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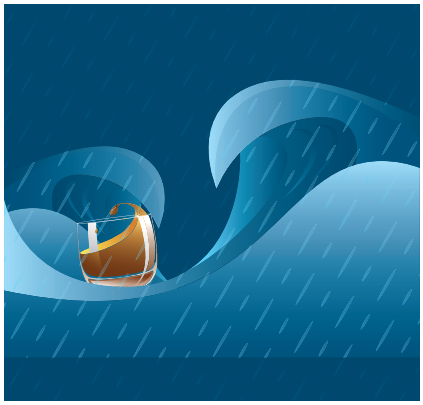
Joe Bates

Scotch and Irish whiskey are grappling with the thorny issue of premiumisation from very different perspectives

For years, premiumisation has been the north star of the global whisky business. For such a time-consuming, capital-intensive industry, its logic was persuasive: convince whisky drinkers to trade up, build brand prestige and make a larger profit on every bottle sold. But with consumers in many markets tightening their belts and unsold casks of maturing spirit mounting in warehouses from Speyside to Kentucky, the limitations of relying too heavily on that formula are becoming clearer.

Interestingly, scotch and Irish whiskey distillers are facing this challenge from different directions. In this issue's European whisky feature (p28), for instance, Richard Woodard explores the ambitions of Irish whiskey producers to premiumise a category synonymous with approachable, smooth-tasting blends. They wish to demonstrate the diversity and quality of Irish whiskey, especially with single malts, which offer an opportunity to attract more discerning drinkers and command higher prices.

Irish Distiller's rarefied new release of the Midleton Very Rare Irish Chestnut Edition, the inaugural release in the brand's Rare Wood Collection, is a great example of the sector's recent arrival into the world of collectible luxury. Using casks made entirely from Irish sweet chestnut trees, it is an intriguing example of how provenance, wood management and experimentation can help create a distinctive, headline-grabbing proposition.



At GBP375 (US$499) per bottle, however, it is firmly at the luxury end of the market. The bigger challenge for Irish whiskey is translating this kind of innovation into a broader understanding of what the category can offer without jettisoning what made it popular in the first place.

As Woodard's feature highlights, Irish whiskey's mainstream appeal, exemplified by category leader Jameson, has been integral to its growth overseas, especially in India, where volumes surged 60% in 2025.

The scotch whisky business has spent nearly two decades riding the premiumisation express, but the challenging market conditions are forcing major players to look at opportunities further down the price ladder.

This was one of the most interesting insights to emerge from Olly Wehring's interview with Diageo global category director for whisky & luxury Julie Bramham (p32) who, while stressing that premiumisation remains important, identifies value as one of the multinational's key battlegrounds.

Diageo is not planning a wholesale retreat from premium expressions, she maintains, but is adopting a more targeted approach to consumer recruitment and making better use of established brands in markets where they enjoy a strong following.

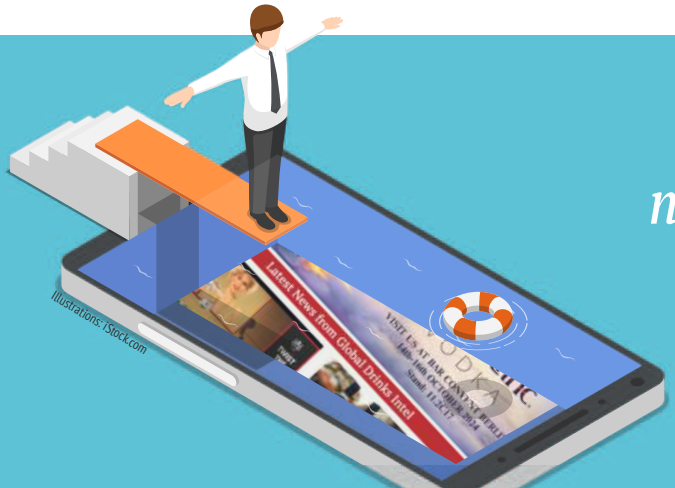
The company's approach to its broad single malt range is also telling. Diageo's decision to concentrate global single malt investment on The Singleton, Talisker and Lagavulin, while continuing to support other malts regionally, reflects a more disciplined allocation of resources, Bramham explains. The company's decision in late October 2026 to end its long-running Special Releases collection is another indication of how Diageo's malt priorities are changing.

The premiumisation train has not pulled into the sidings for good, of course. But neither can it be treated as a universal answer to the industry's growth challenges.

Irish whiskey needs to persuade consumers to explore new styles and higher-priced products, while scotch needs to ensure that its pursuit of higher value does not overlook the growing value opportunity in developing markets such as India and Brazil.

Ultimately, the distillers best placed to navigate the current storm will be those that understand the difference between simply selling a more expensive bottle and giving consumers a compelling reason to buy it, whatever their budget. **GDI**

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News briefs

Catch up quickly on the global drinks stories that matter

COMPANY NEWS

Casa Lumbre Spirits marked the third anniversary of its Almave brand with an extension into the RTD category. The 0% ABV agave-based brand, co-founded by F1 racing driver Lewis Hamilton in late 2023, has released Classic Margarita and Paloma in the US.

Loch Lomond Group swapped distribution partners in Germany. Responsibilities for what the brand owner called an "important market" will be assumed at the beginning of 2027 by Semper idem Underberg's Diversa Spezialitäten distribution business.

Campari Group released what it claims to be the first global marketing campaign for Courvoisier in almost 20 years. 'Pass The Courvoisier', its new marketing focus, "marks the start of a major long-term creative platform shift for the brand, with further news on its repositioning set to break in 2027".

The District Court of Amsterdam ordered **Heineken** to pay EUR111m (US$124.6m) in a judgement that directly connects the group to an anti-competitive ruling in Greece against its unit in the country. The brewing giant said it will appeal the judgement.

Stoli Group teased a resumption of its US operations after announcing in January it had filed for Chapter 11 bankruptcy for its US operations, along with the Kentucky Owl American Whiskey business.

M&A

Heineken agreed the full purchase of Better Drinks Participações through its division in Brazil. Better Drinks, which commenced operations in 2022, holds the rights to the Baer-Mate sparkling yerba mate tea, Mamba Water canned water and Praya craft beer brands.

Constellation Brands sold Tennessee-based Nelson's Green Brier Distillery to Belle Meade Spirits, a company owned by the descendants of its original founder. The multicategory group's spirits portfolio now consists of only the Casa Noble and Mi Campo tequilas alongside High West Distillery.

Chilean wine giant **Viña Concha y Toro** admitted to eyeing further M&A opportunities after buying a majority stake in Maison Mirabeau earlier this year. The Casillero del Diablo brand owner said it is open to securing deals in the "near term" to add established brands to its portfolio.

Carlsberg trimmed its soft drinks presence, agreeing the sale of the Empresa Brasileira de Bebidas e Alimentos unit, better known as Britvic Brazil, to domestic conglomerate Grupo José Augusto Vieira (Grupo JAV) for EUR80m ($89.1m).

FINANCIAL RESULTS

Heineken has reported a fourth consecutive quarter of sales growth, with the three-month period to the end of September proving the group's strongest in the calendar year so far. Subsequently, the year-to-date top line sits at almost 3.5% up on the corresponding nine-month period in 2025.

Molson Coors Beverage Co revised its full-year sales forecast downwards despite a slight improvement in performance from the most recent quarter.

Diageo set the pace for its fiscal 2027 by booking a flat set of sales results from the three months to the end of September — the group's best quarterly performance since Q3 of fiscal 2025 (January to March).

Marie Brizard Wine & Spirits reported a second consecutive quarter of flat sales, calming its seas after a tumultuous 18 months. The William Peel Scotch Whisky owner, which is 78% owned by La Martiniquaise-Bardinet, said its Q2 sales had hit parity (inching up 0.5%) after six consecutive quarters of falling sales.

Rémy Cointreau booked a mid-single-digit lift in sales from its most recent quarter, and the company had Asia-Pacific to thank for its performance, with China's appetite for cognac appearing to have returned.

PEOPLE

Diageo veteran Stephen White resurfaced as whiskey & rum lead for **Campari Group** and will assume leadership across the Appleton Estate, Russell's Reserve, Wild Turkey and Wray & Nephew brands.



Seven-time F1 world champion Lewis Hamilton launches Almave's first non-alc RTD cocktails

WineGB CEO Nicola Bates, who took over from Simon Thorpe in late 2023, left the UK wine organisation in November with immediate effect. A successor has not yet been secured.

Sherry giant **González Byass** has appointed former Pernod Ricard executive Carlos Perez-Somarriba Herrera to lead its marketing division.

AB InBev agreed the departure of Anheuser-Busch CEO & North America zone president Brendan Whitworth. The move brings to an end Whitworth's 13-year career with the brewing giant.

Diageo has appointed Sebnem Erim as its next North America chief marketing officer. The executive left AB InBev, which she joined as senior vice-president of global innovation & growth in early 2023, after nearly four years to join the Smirnoff brand owner.

INDUSTRY NEWS

Mexico's Eleventh Collegiate Administrative Court of the First Circuit ruled that the term 'azul' — the Spanish word for 'blue' — cannot be exclusively claimed by any single tequila brand. The judgement is the latest development in a trademark dispute brought by Clase Azul-owner Casa Tradición against Casa Azul Spirits.

New Zealand Winegrowers welcomed the free trade agreement (FTA) with India, which will see the rate of duty on New Zealand wine exports to the country reduced by up to 83% over the next decade.

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Why marine shipping is Concha y Toro's biggest eco hurdle

Chilean wine major Viña Concha y Toro received B Corp status in 2021 and recently released updated sustainability targets for 2030. Group sustainability director Valentina Lira speaks to **Jessica Broadbent** about delivering the strategy across one of the world's largest wine businesses



Viña Concha y Toro aims to implement regenerative agriculture practices across 100% of its land by 2030

Viña Concha y Toro has increased several long-term sustainability targets, including pledging to reduce CO2e [carbon dioxide equivalent] emissions by 42% by 2030 and achieve net zero by 2040 — ten years earlier than initially planned. Which area is furthest from meeting your goals? When you measure carbon footprint, you have different categories, and the one which is the most difficult — because we depend on them 100% — is marine transportation. We're one of the largest wineries in the world, but if you consider the activity of wineries compared to other industries, we are very small. We don't have the opportunity to negotiate.

The International Maritime Organization (IMO) has renewable energy goals for 2050, so that's good news, because it means they'll start incorporating renewable energy.

Are you having conversations with shipping suppliers, trying to apply a bit of pressure? Not pressure, but trying to do something together. Maybe we will run a pilot.

If the IMO targets are for 2050, are you concerned you won't meet your own goals? The thing is, when you work with the net-zero standard, you don't need to go to zero emissions. It's not the same. It means: 'I can have some, but I need to visualise my captures.' That's why we are also working in captures to prepare for net zero.

So even if the marine industry isn't able to reduce [emissions] at the rate that we require, we still have the opportunity to [use] carbon captures to make net zero. By 2050, maybe Concha y Toro can be net positive. That's the idea.



Valentina Lira: 'Retail is helping a lot in environmental education'

By 'captures' you mean the act of extracting CO2 from the atmosphere and storing it? Yes. Concha y Toro is sequestering carbon using nature-based solutions. If we have well-implemented regenerative practices in place, we should see an increase in the carbon that we are storing in the soil. [To achieve net-zero status, a business must cut total emissions by at least 90%, with the final 10% offset using captures.]

How do businesses measure their individual marine emissions if they have one container on a huge ship? In marine transportation, carbon emissions are measured by the weight of the boxes or the products, and the distance travelled.

This is all very complex. How do you communicate your sustainability work to the end consumer? The only way is through certifications. We have a certified carbon footprint from the International Wineries for Climate Action, but we are not promoting it at the bottle level, because it's really complicated and we need to deliver simple messages. What we are delivering to the final consumer today is only the B Corp certification, meaning: 'We are a good company.'

How about retail buyers? The retailers are the ones that are doing the selection. They are taking the flag, so to speak, of scanning suppliers and presenting [who is sustainable] to the final consumer. Retail is helping a lot in environmental education.

What's the most common data point retail buyers ask you for? Carbon footprint.

What is the most important thing for the end consumer? Nature. Carbon footprint is something that only a few people understand — consumers are not really worried about the weight of the bottle because they don't make the connection — but there is something about nature.

Everyone feels a connection with nature when they see trees, birds or a healthy ecosystem — that is something that we can show to the final consumer. They are more sensitive to that kind of information.

Concha y Toro aims to make its labels more accessible. How can it communicate the 'nature' element on-pack? We have very interesting ideas, but can't show you yet. GDI

Stock Spirits targets international growth through brand innovation and expansion

Stock Spirits chief marketing officer Anne Martin outlines how the group is combining brand heritage, innovation and expansion to reach new consumers, markets and occasions

Stock Spirits Group is looking to 2027 with a clear ambition: to unlock more growth from its distinctive portfolio of brands and to extend their reach across international markets.

For chief marketing officer Anne Martin, that means focusing investment where the opportunities are greatest, responding to changing consumer tastes and drinking occasions, and building on the group's combination of local market knowledge and international scale.

From Sierra Tequila and Limoncè Aperitif to Clan Campbell Scotch Whisky and Żołądkowa Vodka, she says the priority is to take brands with established roots and introduce them to new audiences, markets and occasions.

Focus on growth potential

Stock Spirits has identified five priority brands, alongside RTDs, as key drivers of future growth. At the forefront of this quintet is Sierra Tequila, buoyed by the 2026 launch of the Sierra 100% Agave Range and the fruity lower-strength Sierra Lime Liqueur. The other four brands are Limoncè Aperitivo, Żołądkowa de Luxe Vodka, Clan Campbell Scotch Whisky and Finsbury Gin.

For Martin, the decision to prioritise Sierra Tequila is obvious given tequila's continued international growth. She says Limoncè Aperitivo, launched in 2025 and augmented by the 2026 release of Limoncè RTD Spritz, is capitalising on the "surging popularity of the Mediterranean-style aperitivo hour and the growing consumer interest in lighter spritz-based drinks".

Clan Campbell Smooth Shot Vanilla was designed to enjoy as part of mid to high-energy occasions





Stock Spirits Group CMO Anne Martin

As for vodka, Martin points out that it remains Europe's most popular spirits category and Żołądkowa de Luxe is a market leader in Poland. There are, she adds, further growth opportunities in flavoured vodka. It's a similar story in scotch whisky, where Martin sees volume potential in flavoured line extensions — in April 2026, Stock Spirits launched Clan Campbell Smooth Shot Vanilla, a 25% ABV whisky liqueur.

Exploiting the RTD opportunity

Stock Spirits sees significant growth potential in ready-to-drink formats. "RTDs are booming in all markets and helping to offset some of the decline in spirits, especially in Western markets like the UK and Germany, so they remain a big priority," Martin explains. "We also see an opportunity in ready-to-serve premixed drinks in a larger format than an RTD, such as 37.5cl, 50cl or 70cl, designed for sharing or serving rather than individual consumption."

Geographic expansion is another priority for the group. Through its Stock International team, the company is actively seeking to grow its global brands beyond its established routes-to-market, building on the double-digit growth delivered by the team in the last fiscal year.

While Sierra Tequila has historically been a central focus for international partners, Stock Spirits now wants to develop the broader portfolio in existing partner markets while establishing new distribution relationships elsewhere. Martin says this is first and foremost a distribution-led strategy, but the group may also explore M&A opportunities.

Innovation pipeline

As the key Christmas and New Year period looms, Martin says the focus for Stock Spirits is on accelerating recent launches and strengthening their distribution and marketing support ahead of the festive season. A case in point is Clan Campbell Smooth Shot Vanilla, which is targeted at a younger generation of whisky drinkers. It is gaining traction in France and expanding into markets including Germany and Czechia.

An exciting pipeline of new product development is scheduled for next year, according to Martin. The details of many releases are still under wraps, but one upcoming launch she does divulge is a new Strawberry Chilli vodka-based Żołądkowa de Luxe liqueur, adding to a growing range which already includes Coffee and Peach variants.

Underpinning Martin's confidence in the group's future growth prospects is its ability to respond quickly to changing consumer preferences and new drinking occasions. Value is another important part of the equation, she says. With consumers increasingly attentive to price, Martin believes Stock Spirits is well placed to compete by "combining distinctive brands, continued innovation and accessible price points".

For Martin, Stock Spirits' competitive advantage lies in bringing together the heritage and distinct identity of its individual brands with the scale, capabilities and ambition of a pan-European group.

Through continued investment in innovation, broader international distribution and a portfolio of distinctive, accessibly priced brands, she says Stock Spirits aims to build a "vibrant house of brands in Europe and beyond". GDI

Best in the business: introducing the Global Drinks Awards 2027 winners

As the drinks industry navigates falling volumes and shifting consumer tastes, the inaugural Global Drinks Awards celebrates the producers and products proving that excellence endures. **Eloise Feilden** reports



Blind-tasted, independently judged: judging at the The Art Workers' Guild in London

If we've heard it once, we've heard it a thousand times: this industry is in a state of flux. Alcohol volumes declined for the third successive year in 2025, according to IWSR, falling by 2% or 500m nine-litre cases. As we reach the end of another year marred by global conflict and economic strain, it seems likely 2026 will see similar declines.

Still, we need only look back to Prohibition or the phylloxera crisis to be reminded of the drinks industry's resilience in the face of hardship. Survival, reinvention and adaptation are the sector's bread and butter.

While beer, wine and spirits volumes all contracted year on year, RTDs are seeing growth and the no/low category continues to buck the downward trend. Indian whisky, Irish whiskey, bitters, spirit aperitifs and tequila also show promise, reinforcing the existence of bright spots even in trying times.

Today, as tastes and behaviours change, so too do the strategies of drinks brands hoping to cater to them.

In the post-Covid-19 pandemic years, premiumisation has been declared the direction of travel, but with pockets pinched and economic uncertainty rife, the 'why' behind higher price tags is more important than ever. Storytelling, provenance and ritual all play their part in building a cultural cachet around a product, but, ultimately, the quality of what's in the bottle decides its fate.

Where the liquid does the talking

It is against this backdrop that the Global Drinks Awards were born, designed to offer brands an opportunity to receive trade-led recognition. The aim is straightforward: to create awards that producers and buyers can trust, with medals earned through the quality of the liquid.

