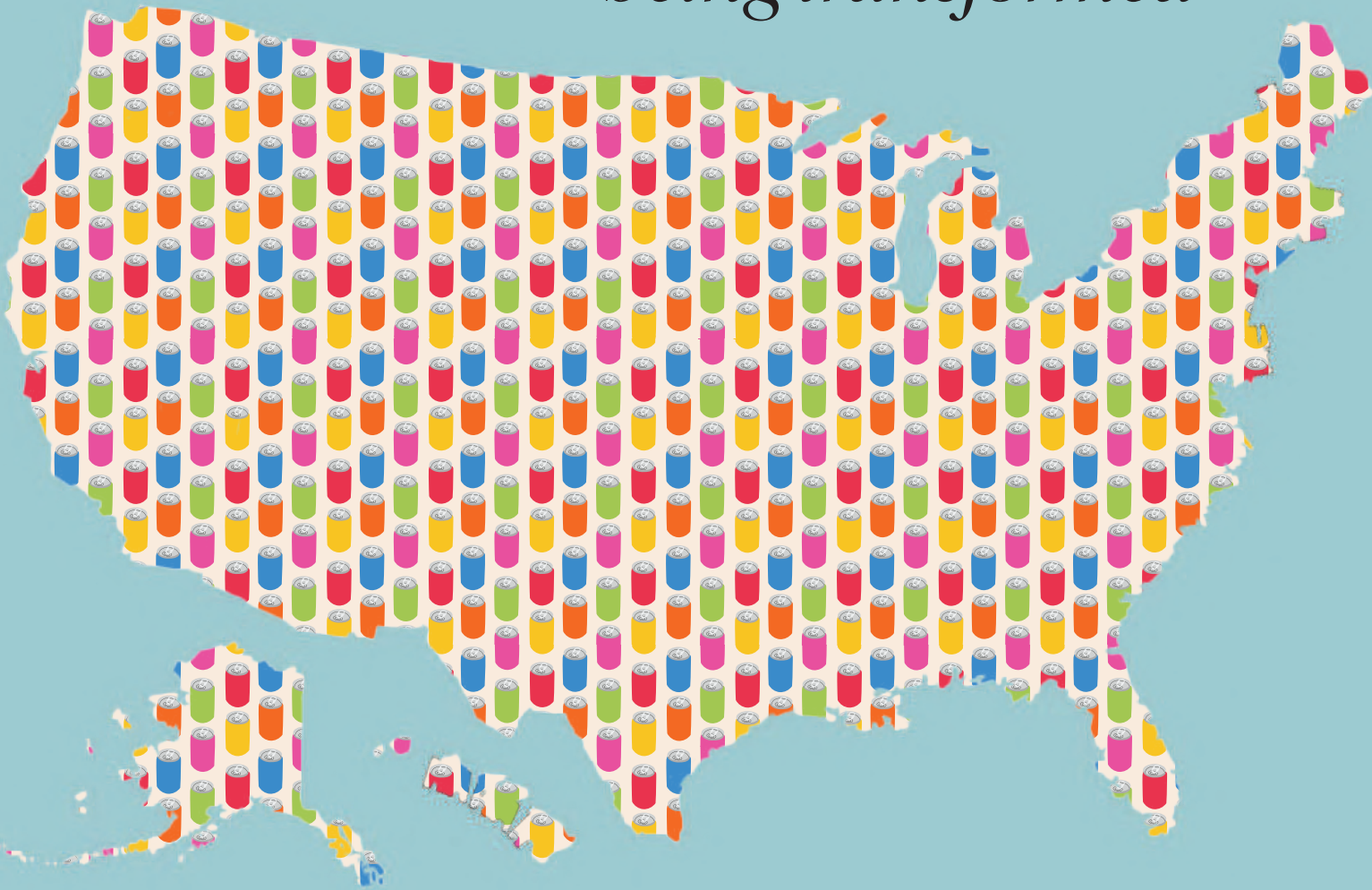


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FOR THE GLOBAL DRINKS EXECUTIVE | JUNE 2026

*The RTD revolution:
how the US category is
being transformed*



US whiskey On the rocks at home, distillers eye new frontiers

Interviews with Mark Anthony Brands, Molson Coors Beverage Co, Southern Glazer's Wine & Spirits, Casa Redondo, Everleaf Drinks and Clonakilty Distillery

Tequila Celebrity power wanes as the North American gold rush ends

Rum Can premiumisation reverse trends in the Americas?



