet every opinion — that's a fast way to dilute your vision."

Instead, stay grounded in your brand's ethos, and focus your energy on prospects who are genuinely aligned. "Get investors to show their hand early," Everett-Lyons advises. "Too many founders spend months courting prospects only to discover the cheque is far smaller than required."

For early-stage spirits brands, that's time and energy that could be spent establishing customer relationships, building stockist traction or fine-tuning your product story. Everett-Lyons also warns against seeing crowdfunding as a silver bullet. "Crowdfunding looks appealing — glossy campaigns and an army of micro-investors — but it's far from easy," he warns. Campaigns need significant pre-commitment to gain traction: "Without that early momentum — think 50% of the fund achieved before launching — you're shouting into the void."

Seek smart money, not just money

When capital is tight, the temptation is to accept cash from wherever it's offered. But long-term success is shaped just as much by *who* is on the capitalisation table as how much they put in.

"The best investors offer more than capital — market insights, networks and hard-earned experience," Everett-Lyons says, but equally important is alignment. "Make sure their approach fits your ethos. The recent closure of Distill Ventures is a cautionary tale. Even the biggest corporates will pull back when the accelerator model no longer aligns with their priorities."

In other words, today's perfect partner may be tomorrow's mismatch. Founders need to consider not just an investor's cheque size and reputation, but whether they'll support their brand's long-term direction.

When weighing offers, remember that capital brings options, but also requires discipline. "High-growth businesses in tough markets need more capital than founders often anticipate," Everett-Lyons says. "Cash provides options, but beware the trap of 'we've got it, so we'll spend it'. Too often, that mindset leads to vanity projects rather than investments that drive the bottom line."

Be disciplined, deliberate and long-term in your thinking

Fundraising doesn't end with closing a round — it's an ongoing process of planning, proof-building and positioning your brand for the next stage. Every move you make should add credibility, momentum or scalability.

Everett-Lyons advocates for clear milestone-setting at each stage of fundraising. Early rounds should prove product-market fit, middle rounds should validate growth potential and later rounds must show commercial robustness. This progressive de-risking builds investor confidence and positions you for better terms as you grow.

Most importantly, don't compromise the heart of your business just to raise money. "Know who you are, know what you want," Everett-Lyons says, "and only take on partners who can help you get there without compromising the very thing that makes you worth investing in." GDI

Five lessons for drinkpreneurs
Fluxion Advisors MD Alex Oldroyd

From equity analyst to trusted advisor, Alex Oldroyd has helped scale, structure and sell some of the UK's best-known drinks brands. She shares the lessons she wishes every founder knew from day one. Interview by **Henry Mathieu**

Cash is king — from the start

For Alex Oldroyd, who spent 16 years in equity research at Morgan Stanley and Barclays before founding Fluxion Advisors, the single most important principle for drinks entrepreneurs is financial discipline. "Every penny that you spend has to come from somewhere," she says. "Either you're going to have to generate it, or you're going to have to raise it or borrow it."

That means spending with measurable returns in mind, rather than chasing top-line growth for vanity's sake. "It's not growth at any cost," Oldroyd cautions. "You need to start generating profitable growth or the business won't be sustainable."

In a category where flashy marketing can often take precedence over margin, Oldroyd's perspective is grounded in real-world deal experience. "There has been a tendency to think, 'I can raise lots of money and throw it at growth', but if you're not making money, it's just not a sustainable business — and strategics won't want to buy it."

Your first investors are people, not pipelines

Entrepreneurs often imagine a perfect world where institutional capital swoops in early, but the reality is much messier. "Investors are all people — it's people's money being invested," Oldroyd notes. "Your early investors are very rarely people you don't know."

Friends, family and local networks often provide that first financial backing. But even more important than where the money comes from is understanding the terms and the long-term implications. "A lot of institutional investors want a very high return," Oldroyd explains. "They dazzle the entrepreneur with a really high upfront valuation, but what they're actually doing is setting up a preferred return that gets paid before the founder sees anything."

Her message is clear: structure matters. "You need to think about how the investor is coming into the company, how you're going to get them out — and what happens if you miss your business plan. If it only benefits the investor and not you, then maybe you shouldn't take the deal."



Alex Oldroyd: 'Lock down IP early'

Get it in writing — always

Even the best ideas fall apart without proper structure. In Oldroyd's experience, one of the biggest weaknesses in early-stage drinks companies is the lack of proper contracts. "A handshake of 'I'll do this when we exit' is not good enough," she warns.

That applies to suppliers, agencies, distributors, co-packers and even co-founders. "You might be friends with these people, or have worked with them before, but you need professional and fair contracts that can last ten years or more," she says. "Circumstances change. Relationships change."

And those changes can have dramatic consequences. "If your contract ends on a change of control and that contract is critical to the business, you don't have a business," Oldroyd says. "You need to make sure your key agreements survive a sale."

It's not just about protecting yourself, it's also about aligning incentives. "If your partner is going to take quasi-equity and a share of the upside, they need to commit to generating that upside. If it's all clear and on paper, you have a real partnership. If it's vague, you have a risk."

Own your IP, or someone else will

One of the most common — and costly — mistakes Oldroyd sees is poor intellectual property protection. "You need to be really clear on the ownership of all your brand assets," she says. "If you're going to sell, a premium price is paid by the buyer because there's value in the IP."

That includes everything from trademarks and recipes to packaging designs and marketing materials. "No one individual does it all — you contract people to help," she says. "But I've seen brands come to sell and realise they don't actually own the brand image or the recipe, or have the rights to a key market."

Oldroyd recalls several deals that were nearly derailed due to unresolved IP. "It can all be fixed, but if you're in a sale process and someone's holding a key asset, you've got no leverage. They can name their price."

Her advice: Lock down IP early and revisit it regularly. "You're building a brand," Oldroyd says. "Make sure you own it."

Focus beats footprint

With today's interconnected markets and social media-driven hype, many drinks brands aim to be everywhere, fast. Oldroyd urges caution. "I see brands sending pallets to 50 different countries, or launching five SKUs at once," she says. "That's not scale. That's distraction."

Strategic buyers — the eventual acquirers of most drinks startups — want simplicity. "Their ideal acquisition is a single SKU that's really big in one or two markets. They're not set up to manage a complex spider web of products and territories."

Oldroyd has seen the downside of premature expansion, especially in the US. "Founders do a deal with a big distributor, flood the market and nothing sells through," she recalls. "Suddenly, your brand is dusty on a shelf and retailers won't touch it again."

Instead, Oldroyd recommends focusing on building repeat purchase and brand pull in core markets. "Get on the shelf and make sure you're doing something to get off it," she says. "Don't confuse the consumer. Don't confuse the buyer." GDI

Concept-to-shelf launch a first for Starboard Group

Travel retailer Starboard Group has launched Invicta Tequila, a premium spirit developed with Invicta Watch Group and produced by Casa Maestri Distillery in Mexico, on board 26 cruise ships.

The launch marks Starboard's first attempt at creating a branded premium spirit from concept to shelf as part of a broader strategy to evolve "beyond traditional vacation retail operations into brand-building, experience curation and category innovation".

Starboard Group president & CEO Lisa Bauer said: "This launch leverages our expertise and global resources in the premium spirits space to help extend the [Invicta] brand into a new lifestyle category and offer exclusive, personalised onboard experiences that will excite customers and fans."

Invicta is a well-established and consistently high-performing brand across the ships on which Starboard operates. It has strong guest loyalty, so the leap to tequila — a category that has been growing 30% year on year for the retailer — made sense.