Every product is tasted blind and scored independently by a panel of industry experts, with no drinks producer or cask broker sponsorship and no medal quota. Each entrant receives constructive, anonymised feedback, helping brands understand genuine trade perception and ensuring practical value.

"Each spirit is assessed fairly and impartially by a selection of some of the best and most experienced palates in the business," says drinks writer, presenter & consultant Becky Paskin, who led the whisky judging at the Global Drinks Awards.

The awards attracted more than 500 entries from 35 countries and called for 12 sets of judges, who gathered at The Art Workers' Guild in Bloomsbury, London, over two days in October in search of this year's best liquids. Paskin was joined by fellow category leads Millie Milliken, Kieran Healey-Ryder, Vicky Ilankovan, Oliver Kitson, Dan Warner and *Global Drinks Intel* digital editor Olly Wehring.

The inaugural edition of the Global Drinks Awards was sponsored by OKI Europe, while The Gin Guild was category sponsor. The awards were also supported by several industry partners: the English Whisky Guild, the Indian Malt Whisky Association, The Whisky Shop & Whisky Shop Auctions, and The West Indies Rum & Spirits Producers' Association.

The results garnered titles ranging from Global Best Mezcal and England's Best Single Malt Whisky to Global Best Sake, all selected by our expert judges. Plus, a dedicated New Product of the Year award celebrates the bright spots of innovation within each drinks category, proving that even in the face of adversity, the drinks industry still stands tall. »

Read on to discover the category and gold medal winners at this year's Global Drinks Awards. For the full list of winners, visit ***globaldrinksawards.com/2027-winners/***

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Agave-Based Drinks

» For spirits journalist Millie Milliken, head judge for agave at the Global Drinks Awards, the category is "one of the most exciting in spirits right now".

Agave spirits are in growth in 2026, thanks in part to tequila's meteoric rise over the last decade. Tequila volumes worldwide rose at a CAGR of 6% between 2019 and 2025, according to the latest IWSR data, and are expected to continue in the green, expanding at a 2% CAGR to 2030. The subcategory's success has had a trickle-down effect for the broader agave category, with rising demand leading to better knowledge and, in turn, more exploration.

"Producers are homing in on creating liquids that have true character and speak of the true essence of the myriad flavours that can be created around the raw material," says Milliken. "The entries to the awards were a showcase of this shift and some of the highest-scoring entries were awarded for being expressive, distinct and surprising."



Global Best Mezcal
Mezzaro: Mezzaro Mezcal



Global Best 100% Agave Blanco Tequila
Moët Hennessy: Volcan de mi Tierra Volcan Tequila



» **Global Best 100% Agave Reposado Tequila**
Lady Dragon: Lady Dragon Reposado Cristalino Tequila



Gold Medal
Colangelo & Partners: Loka Loka Reposado Tequila



Gold Medal
Lady Dragon: Lady Dragon Reposado Cristalino Tequila



Gold Medal
Mezzaro: Mezzaro Mezcal



Gold Medal
Moët Hennessy: Volcan de mi Tierra Volcan Tequila



Gold Medal
Moët Hennessy: Volcan de mi Tierra X.A. Tequila



Agave in the spotlight: Millie Milliken puts her palate to the test

Aperitifs



Global Best Vermouth Rosso
Maison Villevert: La Quintinye Vermouth Royal Rouge



Global Best Vermouth Semi-Sweet
Italspirits: Casa Savoia Orancio Vermouth



Gold Medal
Maison Villevert: La Quintinye Vermouth Royal Rouge



Gold Medal
Italspirits: Casa Savoia Orancio Vermouth

Fruit Brandy



Global Best Pear Brandy
Foneka: Anton Kaapl Williams Pear Brandy



Gold Medal
Foneka: Anton Kaapl Williams Pear Brandy

Gin

The martini boom is bringing this long-established category back into the limelight in 2026, and gin makers are poised and ready to pounce on the newfound opportunity.

For Dan Warner, who led the gin judging panel at this year's blind-tasting contest, what stood out across the blind-tasting flights was confidence.

"Producers seem to be leaning less on novelty botanicals to get noticed and are instead working at producing balanced recipes," he says, noting a particularly strong showing from the London Dry category, "perhaps reflecting consumers returning to 'tried and trusted', which London Dry Gin often represents".



Global Best London Dry Gin
MarGin Gin: MarGin London Dry Gin



Global Best Contemporary Style Gin
The Muckross Wild Irish Spirits Co: Muckross Wild Irish Gin



Austria's Best London Dry Gin
AX Elixir: AX Elixir X1 Gin



Switzerland's Best London Dry Gin
Wasserturm Souvenirshop: Titlis Gin »

La Quintinye
VERMOUTH ROYAL
CHARENTE

Global Best Vermouth



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GLOBAL
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» **Wales' Best London Dry Gin**
Welsh Shepherd Spirits: Welsh Shepherd London Dry



Gold Medal
AX Elixir: AX Elixir X1 Gin



Gold Medal
Berry Bros & Rudd: No.3 London Dry Gin



Gold Medal
Cinque Spirit: Cinque Rye Gin



Gold Medal
MarGin Gin: MarGin London Dry Gin



Gold Medal
The Muckross Wild Irish Spirits Co: Muckross Wild Irish Gin



Gold Medal
Wasserturm Souvenirshop: Titlis Gin



Gold Medal
Welsh Shepherd Spirits: Welsh Shepherd London Dry

Grape Brandy



Global Best Grape Brandy
La Martiniquaise–Bardinet: Beehive XO Gold Edition Brandy



Global Best Cognac
Blue Sky Brand: Honor VSOP Platinum Cognac



Gold Medal
La Martiniquaise–Bardinet: Beehive XO Gold Edition Brandy



Gold Medal
Blue Sky Brand: Honor VSOP Platinum Cognac



Blind tasting in full swing: Global Drinks Intel *retail editor Kevin Rozario puts in the work on Day 2 of judging*

Liqueurs

"Liqueurs have historically been seen as a supporting role in drinks and not the frontman like other spirits," says craft spirits consultant Oliver Kitson, lead liqueurs judge for the Global Drinks Awards.

But two factors are helping liqueurs claim more of the spotlight. The first, according to Kitson, is the "maturing craft distilling sector", which is injecting energy into the category. Second is the no/low movement, "where liqueurs fit in naturally as a mid-strength offering for mixologists and consumers".

With rum and brandy-based spirits, as well as more "off the wall entrants", catching the judges' eye, it's clear that the sheer diversity of the category is yet another factor enabling its current ascent.



Global Best Botanical Liqueur
Belfast Estate: Jenjanm Root Ginger Liqueur



Global Best Coffee Liqueur
Coffee Spirit: Norse Code Hel Above Coffee Liqueur



Global Best Fruit Liqueur
Foneka: Anton Kaapl Punč Vánoční Liqueur



Global Best Rum-Based Liqueur
Aruba Rum Distillery: Pepe Margo Distillery Rum & Coconut Liqueur



France's Best Botanical Liqueur
Pegasus Spirits: Minty Liqueur



France's Best Fruit Liqueur
Rémy Cointreau–Maison Brillet: Belle de Brillet Liqueur



England's Best Fruit Liqueur
Auberon: Auberon English Rhubarb Liqueur



Gold Medal
Aruba Rum Distillery: Pepe Margo Distillery Rum & Coconut Liqueur



Gold Medal
Aruba Rum Distillery: Pepe Margo Distillery Coffee Liqueur



Gold Medal
Auberon: Auberon English Rhubarb Liqueur



Gold Medal
Belfast Estate: Jenjanm Root Ginger Liqueur



Gold Medal
Coffee Spirit: Norse Code Hel Above Coffee Liqueur »


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STRENGTH
SINGLE MALT
SCOTCH WHISKY
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BUNNAHABHAIN
DISTILLERY
700
ML
63.6%
VOL
5
YEARS
PRODUCT OF SCOTLAND



» **Gold Medal**
Foneka: Anton Kaapl Punč Vánoční Liqueur



Gold Medal
Pegasus Spirits: Minty Liqueur



Gold Medal
Rémy Cointreau–Maison Brillet: Belle de Brillet Liqueur

No & Low

"For too long, drinks makers have been constrained by the established rules of their categories and the traditional mindset of marketers, defining products by what they do not contain rather than celebrating what they do," says Kieran Healey-Ryder, global head of team for Whyte & Mackay and no & low lead judge at this year's Global Drinks Awards. "And my word, do these drinks deserve celebration".

After decades of being considered, as Healey-Ryder puts it, "soft drinks with an edge", the non-alc category is taking prominence. IWSR forecasts it to grow 36% by volume from 2024–29, and this year's blind tasting gave a glimpse into its remarkable quality.

"We had the opportunity to taste an extraordinary breadth of products, from wine through to spirits, aperitifs and canned drinks," says Healey-Ryder. "The quality was exceptional. The experience of flavour was, at times, off the charts and unlike anything I had experienced before. Some of those drinks will remain long in the memory."



Global Best Alcohol Free (<0.5%) Cider
Tripple J Drinks: Chance Clean Cider



Global Best Alcohol Free (<0.5%) Lager/Pils Beer
Hofmeister: Hofmeister Bearly Any



Global Best Alcohol Free (<0.05%) Spirits/Aperitifs
Star Tender: Ouzero Apero Anise



Global Best Alcohol Free (<0.5%) Stout/Wheat Beer
Big Drop Brewing: Big Drop Galactic Milk Stout



Ireland's Best Alcohol Free (<0.5%) Cider
Oisin Agus Niamh Teoranta: Cronins Cider 0.0%



USA's Best Alcohol Free (<0.5%) Lager/Pils Beer
Athletic Brewing: Athletic Brewing Co Noble Pils



Gold Medal
Athletic Brewing: Athletic Brewing Co Noble Pils



Gold Medal
Big Drop Brewing: Big Drop Galactic Milk Stout



Gold Medal
Hofmeister: Hofmeister Bearly Any



Gold Medal
Oisin Agus Niamh Teoranta: Cronins Cider 0.0%



Gold Medal
Star Tender: Ouzero Apero Anise



Gold Medal
Tripple J Drinks: Chance Clean Cider



Setting the stage: GDI*'s digital editor Olly Wehring kicks off Day 2 of judging*

Rum

For Vicky Ilankovan, executive director of Equal Measures UK and lead rum judge at the Global Drinks Awards, the entries in this year's competition were indicative of a wider UK trend, where consumers are seeking out sweeter styles, "often with a flavoured edge".

With this area of the category well catered to, Ilankovan is turning her eye to liquids like Haitian clairin and "regional rums that branch out from the expected — think Jamaican sugarcane juice 'jagricoles', single estate series and ferment experimentation", she says. "This desire for exploration and creativity has been lapped up by curious bartenders who are, in turn, bringing this joy to their consumers."

Ilankovan's hope is that these standout examples of premium rum will find their way into the mainstream. "I think we will continue to see more of this in the premium rum category," she says, "and hope that this will be evident in the coming years of the competition."



Global Best Aged Rum
Eminente Rum: Eminente Gran Reserva Edition No.2 Rum



Global Best Light Rum
The Original Rum Bum: Rum Bum Caribbean Premium Silver »

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» **Global Best Spiced Rum**
Titan Spirits: Titan Spiced Rum



Best Aged Rum Aged 5 Years and Under
Brown-Forman: Diplomático Ambassador Rum



Best Aged Rum Multi-Origin No Age Statement
Takamaka: Takamaka Kreol Cask Rum



Best Aged Rum Single Origin No Age Statement
Campari Group: Appleton Estate Signature Rum



Best Light Rum Single Origin Unaged
Campari Group: Wray & Nephew White Overproof Rum



Haiti's Best Aged Rum
Crillon Importers: Rhum Barbancourt 8yo



Gold Medal
Brown-Forman: Diplomático Ambassador Rum



Gold Medal
Campari Group: Appleton Estate Signature Rum



Gold Medal
Campari Group: Wray & Nephew White Overproof Rum



Gold Medal
Crillon Importers: Rhum Barbancourt 8yo



Gold Medal
Eminente Rum: Eminente Gran Reserva Edition No.2 Rum



Gold Medal
Eminente Rum: Eminente Reserva 7yo Rum



Gold Medal
The Original Rum Bum: Rum Bum Premium Overproof



Gold Medal
The Original Rum Bum: Rum Bum Caribbean Premium Silver



Gold Medal
Takamaka: Takamaka Kreol Cask Rum



Gold Medal
Titan Spirits: Titan Spiced Rum

Speciality Drinks



Global Best Sake
Saketime: Kay Junmai Daigino Sake



Gold Medal
Saketime: Kay Junmai Daigino Sake

Vodka

Flavour fatigue and the rise of RTDs have driven stagnation in the vodka category of late, but the sector looks set to stabilise and return to growth in the years ahead.

As with gin, the martini's ascent to stardom has turned the tide for vodka in the on-premise, and with no sign that consumers will turn away from the stiff drink anytime soon, the category's future looks brighter than it has for years.



Global Best Vodka
Holiday Vodka: Holiday Vodka



Global Best Flavoured Vodka
Bacardí: Grey Goose Berry Rouge Flavoured Vodka



Best Grain Blend Vodka
Speight's: Speight's Ten Times Distilled Northern Vodka



Best Mid-Strength Vodka
The Boatyard Distillery: V-52 Premium Light Vodka



Best Potato Vodka
Night Hawk Distillery: Night Hawk Potato Vodka



Best Rye Vodka
Moët Hennessy: Belvedere 10 Vodka



Czechia's Best Grain Blend Vodka
Foneka: Anton Kaapl Legionär Vodka



France's Best Wheat Vodka
Bacardí: Grey Goose Altius Vodka



Romania's Best Wheat Vodka
Bran Distillery: Vampire's Prince Ultra Premium Vodka



Gold Medal
Bacardí: Grey Goose Altius Vodka »

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» **Gold Medal**
Bacardí: Grey Goose Berry Rouge Flavoured Vodka



Gold Medal
The Boatyard Distillery: V-52 Premium Light Vodka



Gold Medal
Bran Distillery: Vampire's Prince Ultra Premium Vodka



Gold Medal
Foneka: Anton Kaapl Legionär Vodka



Gold Medal
Holiday Vodka: Holiday Vodka



Gold Medal
Moët Hennessy: Belvedere 10 Vodka



Gold Medal
Moët Hennessy: Belvedere Organic Vodka



Gold Medal
Night Hawk Distillery: Night Hawk Potato Vodka



Gold Medal
Speight's: Speight's Ten Times Distilled Northern Vodka



Gold Medal
Pegasus Spirits: Pegasus Vodka

Whisky

Whisky was the big hitter on awards day, with 145 expressions hailing from Scotland to Taiwan and India to Ireland achieving gold, silver and bronze medals. "The whisky category in Global Drinks Awards' inaugural year was fascinatingly diverse, with a decent showing of very different styles from across the world," says drinks writer & whisky lead judge Becky Paskin.

For her, the entries at this year's awards are reflective of the growing curiosity among whisky drinkers. "Consumers are seeking more diversity in the whiskies they try," she says, "and a medal is a guarantee that the bottle they're spending their precious money on comes with a seal of approval."



Global Best Blended Grain Whisky
Wan Ja Shan Brewery: Dawu Double Cask Taiwanese Whisky Sherry Cask & Cognac Cask



Global Best Blended Malt Whisky
Maison Villevert: Talbert Celtic Malt Whisky



Global Best Blended Whiskey
The Teeling Whiskey Co: Teeling Explorers Series 15yo Japanese Edition Blended Irish Whiskey



Global Best Bourbon Whiskey
Brother's Bond: Brother's Bond Bottled-in-Bond Straight Bourbon Whiskey 7yo



Global Best Pot Still Whiskey
Pernod Ricard: Redbreast 27yo Single Pot Still Irish Whiskey



Global Best Rye Whisky
Brother's Bond: Brother's Bond American Blended Rye Whiskey



Global Best Single Cask, Single Malt Whisky
Rumsky: Integrity Malts Staoisha Islay Single Malt Whisky



Global Best Single Grain Whisky
Brave New Spirits: Cask Masters of Cameronbridge 15yo Single Grain Scotch Whisky



Global Best Single Malt Whisky
King Car Group Kavalan Blender's Reserve No.1 Single Malt Whisky



Best Bourbon Whiskey No Age Statement
Brother's Bond: Brother's Bond Regenerative Grain Straight Bourbon Whiskey



England's Best Single Malt Whisky
Cotswolds Distillery: Cotswolds Signature Single Malt Whisky



India's Best Blended Whisky
Allied Blenders and Distillers: Woodburns Contemporary Indian Whisky



India's Best Single Malt Whisky
John Distilleries: Paul John Peated Select Cask Indian Single Malt Whisky



Ireland's Best Blended Whiskey No Age Statement
Allied Blenders and Distillers: Aodh Triple Distilled Blended Irish Whiskey



Ireland's Best Blended Whiskey 12 Years and Under
Johnny Doyle: Johnny Doyle 10yo Irish Whiskey



Ireland's Best Pot Still Whiskey Aged 13–20 Years
Pernod Ricard: Redbreast 18yo Single Pot Still Irish Whiskey



Ireland's Best Pot Still Whiskey No Age Statement
Pernod Ricard: Jameson Distiller's Batch Single Pot Still Irish Whiskey



Ireland's Best Single Malt Whiskey
Powerscourt Distillery: Fercullen Single Malt Irish Whiskey »

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» Ireland's Best Single Malt Whiskey Aged 21 Years and Over
The Teeling Whiskey: Teeling Rising Reserve Single Malt Irish Whiskey Series 5 PX Sherry Cask



Japan's Best Single Malt Whisky
Hombo Shuzo Co: Mars Komagatake Single Malt Whisky



Scotland: Best Blended Whisky Aged 13–20 Years
Bacardí: Dewar's 19yo Blended Scotch Whisky The Champion's Edition 126th US Open



Scotland: Best Scotch Blended Whisky Aged 12 Years and Under
Bacardí: Dewar's 12yo Mizunara Blended Scotch Whisky



Scotland: Best Single Malt Whisky
Brown-Forman: Benriach The Sixteen, 16yo Speyside Single Malt Whisky



Scotland: Campbeltown's Best Single Malt Whisky
Loch Lomond Group: Glen Scotia 12yo Campbeltown Single Malt Whisky