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COMMENT

Joe Bates

The RTD category remains the darling of the wider beverage alcohol market, but in the US the sector is both premiumising and maturing, forcing even the country's largest supplier to adapt

At a worrying time for most of the beverage alcohol market, RTDs continue to ride high as other categories falter. They are the Swiss army knife of the drinks business, seamlessly adapting to whatever market needs are thrown at them — whether it's capturing value-conscious shoppers in discount supermarkets, tapping into the sober-curious trend, or delivering premium cocktail experiences in busy on-premise venues.

RTDs were the only major category to enjoy growth globally last year, posting volume and value growth of 2% and 4%, respectively, according to IWSR.

However, in the US — where the RTD revolution began in the mid-2010s — the category is changing apace. The peak volume era of the early 2020s, characterised by a seemingly endless proliferation of lookalike malt-based seltzers, has transitioned into a more settled, mature period.

The category is cooling in terms of its size, with stateside volumes dipping 1% in 2025. Consumers are drinking less frequently, but spending more per can, trading up from artificial malt bases to more premium bar-quality spirits-and-wine formats.

Few companies exemplify the RTD category's US trajectory better than Mark Anthony Brands, still regarded as the ultimate independent titan of the North American RTD scene. The company built a multibillion-dollar empire by scaling



The Finnish Long Drink sold to Mark Anthony Brands for a reported US\$325m in April

its own malt-based blockbuster brands like White Claw and Mike's Hard Lemonade, effectively creating the hard seltzer category in the process. Yet the sector's transformation has forced this category giant to adapt its strategy.

In *Global Drinks Intel*'s exclusive interview with Mark Anthony Brands president David Barnett (see p35), he charts the company's aggressive recent foray into the fast-growing premium spirits-based RTD sector through the acquisition of The Finnish Long Drink, as well as the introduction of White Claw Zero Proof to capitalise on the booming no/low category.

"Staying disciplined around flavour, innovation and occasion-based relevance is essential to sustaining growth," Barnett explains.

For a broader look at the latest developments in the RTD category in the US, turn to Maia Gosselin's report on p32.

She outlines a rapidly maturing and premiumising sector which is losing its

reputation for sugary taste profiles, cheap ingredients and low ABV.

Today's high-end offerings wouldn't look out of place on a designer bar's cocktail menu, offering retailers and bar owners good margins, premium positioning, zero labour costs and the chance to speed up service.

Despite a recent wave of heavy hitting mergers, acquisitions and cross-category joint ventures, Gosselin's report makes it clear that much of the top-tier innovation within the RTD category is coming from new independent players.

It's a timely reminder that consumers shop the RTD aisles the same way they do craft beer. They are looking for novelty and specific flavour fusions. This low brand stickiness leaves a large window open for innovative, smaller independent RTD players to steal market share.

While mature RTD markets like the US are becoming more value-driven, emerging markets remain in full-growth mode.

The category is powering ahead in markets such as South Africa, Brazil, Mexico and India, fuelled by rising middle-class disposable incomes and a massive demographic of younger LDA consumers.

For all the innovation reshaping the category, the global RTD story is becoming one of two distinct gears: premiumisation and moderation in mature markets versus rapid volume expansion across the emerging world. **GDI**



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News briefs

Catch up quickly on the global drinks stories that matter

COMPANY NEWS

Brown-Forman and **Pernod Ricard** withdrew from their month-long discussions regarding a potential merger. The pair said they “were unable to reach mutually agreeable terms”.

The US division of **AB InBev** has doubled its investment commitment in the country through the ‘Brewing Futures’ initiative to US\$600m. The programme was initially launched last year to create and sustain manufacturing jobs for those working for Anheuser-Busch.