Casa Maestri, on the other hand, is new to the Starboard portfolio, but has shown early momentum. "Guests are responding positively to its artisanal quality, Mexican heritage and premium positioning," a Starboard Group spokesperson said.

Initial sales of Invicta Tequila have been "very encouraging", according to Starboard, which is part of Global Travel Retail Holdings, a joint venture between LVMH and Gissy Investments. "We see strong potential for continued growth as we integrate it into more onboard experiences," added the spokesperson.



Invicta represents a first for Starboard, which led its development from concept to shelf

Tequila's 30% surge reflects a shift toward more premium offerings. Across the category, the average selling price is currently around US$50, but Starboard is seeing strong gains in the $75-plus price tier where the new product is positioned.

Heinemann: premiumisation, authenticity and craft remain key to spirits growth in GTR

The travel retail liquor business may be facing challenging times, but global travel retailer Gebr Heinemann is confident that the right approach can still yield results.

Manuel Schilling, head of spirits buying at the Hamburg-based travel retailer, reports categories like gin and rum are seeing "continued interest in craft and authenticity".

"Consumers are seeking out unique flavour profiles and brand stories," he told *Global Drinks Intel*. "Premiumisation remains a key trend in travel retail, where shoppers are often looking for something special or exclusive."

While premiumisation stays on the agenda, other purchase drivers must also be addressed. "Factors such as brand recognition, packaging appeal and perceived value for money are critical," noted Schilling. "Sustainability and health-conscious choices are also increasingly influencing decisions, particularly among Gen Z and Millennial travellers."

Charlotte Reid, IWSR's senior insights manager for travel retail, agreed. "Price remains a key purchase driver — everyone wants as much value as possible when they spend," she said. "Immersive and interactive activations are also purchase drivers, and design and packaging are not considered enough to attract shoppers."

Looking ahead to the next 12–18 months, Schilling predicts that the premium and craft segments will remain strong in travel retail, "particularly if brands can offer exclusivity or storytelling that resonates".



Hennessy's 'Cabinet of Curiosity' trunk

Möet Hennessy: GTR 'by invitation only'

'The Privileged Moment' is how Möet Hennessy is framing a new concept of invitation-only events and tastings of its rare cognac Hennessy Paradis in global travel retail.

At the heart of the experience designed to engage high-net-worth individuals and cognac connoisseurs, is an oak 'Cabinet of Curiosity' trunk that guests unlock to gradually reveal multiple facets of Hennessy Paradis.

The experience first launched at Haikou International Duty-Free City — a downtown duty-free mall in Hainan, China — last year. It is now being rolled out to key GTR locations, including Sanya (also in Hainan), Macau, Hong Kong, Paris and Dubai.

Executive Retail Shops brings high-end liquor to Fort Lauderdale Airport

Specialist travel retailer Executive Retail Shops (ERS), has opened two new stores at Fort Lauderdale-Hollywood International Airport in Florida, specifically serving the wealthy passengers who travel on private jets.

Partnering with the Sheltair Aviation FBO (fixed-base operator), ERS has inaugurated a modern 64sqm flagship store selling spirits, plus fragrances and jewellery. High-end products lead the alcoholic beverages offer, with an exclusive Louis XIII Cognac (1.5L) priced at more than US$10,000 and Hennessy Paradis (70cl) available for just over $1,400. However there is a broad mix available, including mainstream products such as Cinzano Extra Dry Vermouth (1L) at $13.50. A smaller boutique shop is slated to open this winter.

The two stores at Fort Lauderdale bring ERS' points of sale to 21 in the private aviation travel retail niche. James Mullaney, president of ERS (part of Duty Free Holdings) estimates there are more than 3,000 FBOs across the US alone, offering untapped retail potential.

Driving resilience & growth: how Ferovinum empowers companies like SipWell

For **SipWell Brands**, a leading force in global travel retail distribution, the combination of entrepreneurial agility and **Ferovinum**'s fintech-powered funding and supply chain platform has proven to be a transformative advantage



Global finance experts Mitch Fowler (CEO) and Dan Gibney (CFO) founded Ferovinum in 2018

A unique challenge in GTR

SipWell Brands began in February 2020, just weeks before the Covid-19 pandemic halted international travel. "Our core customer base — duty free and travel retail — went to zero overnight," says Andrew Torrance, co-founder of SipWell. With decades of experience at companies like Diageo and William Grant & Sons, Torrance understood the uniqueness of the travel retail space — where customer moods peak, premium brands thrive and airport experiences shape buying behaviour.

But no expertise could prepare a startup for the global standstill and SipWell faced a critical pivot point. The company doubled down on its strengths, launching Fable, its own whisky brand, while maintaining key retail relationships even when there was no trading. "We just kept showing up," Torrance shares, underlining the importance of personal connection in a sector built on trust and consistency.

The Ferovinum solution: smart working capital meets sector savviness

Enter Ferovinum — a fintech startup offering sector-specific capital and supply chain technology solutions for the global wine, spirits and broader drinks industry. Built to support liquidity and flexibility, Ferovinum delivers enterprise-grade supply chain tools and tailored funding mechanisms that traditional lenders can't match.

"For a company like ours dealing in high-value goods — where a single bottle can be on the premium to luxury side of costing — cash flow is king," says Torrance. Traditional funding routes often prove too rigid or ill-suited for the nuances of the drinks trade.

"What Ferovinum allowed us to do was take opportunities when they came. A Hine Cognac listing with Heinemann pushed our orders from tens of thousands to hundreds of thousands. Without Ferovinum, we wouldn't have had the ability to take that on," explains Torrance.

The partnership has had a measurable impact. "We're probably 30% to 35% ahead of where we'd expected to be without Ferovinum's support," Torrance estimates. This isn't just growth for growth's sake — it's strategic scaling into prestige brands and ambitious new geographies like India, the Middle East and beyond.

Changing the game: simplicity, clarity and confidence

At its core, Ferovinum's model is refreshingly simple. As Torrance puts it: "Ferovinum funds against that stock and future sale. It's clear, quick and efficient."

This simplicity is vital in a business where timing and decisiveness determine success. Unlike traditional commercial loans, Ferovinum's structure is tied directly to inventory and sales, allowing businesses to act with confidence and speed. "It's not just about getting a 'yes' — it's about getting the right answer fast, even if it's a 'no,' with options for how to move forward," says Torrance.

Fueling ambition and resilience

For founders like Torrance and his partner Calum Lawrie, business isn't just strategy — it's personal. "The highs are higher, the lows lower," he admits. "You don't have a safety net like in the corporate world. You're carrying the emotional and financial weight of your team, your family, your choices."

In this high-stakes environment, Ferovinum doesn't just offer capital; it offers confidence. "It's allowed us to look ahead, not just tread water. That means going after new listings and doing it all without compromising our values," says Torrance.

A new funding and supply chain partner for a new era

With over GBP150m (US$201m) in funding deployed and GBP350m of product transacted on its platform, Ferovinum has established itself as a quiet force of change in the drinks industry. As co-founder Mitch Fowler explains: "Our role is to bring some calm, flexibility and control back to the businesses who are navigating sudden change."

In June, Ferovinum completed a new $550m securitisation programme enabling the platform to expand operations in the US, Europe and Australia, and is poised to help businesses of all sizes looking to grow.