Scotland: Campbeltown's Best Single Malt Whisky No Age Statement
Loch Lomond Group: Glen Scotia Double Cask Campbeltown Single Malt Whisky



Scotland: Campbeltown's Best Single Malt Whisky Aged 13–20 Years
Loch Lomond Group: Glen Scotia 15yo Campbeltown Single Malt Whisky



Scotland: Highland's Best Single Malt Whisky
Cartel Bros: The GlenJourneys 21yo Highland Single Malt Whisky



Scotland: Highland's Best Single Malt Whisky Aged 13–20 Years
Loch Lomond Group: Loch Lomond 18yo Single Malt Whisky



Scotland: Highland's Best Single Malt Whisky No Age Statement
Whyte & Mackay: Fettercairn Vanguard Collectable 2nd Release



Scotland: Islay's Best Single Malt Whisky
Ardnahoe Distillery: Ardnahoe Bholsa Islay Single Malt Whisky



Scotland: Lowland's Best Single Malt Whisky
Inchdairnie Whisky: KinGlassie 8yo Fife Single Malt Scotch Whisky Raw Edition



Scotland: Other Regions' Best Single Malt Whisky Aged 12 Years and Under
Borders Distillery: The Borders 8yo Single Malt Whisky First Release



Scotland: Other Regions' Best Single Malt Whisky Aged 13–20 Years
Whyte & Mackay: Jura 16yo Single Malt Whisky



Scotland: Other Regions' Best Single Malt Whisky No Age Statement
Whyte & Mackay: Jura Single Malt Whisky French Cognac Cask



Scotland: Speyside's Best Single Malt Whisky Aged 12 Years and Under
Speyside Distillers: Spey 12yo Brume Dorée Cask Strength Speyside Single Malt Whisky



Gold Medal
Allied Blenders and Distillers: Aodh Triple Distilled Blended Irish Whiskey



Gold Medal
Allied Blenders and Distillers: Woodburns Contemporary Indian Whisky



Gold Medal
Amrut Distilleries: Amrut CaféX Indian Single Malt Whisky



Gold Medal
Amrut Distilleries: Amrut Kranthi Indian Single Malt Whisky



Gold Medal
Ardnahoe Distillery: Ardnahoe Bholsa Islay Single Malt Whisky



Gold Medal
Ardnahoe Distillery: Ardnahoe Infinite Loch Islay Single Malt Whisky



Gold Medal
Bacardí: Dewar's 12yo Mizunara Blended Scotch Whisky



Gold Medal
Bacardí: Dewar's 15yo Mizunara Blended Scotch Whisky



Gold Medal
Bacardí: Dewar's 19yo Blended Scotch Whisky The Champion's Edition 126th US Open



Gold Medal
Barrell Craft Spirits: Barrell Cigar Blend Bourbon Whiskey



Gold Medal
Barrell Craft Spirits: Barrell Seagrass Rye Whiskey



Gold Medal
Borders Distillery: The Borders 8yo Single Malt Whisky First Release



Gold Medal
Brave New Spirits: Cask Masters of Cameronbridge 15yo Single Grain Scotch Whisky



Gold Medal
Brother's Bond: Brother's Bond American Blended Rye Whiskey



Gold Medal
Brother's Bond: Brother's Bond Bottled-in-Bond Straight Bourbon Whiskey 7yo »

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2027 Global Gin Awards ~ Best London Dry Gin

2027 GLOBAL GIN AWARDS GLOBAL BEST LONDON DRY

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GDA RESULTS



» **Gold Medal**
Brown-Forman: Benriach The Twelve, 12yo Speyside Single Malt Whisky



Gold Medal
Brown-Forman: Benriach The Sixteen, 16yo Speyside Single Malt Whisky



Gold Medal
Brown-Forman: The GlenDronach 12yo Highland Single Malt Whisky



Gold Medal
Brown-Forman: Glenglassaugh 15yo Single Malt Whisky



Gold Medal
Cartel Bros: The GlenJourneys 21yo Highland Single Malt Whisky



Gold Medal
Cotswolds Distillery: Cotswolds Signature Single Malt Whisky



Gold Medal
Hombo Shuzo Co: Mars Komagatake Single Malt Whisky



Gold Medal
Inchdairnie Whisky: KinGlassie 8yo Fife Single Malt Scotch Whisky Double Matured



Gold Medal
Inchdairnie Whisky: KinGlassie 8yo Fife Single Malt Scotch Whisky Raw Edition



Gold Medal
John Distilleries: Paul John Classic Select Cask Indian Single Malt Whisky



Gold Medal
John Distilleries: Paul John Oloroso Indian Single Malt Whisky



Gold Medal
John Distilleries: Paul John Peated Select Cask Indian Single Malt Whisky



Gold Medal
Johnny Doyle: Johnny Doyle 10yo Irish Whiskey



Gold Medal
King Car Group: Kavalan Blender's Reserve No.1 Single Malt Whisky



Gold Medal
King Car Group: Kavalan Distiller's Reserve No.1 Single Malt Whisky



Gold Medal
King Car Group: Kavalan Grand Reserve No.1 Single Malt Whisky



Gold Medal
Loch Lomond Group: Glen Scotia Aged 12 Years Campbeltown Single Malt Whisky



Gold Medal
Loch Lomond Group: Glen Scotia Aged 15 Years Campbeltown Single Malt Whisky



Gold Medal
Loch Lomond Group: Glen Scotia Double Cask Campbeltown Single Malt Whisky



Gold Medal
Loch Lomond Group: Loch Lomond 18yo Single Malt Whisky



Gold Medal
Maison Villevert: Talbert Celtic Malt Whisky



Gold Medal
Pernod Ricard: Jameson Bow Street 18yo Blended Irish Whiskey



Gold Medal
Pernod Ricard: Jameson Distiller's Batch Single Pot Still Irish Whiskey



Gold Medal
Pernod Ricard: Midleton Very Rare 2026 Vintage Release Blended Irish Whiskey



Gold Medal
Pernod Ricard: Redbreast 18yo Single Pot Still Irish Whiskey



Gold Medal
Pernod Ricard: Redbreast 27yo Single Pot Still Irish Whiskey



Gold Medal
Piccadily Agro: Indri Diwali Ruby Port Cask Indian Single Malt Whisky



Gold Medal
Piccadily Agro: Indri Drú Cask Strength Indian Single Malt Whisky



Gold Medal
Piccadily Agro: Indri Trini Three Wood Indian Single Malt Whisky



Gold Medal
Powerscourt Distillery: Fercullen Single Malt Irish Whiskey



Gold Medal
Rumsky: Integrity Malts Staoisha Islay Single Malt Whisky



Gold Medal
Speyside Distillers: Spey 12yo Brume Dorée Cask Strength Speyside Single Malt Whisky »



Gold Medal
The Teeling Whiskey Co: Teeling Crystal Single Malt Irish Whiskey



Gold Medal
The Teeling Whiskey Co: Teeling Explorers Series 15yo Japanese Edition Blended Irish Whiskey



Gold Medal
The Teeling Whiskey Co: Teeling Rising Reserve Single Malt Irish Whiskey Series 5 PX Sherry Cask



Gold Medal
Wan Ja Shan Brewery: Dawu Double Cask Taiwanese Whisky Oat Spirit Cask & Bourbon Cask



Gold Medal
Wan Ja Shan Brewery: Dawu Double Cask Taiwanese Whisky Sherry Cask & Cognac Cask



Gold Medal
Wan Ja Shan Brewery: Dawu Peated Taiwanese Whisky



Gold Medal
Whyte & Mackay: Jura 12yo Single Malt Whisky Sherry Cask Finish



Gold Medal
Whyte & Mackay: Jura 16yo Single Malt Whisky



Gold Medal
Whyte & Mackay: Jura 19yo Single Malt Whisky



Gold Medal
Whyte & Mackay: Jura Single Malt Whisky French Cognac Cask



Gold Medal
Whyte & Mackay: Fettercairn 16yo Highland Single Malt Whisky



Gold Medal
Whyte & Mackay: Fettercairn 17yo Highland Single Malt Whisky



Gold Medal
Whyte & Mackay: Fettercairn Vanguard Collectable 2nd Release Highland Single Malt Whisky



Axiom Communications director Jo Jacobius assesses the aromatic profile of a Global Drinks Awards entrant »



New Product Awards

What makes a classic? The title is reserved for the rare few expressions whose enduring quality allows them to withstand the test of time; a status which reflects generations of relevance and universality. But all classics start somewhere. The New Product Awards, launched in 2025, recognise outstanding liquids released within the past 24 months. Celebrating innovation, quality and commercial relevance, the awards are designed for new liquid launches, brand extensions, finishes and flavour developments, highlighting products shaping the future of their category. In other words: those destined to be considered the classics of the future.



New Product of the Year
100% Agave Reposado Tequila
Lady Dragon: Lady Dragon Reposado Cristalino Tequila



New Product of the Year
Aged Rum
Takamaka: Takamaka Kreol Cask Rum



New Product of the Year
Blended Whisky
Bacardí: Dewar's 19yo Blended Scotch Whisky The Champion's Edition 126th US Open



New Product of the Year
Botanical Liqueur
Pegasus Spirits: Minty Liqueur



New Product of the Year
Bourbon Barrell Craft Spirits: Barrell Cigar Blend Bourbon Whiskey



New Product of the Year
Campbeltown Single Malt Whisky
Loch Lomond Group: Glen Scotia Double Cask Campbeltown Single Malt Whisky



New Product of the Year
Clear Vodka
Holiday Vodka: Holiday Vodka



New Product of the Year
Flavoured Vodka
Bacardí: Grey Goose Berry Rouge Flavoured Vodka



New Product of the Year
Fruit Liqueur
Auberon: Auberon English Rhubarb Liqueur



New Product of the Year
Highland Single Malt Whisky
Whyte & Mackay: Fettercairn Vanguard Collectable 2nd Release Highland Single Malt Whisky



New Product of the Year
Light Rum
The Original Rum Bum: Rum Bum Caribbean Premium Silver



New Product of the Year
Mezcal
Mezzaro: Mezzaro Mezcal



New Product of the Year
Mid-Strength Vodka
The Boatyard Distillery: V-52 Premium Light Vodka



New Product of the Year
Rum-Based Liqueur
Aruba Rum Distillery: Pepe Margo Distillery Rum & Coconut Liqueur



New Product of the Year
Single Malt Whisky
King Car Group: Kavalan Blender's Reserve No.1 Single Malt Whisky



New Product of the Year
Gold Medal
Bacardí: Dewar's 12yo Mizunara Blended Scotch Whisky



New Product of the Year
Gold Medal
Bacardí: Dewar's 15yo Mizunara Blended Scotch Whisky



New Product of the Year
Gold Medal
Brown-Forman: Glenglassaugh 15yo Single Malt Whisky



New Product of the Year
Gold Medal
King Car Group: Kavalan Distiller's Reserve No.1 Single Malt Whisky



New Product of the Year
Gold Medal
King Car Group: Kavalan Grand Reserve No.1 Single Malt Whisky



New Product of the Year
Gold Medal
The Original Rum Bum: Rum Bum Premium Overproof

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Is local oak the final piece in whisky's provenance puzzle?

From Ireland to Denmark and the Caucasus, Europe's whisky distillers are breaking new ground by using locally sourced casks to explore fresh flavour frontiers and double down on provenance. **Richard Woodard** reports



Provenance lies at the heart of whisky's appeal, reinforced by the knowledge that no two distilleries will produce exactly the same spirit thanks to the local conditions that shape flavour.

Craft operations, in particular, now take this further, sourcing cereal grains from surrounding farms or even growing it themselves. But what about casks? Rather than using oak imported from Kentucky or Jerez, is it possible to close the provenance loop and source local wood instead?

The short answer is yes — but it's complicated. And we need to define what we mean by 'locally sourced'. Depending on the distillery, this could involve casks coopered from trees growing in the area, or it might refer to previously used casks acquired from local wineries. Both confer provenance in subtly different ways.



Midleton master distiller Kevin O'Gorman (top) says every bottle of Midleton Very Rare Dair Ghaelach can be traced to the specific woodland — and individual tree — that supplied the finishing cask, creating a 'deeper connection to Ireland'

"This is definitely an aspect that distillers are looking into, but outside the traditional cask-making regions, it's often hard to find a cooper who can make you a local wood cask," points out Billy Abbott, brand ambassador at online retailer The Whisky Exchange. "And that's before you try to find a tree that you can cut up and extract a useful number of straight boards from."

Scarcity, cost and flavour

This is the chief challenge with creating casks from locally sourced wood: compared with the industrial-scale forests and cooperages of the US, France and Spain, operations in other countries are minuscule and their products are expensive; however fascinating and worthwhile the results, this is very much a niche.

Not that Europe's whisky-makers are discouraged. Pernod Ricard's Irish Distillers has been championing its Midleton Very Rare Dair Ghaelach whiskies, part-matured in oak sourced from Irish forests, for over a decade now, creating a "deeper connection to Ireland", according to Midleton master distiller Kevin O'Gorman.

"It isn't only about provenance," he adds. "The oak has a direct influence on the flavour of the whiskey. Each release comes from a specific Irish woodland, with bottles traceable back to the individual tree used to make the finishing cask. This gives consumers a clear connection between the origin of the wood and its influence on the whiskey." »

FIVE KEY TRENDS

1. Native oak takes centre stage
Distillers use local oak to strengthen regional identity and create distinctive flavours.

2. Finishing offers balance
Finishing and pre-ageing help manage native oak's intense tannins, spice and woody notes.

3. Wine casks reflect heritage
Georgian and Romanian producers reuse local wine and brandy casks to express regional traditions.

4. Alternative woods expand horizons
Chestnut, acacia and other native woods offer new flavours and differentiation.

5. Supply and cost pose challenges
Limited wood supplies and the expertise needed to craft casks make local sourcing expensive and complex.

» Question of balance

That flavour contribution needs careful handling. "Wood from outside the more well-known oak production areas is incredibly varied, so there's often much less experience in how the flavours might interact with the whisky," says The Whisky Exchange's Abbott. "Some are very assertive and can quickly overtake the flavours of the underlying spirit."

Scotch distillers have found this when using Scottish oak; it's a similar story in Ireland. Church of Oak, a distillery in County Kildare that is yet to release its first whiskey, has conducted experiments with Irish oak, but head distiller Greg McEntee is cautious. "It's likely to be more suitable for finishing," he suggests. "The influence that the Irish oak has on the liquid is a bit too much for full maturation, unless it's been used elsewhere first. And the availability is very poor."

On the other side of the Wicklow Mountains, Glendalough Distillery has used oak sourced from nearby forests to 'finish' both its pot still and peated pot still whiskeys. "Irish oak tends to bring a rich spice character, alongside darker notes of toasted oak, coffee, cocoa and dried fruits," says head distiller Ciarán 'Rowdy' Rooney.

Ireland's growing conditions give the wood a wider grain structure than regular European oak, and Rooney reckons that spice profile works particularly well alongside the naturally spicy, textured pot still character.



Thy pre-aged and finished its spelt-rye whisky in a cask made from Jutland forest wood

Like any deviation from the norm, investing in local oak comes with a unique set of challenges.

"Unlike more commonly used oak species, there's no established supply chain sitting on your doorstep," says Rooney. "You're starting with a rare and finite resource, so every decision matters, from selecting the right trees through to how the wood is seasoned and transformed into casks. It also requires significant investment."

A new expression of terroir

The Irish experience is echoed across the North Sea in Denmark, and the Jutland distillery of Thy Whisky. Here, co-owner, master distiller & managing director Jakob Stjernholm started experimenting with Danish oak four years ago, before a collaboration with Aarhus craft museum Den Gamle By — which had just taken on a cooper apprentice — in 2025.

The trial involved creating a traditional 53-litre cask from wood grown in Jutland forests, then pre-ageing and finishing Thy's spelt-rye whisky in it (combined with new American oak). It yielded 353 bottles, priced locally at DKK799 (US$120) each.

"Our experience is that Danish oak can contribute quite pronounced tannins, spice and a deep wood character," says Stjernholm, "but also lighter and sweeter-sour flavours in the direction of red berries and juicy oak. By blending it with the American oak and bourbon casks we normally use for our spelt-rye whisky, it has helped us find a balance where the Danish oak adds new layers and complements the whisky, instead of taking it over."

Thy aims to use these casks judiciously. "We grow and malt all our own grain, so exploring local oak is a natural extension of our single-estate philosophy," explains Stjernholm. "[But] with the reservation that we as farm distillers adhere more to a grains-and-malt-driven expression on our whisky, [rather] than heavy cask influence."

Nonetheless, the collaboration is set to continue, with a plan to include larger cask sizes, alongside testing maturation periods and strategies. "Pre-ageing looks quite interesting right now," says Stjernholm, "but there's still a lot to learn." He sees Danish oak as an interesting addition, rather than as a primary ageing cask. »







Nestled deep in the Wicklow Mountains, Glendalough Distillery sourced oak from nearby forests to 'finish' its pot still and peated pot still Irish whiskeys

» Like Stjernholm, Frédéric Revol, founder of Rémy Cointreau-owned French Alps distillery Domaine des Hautes Glaces, sees wood "as an extension of terroir, as well as a source for experimentation". Hautes Glaces sources all its oak from France's wealth of managed forests: Tronçais, Limousin, Vosges, using both quercus robur and quercus petraea.

Revol highlights Epistémè R15C25, a pair of rye whiskies using grain sourced from the same farm but matured respectively in quercus robur and quercus petraea. "There is definitely an appetite for whisky drinkers to open their horizons," he says. "More and more consumers consider the importance of provenance, the origin of the raw material and its impact on flavour."







Hautes Glaces founder Frédéric Revol's experiments led to Epistémè R20W26 Étoile (Acacia) and Epistémè R20W26 Rond (Oak), each bottled at 48% ABV and limited to 522 and 582 50cl bottles, respectively

Local wine casks play their part

Other distillers look to the broader heritage of their location. Jimsher Whisky in Georgia taps into that country's 8,000-year wine history, giving a second life to the company's wine and brandy casks, ranging across French, American, Hungarian and Caucasian oak.