Treasury Wine Estates has completed what it has called a “detailed review” of its operating model, selecting a regional structure over the current portfolio-led set-up. The group will move to a four-region arrangement later this year, comprising: The Americas; Australia & New Zealand & Europe; Greater China; and Emerging Markets (the rest of Asia, the Middle East & Africa).

M&A

California-based **The Wine Group** bought US alcohol-free RTS brand **Phony Negroni** at the end of April. As well as the namesake premix, **Phony Negroni** also includes a non-alcoholic mezcal negroni, espresso negroni, white negroni and amaro.

Sazerac Co bolstered its tequila footprint further, agreeing what it has called a “strategic partnership and financial investment” in influencer & entrepreneur **Kendall Jenner’s** 818 Tequila brand. The transaction will see Sazerac assume responsibility for 818’s sales and distribution in the US.



Producer **St Agrestis** has sold its **Phony Negroni** non-alcoholic beverage line to **The Wine Group**

RESULTS

Marie Brizard Wine & Spirits said it was expecting last year’s struggles to fade from view in the months ahead, although the group’s first-quarter sales were down by approaching double digits.

Molson Coors Beverage Co revealed it hit flat sales in its latest quarter, finally book-ending the top-line declines of the last seven. While the performance (+0.1%) was behind that of rivals **Carlsberg** (+3.6%) and **Heineken** (+2.8%), CEO **Rahul Goyal** hailed a “solid start” to the current year.

Proximo Spirits took a beating in the first three months of 2026 in the US and Canada, where its sales have slumped by a quarter. The company, which handles the **Jose Cuervo** tequila brand outside Mexico for parent **Cuervo**, saw its total sales in the three months to the end of March tumble by 13.5%.

Rémy Cointreau booked a bumper closing quarter to its financial year that pulled fiscal 2026 up to the same sales level as the year prior. The group, which went into Q4 with its year-to-date sales down by 1.9%, said earlier that its top line in the three months to the end of March jumped by almost 9% on the corresponding quarter in 2025.

Sparkling wine giant **Henkell Freixenet** posted a flat set of sales figures from last year, warning also that 2026 is likely to prove “demanding”. The 12-month period was coloured by what the Germany-headquartered business called a “strained global economy and cautious consumer spending”.

Carlsberg reported its strongest rise in quarterly sales for two years, bettering its rival, **Heineken**, in the three months to the end of March.

Heineken posted a strong start to 2026, booking a near-3% rise in sales from the first three months of the year. The company’s namesake brand’s portfolio delivered a 6.9% volume increase, led by its 29.3% jump in the Asia-Pacific reporting region.

PEOPLE

Rumours that **Diageo’s** new CEO planned to “streamline the British distiller’s regional



Image: Nick Wigner and 818 Tequila

Spirits giant Sazerac has invested in 818 Tequila, the US-based brand founded by Kendall Jenner

management teams” surfaced at the end of April. **Dave Lewis** joined at the start of this year and has previously been open about his “turnaround” plans for the business.

In mid-May, reports claimed that three senior execs were set to “leave” **Diageo**, including chief HR officer **Louise Prashad**, Africa president **Hina Nagarajan** and North America chief marketing & innovation officer **Ed Pilkington**. **Diageo** declined to comment.

Ste Michelle Wine Estates appointed **David Richardson** as its CEO, four months after **David Bowman** took the post and five months after being acquired by the **Wyckoff Family**. **Richardson** joins the US Pacific Coast wine group after 14 years as CEO of food logistics provider **NewCold Coöperatief UA**.

Compass Box officially confirmed the recruitment of its next CMO. **Ivo van den Brand** assumed the marketing lead following the March departure of **Racheal Vaughan Jones**.

INDUSTRY NEWS

Trade organisation the **Consorzio di Tutela del Prosecco DOC** signed a three-year agreement with the **Internazionali BNL d’Italia** tennis tournament. The partnership sees the consortium named ‘official partner’ and ‘official sparkling wine’ of the event in Rome.