It's a sentiment echoed by Torrance, who believes Ferovinum's model is practical and empowering rather than burdensome. "We don't need handouts," he says. "We just need smart tools that let us get on with it." That's exactly what Ferovinum is doing for the drinks trade. GDI

To find out how Ferovinum is helping different drinks businesses across the industry, visit www.ferovinum.com

FEROVINUM SipWell

How Intagulf is redefining travel retail drinks logistics in the Gulf

Over 20 years, Intagulf Travel Retail has become a major drinks distributor to travel retailers in the Middle East, India and East Africa. MD Mark Rogers tells **Joe Bates** the Gulf has become 'a dynamic and growing market'



Intagulf Travel Retail boasts a 99.98% pick accuracy rate and a stock availability level of 85%

Two decades is a long time in the fast-moving, intensely competitive world of travel retail. Yet for Mark Rogers, the managing director of Dubai-based Intagulf Travel Retail, one of the Middle East's leading beverage suppliers to the region's duty-free retailers and a sister company to London-based International Diplomatic Supplies, 20 years have flashed by.

A milestone worth toasting

"It feels just like yesterday," he recalls. "We were excitedly waiting and watching our first-ever container, imported directly from Australia, reverse up to our empty warehouse. The container held wines like Yering Station, Mount Langi Ghiran and Parker Coonawarra bound for Dubai Duty Free. I am pleased and proud to say they are still selling strong today."

The last 20 turbulent years haven't been easy for anyone involved in the travel-retail business, of course. "We got through the financial crisis of 2008–09 and the Covid pandemic in 2020–21, coming through it together and stronger," says Rogers, who previously held senior positions at Spinneys Abu Dhabi and MMI Dubai, two of the Gulf's biggest alcohol distributors and retailers. "It is a true testament to the dedication and passion of all involved."

A portfolio with global reach

Today, Intagulf Travel Retail boasts an annual turnover of over US$40m. It sources over 2,000 fine wines, boutique spirits and premium beers from more than 50 countries worldwide, and has forged partnerships with respected fine wine labels, such as Burgundy's Remoissenet, Chianti's Vicchiomaggio, Germany's Balthasar Ress, Margaret River's Fishbone, California's Ironstone, Chile's Cono Sur and South Africa's Mooiplaas.

Recent high-profile additions to Intagulf's range include Italy's Masi, famed for its rich, full-flavoured Amarone della Valpolicella wines; Bollinger, one of the most prestigious champagne houses; and Champagne Ayala, a pioneer in the creation of low-dosage wines.

"We are also delighted to begin work with the Carlsberg Group, and their exciting range of brands including Tuborg, Kronenbourg, Brooklyn and Somersby, as we help to develop the beer category, which is becoming an increasingly important purchase of choice on arrivals, for residents and tourists alike," says Rogers.

Sustainability amid the desert heat

Products are stored in the region's only purpose-built, temperature and humidity-controlled wine cellar, located in Dubai's Jebel Ali Free Zone, a free zone close to the port offering state-of-the-art infrastructure including warehouses, office spaces and advanced logistics facilities.

Opening these bespoke facilities in 2018 was a turning point for the company, according to Rogers, allowing it to process more orders simultaneously.

Distributing fine wines in the Middle East, where summer temperatures exceed 40°C almost daily and sometimes approach 50°C, presents significant logistical challenges. Preserving the integrity of delicate products like Masim Amarone della Valpolicella or Bollinger champagnes requires meticulous care. If a wine's temperature rises above 21°C, it can 'cook', accelerating its ageing in an undesirable way. At higher temperatures, fresh, fruity and floral aromas are lost. Corks can even be pushed out of the bottle, allowing oxygen to seep in.

"Twenty years ago, we calculated that to import in [refrigerated] reefer containers it added AED1.00 [US$0.27] per bottle of wine," explains Rogers. "That was what was required to bring good-quality wine into »

KEY TAKEAWAYS

- Intagulf Travel Retail now boasts an annual turnover of more than US$40m and sources over 2,000 products from more than 50 countries.
- Its tightly integrated ERP system with demand forecasting and real-time inventory has made it a logistical leader in the Gulf.
- Intagulf focuses on educating its staff to drive trust, upselling and support a luxury experience.
- Investment in climate-resilient logistics and cold-chain infrastructure has driven growth in the in the hot-weather markets of the Middle East.

» and out of this region, where temperatures in the summer are over 40°C, making importing anything of any quality in dry containers basically impossible.

"Back then, we passed that AED1.00 per bottle on to the customer and explained it," he recalls. "Today, it is no different, except it is the whole value chain, which we are transparent about and declare in our annual carbon report. Consumers can then make an informed decision."

In 2022, Intagulf Travel Retail became carbon neutral, a milestone Rogers describes as both challenging and rewarding. One of the toughest aspects, he remembers, was fully understanding where the carbon expenditure was taking place in the company's operations in order to gather all the necessary data. Intagulf self-generates all the power needed at its Jebel Ali warehouse and office, and intentionally partners with suppliers with genuine sustainability credentials.

"We offset the balance to get to carbon neutrality, and are proud to deliver all goods to all our customers in a carbon-neutral state," says Rogers.

Investment in tech and training

Technology increasingly plays a pivotal role in Intagulf's operations, allowing it to boast a 99.98% pick accuracy rate and stock availability level of 85%, despite processing more than 1m items per year.

"We have invested heavily in our own ERP [enterprise resource planning] system, linking it closely with forecasting, purchasing, sales and accounts," says Rogers. "It gives us a clear view of the business from whichever perspective you are looking at it. We are also currently implementing a data warehouse project to make this even simpler and more straightforward to give us a true picture of what we are doing well and what needs more effort," he adds.



Mark Rogers: 'The level of wine knowledge in the region has increased exponentially'

Rogers' personal expertise as a Wine & Spirit Education Trust (WSET) Level 4 diploma holder shapes Intagulf's approach to brand selection and staff training.

"The level of wine knowledge in the region has increased exponentially within the last 20 years, and it is important for all the team to be knowledgeable as customers look to us for help and guidance, and understanding our range is a key part of that," he explains.

"I used to teach WSET qualifications and, in fact, taught all our admin and finance staff Level 1, and we have sales, purchasing and marketing all with either Level 2 or 3. Our Dubai buyer, Louise Price, is also currently working on Level 4."

Lessons amid regional tensions

Reputation, built on "consistent character and care", is equally vital. "If you know your trade channel, know the key drivers, you can stay consistent and ensure you under-promise and over-deliver, be consistent in all your dealings, and that means when it is going well and not so well," Rogers advises.

"The industry network hasn't changed that much over the years, and your reputation is everything, so don't do anything 'out of character' which will be remembered in ten years or more! That builds longevity in this industry. We all know the industry good guys."

Rogers' time guiding Intagulf through the financial crisis and pandemic has taught him resilience and focus. "Don't take anything for granted, do the basics really well, be honest with customers and suppliers, keep the debtors under control, only work with trusted partners, and stick to what you know," he says. "Your company's character will shine through.

These lessons remain relevant amid current regional tensions, such as the recent Iran-Israel clashes.

"It does put people on edge, and will undoubtedly affect travel in the short term, as we saw with flights cancelled and airports closed for security. It teaches us all not to take anything for granted, and to work harder than ever to offer the best products and experiences to customers, as the market quickly recovers," Rogers reflects.

Eyes on the future

Despite these tensions, Rogers remains bullish about the future of the alcoholic beverage industry in the Gulf and believes unique products will drive wine sales in duty free, especially special limited editions. "Consumers are looking for something different and often buy by region or grape rather than brand," he notes.