Jimsher's four core expressions take their names from the casks in which they undergo the second stage of their maturation: Saperavi, Tsinandali, Traditional Georgian Brandy and Trio, combining all three.

"Whisky enthusiasts are always searching for the next big discovery," says distillery founder Jimsher Chkhaidze. "For many people, it is their first time tasting Georgian whisky, and the wine cask is what makes them curious and then brings them back."





Tămâioasă Românească is one of several Carpathian whiskies matured in wine casks, says whisky director Allan Anderson (right)





Jimsher founder Jimsher Chkhaidze (left) sees wine and brandy cask maturation as a key selling point

It's a similar story with Romania's Alexandrion Group and its Carpathian single malt, which uses the company's wine casks in products such as Carpathian Single Malt Whisky Peated Feteasca Neagră Cask Strength and Carpathian Single Malt Whisky Tămâioasă Românească Fully Matured, respectively local red and white wine styles.

"We see this as an opportunity to create whiskies that reflect their place of origin, while exploring new dimensions of flavour through maturation," says Allan Anderson, master distiller & whisky director.

There are almost endless riffs to be played on local oak sources, but distillers aren't stopping there. Unlike in Scotland, where whisky must be matured in oak, there are no such restrictions in Ireland and elsewhere. Revol at Hautes Glaces is experimenting with acacia from the Champaran Forest »

Irish distillers seek growth as markets shift

Irish whiskey spotlight

Single malt is showing promise as new markets help the category offset sluggish trading in the US, reports **Richard Woodard**

The most significant recent development for Irish whiskey has been the difficult trading conditions experienced in its largest market: the US. As IWSR data makes clear, growth of any kind — volume or value — has been hard to come by thanks to a combination of economic challenges and moderation.

However, this has encouraged companies to look elsewhere for gains. The markets sitting immediately below the US in terms of scale have all been in rude health recently: India, Poland and Germany all recorded double-digit CAGR volume and value growth between 2019 and 2025, according to IWSR data, and the UK is not far behind.

India's exponential growth has been the chief headline-grabber, spearheaded by the ubiquitous Jameson, which commands a huge following thanks to a winning combination of accessibility in price and flavour terms, plus powerful branding from Irish Distillers.

Others will hope that the category's dominant brand is building a bridgehead from which they will all benefit as Indian consumers increasingly explore the category — and the same will be true in other emerging markets from Latin America to Central and Eastern Europe.

Much of the global attention focuses on Irish whiskey blends — which account for the vast majority of volumes — or single pot still, the country's signature whiskey style. But what about Irish single malt? It may be a small subcategory, but its recent growth trajectory suggests that it's outperforming Irish whiskey as a whole.

Such gains are not easily earned, according to Yury Surin, chief marketing officer at Stoli Group, owner of The Irishman and Writers' Tears. "We see a shift in how people buy, rather than in how much they buy: fewer bottles, chosen more carefully," Surin explains. "That works for single malt, but it doesn't turn into easy volume."

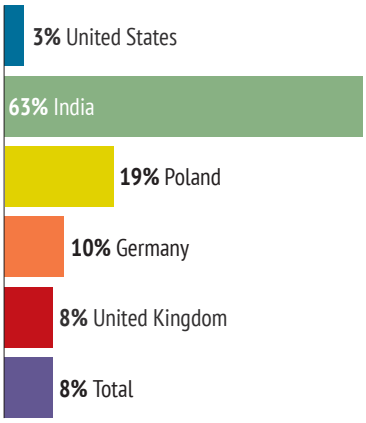
He highlights two standout markets for The Irishman: France (where Irish single malt is growing fast, as per IWSR data) and Irish duty free. Surin agrees that there is growing interest in the segment, but cautions: "The downside is price: with Scotch under pressure, the whisky shelf has become heavy with promotions and price cuts. That leaves less room for innovation and activations — exactly what a smaller single malt brand needs to be noticed."

The Irishman is consciously positioned as a single malt from Ireland, rather than as an Irish single malt, and the brand's blended iteration, The Harvest (unusually combining 70% single malt and 30% single pot still), is used as an entry point.

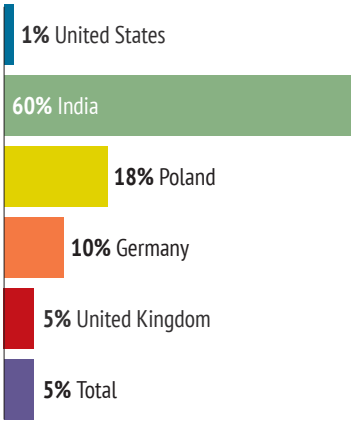
But do people understand Irish single malt? "Not well yet — it has to be explained," admits Surin. "Most whisky drinkers know Irish whiskey as a smooth blend, and many don't know Ireland makes single malt at all. The Irishman is triple distilled from 100% Irish malted barley, which makes it lighter and fruitier than most single malt scotch. We explain ours through tasting: once people try it, the conversation gets much easier."

Top 5 Global Markets for Irish Whiskey

% CAGR Value 2019–25



% CAGR Volume 2019–25



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

» and chestnut from Dauphiné, resulting in Epistémè R20W26, another pair of expressions matured respectively in oak and acacia.

Meanwhile, Irish Distillers has released Midleton Very Rare Irish Chestnut Edition, part-matured in casks made from six sweet chestnut trees grown on the Cappoquin Estate in County Waterford. The first release in the Rare Wood Collection, the whiskey is priced at GBP375 (US$502) in the UK



— its price perhaps reflecting a challenging project, with O'Gorman reporting angels' share evaporation of 29% over a five-year period, double that of oak, thanks to chestnut's porous nature.

However imaginative the experiment, the acid test is always the liquid. "Ultimately, I believe local cask maturation should never just be a marketing story," says Alexandrion Group's Anderson. "The provenance is important, of course, but the real value lies in what those casks contribute to the whisky itself."

Rooney at Glendalough agrees. "Consumers are fascinated by the fact that the oak comes from Wicklow forests just minutes from the distillery, and that every bottle can be traced back to a specific forest," he says.

"It's a genuine story that people immediately understand. But ultimately, the flavour has to deliver. The local oak may be what catches someone's attention initially, but it's the quality of the whiskey that brings them back." GDI



Q&A with Diageo global category director for whisky & luxury Julie Bramham

Diageo is sharpening its growth strategy, with whisky and luxury at the heart of its plans. **Olly Wehring** speaks to global category director Julie Bramham about unlocking growth across its whisky portfolio and what the shift means for the group's long-standing premiumisation strategy

You've been with Diageo since 1999. Talk us through your time there. I've spent most of the last decade in whisky, including as CMO in India, which is a huge whisky market; also as head of Johnnie Walker; and, more recently, running our luxury business, which wasn't exclusively whisky. As we've moved into a new operating model, whereby we're running by category, most of Diageo's luxury business is whisky, and most of that whisky is scotch.

Luxury still sits very much with me and continues to be a really important part of our business strategy.

Historically, Diageo's internal definition of success has been its share price, first and foremost. Does that still ring true? That continues to be the case, absolutely. We're super-focused on the work that we're doing at the moment in driving shareholder value, but as a big PLC, our biggest success measure should be our ability to return to our shareholders.

Diageo's strategy shift has been well documented. What has it meant in your areas of responsibility? This is a really exciting time to be part of Diageo, as we pivot our strategy to make sure that we're returning to the shareholder. That's what we're all focused on. Whisky embodies the overall business strategy. We've got a huge portfolio of winning brands, and that's the same in most of the categories in which we compete. That means we have a bigger opportunity to meet more consumer needs on more occasions, and that's the big thing that I'm focusing on.

In our proposition map, which we used at our Capital Markets Day [in August], we look at the consumer occasions and motivations when they're choosing whisky. It shows clearly where Diageo is, as well as some clear growth opportunities. The chart's laid out top to bottom by price — we span from US$10 per bottle all the way up to five, sometimes six digits — and left to right by occasions and motivations, framed based on social benefit, such as in groups and higher-energy occasions, through to solus drinking and more self-reward.

With our portfolio of well-known brands, we really want to make sure we're getting them working harder to meet consumer needs on more occasions. That's a good embodiment of Diageo's wider strategy, which is essentially saying we've got more opportunity to grow with our core brands on more occasions, and we're going to take that opportunity now.

Diageo's had both the brands and the consumer occasion awareness for years, though. What has actually changed? Our participation across those occasions is what's changed. When I addressed the attendees at our Capital Markets Day, I said that we have the best whisky portfolio in the world, but we have underleveraged parts of it. This is all about participation. We've identified the areas with growth for us to go after, and we need to be more competitive in those areas.

For Johnnie Walker, the opportunity is for us to be sharper around the occasions and the price points. The opportunity is more about the brand's marketing effectiveness, being more focused with what we do with the brand and leveraging innovation more. »

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» On the malts, with the brands and portfolio that we have — with incredible whisky, incredible heritage and an incredible aged inventory — our performance hasn't been as strong as it should be. We should be more competitive here, and we're on this.

We call the third battleground 'social whisky', which is more relevant in the Americas in terms of how consumers enjoy whisky in higher-energy occasions. Buchanan's, Old Parr and Crown Royal are the big brands there. One example of our participation is our work on long serves with Buchanan's that puts it in the hands of different consumers. We've also got Buchanan's Pineapple — 80% of its consumers are new to the brand. That [lively social] occasion already exists, but we're bringing new consumers to the brand.

The fourth area — and I use the term cautiously — is in 'value whisky'. Whisky is highly aspirational at every price level. What we haven't done, though, is participate in full with the brands that we have here across the geographies.

With Diageo's longstanding prioritisation of premiumisation, does presenting a chart with the word 'value' on it give you sleepless nights? It would be fair to say we've had a premiumisation strategy for a number of years and it served us well. What we're seeing now are consumer recruitment opportunities in which some of our brands can participate in full. Premiumisation will continue to be really important, and whisky is the category where we see it the most.

The size of the 'value' bar in the presentation doesn't signify the weight of what we'll do there. We recognise that we have different plays in different parts of the world. These brands are quite big and credible, but we didn't ever have one global play here. Black & White is in Latin America, for example; White Horse is in Brazil and Japan; J&B is in Southern Europe and India; and Bell's is in the UK.

We're going to leverage further the latent equity that exists in these whiskies in the markets that they're in. The expansion of our play so far has been quite cautious. These are low-investment brands, so we're not investing huge amounts in A&P to build them. This is about having a proposition that looks great on the shelf to meet the needs of consumers who are buying in that segment.

While this is a focus of ours, and we have called it out as a battleground, I wouldn't want to give it more focus than it deserves.



Diageo is prioritising three single malt brands: The Singleton (above), Talisker and Lagavulin

How comfortable are you with Diageo's existing portfolio you'll succeed in all the battlegrounds identified? We're confident.

Have any brands been identified as surplus to Diageo's identified needs? I wouldn't say 'surplus'. [CEO Sir] Dave [Lewis] is on the record with his view of our M&A agenda.

As well as the big battlegrounds where we're going to compete more effectively to win share and grow our business, we're making sure we're present in the emerging areas of the category. For example, in 2023, we launched Godawan, our Indian single malt, which is a very fast-growing category. Then there's our Chinese single malt, YunTuo, which we're looking at the progress of to see when we're going to start bottling.

So we're still investing in the emerging and fast-growing parts of the whisky category. I get a load of energy from these brands, as well as from working on what's going to win us market share and growth in the short term.

Diageo has identified three single malts as priorities — The Singleton, Talisker and Lagavulin. Why have these three been chosen and not the others? It's not *not* the others. Diageo's advantage in single malt is our portfolio. If you look at us versus the competition, we have many more brands and have huge competitive advantage here. What we're trying to do is highlight the brands that we're going to put our focus and investment on globally.

We have a load of regional focuses, as well as brands at the very top end — such as Brora and Port Ellen — that we will continue to invest in and grow. They will be important pieces of the portfolio.

Our message for the investor community is about focus. We'll certainly be leveraging the full portfolio, but it won't all necessarily happen globally. Mortlach has a stronghold in some Asian markets, for example. We'll absolutely keep going with the brand there.

Diageo recently introduced smaller pack sizes and launched mid-strength extensions of Captain Morgan, Gordon's and Smirnoff, both high-profile moves which exemplify the change in strategy. Can we expect expansion of either of these concepts? We've certainly underleveraged smaller formats. We actually have small formats for many of our brands that aren't at the levels of distribution that we want them to be. Our greater participation here might enable somebody to buy Johnnie Walker Blue Label as a gift in a smaller format where otherwise they wouldn't have chosen Johnnie Blue. So we see small formats as a core recruitment opportunity, and not only at the premium end of the market.

For our scotch portfolio, we're founding partners of the Scotch Whisky Association, so we very much respect its guidelines on category definitions. The wider whisky category is growing in vibrancy and becoming more flexible. Outside of scotch, flavours have been out there for a number of years, and we play with flavour on some of our brands in some of their geographies, such as Buchanan's Pineapple.

We will absolutely continue to look at the best way to meet consumer needs. We maybe won't stretch the rules of the category, but we will stretch how the category grows, including with RTDs, where whisky hasn't participated very much and where we're going to do more.

What do you have in mind in RTDs? There are consumers who drink whisky, who also drink RTDs; not as much as in other categories, but there's certainly overlap. We also know that in many occasions, consumers are looking for convenient or easy ways to enjoy whisky. The category as a whole has underindexed in meeting those consumer needs. Diageo hasn't necessarily always had brilliant propositions in this space, so we're doing a tonne of work to really understand what the consumer opportunity is, and we will push out in lots of different ways to bring the proposition to life.

A lot of our work is still at the early concept stage, but we'll be looking to bring some competitive propositions to market over the coming year or so.

A Johnnie Walker RTD? I won't say too much, but let's see. GDI

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

How Henkell Freixenet makes the festive season sparkle

As the drinks trade prepares for its most lucrative quarter, Henkell Freixenet **CEO Dr Andreas Brokemper** reveals how the group is adapting to the changing dynamics of the holiday period





Henkell Freixenet's diverse portfolio caters to every sparkling occasion

Economic pressures may be constraining consumer spending this year, but the much-anticipated festive season remains one of the most crucial trading periods for the sparkling wine category.

Nowhere is this more keenly felt than in the on-premise, where celebratory social occasions drive increased consumer demand. To capitalise on this opportunity, venues and wholesalers must have a well-balanced sparkling wine assortment, yet curating a successful offer has never been more complex.

Alongside classic champagne, there are popular regional products for buyers to consider, such as prosecco and crémant, as well as no/low options and sparkling RTD aperitifs. Navigating this requires a portfolio partner with both global reach and category breadth, such as Henkell Freixenet, the world's leading sparkling wine producer.

"'Making Life Sparkle' sums up our mission," says CEO Dr Andreas Brokemper, highlighting the group's corporate claim. "This means bringing our strong brands and broad portfolio of sparkling wines — spanning prosecco, cava, crémant, champagne and sekt, both with and without alcohol — to consumers worldwide."

With revenues of EUR1.25bn (US$1.38) in 2025 and distribution in more than 130 countries, Henkell Freixenet boasts a truly global footprint. Europe remains its powerhouse region, especially in core markets such as Germany, the UK, France, Italy and Poland. The company also has a substantial presence in Latin America's leading market, Brazil.

Dr Brokemper acknowledges the make-or-break significance of the Q4 festive period for the wider drinks business, while noting that consumer habits are transforming rapidly.

"The seasonal period is a very important time of the year for our business," he says. "In some markets, we generate up to 50% of our turnover in these four months alone. People love to toast during the festive season, a tradition that is culturally and emotionally connected in many markets.

"At the same time, enjoyment moments during the Christmas season are becoming more relaxed and informal. Consumers are looking for different products for different occasions, from daytime get-togethers to early evening aperitifs and late-night parties."

HENKELL FREIXENET
MAKING LIFE SPARKLE

To cater to such diverse consumer demand, Henkell Freixenet offers a varied portfolio spanning multiple sparkling styles and occasions. Its range extends from the rare, single-plot terroir cuvées of champagne house Alfred Gratien and *méthode traditionnelle* wines from Loire crémant producer Gratien Meyer, to the more relaxed, aperitivo-inspired Freixenet Solare and convenient Mionetto Orange Spritz, perfect for informal festive gatherings.

Mindful consumption has emerged as one of the defining trends shaping the global drinks industry, with the alcohol-free category continuing to gain momentum. According to IWSR, global volumes of no-alcohol (NA) sparkling wine grew double digits in 2025.

"For us, alcohol-free is not a compromise," insists Dr Brokemper. "Consumers expect the same quality, good taste and presentation. This is our standard, and it is part of our company mission. We employ a mirror strategy: all our key brands now have an alcohol-free counterpart with the same high quality in design, taste and presentation."

Henkell Freixenet brings over 30 years of experience to the NA category, having recently expanded its premium dealcoholised sparkling wine production capabilities at its Wiesbaden facility — the group's central hub for alcohol-free expertise. This infrastructure enables the group's brands to produce gently dealcoholised wines that successfully retain structural balance, aroma and effervescence.

The group's expanded NA portfolio includes Freixenet Cordon Negro Alcohol-Free and Mionetto 0.0%, alongside Mediterranean-style aperitif Freixenet Solare Alcohol-Free, ready-to-serve Mionetto Orange Spritz Aperitivo Alcohol-Free and Henkell Alkoholfrei 0.0%, an alcohol-free version of Germany's most exported sparkling wine. This extensive portfolio breadth, which also features historic estate wines like Schloss Johannisberg, is underpinned by third-party industry validation.

As the drinks industry enters its most important trading period, the right partners are essential to meeting evolving consumer demands. Whether elevating high-end dining, supplying holiday retail shelves, or serving zero-proof celebrations, Henkell Freixenet provides the trade with the tools to make the festive season sparkle. GDI

Craft distillers feel the sharp end of US distribution consolidation

Jessica Broadbent discovers why craft distillers are the biggest losers of the route-to-market headwinds blowing across the three-tier system in the US



As a 'small' producer, Brucato Distillery admits it is 'never going to be the priority for a sales team'

US craft distiller numbers are shrinking. As of August, the number of active producers sat at 2,131, a 6.6% decrease year on year, marking the first time closures have outpaced distillery openings.

"[We're facing] challenging times," admits American Craft Spirits Association (ACSA) CEO Emily Pennington. "I don't think it would be realistic of me to say that the category is thriving."