President Donald Trump announced his intention to remove the US tariff on imports of scotch into the country following the visit of the King and Queen of the UK. The decision should result in the removal of the levy of 10% on scotch at an unspecified point in the future.



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Sustainability matters

Q&A with *Everleaf Drinks* founder Paul Mathew

Which recent ESG initiative or improvement are you most proud of? The biggest impact this year has been our move to a 100% post-consumer recycled glass bottle — a small change with significant benefits, and one we're building on later this year with a lighter-weight bespoke version.

But I'm most proud of our 'plant time' KPIs — the number of hours we can spend in nature with our team, trade and consumers. We've done bike rides, walks in parks and botanical gardens, and even wildflower planting — in the rain and mud — with one of our charity partners, Plantlife. That's the bit that makes me proud — the whole of the Everleaf team getting behind our target of 'being more plant'!

What is the biggest ESG challenge facing the drinks industry? For smaller businesses like ours, it's keeping up with all the changing legislation while continuing to do the good things that matter to us as a business. We're working with a great startup called Alkatera that aims to have all the information required for reporting against everything from EPR to our B Corp recertification and impact reports in one place, which will help enormously.

What one piece of advice would you give to companies looking to strengthen their ESG performance? Make a start and build from there. Incremental improvements. It can be really intimidating when you start out, but do what you can and keep growing.



Conservation biologist & bar owner Paul Mathew created non-alcoholic brand Everleaf in 2019

Everleaf won Sustainable Spirits Product of the Year at the 2025 Global Drinks Intel ESG Awards. How did it influence your approach? It's made us feel really positive about growing that side of what we do. We were all so proud of winning and really want to build on that together.

Q&A with *Clonakilty Distillery* founder Michael Scully

Which recent ESG initiative or improvement are you most proud of? After 12 months of preparation, Clonakilty received B Corp certification in May 2025, becoming the first whisky distillery in the EU to receive this qualification.

At Clonakilty, we recognise that B Corp certification is the gold standard, and the changes and initiatives we implemented

to achieve this standard enabled us to put truly lasting and robust structures in place.

What's the biggest ESG challenge facing the drinks industry today? There is a compliance cost to many of these initiatives. As a small example, we only purchase more expensive renewable electricity as part of our sustainability commitment. So right

now, there is a constant wrestling match between what is more cost effective and what is the right thing to do. Long term, there is only one answer, so despite the financial challenges, we must stay true to our values, including our commitment to customers, staff and community.

What advice would you give to companies looking to strengthen their ESG performance? Identify and join a certification programme, whichever that may be, include all staff when it comes to deciding what's important, and let them lead from the ground up in implementing those initiatives.

How has winning an ESG Award influenced your approach? Among other sustainability awards, we were fortunate to be awarded a gold medal at the Global Drinks Intel ESG Awards 2025. These accolades gave us the confidence and grounding to fully commit to our long-term ESG programme.

Clonakilty founder Michael Scully (centre) and team celebrate achieving B Corp status



● Have your own ESG story to tell? The Global Drinks Intel ESG Awards are judged by the industry, for the industry. Early Bird ends 3 July. Discover more at gdi.esgawards.com



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Every drop counts: drinks companies step up action on water security

Water is at the core of the beverage industry – from agriculture and production to packaging and transport. **Jessica Broadbent** examines what's being done to protect supply

Global demand for water is rising. United Nations estimates suggest our need has far outpaced population growth, and the organisation warns: “At the current speed, the world will not achieve sustainable water management until at least 2049.”

The drinks industry consumes vast amounts of water between agriculture, production, packaging and transportation. Many companies are now dedicating whole segments of their ESG strategy to water stewardship as availability increasingly impacts the entire supply chain.

It's not just high-stress zones that face challenges — even soggy locations like Scotland are seeing signs of change.

Beer

Water is up there at the top of the sustainability agenda for brewers, many of whom are working to reduce the average amount of water used per hectolitre brewed.