He also welcomes the growing contribution of more affluent Indian travellers across the Middle East at a time when spending by mainland Chinese passengers has markedly declined. "We have always been wine-focused, and I see the increase in Indian outbound travel as a chance to increase the wine category as part of the overall liquor [sales] mix. It is nearly always in single digits as part of the mix, which gives an incredible opportunity," Rogers observes.

In recent years, some Middle Eastern countries have shown a trend toward liberalising alcohol policies, particularly in tourist areas and for non-Muslim populations, driven by economic diversification and the need to attract foreign investment and tourism. "It is allowing more consumers to come into the category for sure, and opening the ability to buy products, with new services all the time," argues Rogers.

"We only sell into travel retail and we work closely with operators to offer a superior product/price than the domestic market, to capitalise on the ideal availability."

Looking back over the past two decades, Rogers has seen major drinks brands change their attitudes towards the Middle East market. "Today, the Gulf, and particularly Dubai, represents a dynamic and growing market with a sophisticated consumer base," he says. "It's a region where premium experiences matter, and we're working closely with partners to ensure the right products are available, visible and well-supported."

Rogers has good reason to be positive: tourism and booming transit traffic continue to propel the region's duty-free retailers to ever-greater heights — Dubai Duty Free, for instance, posted record H1 2025 sales figures of US$1.1bn. With its two-decade legacy of quality, innovation and trust behind it, Intagulf Travel Retail is well-placed to share in this growing success. GDI

Unlocking the US travel on-premise

The travel on-premise can be a high-volume channel for drinks brands — as long as they understand its unique characteristics. **Matt Crompton** draws on CGA by NIQ's *US Channel Strategy Report* to help businesses navigate the distinctive airport bar channel



Le Grand Comptoir at JFK International: One in ten on-premise consumers visit airport bars in the US

The on-premise is an incredibly multifaceted industry, encompassing a diverse range of venue types that cater to distinct market segments, each requiring its own tailored approach to marketing, activation and execution in order to drive success and meet the specific needs of its audience. Airport bars, in particular, present a unique set of dynamics and characteristics that businesses must fully understand if they are to truly maximise their potential.

One key consideration is understanding how the airport bar consumer profile differs from the average on-premise visitor. Gender distribution is markedly skewed male in US airport bars, with 60% of visitors identifying as such and 40% as female. This contrasts with the more balanced split seen in the wider on-premise, where women make up a slight majority at 52%.

Age distribution also differs notably from the average on-premise channel. In typical US on-premise venues, visitation gradually increases with age, with the 55-plus demographic accounting for 40% of visits, while airport bars tend to attract a younger crowd. The 35–54 age group is the most prominent at 39%, closely followed by the 21–34 bracket, which represents a significant 35%, meaning that businesses must address the needs of both younger and middle-aged consumers in the travel setting, keeping in mind the male-dominated audience.

But divergences aren't just about demographics: spending habits differ significantly as well. Airport bar consumers spend considerably more on F&B, with nearly one-third more overall spend and an impressive two-thirds more on alcohol alone compared to the average on-premise consumer.

Their visitation frequency further highlights how airport bar users are a highly engaged and higher-spending consumer base. One in ten consumers visit airport bars, with three in ten doing so weekly and just under half visiting monthly. Furthermore, over two-thirds of these visitors go to on-premise venues weekly specifically for F&B, compared with only 42% of average consumers. Even more strikingly, 58% visit weekly for drinks alone, versus just one in three among the broader on-premise audience, which shows how significant the potential for drinks brands might be in this channel.

CGA by NIQ research also shows that airport bar visitors tend to have a higher average household income and are more likely to have children in their care (51% compared to just 36%). With family groups visiting airport bars, these visits are also likely to result in higher overall bills.

Understanding the airport bar visit

Airport bars are most frequently visited by leisure travellers, particularly those in the older demographic. Yet brands must cater to other occasions too — two in five visitors are travelling for business, with middle-aged men over-indexing in this group. Leisure visits may call for a celebratory, informal atmosphere, for instance, while business travellers may prioritise speed, convenience and a more refined, premium experience.

Versatility should also be a key focus when balancing F&B-led offerings. CGA by NIQ data show that most visitors to US airports plan to visit both types of establishments in the coming year. Operators will benefit from adopting flexible venue formats that can cater to the varied needs of travel on-premise consumers.

When it comes to specific times of day, users visit airport bars throughout the day, from early morning breakfasts to late evening departures. So it's essential businesses tailor offerings across all dayparts to maximise reach, although the central part of the day — from mid-afternoon to early evening — attracts the highest footfall.

Each airport has its own traffic patterns influenced by flight schedules and destinations. By analysing these patterns, businesses can better predict peak times, understand the type of consumer likely to pass through and align activation strategies and product offerings to drive engagement throughout the day.

Consumption behaviour

CGA by NIQ research shows that beer and wine are the most commonly chosen categories among US airport bar visitors, with the channel ranking as the third most popular choice for wine consumption.

Spirits follow closely and, with about one in ten airport bar visitors — especially the younger segment — opting for the likes of no-ABV beers and mocktails, non-alcoholic options are gaining popularity. A well-rounded beverage menu should include all these options to meet the diverse preferences of American travellers.

When it comes to younger consumers, preferences in airport bars tend to be more fragmented, with a wider variety of drink choices and less predictable behaviour. In contrast, older demographics display clearer and more consistent patterns, making them easier to target with specific offerings. For example, the majority of women aged 55 and over prefer wine, while males aged »

» over 34 are more likely to choose beer.

Regardless of their category of choice, the tendency to trade up is a behaviour that cuts across all consumer segments in the airport bar channel. A remarkable two-thirds is willing to pay extra for high-quality, premium brands, with males aged 21–54 a key audience for luxury and upscale offerings.

Four in five consumers say they prefer fewer higher-quality drinks over a larger number of lower-quality ones, so there's clear space for premium offerings in airport bars. Given that visits to these venues might be shorter than in other channels, premium brands and serves must capture consumers' attention quite swiftly: with limited time and a lower likelihood of multiple drink orders, first impressions are crucial.

That being said, airport bars must not lose sight of value offerings, as nearly three in five visitors are likely to choose lower-cost options for at least some of their drinks. These options should be clearly highlighted on menus, making them easy to find and appealing to budget-conscious users.

Path to purchase

Another key factor for operators and brands to consider is how consumers make ordering decisions at airport bars, and how this process may differ from their behaviour in more conventional on-premise settings. Understanding these unique decision-making paths can help tailor marketing, menu design and staff training to better capture attention and influence choices in the fast-paced travel environment.

Airport bars have one of the highest percentages of visitors who already know what they want to drink before arriving. This may be due to routine, as many consumers treat visiting the bar as part of their travel ritual, selecting specific drinks based on the type of trip or the time of day they are at the airport. Recognising these habits can help brands anticipate preferences and tailor their offerings and messaging.

Yet this doesn't mean there aren't opportunities to influence users — two in five visitors are undecided before ordering and can be swayed by factors such as competitive pricing, compelling menu options and drinks that align well with the time of day. Brands should work closely with operators to ensure they are visible and appealing at the right moments and in the right spaces, whether through strategic menu placement, targeted promotions or timed offers that align with peak ordering times.

CGA by NIQ research shows that even consumers who have already made up their minds before visiting the bar can be influenced by special offers, discounts or strategic menu recommendations, as these might prompt re-evaluation and drive trial.

Around half of visitors consider multiple categories or brands, meaning they may switch from one to another during the same visit: this switching moment is crucial for brands that want to target consumers open to trying something new. At this stage, the availability of quality products is crucial to enticing consumers to try a different category or brand, but price plays a significant role too, influencing 34% of those who switch.