American craft spirits also faced volume (-8%) and value (-3.7%) declines in 2025, according to the organisation's just-released *Craft Spirits Data Project 2026*, casting a depressing light on trading conditions for small-scale producers.

So what factors are behind this gloomy state of affairs?

Distribution: a distiller's 'greatest challenge'

Competition from larger brands with more volume capability, revenue potential and negotiating power has always been a challenge for smaller producers looking for a route-to-market, and Pennington says distribution is now "far and away the greatest challenge" craft distillers face.

At the wholesale level, distributors are increasingly streamlining operations and "narrowing their focus on the biggest brands", Pennington says. At a retail-tier level, buyers are picking up fewer new products "and have higher expectations for performance when they do take on new ones".

More broadly, the US three-tier system faces structural challenges, including the consolidation of mega-wholesalers, which contributed to the collapse this year of Republic National Distributing Co (RNDC) once the country's second-largest alcohol distributor. RNDC's bankruptcy reverberated across the industry, even down to craft distillers who weren't on the giant's roster.

Of those who were, Pennington predicts "few, if any, have fully recovered at this point; they are still in triage mode, trying to find new routes of distribution".

Wholesale consolidation has flooded mid-tier distributors with larger brands. The co-founder of Californian amaro brand Brucato, Sierra Clark, argues that craft-sized businesses which previously had "a chance to be taken seriously" by boutique and mid-level distribution companies are now being overshadowed. "Suddenly, a lot of mid-levels are paying attention to bigger brands," she says.

Brucato produces 2,500 nine-litre cases a year, putting it into the 'small' producer tier under ACSA's definition, which accounts for 90% of distillers. Part of the problem, Clark says, is that small distillers "are never going to be the priority for a sales team", admitting that "we're the first to get cut usually, and we're the first to be deprioritised if we're not being cut. As everything is changing in the industry, it is hitting the craft distillers the hardest."

In New York State, Hillrock Estate Distillery founder & CEO Jeffrey Baker says distributor consolidation "generally has not been a good thing", having witnessed "the service and the ability to handsell evaporate" for distillery peers.

"These mega distributors, they've gobbled up so many smaller distributors and, at the same time, taken on many more suppliers, they just simply don't have the time or capability of servicing smaller suppliers anymore," he says. »

FIVE KEY TRENDS

1. Craft producer numbers are falling
The US had 2,131 active craft distillers in August, down 6.6% year on year.

2. Distribution is harder to secure
Distributor consolidation is limiting smaller producers' access to market, while wholesalers are prioritising bigger brands and retail buyers are taking on fewer new products.

3. Producers taking a more hands-on approach to distribution
Craft producers are increasingly expected to provide clear sales plans, support account relationships and invest directly in helping distributors sell their products.

4. Rise of direct-to-consumer sales
D2C shipping offers an alternative route-to-market, but restrictive state laws limit its potential.

5. Rising pressures are reshaping the economics of craft spirits
Falling volumes and value, intense competition, regulatory hurdles and cost pressures are creating a difficult trading environment, leaving smaller producers disproportionately exposed.

» Hillrock Estate Distillery is a medium-sized distillery producing around 20,000 nine-litre cases of whisky a year, and works with both small and larger distributors across the US, but Baker says that in today's market, regional, family-owned distributors "are better suited for serving smaller suppliers and telling a story".

In Colarado, Cody Butters Lewis has spent her career working for multinational brands like Molson Coors and, latterly, Mast-Jägermeister. Now the owner of a craft business, having purchased grain-to-glass distillery Peach Street Distillers with her husband Michael Lewis last year, she agrees that when it comes to finding distribution, "you've got to be really smart about who you choose".

A brand like Peach Street (also a small distillery producing around 4,000 nine-litre cases/year) is looking at smaller distributors than the likes of Jägermeister. Still, Butters Lewis is clear on what the business needs from a distributor in order to grow. "They can't be inefficient; they need to have a chain [account] team. They need to have the appropriate amount of calls per account per week," she says.

Boots on the ground

As the US wholesaler landscape faces seismic shifts, it is increasingly important for craft distillers to strengthen their ties with both wholesale teams and retail accounts.

Having moved into the sector from multinationals, Butters Lewis has noticed craft producers can expect too much of their distributors. "A lot of craft suppliers go in [to wholesalers] and go: 'Oh my God, I can't wait to be a millionaire. Here's my brand, grow it,'" she says. But she warns that "you need a plan for the distributor to go out and execute, and then you have to hold their hand to the fire. You end up doing probably 75% of the work. But once you get there, it becomes easier."

Clark at Brucato agrees, arguing that the distiller–distributor relationship relies on mutual support. "Our investment is increasingly going to be supporting our distributors and making sure that they know we're in it with them. We're going to support them any way they want," she says.

With two young children at home and limited capacity to travel, Clark and husband James plan to grow their sales team — though "the days of flashy sales ambassadors [across the industry] are over".

She says: "Those positions work when people are drinking at high volume. You need to constantly show face, and there's enough income to justify it. But it's not a laser-sharp approach." If a distiller has limited budgets, she advises: "Go all in on supporting the distributor."

D2C hurdles

Though not a silver bullet for craft distillers, direct-to-consumer (D2C) shipping "could help with longevity" for struggling businesses, Pennington says. Butters Lewis at Peach Street agrees, advising brands to "self-distribute as long as you can, because you get to keep all that margin".

The ACSA is advocating for the expansion of D2C laws across the US. At present only ten states plus Washington DC allow it and to varying degrees, with some only permitting home-state delivery.

In California, a one-year D2C pilot scheme (an expansion of an order signed during the Covid-19 pandemic) will expire at the end of the year. It seems unlikely the trial will be extended; a "particularly rough blow to the craft distillers in California, as they had some of the most progressive D2C regulations in the country", Pennington says.

Clark points out that the changing law will have a knock-on effect on marketing strategy including social media, which Brucato uses to direct consumers to its website for D2C options. "It feels like the industry is, from a legal perspective, picking on the little craft distillers," she says. "It is a problem for us economically, but it's also just a situation where you don't feel supported by the industry writ large."

Meanwhile in New York, where D2C shipping is permitted to some states, Baker says Hillrock's direct sales "have been expanding rapidly". He predicts "that trend will continue" across the craft sector, particularly if wholesaler contraction continues.

While distribution may be one of the most pressing issues facing craft distillers, they also contend with industry-wide regulatory pressures, rising costs and shifting consumer habits — all of which hit harder when budgets and teams are smaller.

Alongside pushing for expanded D2C laws, Pennington says the ACSA is "spearheading" the proposed Spirit Act, which would offer tax relief to distillers using US-grown materials, while also campaigning for a study of the three-tier system and its impact on small producers' market access.

"We're not asking for small businesses to be handed success," she says. "We're asking for a level playing field to be able to compete." GDI







'We're having fun. We wouldn't do it otherwise', says Brucato Distillery co-founder Sierra Clark (left); Peach Street Distillers; and Hillrock Estate founder & CEO Jeffrey Baker

The savoury shift: bitters find fresh relevance behind the bar

Bartenders are looking for new ways to season, structure and transform drinks, creating fresh opportunities for bitters brands as savoury flavours move from kitchen to cocktail. **Lucy Britner** reports

"The future isn't about making cocktails savoury just for the sake of being savoury," says Patrick Pistolesi, owner & head bartender at Drink Kong in Rome. "It's about having another flavour direction available to us."

For Pistolesi, whose bar is a regular on the World's 50 Best Bars list, this distinction gets to the heart of savoury's current moment behind the bar. Miso, mushrooms, vegetables, salt and umami are increasingly appearing in cocktails, but the most interesting development may be less about forcing savoury onto the menu and more about bartenders using another set of tools with which to build complexity.

At Drink Kong, red miso brings salinity and umami to the drink gaijin, balanced alongside Japanese whisky and ripe, grilled pineapple. The bar has also explored shiitake, fennel, aubergine and other culinary ingredients, while its bloody mary remains one of its most consistently popular genuinely savoury serves.

"The interesting territory is often not making a completely savoury drink, but using savoury, saline or umami flavours to create a better and more complete cocktail," says Pistolesi.

Bringing that sense of completeness spells opportunity for bitters — often dubbed the seasoning of the cocktail world. As menus move towards savoury profiles, cocktail bitters can deliver highly specific flavours in small measures, allowing bartenders to season a drink without fundamentally rebuilding it.

The shift is already visible elsewhere in the on-premise. At Cause | Effect Cocktail Kitchen in Cape Town, director Kurt Schlechter says guests are embracing savoury flavours because they offer a way to add intensity without relying on sweetness. And at Hidden Society in London, operations manager Antonio Cozzolino describes an "unmistakable" appetite for savoury, saline and mineral profiles. At the same time, bitters producers are packing their bitters portfolios with flavours ranging from celery, cucumber and olive to hops and seaweed. »



Savoury isn't the point — flavour is, according to Patrick Pistolesi, owner & head bartender at Drink Kong in Rome

FIVE KEY TRENDS

1. Savoury as a tool for complexity
Bartenders are using umami, salt and vegetal flavours to add depth and balance, rather than making cocktails savoury for the sake of it.

2. Bitters as a concentrated seasoning
Celery, olive, cucumber, seaweed and hops bitters offer precise flavour and structure in small quantities. Amari and herbal liqueurs also have potential as structural ingredients.

3. Lighter, mineral-led profiles
Saline, mineral and herbal flavours are creating delicate, less-sweet cocktails that work particularly well as aperitifs.

4. Crossing categories
Savoury profiles are moving across cocktail categories, appearing in bloody marys, aperitivo serves, highballs and more experimental creations, as well as no/low drinks.

5. The kitchen and bar converge
Vegetables, fermented ingredients, spices and culinary techniques are becoming part of bartenders' everyday toolkit, driven by experimentation and consumer curiosity.

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Seasoning the cocktail

» For Schlechter, savoury is already a familiar part of cocktail development. "We have always served a version of (arguably) the first savoury cocktail, the prairie oyster, which features egg yolk, salt, pepper and vinegar," he says. "And a version of the bloody mary," which Schlechter adds is currently a Thai-style with coriander, ginger, chilli and chilli paste. "Guests are embracing savoury as it is a great way to add flavour bombs without utilising sweet ingredients."

Cause | Effect's current most popular drink is homework, which combines burnt cedarwood, lime leaf and jalapeño shrub cooked sous vide, served with Del Maguey Chichicapa Mezcal, finished with pencil shavings and cedarwood mist.

The question is: as savoury moves from specialist cocktail territory into the wider flavour vocabulary of the bar, how far can bitters go with it?

At Cause | Effect, bitters form part of that flavour exploration. Schlechter is also the founder of Max Schlechter Bitters, a brand he founded to pay tribute to the explorers and botanists in his family. Flavours include Rooibos, Olive & Seaweed, and Naartjie. It's made with the local bittering agent "*leonotis leonurus,* commonly known as wild dagga, alongside 20 other fynbos botanicals", says Schlechter. He also uses the Angostura range and "a tincture of local Artemisia Afra [wormwood] and hibiscus for our brandy old fashioneds".

Nicolò Luxardo, export director for Italian liqueur company Luxardo, sees the savoury trend as part of a broader move into the culinary world.

"Over the last 15 to 20 years, an incredible amount has been done with fruit, citrus and sweeter flavours, so ingredients coming from the culinary world naturally offer another direction," he says. "Salt, herbs, vegetables, spices, fermented ingredients and umami flavours give bartenders a completely different palate to work with."



Hidden Society's sky cocktail forms part of a five-drink tasting journey inspired by a Bob Ross landscape

Savoury precision

While savoury drinks are making waves, the trend isn't a new one for Stephan Berg, founder of The Bitter Truth, who points to the company's Original Celery Bitters, launched in 2007. The Bitter Truth has subsequently added Cucumber Bitters and Olive Bitters to its range.



Cause | Effect aims to evoke the nostalgic scent of pencils and school days with its homework serve

"These savoury bitters are available in 80-plus markets, have found their way into mixology repertoire and are widely used," says Berg. "For example, Bar Sprezzatura in San Francisco serves a caprese alla Sprezzatura using Burrata Washed Moletto Tomato Gin, Basil Eau De Vie, olive brine and Olive Bitters, Caprese Cicchetti and aged balsamic."

The Bitter Truth's Hazy Hops Bitters, launched in 2025, is another example of the category's expanding flavour territory. The expression draws on Bavaria's hop-growing heritage, with Berg highlighting the breadth of flavours available from hops and their potential in cocktails, particularly low/no-alcohol drinks.

Beyond heavy umami

While 'savoury' can easily conjure images of heavy, umami-rich drinks, Hidden Society in London is exploring a lighter interpretation. Since opening at the end of March, the bar has seen what Cozzolino calls an "unmistakable" appetite for "savoury, saline and mineral profiles".

"Guests aren't viewing savoury serves as novelty orders; they are actively seeking them out as an opening pour," he says. The bar's sky drink approaches savoury "through the lens of ozone, light salinity and airiness".

Vacuum infusions and "delicate saline balancing" are used to create drinks that feel "ethereal and modern" without relying heavily on sugar, Cozzolino explains.

That opens another set of possibilities for bitters brands. Cozzolino describes bitters and seasonings as "structural tools that sharpen a cocktail's architecture without dragging down its colour or lightness". His toolkit includes saline and mineral bitters, citrus blossom and herb bitters, celery and cucumber bitters, plus gentian and alpine roots.

The approach also creates a natural connection with aperitivo drinking, Cozzolino asserts: "Lean, mineral and savoury elements awaken the palate and pair effortlessly with dining, making them ideal early-evening serves." »

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The amari opportunity

» Beyond cocktail bitters, amari and herbal liqueurs are famed for their aperitivo appeal — and the savoury trend could spark further opportunities.

Pistolesi sees potential in the inherent complexity of the category. "Amari are incredibly complex: bitter and herbal, of course, but they almost always contain an important sweet component as well," he says. "Introducing saline, vegetal or umami elements could create some very interesting contrasts."

Luxardo similarly sees amari and herbal liqueurs as natural participants in a more culinary approach to cocktails. "Products with roots, herbs, spices and bitter botanicals naturally bring complexity without relying heavily on sweetness," says Luxardo, pointing to products such as Del Santo, with its herbal, spicy and bittersweet character.

There is also a connection with lower-ABV drinking. "Using liqueurs, amari and bitters as structural ingredients gives bartenders a lot of flavour without necessarily having to build every drink around a large measure of a base spirit," explains Luxardo.

Hardenberg-Wilthen business development director Carl Graf von Hardenberg sees the same opportunity in the broader bitters category, particularly as brands explore occasions beyond the traditional shot.

The German liqueur company's Schwartzhog brand is being used in simple serves such as Schwartzhog and ginger beer, with the business increasingly looking towards highballs and long drinks.

"We're going away from the classical shot," says Von Hardenberg. "It's going towards more easy drinking, low alcohol, interesting flavour." For him, that creates a new occasion map for bitters, with cocktails and highballs extending into daytime and early-evening drinking.

Bartenders first, consumers next

There is broad agreement that bartenders are playing a significant role in developing savoury drinks, with consumers determining which ideas achieve wider traction.

Luxardo says: "Bartenders are naturally experimental and they are constantly exposed to ingredients, techniques and ideas from restaurants and other bars.

"Consumers then decide which of those ideas survive."

Von Hardenberg sees a combination of both forces. "On the one hand, bartenders are looking for something new and something extraordinary," he says. "Also, consumers are looking for different flavour experiences."

That interaction between bar and consumer could determine whether savoury develops into a lasting part of cocktail culture or remains a specialist trend.

At Drink Kong, Pistolesi expects it to remain a component rather than dominate menus. "I think savoury cocktails have earned a permanent place in contemporary cocktail culture," he says.

"People understand them much more easily today, bartenders have become much more confident using culinary ingredients, and the boundary between kitchen and bar continues to become less rigid. But I still see them as part of the picture rather than the whole picture. For most bars, having one or two really good savoury cocktails on a menu makes sense."

Luxardo compares the trajectory with techniques such as clarification, fat-washing and fermentation, which have moved from novel concepts into the standard repertoire of modern bartending.

"We will probably see fewer drinks that are deliberately described as 'savoury cocktails' and more drinks where salt, herbs, spices, vegetables, fermentation or umami are simply used naturally to create balance and complexity."

For bitters, that could be the more significant opportunity. As bartenders become increasingly comfortable borrowing from the kitchen, the demand is likely to be for precise flavour tools that can be used selectively across a whole range of different drinks styles. GDI





German brand The Bitter Truth produces three main savoury bitters designed to add herbal, vegetal and saline complexity to cocktails: Celery, Olive and Cucumber (above). Luxardo Del Santo is an Italian green herbal liqueur built around achillea moschata, *an Alpine plant also used in grappa*

Bitters roundup

From limited editions and seasonal alcohol-free aperitivos to international launches, bitters brands are pushing into new occasions and territories



Botivo expands range with winter-inspired aperitivo

Botivo has added a Wintery Botanical Aperitivo to its line-up of alcohol-free bittersweet drinks. The latest addition combines date molasses with clove, allspice and vanilla, finished with smoky saffron. These are infused into Botivo's bittersweet base of British apple cider vinegar, gentian and wildflower honey.



The Bitter Truth marks 20 years with Barfume Edition

The Bitter Truth is celebrating its 20th anniversary with the return of its Aromatic Leaf Bitters in a limited Barfume Edition, with a spray head. Originally produced for Havana Club 7 in 2015, these bitters are said to have notes of a smoking lounge. The launch took place at BCB Berlin.

Schwartzhog targets Buenos Aires with on-premise launch



Hardenberg-Wilthen has launched Schwartzhog to the on-trade in Argentina, with a particular focus on Buenos Aires. Activation is centred on clubs, high-volume bars and influential venues, with the aim of introducing Schwartzhog serves to bartenders and consumers in the city. The company is also building distribution in the local off-premise.



Warner's unveils botanical alcohol-free aperitif

Warner's Distillery has launched alcohol-free Warner's Botanical Aperitif. The drink takes inspiration from a haymaker's punch, once enjoyed by farmers working in the fields. The liquid is said to be earthy, floral and bittersweet with citrus, herbs and bitterness.