Brands should consider offering products that are perceived as premium but remain competitively priced against alternatives, striking the right balance to attract both quality-conscious and price-sensitive consumers.

With more than four in five airport bar visitors likely to return in the next 12 months, the travel on-premise channel offers significant opportunities. But to succeed, drinks companies must leverage actionable insights into what motivates travellers to visit, how their preferences and behaviours differ across drinks categories, and what drives their purchasing decisions. GDI

Matt Crompton is CGA by NIQ vice president Americas on-premise. Contact him at ***matthew.crompton@nielseniq.com***

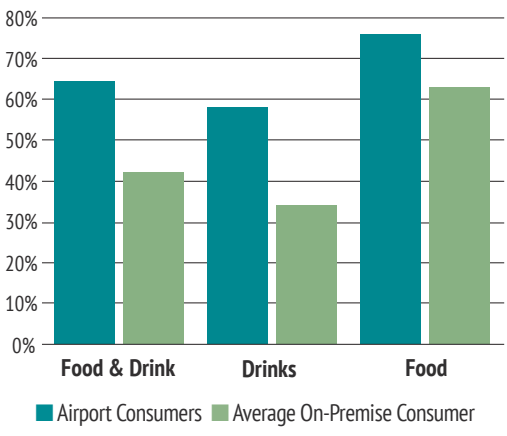
THE **RESEARCH**

CGA by NIQ's suite of research services offers brands, suppliers and operators a comprehensive view of the global on-premise. The *Channel Strategy Report* offers a comprehensive overview of the airport bar channel, uncovering consumer profiles of interest, providing information around consumer visitation and their consumption behaviours within the channel. To discuss how the *US Channel Strategy Report* can support your strategies, or to learn more about CGA's other sources of consumer insights, visit **www.cgastrategy.com**

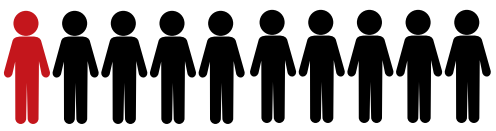
DATA DROP

Travel On-Premise US Airport Bar Users Are A Highly Engaged Consumer Base

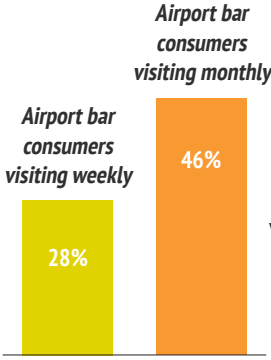
Weekly Bar Visitations *US Airport On-Premise vs Domestic On-Premise*



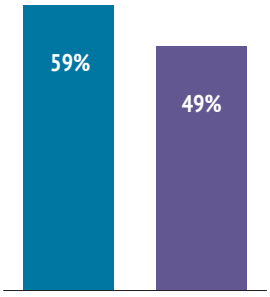
Source: CGA by NIQ US Channel Strategy Report 2024



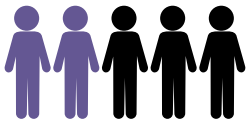
One in ten on-premise consumers typically visit airport bars



Three in ten on-premise consumers visit airport bars weekly, while **just under half** visit monthly



Three in five (59%) of on-premise consumers know what they will drink before entering airport bars. There are opportunities to influence the **two in five (49%)** who decide in the venue





Harding+ has 14 blue-chip cruise partners, including P&O Cruises (above), Carnival, Cunard and Viking

Harding+ charts a new course for cruise retail

One of the world's biggest cruise retailers, Harding+ is using customer research and AI technology to take its onboard drinks business to the next level, writes **Joe Bates**

The cruise retail channel has rapidly become the darling of the wider travel retail industry. Blessed by a rapidly growing pool of affluent captive customers — a record-breaking 34.6m people took a cruise in 2024, a 9% year-on-year increase — the cruise business is also going upmarket.

The luxury cruise fleet has more than tripled since 2010, according to the latest data from the Cruise Lines International Association, and by 2028, around 1.5m consumers are expected to take a luxury cruise.

Such stats are music to the ears of premium-plus drinks brands, but prospering in this niche sector takes a specialised and experienced retail partner. Step forward UK-based Harding+. Established in 1930, the company is one of the world's largest cruise retailers, with more than 300 onboard shops spanning 85 ships and 14 blue-chip cruise partners, including Carnival, Cunard, P&O Cruises and Viking.

The retailer has been undergoing rapid expansion and was No.2 on the 2024 Interpath Retail Index, which ranks UK retailers based on a two-year average of their CAGR. Harding+'s sales in December 2022 hit GBP189.9m (US$257.1m), marking a dynamic growth rate of 145.66%.

Cruise versus airport retailing

At the heart of the retailer's success is a sharp focus on customer insight, innovation, differentiated brand partnerships and a recent pivot towards AI technology. Stuart Brown, Harding+ head of commercial — liquor, tobacco & confectionery, is keen to stress that cruise retail is fundamentally different from its airport or land-based counterparts.

"The key differences in managing spirits for cruise retail versus airport or land-based duty free lie in repeat visits and dwell time," he observes. "Industry data indicates that the average cruise guest visits onboard shops 3.3 times during a seven-day cruise, so we benefit from considerably longer dwell times compared to the typically hurried, functional nature of airport shopping."

Such an extended engagement window, Brown argues, allows Harding+'s highly trained staff to connect more meaningfully with guests, creating genuine rapport and providing tailored guidance. These retailer-customer interactions support deeper brand education and product exploration, often leading to more thoughtful purchases, repeat sales and opportunities for customers to trade up.

Guests want more than duty free

A recent survey of 30,000 onboard guests found that prospective cruise customers crave both value and exclusivity, especially people new to the cruise holiday, one of Harding+'s fastest-growing segments.

"They're drawn to the strong value proposition that duty-free pricing naturally offers, but they're also excited by the opportunity to purchase something they can't find on land, whether that's a cruise-exclusive or a travel retail-exclusive expression," says Taylor Cowell, Harding+ buyer — liquor, tobacco & technology.

To meet this demand, Harding+ has elevated its exclusive offerings. A recent standout example is the Jack Daniel's Single Barrel programme with Carnival Cruise Line, which was announced in May this year. Co-developed with brand owner Brown-Forman, the bespoke collection includes bottles of Jack Daniel's engraved with the Carnival logo.

"We were really pleased with both the commercial performance and guest engagement from our Jack Daniel's Single Barrel programme in partnership with Brown-Forman," says Cowell. "It aligned perfectly with one of our core strategic pillars, offering exclusive products that aren't available domestically, and the response onboard reflected that."

Cowell reveals that such high-level liquor activations often lead to sales increases of over 100%, but there are broader benefits for the promoted brand too. "With a captive audience and multiple store visits being the norm on a cruise, there's a huge opportunity to engage guests meaningfully," she says. "Tastings, education and brand ambassador moments all help turn interest into purchase." »





The Jack Daniel's Single Barrel programme with Carnival Cruise Line is being expanded

One size doesn't fit all

»Harding+ takes care to adjust its onboard liquor assortment to different cruise itineraries: what works in the Caribbean may not translate to Scandinavia. "Just 11% of our total assortment is aligned globally, highlighting how tailored and locally relevant our approach truly is," reveals Cowell. "We place strategic emphasis on itinerary specific ranges that add a genuine sense of place to the onboard experience."

Tequila, for instance, reflecting wider international trends, is booming, up 42% year on year in Europe and a staggering 51% in Australia. In the US, bourbon remains dominant with an 18% year-on-year increase. Meanwhile, sales of gin in Europe and brandy in the US and Australia are showing signs of softening.