Campari expands aperitivo portfolio in South East Asia

Campari Group is accelerating the growth of spritz culture in South East Asia through its aperitivo portfolio. Building on Aperol and Campari, the group has introduced four more Italian names, including fruit-forward Sarti, artichoke-based Cynar, sparkling Mondoro and alcohol-free Crodino.





Silver linings persist despite tough outlook for Japan's drinks trade

Tax reforms and demographic shifts are weighing on spirits sales in Japan, but pockets of light peak out amid the clouds. **Joe Bates** reports

Japan's demographic crisis and moribund economy haunt the country's beverage alcohol industry like two spectres at a feast.

Around 30% of Japan's population is now aged 65-plus, shrinking the workforce and, in turn, increasing the economically inactive population. Meanwhile, Japan's economy, currently ranked fourth in the world by the International Monetary Fund, is projected to slip to sixth place in global GDP rankings in 2027, trailing India and the UK.

Given these chilly headwinds, it is no surprise IWSR forecasts Japan's total beverage alcohol market to decline at a CAGR of 1% through to the end of the decade.

However, pockets of growth across individual categories, coupled with increasingly diverse and adventurous consumer tastes, are giving domestic and international players reasons for optimism.

"While Japan's alcohol market faces demographic challenges, consumer needs are becoming more diverse," explains a spokesperson for Suntory Spirits Ltd, one of the country's big four alcohol giants along with Asahi Group, Kirin and Sapporo. "We see an opportunity not only to create value through quality and craftsmanship, but also to create new occasions and experiences that make alcohol relevant to a wider range of consumers."

Alcohol tax reform implications

October's alcohol tax reforms are undoubtedly the biggest regulatory shake-up impacting Japan's beverage alcohol sector this year. The changes have significant implications for beer, happoshu (low-malt beer) and RTDs. The latter is a hugely important category in Japan, accounting for almost 22% of the total beverage market, according to IWSR.

From 1 October, tax on beer, happoshu and third-category drinks converged at JPY54.25 (US$0.34) per 35cl — effectively cutting beer tax by around JPY9 and raising the levy on the other two categories by about JPY7. At the same time, the tax on RTDs rose from JPY28 to JPY35. In all cases, the shelf-price impact of these changes will depend on how much producers and retailers pass them on.

IWSR research director Piotr Poznanski says the overhaul removes the tax rationale for third-category beer, with weaker happoshu and third-category lines likely being delisted.

"Competition will shift from tax engineering to brand, taste and promotion, favouring the major brewers and potentially creating a new value-beer tier," he says. "Consumers are likely to split between trading up to beer, staying with reformulated brands and leaving beer-type drinks altogether." »

TOP FIVE TRENDS

1. Tax reforms reshape the market
Japan's October tax changes are set to accelerate the decline of weaker beer alternatives and shift competition towards brand, taste and promotion.

2. Japanese whisky sees domestic decline
Volumes fell 3% in 2025 amid inflation, price hikes and a weak yen, with RTD highballs and premium tequila adding competitive pressure.

3. International expansion key
Nikka's strong sales growth and investment in production capacity reflects the growing importance of overseas markets for Japanese whisky producers.

4. Scotch consumption falls, but audience diversifies
Scotch volumes plunged 27% in 2025, but more women are discovering whisky, particularly through at-home and off-trade consumption.

5. Japanese craft gin thrives
Domestic gin value more than tripled between 2020 and 2025, driven by younger consumers, women and growing interest in Japanese botanicals and RTD formats.

» Although the economic advantage of higher-priced RTDs over full-strength beer has narrowed, Poznanski remains cautiously optimistic about the category's prospects. "RTDs should retain advantages in flavour, lower-ABV options and appeal to younger LDA-plus consumers, although growth may slow," he says.

Japanese whisky volume falls

The overall Japanese whisky market declined by 3% in volume in 2025, one of the sharpest falls recorded in nearly two decades, according to IWSR. Only during the Covid-19 pandemic was the market more disrupted.

"Domestic consumption volumes fell sharply, driven by aggressive price hikes, record-level inflation over 2023–25 and a persistently weak yen," says Poznanski.

Highball whisky cocktails remain a key element of Japanese drinking culture, but drinking habits across the country are evolving. Poznanski warns that that higher prices and competition from expanding RTD highball ranges will divert consumers away from bottled whisky formats and put pressure on volumes. "Premium tequilas will increasingly compete for the same affluent, urban drinkers," he adds.

Unsurprisingly, Suntory Spirits, historically the pioneering force behind Japanese whisky, strikes a more upbeat note. It sees considerable opportunities for whisky-based highball RTDs as a vehicle to introduce younger LDA consumers into the wider whisky category.

"Our focus is not only on selling whisky, but also on expanding whisky culture and creating new occasions to enjoy it," says the company's spokesperson. "The highball has evolved from a trend into an established part of everyday drinking culture in Japan, and we believe there is still significant room for further growth."

In the hopes of capitalising on the trend, Suntory Spirits released the Suntory Highball, an accessibly priced 5% ABV canned mix containing Kakubin Blended Whisky, soda and yuzu, in August 2026.

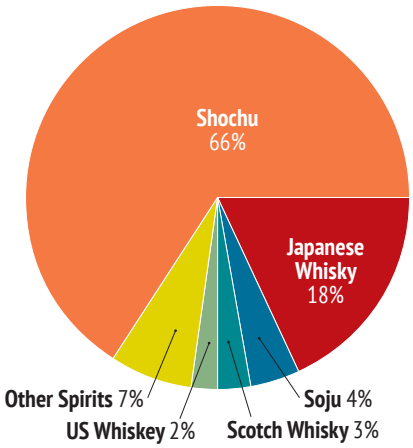


Suntory Highball, a mix of Kakubin Blended Whisky, soda and yuzu, hit shelves in August

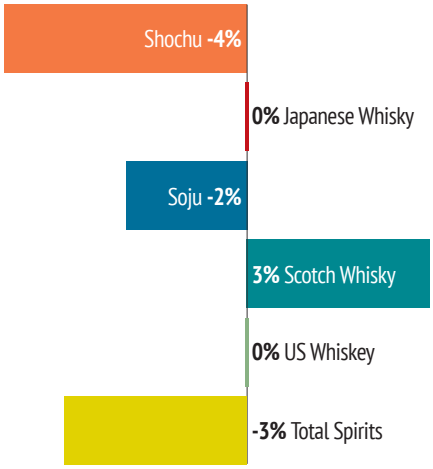
DATA DROP

Top 5 Spirits Categories in Japan

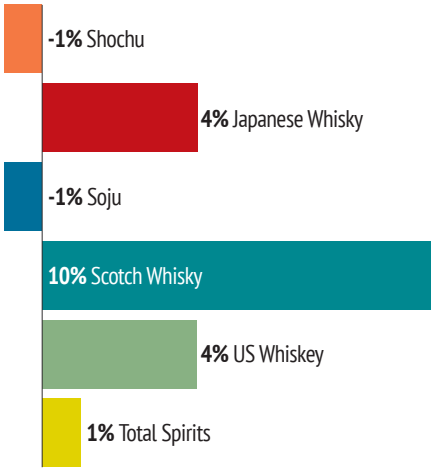
% Share of Volume Total 2025



% CAGR Volume 2019–25



% CAGR Value 2019–25



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

Nikka bucks category trend

With its whiskies sold in more than 65 countries, Nikka, a subsidiary of Asahi Group, is managing to buck the broader category decline.

Sales totalled JPY59.7bn last year, up from JPY27.3bn in 2023. The company has set an ambitious sales target of JPY100bn by 2034, spending JPY7bn upgrading its historic Yoichi Distillery on the island of Hokkaido, with expanded production coming online in 2027.

"We have been investing not only in the Yoichi Distillery, but also in the Miyagikyo Distillery [located in the Tōhoku region] and other production facilities, including the Tochigi Aging Cellar and Kashiwa Bottling Plant, to prepare for future growth and build capacity steadily," adds Nikka education & global PR lead Emiko Kaji.

"We believe there is still significant room for Nikka to grow internationally, particularly in markets where we have not yet established a presence. There is also further potential for growth in existing markets, including Japan, through deeper market penetration."

Scotch volumes plummet, but consumption diversifies

Scotch suffered a disastrous 2025 in Japan, with volumes plunging 27% to 54m bottles, according to Scotch Whisky Association data. IWSR's Poznanski explains much of the decline in imported whisky sales in Japan is due to the depreciation of the yen, which has hit consumer spending power.

Even so, an additional door has begun to open for scotch brands. Pernod Ricard Japan head of corporate & brand communications Risa Shimizu is heartened by the increasing number of women drinking whisky.

"Up until now, the whisky market in Japan was predominantly made up of male consumers — in fact, roughly 70% of whisky in Japan is consumed by men," she says, citing IWSR data. »

» "However, gradually and slowly, we are seeing more women drinking whisky in Japan, fuelling the off-trade whisky market. While the on-trade remains a key focus for the market, we are seeing more women discovering and engaging with scotch, purchasing through off-trade to enjoy at home, drinking with friends in a more casual environment."

More generally, Shimizu believes Japan's growing "drink better" mindset is good news for premium-plus brands like Chivas Regal, which she says are steeped in "provenance and craftsmanship. These are things the Japanese consumer appreciates; they're inherent to the Japanese culture."

Aged in sake casks from Masuizumi, Chivas Regal Takumi, which first launched in 2024, is the brand's most direct play to win loyalty from whisky drinkers in Japan, serving as "a tribute to Japan's craftsmanship and unique flavour profiles", Shimizu says.



Chivas Regal Takumi: 'a tribute to Japan's craftsmanship and unique flavour profiles'

Domestic gin on the up

In an otherwise challenging beverage alcohol market, domestically produced gin continues to be a success story. According to Suntory estimates, the value of the domestic gin market reached around JPY24.7bn in 2025, more than tripling from 2020 levels, with younger LDA consumers and women driving sales.

"Japanese craft gin Roku is now the world's No.2 selling brand in the above-super-premium gin category based on IWSR 2025 data," says the Suntory spokesperson.

Recent Roku releases for the Japanese market include the 43% ABV Roku Yuzu Yukimi Edition, launched in October, which dials up the citrus notes of yuzu, one of the gin's six Japanese botanicals (alongside eight traditional gin botanicals), and Roku Premium Gin Soda, a 9% ABV RTD released in the same month.

Structural headwinds

Despite these pockets of growth, the overall picture for the spirits market in Japan looks a gloomy one. "In the long term, Japan's consumer outlook will remain constrained by structural demand weakness and demographic headwinds," says a downbeat Poznanski.

"A steadily declining working-age population will limit employment-driven income gains and keep aggregate household demand subdued. Long-term consumption growth is therefore expected to remain modest." GDI



Japanese and scotch whiskies are key sales drivers at Canes & Tales in the Waldorf Astoria Osaka

Premium pours, local prices: Japan's luxury bars face a changing market

Local price sensitivities and rising operational costs are becoming increasingly important considerations within Japan's well-established, high-end bar scene, even as international tourism booms.

In Osaka, intimate master-bars, often run by veteran founder-bartenders, and casual pubs or *izakayas* have long dominated, though luxury cocktail bars are gaining traction. However, the task of driving local repeat trade while catering to wealthy tourists requires a nuanced approach to value.

"The challenge in Osaka is finding the right balance between delivering a genuinely high-end experience and maintaining a price point that feels appropriate for the local market," says Dominic Dijkstra, director of mixology at Canes & Tales, a 42-seat, 'hidden' speakeasy in the Waldorf Astoria Osaka. "Guests are interested in quality and experience, but they are also conscious of value, so pricing needs to be considered carefully."

Japanese and scotch whiskies remain pivotal sales drivers, with strong interest in high-end lines and older bottlings, albeit from a small percentage of wealthier customers. "At the same time, the majority of guests remain fairly considered when it comes to price," Dijkstra acknowledges.

Macroeconomic pressures are increasingly reframing menu development. Currency volatility and unpredictable allocations for imported spirits are prompting bars to embrace a wider range of domestically produced spirits, such as shochu, awamori (a distilled rice-based spirit), infused and sparkling sakes, and doburoku, an ancient, unfiltered, sake-like beverage.

This approach to sourcing, says Holly Graham, founder & creative director of Tokyo Confidential, a lively, house-party-inspired bar in Japan's capital, helps mitigate possible supply chain issues. On the upside, integrating traditional spirits and local flavours also creates more distinct, narrative-driven menus.

"We love to showcase them being used in unusual ways as that impresses locals and visitors alike," says Graham. "It also invites conversation with guests and education as lots of people ask to try particular spirits or ingredients alone and want to learn more."



VIEW FROM THE ON-PREMISE

Charlie Mitchell

Body, mind and bar — socialmaxxing in the on-premise

Earlier this year a clip went viral and I still think about it. Steven Bartlett, the British entrepreneur host of *The Diary of a CEO* podcast and a man whose self-proclaimed success knows no bounds, succeeded in yet another thing. He united the world of drinkers against him.

By his account, he had a couple of glasses of wine and his world fell to pieces. It ruined three days of his life where, alas, he wasn't able to go to the gym, his sleep suffered and his productivity fell through the floor. He knew this because, crucially, he was able to track it.



Image: Stock.com/Drazen Zigic

Now, please do not confuse me for somebody who knows how many steps they take a day, what their Whoop score is or how many green rings I have on my watch (mostly because it's analogue). However, there is a serious point to this.

Booze doesn't help sleep, nor does it positively impact productivity in the long run (despite some of my better ideas being crafted in the confines of a drinking establishment), nor does it support better physical or mental health. And now the proof pings at us on smartwatches, on meditation streaks and on step counts.

Indeed, this wealth of self-reflective knowledge has led to Dictionary.com crowning 'maxxing' as their word of the year 2026. In his quest to control and optimise every aspect of his measured life in search for the ultimate — and scored — life, Bartlett is maxxing personified.

Be it sleepmaxxing, proteinmaxxing or even booksmaxxing (less around enjoyment of books and more about being seen to enjoy reading), mental and physical health are being not only prioritised, but quantified. Indeed, body and mind sit firmly at the top of personal agendas.

However, concentrating so unwaveringly on physical and mental health leaves out one crucial pillar of health: social health. One can optimise every score imaginable and still lead a miserable, isolated existence. It's why I've been pleased to see 'socialmaxxing' (optimising social skills and social occasions) infiltrate the wellness vernacular as people recognise the need for connection.

Social health is, of course, nothing new. It was included within the World Health Organization definition of 'health' in 1948, but is often dismissed in comparison to other aspects of wellness.

In a time when the Organisation for Economic Co-operation and Development reports that daily face-to-face contact with friends has fallen from 21% to 12%, and about 900,000 people die each year from factors associated with loneliness and social isolation, it is refreshing to see a renewed focus on what is good for the soul, which invariably involves connecting with other souls and often involves eating and drinking out.

Bringing people together is what hospitality does best. The brilliant Claire Warner, founder of the Good Measure Guild, whose mission is to improve the way we gather, recently said that she'd like to see doctors prescribe visits to the pub within the next ten years. While that may have been a ludicrous thing to say even a couple of years ago, it now feels realistic. And the more we talk about the social benefits of the sector, the greater the weight of opinion will be.

It's why I was interested to read Heineken's latest research report, *The Future Role of Bars in Europe*. In what is, principally, a research study into on-premise habits, the word 'social' appears 47 times in a 19-page summary of findings, compared with just 18 times for the word 'alcohol'. 'Connection' was mentioned 18 times in addition to ten 'socialisings', while 'beer' appeared just thrice.

The report emphasises the role of bars rather than the role of drinks, and a sense that connection is the main selling point of the sector. In an environment where consumers are drinking less, the value of socialising should be promoted, with alcohol supporting rather than being the main character.

For drinks brands, that supporting role should be one which is cherished rather than scorned. Brands that promote social good will be the ones who build genuine relationships with a new age of drinkers.

Heineken's report cites giving people a 'reason to stay together', so look at how this can be achieved. As people look for different ways to gather — UK searches for 'pub quiz' have risen fifteenfold, while interest in Spain's late-afternoon social gathering, the 'tardeo', has increased thirtyfold — there are opportunities to build brands in meaningful, healthy moments that do good.

It is within those moments in which our souls are nourished. The hearty laughs, the deep conversations and the shared empathy born from an evening of personal tales and experiences. They will not be measured, nor will they show on our health scores, but they will make us feel good. The original socialmaxxing was going to the pub; long may it continue. GDI

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

‘A fish out of water’: from building brands to backing founders

Gray Whale Gin co-founder Marsh Mokhtari went from an uncertain career in TV to building and selling the brand for a life-changing sum. He tells **Olly Wehring** his founder journey was shaped by risk, resilience and knowing when to take a deal

You’re the co-founder of Gray Whale Gin and the co-founder & CEO of Make Waves Ventures. Could you introduce yourself in one sentence? I started a booze company and happened to sell it, so I’m batting 1,000, while at the same time, I’m a fish out of water with major imposter syndrome.

What prompted you to set up Gray Whale? Ten years ago, I’d been hosting TV shows for a number of years and my wife was a creative director in advertising. I was out of work more than I was in work, and I never knew where my next paycheck was coming from. We were both keen at the time to create something bigger than ourselves that could also take care of the kids — we have two daughters. At that time, the ‘ginaissance’ was going off in Europe, but we recognised there wasn’t really a quintessential American gin.

Also in 2016, our family were on a camping trip in Big Sur, California, where we saw grey whales. They have their babies in Baja, California, then migrate up to the Arctic and back. Our thinking was, what says ‘I love you, America’ more than a creature that literally hugs our coastline? That’s where the brand name comes from, with all the botanicals being sourced along that migratory path. We also made ocean conservation a part of the story.

What was your experience as an outsider entering the alcohol industry? That was a definite pro, because we put things in our gin that weren’t being put in gins, like seaweed and almonds. I came at things almost from a chef background. Being a fish out of water also allows you to take big swings. Uber is a great example, taking on a taxi industry that felt like it had been around forever.

Now, we have some grey hairs, though, and we know what works and what doesn’t in this industry.

When did Gray Whale launch? It took two years for us to figure everything out. I learned how to distil — I have a medical physics degree and I used to host a show called *Extreme Chef* on the Food Network. We ended up not setting up a distillery: we didn’t have US$2m to start one and we felt our focus was better put into the brand than in a physical factory.