In response, Harding+ tailors its ranges to each ship and itinerary. Unsurprisingly, Caribbean routes lean heavily into rum, with P&O's *Arvia* and *Britannia* ships hosting Bacardí Caribbean Spiced activations last year. In contrast, sailings to Norway now feature Reyka, a William Grant & Sons-owned vodka from Iceland.





Recent onboard activations featured Hendrick's Sunspell (left) and Johnnie Walker Black Ruby

Creating lasting memories

Guest interaction doesn't stop at the shelf. Harding+ is leading the way with immersive brand activations that blur the line between retail and entertainment. From tastings and cocktail masterclasses to personalised bottle label printing and engraving, the aim is to create lasting memories alongside high-impact sales.

Harding+'s research shows that brand partnerships where experiential elements play a role lead to a 35% uplift in sales. Moreover, 87% of guests revealed that their shipboard purchases were influenced by brand theatre.

Examples of such activations include a collaboration with English craft distillery Salcombe and P&O Cruises, where an exclusive expression, Marabelle Gin, is distilled onboard P&O Cruises' *Iona*.

"This unique collaboration links the guest experience of enjoying a G&T at the bar and participating in cruise line-organised cocktail masterclasses to purchasing a bottle as a special keepsake that will remind them of their cruise each time they taste it," says Cowell.

Other recent activations in Europe featured Hendrick's Sunspell, a new citrus-flavoured line extension of the Scottish gin, a pioneering onboard collaboration between Pernod Ricard and Walker's Shortbread, and a first-time activation with Aperol Aperitif.

"In the US, we've partnered with Skrewball [Whiskey], Johnnie Walker Black Ruby, Grey Goose Altius, a new [vodka] launch from Bacardí, and Glenmorangie's collaboration with Harrison Ford," adds Cowell. Meanwhile, in Australia, the Jameson, Skrewball, Malibu and Absolut brands have been chosen for high-profile promotions.

The profile of the average cruiser is changing. The age has dropped to 46, and 73% of trips now involve at least two generations. As a result, Harding+ is exploring more inclusive offerings, from family oriented activations to gifting-friendly premium spirits.

However, alcohol-free and low-ABV spirits haven't yet taken off onboard. "We've explored and trialled these segments, but they haven't gained significant traction," Cowell admits. The value-driven nature of duty free likely skews preferences toward full-strength, high-value spirits for now, but Harding+ remains vigilant for shifts in consumer taste.

AI a back-office gamechanger

Behind the scenes, Harding+ is revolutionising how it manages supply and forecasting, a key aspect of effective cruise retail where ships have to be restocked in very short timeframes. The retailer says its 2024 roll-out of an AI-driven replenishment system has slashed out-of-stocks by 60%. The technology accounts for voyage duration, product grading, delivery rhythms and real-time sales data to dynamically optimise inventory.

This innovation isn't just about keeping shelves full. "The integration of real-time data enables us to be highly agile, adjusting our product mix, optimising promotional activity and adapting pricing dynamically using our cutting-edge digital shelf-pricing technology," says Brown.

"Maintaining data integrity throughout the entire planning process is critical, from anticipating guest preferences before the cruise to continuously refining inventory decisions during the voyage based on live insights."

The new system has also resulted in another benefit: helping Harding+ cut 5.7m "pallet kilometres", supporting the retailer's growing commitment to sustainable operations by reducing emissions through smarter logistics.

What it takes to succeed onboard

With cruising expected to grow by 12% year on year in passenger numbers, Harding+ is gearing up for a strong H2 2025.

"Building on the success of the Jack Daniel's Single Barrel Programme with Carnival Cruise Line, we plan to expand the initiative globally, offering guests even more exclusive and premium experiences," says Cowell.

"We're also elevating our tasting and education programmes by fostering deeper collaborations with a wider range of brands, creating richer, more immersive experiences for more of our guests."

She adds that Harding+ is keen to support niche and craft brands eager to break into the fast-growing cruise channel, but they must excel in three areas to succeed over the long term:

1. The ability to offer unique value through storytelling and create immersive activations and experiences.
2. Appeal to a broad range of customers in different regions.
3. And, finally, be able to scale up reliably to supply a truly global business.

"Brands that can demonstrate strength in these areas are best positioned to capture our attention and partnership," she concludes. GDI

New 'Innovation Square' to debut at TFWA World Exhibition 2025

Parasport activities, including a 500km charity bike ride, will kick off proceedings as organisers promise to create 'meaningful connections in unforgettable settings'



Innovation Square, a hub for research and forward-thinking dialogue, makes its debut at TFWA Cannes

The TFWA World Exhibition & Conference returns to Cannes from 28 September to 2 October 2025, once again transforming the Palais des Festivals and its beachfront into the beating heart of the global duty-free and travel retail community.

Last year, at the 40th anniversary of the show, the attendee total came in just behind the highest recorded six years ago. With 7,456 visitors travelling to France for the five-day event, last year's show was bigger than 2023, which recorded 7,385. Despite the 1% increase, the record set in 2019 of 7,531 visitors remains in place.

This year's programme reflects TFWA's ambition to keep the show both business-focused and socially engaging, by "creating meaningful connections in unforgettable settings". Proceedings begin with the 'Yes We Cannes' parasport initiative, culminating in a 500km charity bike ride arriving in Cannes on the opening weekend, before delegates gather for the Carlton Beach Opening Cocktail.

The ever-popular TFWA Lounge follows on Monday and Tuesday, offering relaxed after-work and late-night sessions, while Wednesday sees the beach transformed into the Phenomena Club, with headline DJ Martin Solveig providing the soundtrack.

Alongside the social calendar, Innovation Square, a new hub for research and forward-thinking dialogue, makes its Cannes debut. Early-morning workshops will probe topics ranging from geopolitical disruption to the future of airport retail, equipping delegates with fresh perspectives before the exhibition doors open each day. Complementing this, the One2One meeting service ensures targeted introductions between brands, buyers and operators, underpinning the show's role as the ultimate connector.

Against this backdrop, below we highlight a selection of the must-see beverage alcohol stands at this year's TFWA World Exhibition & Conference.



Bottega

Stand A11 Blue Village

The sparkling wine producer will unveil the top tier of its Prosecco Premium Vintage Collection at TFWA Cannes — Stardust Gold and Stardust Black, both Extra Brut vintage 2021 releases. Produced with extended fermentation to enhance complexity and longevity, the wines represent over a decade of research and refinement by Bottega's winemakers. Stardust Gold, retailing at EUR250 (US$292), is adorned with 5,000 hand-applied crystals, while Stardust Black, priced at EUR119, features 3,000 black crystals for a striking finish. Both highlight the collection's distinctive approach: hand-harvested glera grapes from Unesco heritage hills, sustainable cultivation and ageing in innovative horizontal autoclaves. Positioned for fine-dining pairings and luxury gifting, these wines underline Bottega's ambition to elevate prosecco's image to rival the prestige of champagne.

Caffo

Stand J54 Green Village



Caffo is presenting its new global brand platform, 'Capo That Moment' — an initiative designed to highlight the emotional shift that transforms social occasions into meaningful connection. Central to the showcase is Vecchio Amaro del Capo, Italy's "top-selling amaro", which will feature across three consumption moments: digestive, aperitivo and cocktail. The stand will also spotlight the brand's signature Ice-Cold Ritual. "Del Capo — not for demographics, but for moments that matter," the company notes. »

IT'S NOT JUST A VODKA



Gold Spirit Award
Monde Selection Quality Awards

Superior Taste Award
International Taste Institute

Switzerland Country Winner and World Best Finalist
World Vodka Awards

Swiss Vodka of the Year & Best in Class
Berlin Intl. Spirits Competition

Best of Show & Country Winner
Frankfurt Intl. Throphy

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

Swiss Vodka of the Year
New York Intl. Spirits Competition

Europe Vodka of the Year
Asia Intl. Spirits Competition

Best Vodka Design
Yellow Line Design Awards

Best Premium Vodka Brand
APAC Insider

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

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

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» Casa Redondo

Stand K22 Red Village



Casa Redondo will return to TFWA Cannes on the back of strong double-digit sales growth in travel retail this year. The family-owned Portuguese company, founded in 1929, is best known for Licor Beirão, the country's leading spirit, alongside brands such as Amarguinha almond liqueur, FoxTale Gin and Per Se Aperitivo. More recently, it added Safari Liqueur, a fruit-flavoured liqueur acquired from Diageo in 2024. With travel retail now accounting for around 30% of its business, Casa Redondo will spotlight both its core range and upcoming packaging innovations, while teasing "surprises" designed to reinforce its expanding global footprint.



Diageo

Majestic Beach 1

Diageo Global Travel will return to Cannes this month with a refreshed take on its 'Future of Travel Retail' concept. The showcase will explore how brands connect with consumers across the traveller journey, underlining how Diageo's portfolio is aligned with evolving category trends. Guests will be welcomed into an immersive Departures Lounge featuring activations such as The Gifting Lab, The Explore Lounge, The Launchpad and The Mixology Carousel. These experiences highlight opportunities across airports, airlines and cruise lines, while showcasing how brands like Johnnie Walker, Don Julio and The Singleton are delivering more exclusive, memorable encounters in global travel retail.

Hayman Distillers

Stand L39 Green Village

Hayman's The Original Gin makes its debut at Cannes this year, presenting its classic range of London gins to the GTR audience. Distilled in London since 1863, Hayman's remains the last family-owned producer of the city's original style of gin, widely regarded as the benchmark for the category. Today, the brand is enjoyed in over 70 countries and has recently launched in UK duty free. »



» "Gin continues to be a healthy category and demand for the original style remains strong, so we are looking forward to Hayman's first time at TFWA Cannes," says co-owner James Hayman.

Heaven Hill International
Stand K59 Green Village

Heaven Hill will highlight exclusive travel retail formats for Tequila Ocho and Elijah Craig Bourbon at Cannes. Visitors can also explore the group's premium traveller activations, including Elijah Craig's New York airport showcase celebrating the brand's Ryder Cup partnership at Bethpage Black. Tequila Ocho, famed as the world's first single-field tequila, and Elijah Craig, credited with pioneering bourbon's use of charred oak barrels, embody the craftsmanship and heritage central to Heaven Hill's offering.



Henkell Freixenet
Stand F11 Blue Village

Henkell Freixenet will return to Cannes with an expanded sparkling wine portfolio and clear growth agenda across Asia, the Americas and the Middle East. At its redesigned stand in Blue Village F11, the company will spotlight "global icons" Mionetto and Freixenet alongside innovations in prosecco, alcohol-free wine and crémant. Highlights include the Freixenet alcohol-free diamond range, designed for both on-shelf and in-flight listings, and the new Cordon Negro 0.0%, already shortlisted for a travel retail award. With growing visibility at airports, Mionetto, alongside its Aperitivo Kit and Orange Spritz activations supported by exclusive GTR packs, continues to drive momentum in the aperitivo segment and will also take centre stage on Stand F11. »







» Ian Macleod Distillers
Bay 3 Bay Village

Ian Macleod Distillers will showcase a diverse portfolio of whiskies and gin this year, highlighting both heritage and innovation. Headlining the stand is Tamdhu Cuatro Reserva 12yo, a new core GTR expression, alongside the rare Rosebank Vintage Release III — a 1991, 33yo bottling limited to just 350 bottles. Glenfarclas Highland Single Malt also joins the Ian Macleod portfolio in travel retail for the first time. Edinburgh Gin will debut its Elevated Editions, a GTR-exclusive liqueur range inspired by the brand's early foundations. Guests are also invited to Ian Macleod Distillers' terrace happy hours overlooking Cannes harbour.



Italian Wine Brands
Stand L56 Green Village

Italian Wine Brands will spotlight Voga Italia, bringing the Italian aperitivo spirit to GTR. At its stand, visitors can sample two distinctive expressions: Voga Prosecco DOC Brut, celebratory and effervescent, and Voga Prosecco DOC Still, light and refreshing. With its striking design and lifestyle positioning, Voga Italia aims to "turn everyday moments into stylish occasions for travellers worldwide". Supported by the playful 'How do you prosecco?' campaign, Italian Wine Brands will showcase activations, tastings and in-store concepts that highlight Italy's vibrant wine culture and the brand's growing presence in GTR.

La Martiniquaise-Bardinet
Stand AA4 Blue Village

La Martiniquaise-Bardinet will present a strong line-up of launches at the conference, led by the new Label 5 communication campaign and the exclusive travel retail unveiling of Label 5 Bourbon Barrel at 43% ABV. The portfolio expansion continues with the addition of renowned Venezuelan rum brand Cacique, now part of the group's international offering. Saint James Rum will also celebrate its 260th anniversary with the debut of a special commemorative cuvée, while Beehive Brandy introduces its Gold Edition. Together, these highlights showcase the group's breadth of innovation across whisky, rum and brandy in GTR.



Mont Blanc Vodka
Stand J67 Green Village

Making its first appearance in Cannes, Mont Blanc Vodka brings a distinctly French identity to the premium vodka category. Crafted with crystal-clear water from Angeac-Champagne and Picardy wheat from northern France, the spirit offers a smooth, rounded profile with a subtle velvety finish. The brand draws inspiration from its namesake mountain, with a bottle design echoing Mont Blanc's silhouette in striking purple tones. Positioned to appeal to consumers seeking provenance and refinement, Mont Blanc Vodka will showcase how local terroir and high-quality ingredients can deliver a vodka with both character and standout presence in travel retail.





Nemiroff
Stand E30 Yellow Village

Nemiroff will spotlight its full spirits portfolio, from the classic De Luxe to the repositioned Reserve and the ultra-premium Lex by Nemiroff. The bold Inked Collection adds a modern edge, appealing to adventurous drinkers. This year's focus is on reinforcing the brand's position in global travel retail while strengthening relationships with key partners. With premiumisation firmly on the agenda, Nemiroff is set to underline its ambitions with high-impact activations designed to build awareness of Lex in luxury segments. The showcase reflects a wider strategy to capture demand for elevated spirits experiences across duty-free markets.



Noblewood Group
Stand L36 Green Village

Noblewood Group is set to make a strong showing at TFWA Cannes, led by its flagship Beluga Vodka portfolio. Centre stage will be Beluga Gold Line, the ultra-premium expression renowned for its filtration process, 90-day resting period and signature wax-sealed bottle. Each individually numbered bottle is presented in a leather box and opened through a unique ritual using a custom hammer and brush — a mark of the brand's exclusivity. Alongside Beluga, Noblewood will debut Oyster Fine de Claire Adriatic Gin, its first gin venture, available in two expressions: Gin Adriatic and Wild Citrus. »



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

BOHEMIAN GLASS CLOSURE

VINOLOK



» Osborne Group
Stand D3 Blue Village

Osborne Group will present a refreshed drinks line-up at Cannes. Among the highlights are a new-look Carlos I, the brand's flagship Brandy de Jerez, a ready-to-drink Veterano & Cola, a Gold 999.9 miniature gin and the latest limited-edition Nordés Gin, inspired by the Atlantic Ocean. An entirely new whisky launch is also in development, marking another step in the company's broadening portfolio. The showcase underlines Osborne's commitment to growing its premium Spanish spirits brands in global travel retail through exclusivity, limited editions and refreshed visibility for some of its most established names.