What scale did the brand grow to? In our first two years of research and development, we were very open source, visiting lots of distilleries and speaking to lots of founders. We were told if we sold 500 nine-litre cases in our first 12 months, then we were doing OK. A thousand cases meant you were a unicorn. We launched in April 2018 and within six months, we got a call from one of the biggest strategics in the world. Then another one. Then nine venture capitalists started calling.

That first call was from Diageo, asking how we’d captured 3.5% of California’s gin market in six months. We didn’t have access to data, so I didn’t know we’d achieved that. All I knew was we’d hit 1,500 cases in our first six months. I put that down partly to concentrating only on California to start with. We’d been told that if you get into a state and can’t physically support it, you’ll end up with product just sitting on shelves. You have to earn the right to go into new states. »



Marsh Mokhtari: ‘Being a fish out of water also allows you to take big swings’

» We believe in doing your superpower and doing it often, and outsourcing everything else. I concentrated on sales, while my wife was still full-time at her advertising job. Six months in, we hired one brand ambassador — a 6ft-4in tall surfer/bartender with long hair and an outgoing personality. He embodied the Californian lifestyle positioning of Gray Whale.

The second state we went to was Connecticut, to see if people were only buying our gin because it had a map of the west coast on the bottle. Connecticut's small enough that if you cock things up there, then no one's going to really care. In about five months, we'd captured 6% of the state's gin market.

When we fully exited in May 2024, Gray Whale was the No.1 ultra-premium American gin in the US. In the space of 12 months, we went from two states to 50, and to nine countries very quickly after that.

Gray Whale was acquired outright by Deutsch Family Wine & Spirits after the company first bought 50% in 2019. Why did you sell up completely? Before we started Gray Whale, my wife and I agreed on a number that would cover buying a bigger house, taking care of our parents and creating a nest egg for our kids that meant we wouldn't become a burden on them at some point. The number was in the tens of millions, and felt both tangible and attainable.

The first offers we received were in return for more than 50% of the company — we were only six months old. If we hadn't already agreed on a number, maybe ego would have got in the way and we'd have said no. I'm a big believer in manifestation. If you don't believe, you can't really achieve. When Deutsch made an offer for half of the company, we decided to go for it. We didn't know at the time how to protect ourselves in terms of deal structure, so we hired investment bankers and lawyers. We could have held out for a much better deal, but I'm very happy to say we crushed the number.

You've since set up Make Waves Ventures. Tell us about it. We ended up in a position where we were able to hand-hold other founders. We focus on being able to show a strategic a new business's proof points without giving the strategic a reason to say no.

It's like 'try before you buy', where you buy a stake in the company and with it you get the founder and Make Waves for the next two to five years. It's not just the unloading of a brand — we're still there to help the brand succeed. That way, we all win.

We're creating and advising brands that have to do some good in the world. We're tiny right now, but I have relationships at most of the strategics and they tell me what they're looking for — some of them are in acquisition mode.

The aspiration for Make Waves is to continue along the current path. We're having fun finding brands, nurturing them and helping founders to realise their dreams, which is central to why we decided to do this. It's about seeing other people hit their life goals.

> ***At the start, we're just seeing if they're going to listen and whether we're going to get along. If either thinks the other's an asshole, then we won't work together — I mean, this is going to be hard!***

How does the business model work? We bring capital and resources. We have a lot of high-net-worth individuals in our community in Manhattan Beach and Silicon Valley. We also have multiple creative partners that we used for Gray Whale.

We start with a consulting arrangement of one hour a week for a nominal US$350 per hour. We found that when we gave information without any payment, they didn't listen to it. At the start, we're just seeing if they're going to listen and whether we're going to get along. If either thinks the other's an asshole, then we won't work together — I mean, this is going to be hard.

The next stage is the nuts-and-bolts stuff, like trademarks and IP protection. Also, beyond a pretty pack and a great story and a great liquid, is there a reason to care? Then we'll sometimes focus-test your product. We're basically looking for reasons to say no. If we can't find one, then we'll likely end up doing a deal.

What advice would you give to other brand founders in the early stages with their businesses? With any potential partnership, have the swagger to ask, 'What else do you bring to the table?' If you're looking for capital, money's everywhere. But you need to have that swagger, because dumb money's dumb money. Smart money, however, is very smart.

What's catching your eye at the moment? There's a really fun RTD — every demographic's going to love this — that I'm seeing incredible success for in the UK and another country in Europe. I'm very excited about potentially partnering with them, helping them roll out in the US to one state, show another proof point, and then get a strategic partner to hop on board and crush it!

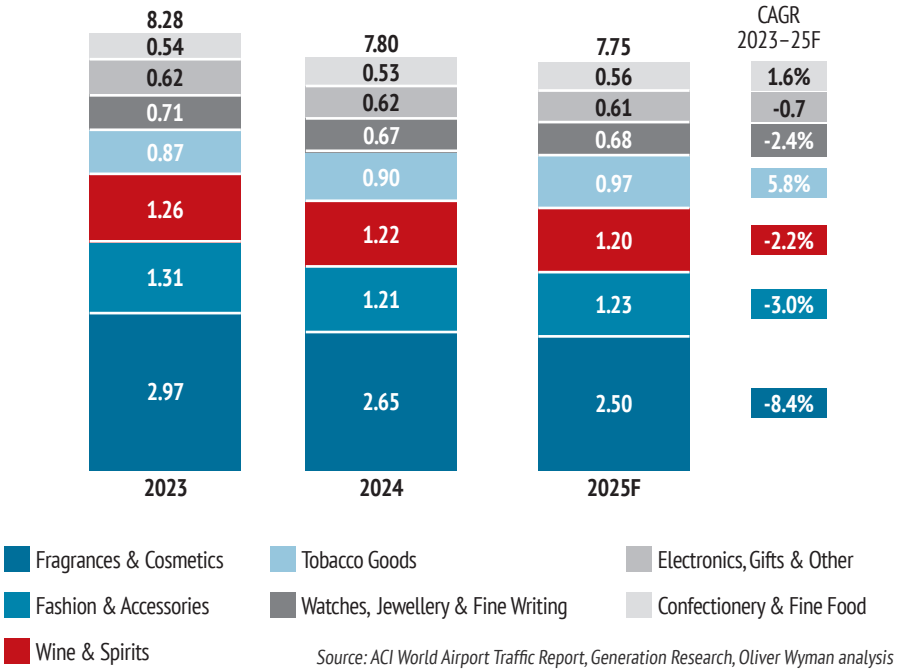
Which do you prefer, being the poacher or the gamekeeper? I see us as more of a hand-holder. You're along for the ride, and we know the way to get you to the exit. GDI



Gray Whale was the No.1 ultra-premium American gin in the US when Marsh Mokhtari and his wife, Jan, exited in 2024. In April, it expanded into vodka

Wine and spirits fare better than most in travel retail

Global Average Duty-Free & Travel Retail Sales per Passenger by Category
2023–25F, US$



Source: ACI World Airport Traffic Report, Generation Research, Oliver Wyman analysis

Wine and spirits has proved more resilient than most other categories in global travel retail despite declining sales, according to new analysis by management consultancy Oliver Wyman for the Tax Free World Association.

Based on sales per passenger (SPP) between 2023 and 2025, CAGR for wine and spirits was down 2.2% (see chart above). This compared favourably with beauty (-8.4%), fashion & accessories (-3%) and watches & jewellery (-2.4%). The big winner was tobacco goods, up 5.8%.

The SPP numbers showed a slower decline for wine and spirits between 2024 and 2025, moving from US$1.22 to $1.20, but well short of the $1.26 seen in 2023.

Oliver Wyman's analysis suggests that travel retail is at a turning point, because price is no longer converting shoppers — 'discovery' is. Liquor's volume business in the channel was built on a historic price advantage that has eroded. Almost one-third of today's travellers believe that airport prices are not lower, according to the analysis.

A global spirits company senior executive told Oliver Wyman: "We lost that perception over the years, and it happened because we were greedy. We increased prices to the point that we were sometimes no longer competitive with the domestic market."

The report calls out the "lottery" of duty-free price competitiveness, adding that "there is no consistency among brands, categories or airport".

In this scenario, Oliver Wyman partner Pierre-Alexandre Koch says brands need to pivot. "Travellers expect novelty, whether through emerging brands, airport exclusives, locally relevant products or continuously refreshed collections that give them a reason to return," he says. "Sampling, demonstrations, immersive experiences and storytelling can help turn passive browsing into meaningful interaction."

Fellow partner Vincent Barbat says: "Passenger growth alone will not define the next decade of travel retail. The opportunity is to understand travellers beyond the average, tailor the proposition to what matters to them in each location, and give them compelling reasons to explore and discover."



Image: Caesars Entertainment

Sips at the Vista Cocktail Lounge, Caesars Palace

Barcelona's Sips takes residency at Caesars Palace

Las Vegas resort Caesars Palace is partnering with Barcelona's Sips Drinkery House — named The World's Best Bar in 2023 — for a two-month takeover of its Vista Cocktail Lounge.

Running until New Year's Eve, the pop-up brings one of Europe's most influential cocktail destinations directly into the high-traffic Las Vegas strip, giving Caesars, which is celebrating its 60th anniversary, a powerful vehicle for differentiation that can drive footfall and spending.

The collaboration shows how major hospitality groups are leveraging world-class bars to elevate their profiles, attract new consumer segments and create higher-margin serves. Caesars will use Sips' distinctive cocktails, presentation style and global reputation to enhance its premium drinks menu across the resort.

For Sips, the pop-up offers a strategic US entry point, giving the Spanish bar access to US consumers without costly permanent infrastructure. The short-term residency demonstrates how independent bars can scale internationally using experiences co-branded with major hospitality operators.

Emporia Brands gains UK distributorship of Savoia

Independent, family-owned UK spirits importer and distributor Emporia Brands has been appointed the distributor for Savoia Vino Aperitivo, giving Giuseppe Gallo's Italian house enhanced access to British bars, restaurants and premium retail. The partnership puts the on-premise at the centre of Savoia's UK growth strategy.

Emporia will handle importing, sales and national distribution, covering the Rosso and Orancio lines. The company will activate them through its wholesaler network and hospitality partners, backed by bartender training, menu development and trade engagement.

Japanese duty-free alcohol shoppers are now younger and more diverse

Younger LDA travellers are driving a shift in Japan's duty-free alcohol market, becoming more deliberate in their shopping habits and driven by value. **Michael Barrett** examines the trend using m1nd-set research

Japan's duty-free alcohol market is skewing younger, less male-dominated and increasingly focused on planning and value, according to exclusive research from m1nd-set's Business Intelligence Service (B1S) database. The findings point to a significant shift in the demographics, travel habits and shopping mindsets.

The average age of Japanese duty-free alcohol shoppers has fallen sharply, from 60 in 2023 to 42 in the first half of 2026. This puts Japan's average just one year above the current global duty-free shopper average age of 41.

Younger generations in Japan now harbour more spending power. Millennials accounted for 38% of Japanese alcohol shoppers in H1 2026, up from just 10% in 2023, while Gen Z represented 21%. Together, the two groups now make up 59% of Japanese alcohol visitors, exceeding the global average of 58%.

Meanwhile, the proportion of Baby Boomers has declined significantly, from more than 30% in 2023 to just 12% in 2026.

The shift isn't only generational, with the balance between genders also being redrawn. In 2023, Japanese alcohol shoppers were overwhelmingly male, at 83%, with women representing just 17%. By H1 2026, the female share had risen to 40%, signalling a more diverse shopper base.

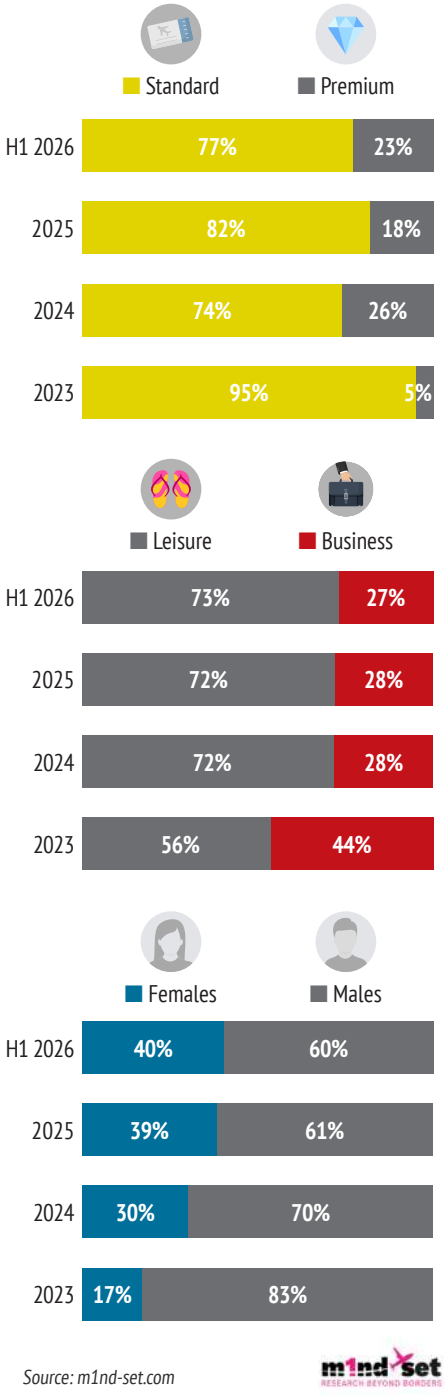
Changing travel patterns

Japanese alcohol shoppers are also changing their travel habits. Business travel accounted for 44% of trips in 2023, but this share had fallen to 27% by H1 2026.

This is a reversal of global trends, where business travel increased from 26% in 2023 to 31% in H1 2026. (Globally, leisure is the main travel purpose at 69%.)

Premium-class travel among Japanese alcohol buyers has risen sharply over the past few years, from just 5% in 2023 to 23% in 2026, slightly above the global alcohol shopper average of 20%. Across global duty-free visitors, premium-class travel has also risen quite significantly to 30% over the past five years.

Demographics & Travel Behaviour
Japanese Alcohol Visitor Trends
2023–H1 2026



Source: m1nd-set.com

From local discovery to planned purchases

To better understand the motivations behind shopping decisions, m1nd-set groups shoppers into five core segments according to their behaviour, attitudes, needs and motivations. The segments are: local touch seekers, emotional brand image seekers, price-sensitive shopping lovers, rational pre-planners and low-income buyers.

Rational pre-planners now form the largest global duty-free segment at 25%, followed by local touch seekers at 24% and price-sensitive shopping lovers at 23%.

Among duty-free alcohol shoppers, local touch seekers is the most predominant segment at 26% in H1 2026, ahead of rational pre-planners (23%) and price-sensitive shopping lovers (21%). Emotional brand image shoppers rose sharply to 21% in 2026, up from 15% in 2025.

The segmentation model also reveals a substantial change in the shopping mindset of Japanese alcohol buyers. In 2023, local touch seekers dominated the market, accounting for 53% of Japanese alcohol shoppers. By H1 2026, however, their share had fallen to 17%.

Rational pre-planners have taken the lead, representing 31% of Japanese alcohol shoppers compared with 23% globally. This suggests that a growing proportion of Japanese travellers approach duty-free shopping with a clearer plan and more defined purchasing intentions.

Price-sensitive shopping lovers account for 23% of Japanese alcohol shoppers, slightly above the global average. Low-income buyers represent 17%, almost double the global alcohol shopper share of 9%.

Together, these findings highlight the importance of understanding both purchase planning and price considerations when targeting Japanese alcohol shoppers. While the audience is becoming younger and more diverse, value remains an important consideration for a significant proportion of buyers. GDI

For more detailed insights into Japanese alcohol shopper behaviour, contact m1nd-set directly at ***info@m1nd-set.com***

RTDs in the on-premise: an untapped opportunity for continued growth

RTDs are enjoying remarkable growth, bucking continued declines in the broader alcohol sector. NIQ's **Graeme Loudon** finds out what's driving the category's momentum and makes a case for RTDs' place on the back bar of Europe's venues



RTDs' versatility has driven their success across Europe, including the UK, where a Jack Daniel's & Coca-Cola promotion offered consumers the chance to win tickets to music events at Wembley Stadium this summer

There was a time not so long ago when a narrow range of traditional categories dominated the alcoholic beverage market. People would pick up a bottle of wine or a multipack of beer from the shop, perhaps a bottle of vodka and a mixer.

Then came ready-to-drink (RTD) beverages — from alcopops and hard seltzers to premixed cocktails and highballs — which disrupted the entire landscape. Today, they maintain eyewatering rates of growth even amid steep declines in the wider alcoholic drinks sector.

In Europe, RTDs have fast become part of people's regular drinking patterns, with 37.9% saying they typically consume RTDs, up from 35.2% in 2025, a 2.7% increase in a single year. This growing consumer interest translates into an expanding market share. RTDs have risen 11.2% year on year in value in the off-premise, and the picture is just as striking in volume terms. Their performance is being driven by genuine demand rather than high price tags, and the momentum shows little sign of slowing.

So what factors have led to the category's standout success?

Versatility has played a major role in the remarkable popularity of RTDs. These beverages work as pre-drinks or aperitifs, but are equally suited to barbecues, house parties, concerts or festivals. According to NIQ's latest REACH survey of key European markets including France, Germany, Italy and Spain, consumption occasions are remarkably evenly spread.

Some 31% of people drink RTDs at home; 29% do so in bars and restaurants; events and concerts account for a further 23%; and 19% consume them on the go. This versatility has helped transform the RTD category from emerging to established in a matter of a few years, turning it into a serious contender with the likes of wine and beer.

Drinks businesses are increasingly tapping into the RTD opportunity, with market leaders investing in the segment and stepping up efforts to reach more consumers across a wider range of occasions. At the same time, consolidation is also accelerating. Major players are acquiring RTD brands to secure future growth and stay ahead of the competition, building a stronger foothold in the market and in distribution.

Perhaps unusually, RTDs are succeeding despite relatively low levels of engagement. Just 16.4% of consumers feel knowledgeable about the category, yet penetration, repeat purchase and future consumption intent remain strong. Consumers, it seems, do not necessarily need to be highly familiar with a category to embrace it. In fact, lack of familiarity opens opportunities for the on-premise, where operators can play a more active role in category discovery.