Proximo Spirits
Stand SUD Harbour Village



Proximo Spirits will use Cannes to preview major global launches across its premium portfolio. Bushmills will extend its 'World Wood Series' Trex 18yo Single Malt beyond Asia, with a new ad campaign aligning brand messaging for partners worldwide ahead of a January 2026 roll-out. The campaign will be showcased at Proximo's SUD yacht in Harbour Village, where visitors can experience the series alongside other prestige expressions. Proximo will also debut 1800 Tequila Triple Cask, the brand's first travel retail-exclusive edition. Bottled at 40% ABV in a 1L format, the new expression will launch globally in duty free in 2026.

Radico Khaitan
Stand L71 Green Village

Radico Khaitan will bring the spirit of India to the south of France with a showcase from Rampur Distillery, Asia's largest and oldest. From the award-winning Rampur Indian Single Malt range to Jaisalmer Indian Craft Gin, the portfolio reflects a legacy of innovation shaped by the Himalayan climate. Visitors to the stand can also discover the much-anticipated Kohinoor Reserve Indian Dark Rum, inspired by the famed diamond and matured across three casks. The stand will further unveil Rampur Jugalbandi No.7 and No.8, completing Rampur's acclaimed series of dual-cask single malts.



The Shed Distillery
Stand J35 Green Village

Drumshanbo Gunpowder Irish Gin will take centre stage for The Shed Distillery with a colourful line-up led by the newly launched Italian Fig & Laurel expression. Already showing strong momentum in the US, the striking purple bottling joins the brand's growing collection of flavour-led editions. Visitors will also discover the tropical Drumshanbo Gunpowder Gin with Brazilian Pineapple, the Sardinian Citrus variant and the original Gunpowder expression, including its travel retail-exclusive ceramic edition. The showcase reflects The Shed Distillery's continued success in expanding Gunpowder Gin's global footprint through distinctive flavours and standout presentation.





Tito's Handmade Vodka
Stand M71 Green Village

Tito's Handmade Vodka will return this year, showcasing its versatile range of pack sizes tailored to travel retail. From large-format 1.75L bottles to convenient 20cl and 5cl formats designed for gifting or impulse purchases, the line-up demonstrates the brand's flexibility across shopper occasions. A highlight of the stand will be the debut of the 2025 limited-edition 'Ugly Sweater' holiday pack, a collectible that has become a seasonal favourite for both retailers and consumers, underlining Tito's strong gifting credentials and playful brand spirit in global duty free.



William Grant & Sons
Stand GO2 Golden Village

William Grant & Sons' TFWA Cannes stand has been designed around its The Balvenie and Glenfiddich shop-in-shop concepts in duty free. The space will feature the travel retail-exclusive Glenfiddich 19yo Limited Edition, created in collaboration with the Aston Martin Formula One team, while Silent Pool Gin takes over the terrace with cocktails celebrating its Royal Ascot partnership. Malt master Brian Kinsman will lead private tastings, and daily cocktail hours will showcase Monkey Shoulder, Hendrick's and Silent Pool. The programme highlights the company's mix of heritage scotch whiskies and contemporary premium spirits. GDI

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VIEW FROM THE ON-PREMISE

Charlie Mitchell

The numbers don't lie — but the story of the on-premise in data is a confused and ambiguous one

Lies, lies and damned statistics. In the era of disinformation, it is often difficult to distil the truth behind the vast array of data points, figures and analytics at our fingertips.

Except, that is, in the on-premise. The eating and drinking-out sector has long been the stubborn outlier of the move towards information-based decision-making and with good reason — the data either isn't reliable, is patchy in coverage or worse still, doesn't exist.

Yes, the sector is somewhat of a black hole of data, with what is available globally tangled in a suffocating web of EPOS providers, wholesalers and modelled outputs which is often difficult to make sense of.

Even now, critical strategic decisions that determine the success or failure of drinks brands in what is the most critical channel to drive consumer loyalty are being made on vibes and gut-feel alone.

But it doesn't have to be this way. The levels of data and insights for the sector continue to develop, while in-venue analysis of consumer behaviour and point-of-purchase decision-making are evolving to allow for detailed understanding of who to target and how to win.

Of course, at CGA by NIQ, we have long been pioneers when it comes to on-premise measurement and analytics, setting up services to understand performance and shine a light on what has been a dark and difficult-to-read sector.

However, rather than bring clarity, the metrics often provide ambiguity as seemingly contradictory readings leave more questions than answers.

Indeed, the story of the sector by numbers is often a nuanced one, where topline figures conceal the detail that matters. However, it is those same measures that are in the highest demand: visitation levels, engagement, spend, volumes and, of course, sales.

These are the numbers on which bonuses rest and on which careers are built.



Illustration: iStock.com/Rawpixel

They are the metrics that define good or bad performance. But, rather than concentrating on what performance looks like at a surface level, the priority should be to invest in a deeper understanding of the many constituent parts of performance, discovering the metrics on which strategy can be built to affect that performance.

With the global on-premise sector ever-more polarised among boom-and-bust markets, it has never been as important to pinpoint the specifics and develop strategies around the **who**, **where**, **when** and **why**.

It is not straightforward and requires expert and specialist analysis and understanding. Done correctly however, tactical and strategic advantages can be accumulated. Take **when**, for example, as the on-premise occasion map continues to shift to expose threats and showcase opportunities.

Overall, we have seen global visits to the sector fall by 3.4% in the past 12 months, but this masks polarised forces at play. In that time, the number of visits has shifted towards lower-tempo, more sedate occasions, which have increased their share of overall visitation.

However, at the same time, the sales volume has moved the other way. The biggest on-premise occasions are becoming bigger. In the UK, for example, the top 20 sales days of 2024 accounted for nearly 15% of all sales of spirits, up 4% compared with 2023.

This necessitates a dual approach to on-premise activation. For those most important of trading days, a fewer, bigger, better strategy should be employed, whereas on the more routine visits, strategy should be focused on distinctive, recognisable and salient serves for when consumers just can't be bothered to try something new.

The **why** is also paradoxical. There is a wealth of data points indicating the consumer desire to disconnect, to take a break from social media and live 'in the moment', especially in the on-premise. This has led venues to foster genuine in-person connection to the point where 'disconnection bars', encouraging guests to put away their phones, are on the rise.

However, similar data exists to show the appeal of social media-friendly serves, Instagrammable decor and selfie stations.

Don't even start with the **who**. I've seen data that suggests Gen Z are abstainers, moderators *and* bingers. [See Chris Tyas' column on p14 for more on this.]

The devil, of course, lies in the detail, and these paradoxes can not only exist in harmony, but thrive, offering opportunities at extreme ends of the scales, as well as in the middle.

Rather than leaving brand planners scratching their heads on how to target, understand and analyse in detail, these inconsistencies can actually *fuel* growth.

A strategic mindset, navigating the scattered map of data to plot where to play and how to win among the sea of information, will move the dial on those **what** performance metrics that matter most. GDI

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