TOP FIVE TRENDS

1. RTDs are in the green
Despite the wider decline in beverage alcohol sales worldwide, the category has grown by 1.6% year on year.

2. Australia leads the way
Australia's on-premise is one of the world's most mature RTD markets, with the category finding success in high-tempo settings and sports events.

3. Uptake slow in Europe's on-premise
In Germany, RTDs account for just 0.1% of on-premise value, against 5.4% in the off-premise. In the UK, they account for a mere 0.9% of on-premise value, compared with 3.1% in the off-premise.

4. Less prep, more pours
RTDs win on speed and convenience, requiring no preparation or mixing, which translates into faster service and less waiting.

5. Operators turn trial into loyalty
Staff recommendations, menu placement and communication around flavour profiles, ingredients and serving styles pave a way towards trial and repeat purchase for consumers.

The on-premise opportunity

RTD presence in the on-premise is still relatively limited, but when the category's value share is compared across channels, the opportunity is clear. In Germany, RTDs account for just 0.1% of on-premise value, against 5.4% in the off-premise. Closing that gap would represent a potential incremental opportunity of US$97m. »

» The picture is similar in the UK, where RTDs account for a mere 0.9% of on-premise value, compared with 3.1% in the off-trade. Matching this share would unlock a potential incremental opportunity worth $733m. Britain is also the category's most premium market, with some 32.9% of consumers choosing more expensive RTDs when ordering out.

In fact, RTD consumers are a particularly valuable cohort for the British on-premise more broadly. Two-thirds (65%) drink out weekly, spending an average of GBP154 ($206) per month in the channel (GBP39 more than the average consumer). Targeting consumers who are already willing to spend and regularly visit bars, pubs and restaurants allows brands and venues to maximise the RTD category's value potential in Britain.

Australia's success story

Looking beyond Europe, Australia's on-premise is one of the world's most mature RTD markets and offers a compelling example of what RTDs can achieve if the category manages to establish itself across a range of drinking occasions.

RTDs account for 14.5% of Australian on-premise value share and more than half of consumers drink them when out, where their appeal extends to multiple drinking occasions. They perform particularly well in high-tempo settings, ranking third among some of the on-premise's most established beverage categories, with 26% of consumers choosing them (sitting behind vodka and cocktails, but ahead of whisky and beer).

At the same time, the category has also found a place in occasions traditionally dominated by beer. RTDs feature among the leading choices for live sports, ranking fourth with 16% of consumers, behind beer (50%), soft drinks (22%) and vodka (17%).

Now well established in the Australian on-premise, RTDs are shifting from the fridge to the front bar. Draught cocktails, spirit mixers and RTD brands are frequently offered on tap alongside beer, giving them a more prominent, premium and visible positioning. This shift brings RTDs closer to the point of purchase for consumers who might not otherwise consider the category, and it lets venues serve consistent, high-quality cocktails at speed.

This could provide a significant opportunity for further growth in Europe, where on-tap formats are still developing.



Image: Suntory Oceania

RTD brands have found phenomenal success in the Australian on-premise, prompting Suntory Oceania to debut Suntory -196 Double Lemon on tap there in June

Unlocking RTDs' potential

The momentum behind RTDs is clear: the category has grown by 1.6% year on year in Europe despite the decline in beverage alcohol sales. But this market energy alone will not guarantee success for brands, suppliers or operators.

To unlock the category's full on-premise potential, suppliers and operators need to look beyond the product itself and consider the wider benefits RTDs can bring to people's drinking experience. Speed and convenience are obvious advantages, as ready-to-serve options require no preparation or mixing, which translates into faster service and less waiting — particularly beneficial when bars get busy.

With clearly displayed alcoholic strength on the packaging, they can also promote more informed consumption, while the sealed format offers an additional layer of reassurance around product integrity.

RTDs can also make cocktails more accessible and the drinking experience more consistent since they do not require specialist bartending skills or complex preparation. For the same reason, they offer venues the chance to adapt to evolving trends more quickly and with more agility.

There are also sustainability benefits to consider. Compared with glass bottles, cans offer advantages in terms of weight, transport efficiency and recyclability (depending on local recycling infrastructure and the packaging's overall life cycle). However, these value levers will not be right for every brand or occasion. Brand owners need to understand which of them will matter most in the segments and occasions they are targeting and adjust their messaging accordingly.

THE DATA

NIQ research tools provide brands and operators with a holistic view of the on-premise. OPM and REACH services enable businesses to address key questions around category, channel and occasion to optimise their sales and marketing strategies. The NIQ team also delivers bespoke analyses, pinpointing opportunities for brands and operators. To learn more about NIQ's consumer insights, visit **www.niq.com** or contact Graeme Loudon, global on-premise insights lead, at **graeme.loudon@nielseniq.com**

Getting the target audience right

Rather than relying on existing drinkers, brands, suppliers and operators can use strategies to encourage trial among consumers who may not yet consider RTDs when ordering out. Menu placement, as well as staff recommendations and clear communication around flavour profiles, ingredients and serving styles can all help users understand what RTDs have to offer and identify options that suit their preferences, in turn increasing the chances of repeat purchases.

Ultimately, though, understanding how trends within the category and wider shifts in consumer behaviour translate to the on-premise will enable RTD brands to deliver the greatest value to drinkers and help businesses better cater to their needs.

This means identifying which settings offer the greatest potential for RTDs, how the category should be communicated, which marketing levers are most effective in driving trial and repeat purchase, and what motivates consumers to choose RTDs in the first place. GDI



MARKETING TRENDS

Chris Tyas

It takes a village to build a challenger brand

There's an old saying: it takes a village to raise a child. Spend enough time around challenger brands and you start to think the same might be true of building one.

From the outside, the story of a startup can look deceptively simple. A founder spots a gap, creates a product, gets a listing and suddenly they're posting impressive sales numbers on LinkedIn.

Lift the lid and the reality looks different.

A challenger might have one founder and a tiny team, but behind them can be hundreds of people: other founders, advisors, buyers, distributors and investors, as well as people sharing suppliers, making introductions or saying, 'I've been through this before. Here's what I learned'.

So how do smaller businesses find opportunities that much bigger companies miss?

I started thinking about this after speaking to Tanya de Sousa Grimaldi, the founder of Slurpz, an all-natural, gently sparkling children's drink with 80% less sugar than traditional juices and sodas. Slurpz came from a simple observation: between toddler juice boxes and the increasingly sophisticated world of adult soft drinks, there isn't much designed for five to 16-year-olds that parents can trust.

The brand launched in the UK in March 2025 and has already secured high-profile retail listings — including Harrods and several independents in the UK, as well as Carrefour UAE — alongside a growing hospitality presence. A five-day trial with Asda supermarket saw more than 1,800 cans sold at a single location, providing encouraging evidence of consumer demand in a larger grocery environment.

But I was more interested in what sits behind that growth, so I sat down with Tanya to find out.

The Slurpz founder came into drinks from law — how, I ask her, did she learn a completely new industry?

"In the beginning, I spoke to lots of people who introduced me to others in the industry," she tells me. "People who had built brands, people in private equity and venture capital with portfolios of brands.



All-natural, low-sugar children's drink Slurpz

"But the founder community really accelerated that learning, particularly being able to learn from people who were further along in their journey.

"Through the Kids Food & Drink Collective, I connect with other founders building better-for-you brands for families. I'm also a member of Buy Women Built and Bread & Jam, and was part of Raising the Glass's Untapped cohort. They're all incredibly supportive communities, with founders generously sharing their knowledge, experience and connections."

Tanya says one of the key benefits of being part of the wider founder network is that she is not only learning from other drinks brands. "If I have a packaging problem, I can put a message into one of those communities and get 30 or 40 recommendations," she explains. "Someone running a snack brand might have solved the same problem."

At trade shows, says Tanya, founders share contacts, reveal who they have worked with and what to avoid.

"You end up with this massive pool of experience around you," she says. "What's remarkable is how generous people are with their knowledge and time, even when they're busy building their own businesses."

That's where the comparison with bigger businesses gets interesting. A multinational has research departments, innovation teams, data and enormous budgets. But much of that expertise sits within the organisation.

A founder's network is less tidy. Tanya might learn from another drinks founder one day and someone making vegan pizza the next. The categories are different, but many of the problems aren't. This shared knowledge can give challenger brands an advantage, helping them move quickly, solve problems and challenge established players.

Tanya is convinced that the network also opens doors commercially. "I went to a Bread & Jam food-service summit and had a ten-minute pitch with Delicious Ideas Food Group," she recalls. "That resulted in us launching with a national wholesaler that summer. You attend conferences to get advice and sometimes come out with an introduction you did not expect."

For a small brand, that can shorten the distance between having an idea and getting it in front of the right person.

Having this resource also changes what Tanya can take on as a small business. "I'm bootstrapping the business deliberately, so I'm focused on building it sustainably rather than expanding the team before we need to," she says.

"But if a major opportunity comes along, I can speak to my advisors and tap into the experience of founders who have navigated similar opportunities, understand what resources are needed and bring in the right expertise to deliver. I don't need to have every capability sitting inside Slurpz today."

This might be the bit we miss when looking at challenger brands.

We judge the size of a business by what we can see: one founder, a handful of employees, maybe a few freelancers.

What we don't see is who they can call.

The founder who has already made the expensive mistake. The person who knows a distributor. The contact who can make an introduction. None of them appears on the org chart. But they're there.

You see the founder. You see the product. You don't always see the village. GDI

Chris Tyas is chief strategy officer at London and Buenos Aires-based independent consumer-centric creative agency Impero. ***www.weareimpero.com***

On our radar

These brands have rolled out the red carpet for star-studded marketing campaigns, enlisting famous faces from an Avengers star to British pop royalty



Image: Mekeila Morris

Charli xcx the new face of Absolut

Absolut Vodka and Charli xcx have joined forces for a new two-year partnership which promises limited-edition drops, collectible items, custom glassware and fan events. The pop princess teased her new collab by posting backstage shots in an 'I ♥ Absolut' T-shirt on Instagram.



Brothers stars shake up Pantelones ad

True Detective co-stars Woody Harrelson and Matthew McConaughey have rustled up a new cocktail ahead of the release of their Apple TV series *Brothers*. Blue blood combines Pantalones Tequila, founded by McConaughey and his wife Camila in 2023, and Harrelson's own Harmony Gin and Origen Vodka brands with blue curaçao, lime juice, honey syrup, chilli tincture and club soda.

Alan Cumming fronts Campari 'Stay Bitter' campaign

Drinks giant Campari has teamed up with Alan Cumming for its latest 'Stay Bitter' campaign. Inspired by the brand's '9 out of 10,000' advertisement from the 1970s, *The Traitors US* host leads a collective of cultural tastemakers dubbed 'The Bitter Nine' in Campari's latest digital campaign.





Grey Goose Altius taps viral illustrator for on-premise campaign

London illustrator Clym Evernden has garnered 202,000 Instagram followers for collaborations with big brands like Hermès, Michael Kors and Rolls-Royce. Now, he has designed artwork for a seasonal cocktail menu, recipe cards and a collectable coaster at Italian restaurant Sale e Pepe in collaboration with Grey Goose Altius.

Chris Hemsworth joins Archie Rose for US debut

Australian whisky brand Archie Rose Distilling Co is hoping to add some star power to its US roll-out via a global marketing campaign fronted by actor Chris Hemsworth. The *Thor* star joined founder Will Edwards as a co-owner of the brand in August.



New products

Take stock with our roundup of the latest drinks launches





Margo Instant Martini Mix

UK-based craft distiller Hepple Spirits, which produces Hepple Wild Juniper Gin and Hepple Moorland Vodka, has created Margo, which should be mixed one part to three of either a gin or a vodka to make a martini.

- Premix, consists of vermouth, botanicals and seasoning, designed to be mixed with a base spirit to make a martini serve. Two variants: Bright Lemon (11.1% ABV) and Dirty Olive (9.1% ABV).
- Went on sale at the start of October in the UK, available online for domestic delivery.
- SRP of GBP19.95 (US$26.60) per 25cl bottle.



Jumex Hard Nectar with Tequila

The Hard Nectar line of the Mexican juice brand Jumex, the result of a partnership between Mexico's Grupo Jumex and New York-based AriZona Beverages Co, has been boosted by a three-strong range featuring reposado tequila as its alcohol base.

- Premix, consists of fruit nectar with reposado tequila. Three flavours – mango, strawberry and watermelon — all at 10% ABV.
- Released in the US in mid-November, initially in Arizona, California, Colorado, Florida, Nevada, New York and Texas.
- SRP not immediately available; packaged in 47.5cl resealable Tetra Pak cartons.

Rancho La Gloria Apple Cinnamon Martini

Released with Christmas in mind, the latest extension of MPL Brands' Rancho La Gloria RTD brand will be on shelves for a limited time.

- RTD, agave wine-based, featuring apple and cinnamon flavours; 13.9% ABV.
- Released in mid-November across the US through selected operators in the country's off-premise channel.
- SRP of US$15.99 per 1.5L bottle; available "while supplies last".

Glengoyne 2013 Vintage Pedro Ximénez Cask Edition



Also created with the festive season in mind, this limited run from Ian Macleod Distillers includes single malt that spent its full maturation period in ex-pedro ximénez casks.

- Scotch whisky, single malt, 13yo, distilled in the Highlands, matured in the Lowlands. Comprises whisky aged in first-fill and refill ex-sherry, blended with liquid fully matured in first-fill ex-pedro ximénez sherry; 47.7% ABV.
- Released last month to "select international markets" including the UK through specialist spirits retailers in the off-premise channel.
- In the UK, SRP of GBP70 (US$94) per 70cl bottle; limited to 9,000 units in total.

Glenfiddich 28 Years Old

Leveraging its sponsorship of the Aston Martin F1 Team, William Grant's Glenfiddich single malt flagship is lining up a 28yo iteration for early next year.

- Scotch whisky, single malt, Speyside, 28yo. Aged in a combination of American and European oak ex-bourbon and oloroso sherry, respectively. The liquid from the American oak has had a secondary maturation in virgin oak; 43.7% ABV.
- Scheduled for release in January in the US and "selected" global travel retail outlets.
- In the US, SRP of US$899 per bottle; available in limited — albeit unspecified — quantities.



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American Craft Spirits Association CEO Emily Pennington

The American Craft Spirits Association (ACSA) launched its annual *Craft Spirits Data Project* in October, revealing that craft distillery closures outpaced openings for the first time in 2025. CEO Emily Pennington tells **Jessica Broadbent** what's making life difficult for small distillers in the US

How does the ACSA help craft distillers? There are three primary [membership] benefits. The first is our advocacy. We represent the voice of independent distillers in both federal and state discussions on lawmaking.

The second is our robust education, and that spans from production methods to sales and marketing.

The third, which can often be the most valuable, is community. Craft distillers that are a part of ACSA can tap into a group that can both identify with what they're going through and help them solve problems that maybe another craft distiller has already faced.

What's making life tough for the country's craft distillers right now? It's a hard time to be an independent distiller in the US. Retail buyers are picking up fewer new products, and they have higher expectations for performance when they do; distributors in the US are reducing staff, cutting divisions, narrowing their focus on the biggest brands and their portfolios; then, of course, consumers are moderating consumption habits.

Altogether, it's challenging times, but I don't like to necessarily focus on the 'woe is us'. It wouldn't be realistic of me to say that the category is thriving, but there are pockets of success. There are over 2,000 craft distillers. It isn't a monolith, by any means.

The ACSA has just released the *Craft Spirits Data Project 2026*, an annual report evaluating the performance and trends in the US craft spirits industry. What is the most significant indicator of how craft distillers are performing? We look at how much craft distillers are reinvesting in their businesses annually and the number of people that they employ. There's a direct correlation between how well their businesses are doing and how much they reinvest annually, and the data for both points saw a pretty significant drop in 2025.



Emily Pennington: 'Distribution is far and away the greatest challenge craft distillers face right now'

We'll have to wait until the release of next year's *Craft Spirits Data Project* to get the full picture, but anecdotally, how is 2026 shaping up? Sales and volumes were down more last year than they look like they're going to be in 2026. That certainly doesn't mean that they're not down, but it's to a lesser degree.

On an anecdotal level, I found that in 2025 craft distillers were still realising that the market was going to be challenging for a while, and there was more confusion and concern about what's going to happen.

This year, I see a lot more adapting to those conditions. It almost feels like we've moved from a period of mass confusion and worry to an acceptance of 'this is what it is' — and we're going to dig in and adapt to the cards that have been dealt to us.

In 2024 and 2025, so much of the industry was saying, 'Is this cyclical or is it long term?' Now, at the end of 2026, we're learning that this is a fundamental shift that's going to last for a little while. We're not just going to magically come right back out of it.

The number of active craft distilleries in the US declined again in 2026, according to the report. Is the industry over the worst? We haven't seen any slowing in the closure rate yet. There's a new announcement every couple of weeks and it's disheartening. I don't see it slowing until we have some sort of macro change — whether that's in consumer demand or market access.

In July, Republic National Distributing Co [RNDC] filed for Chapter 11 bankruptcy protection. What impact is the national distributor's liquidation having on the wider industry? RNDC's collapse has caused havoc for the entire wholesale tier in the US. Imagine you're with the second-largest distributor in the US and it just disappears almost overnight. There's no orderly transition. I'd say that few, if any, of the small distillers who were with RNDC have fully recovered at this point. They're still in triage mode, trying to find new routes of distribution.

How would you characterise the wider distribution landscape right now? Distribution is far and away the greatest challenge craft distillers face right now. Big distillers are focusing on their largest brands. I get it, they have the highest volume, the highest revenues, the most power when it comes to negotiating strategic relationships with their distributors. Of course they're going to focus on those. There's more incentive to focus on those bigger brands, and there's more risk involved if they don't.

Does the three-tier distribution system work for craft distillers? Not in its current form, no. One of our big advocacy pushes right now is to ask the federal government and the Federal Trade Commission in the US to conduct a study of the three-tier system with a focus on distribution challenges and market-access options for small producers.

We aren't advocating for it to be dismantled. We are advocating that there should be more routes-to-market available for craft distillers. We'd like them to focus on what can be adjusted to make the playing field more level. GDI

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

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