“Our main concern is making sure we have dependable access to clean, adequate supplies of fresh water in the places where we operate and source our ingredients,” says Carlsberg global head of sustainability & ESG Simon Boas Hoffmeyer. “Our strategy is focused on improving how efficiently we use water within our breweries and on working with local stakeholders to help protect and replenish water in the wider areas we rely on.”

Carlsberg has partnered with WWF Denmark on water stewardship, which the brewer



Carlsberg Group and WWF Denmark's strategic partnership focuses on protecting and restoring wetlands and improving water availability in vulnerable areas across Asia

says keeps it accountable. “Water challenges cannot be addressed by companies acting alone. WWF brings deep local, on-the-ground presence and expertise,” Boas Hoffmeyer says. “By working with WWF, we help ensure that projects deliver credible, science-based outcomes for nature and communities — not just benefits for our own operations — which is essential for long-term water security.”

Hops are another key focus for brewers. “In recent years, reduced rainfall between the flowering and harvest periods has often resulted in insufficient hop yields,” Japan's Suntory Holdings explains. The group has been working with a hop research institute in the Czech Republic since 2018 to develop drought-tolerant varieties. One hopeful strain is undergoing “large-scale field trials in the Czech Republic”, the brewer says.

Spirits

A host of water-related ESG issues face spirits producers, from the need for water to cool condensers, to the use of precious peatland (a natural water storage system) in whisky production, irrigation of crops like agave for tequila, and the addition of water post distillation, to name a few.

“Water is at the heart of everything we do,” Diageo's chief sustainability officer Ewan Andrew says in the company's Water Stewardship Strategy. “It's the most important ingredient in our products, it's vital to our communities and it's central to our business resilience.”

Last year Diageo identified that around a third of water withdrawals in the company's direct operations come from sites in water-stressed areas. The Don Julio tequila and Johnnie Walker scotch owner expanded its list of “priority” water basins to include those used further along the supply chain.

It has also invested in several projects in Mexico — including an artificial wetland in San Diego de Alejandría (known as ‘the gates to the Highlands of Jalisco’) “to clean wastewater for reuse in local agriculture” — and pledged GBP5m (US\$6.5m) to help restore up to 3,000 hectares of degraded peatland across Scotland, which includes improving water management in some of the country's most iconic yet fragile landscapes. »

Diageo has pledged up to US\$6.5m to restore Scottish peatlands and improve water management



» By its fiscal 2027, Diageo has pledged to replenish more water than it uses for operations in water-stressed areas — a KPI that will extend to “key third-party suppliers” by 2030. Replenishment methods being used include wetland restoration, pond desilting, water capture and water-sanitation-and-hygiene programmes.

Wine

In terms of wine, water scarcity (or conversely, flooding) can devastate an entire year’s production. Penedès — where Spanish sparkling wine cava is produced — has been hit by severe drought in recent years.

In 2025, sales volumes dropped 12.9% compared to 2024, “driven by production limitations resulting from drought”, according to regulatory board DO Cava.

Henkell Freixenet, which owns cava brands Freixenet and Segura Viudas, says drought conditions have had “significant impact on cava”. Head of communications Vanessa Lehmann says: “Nearly three years with almost no rainfall resulted in two



Sales volumes of cava dropped 12.9% last year due to ‘production limitations resulting from drought’

consecutive harvests far below demand, creating substantial pressure on availability, costs and pricing. The positive news is that rainfall returned in 2025 and the harvest improved, though it remains below the long-term average.”

Penedès’ situation is reminiscent of South Africa’s in 2018, when Cape Town’s municipal water supply was on the brink of being shut off following three years of poor rainfall. Incredibly, the winemaking region

turned the situation around through fairly simple household water-saving initiatives and limits on agricultural water quotas.

“By changing a city’s habits, along with the welcome return of some rain, Cape Town managed to avert the worst of the water-scarcity crisis,” the World Economic Forum wrote at the time. “However, the risk of future shortages remains. South Africa is one of the world’s driest countries and demand for water continues to climb.” **GDI**

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Barrel rolling at Michter's Shively Distillery. The Louisville-based producer unveiled one of its 'rarest' whiskey releases, Celebration Sour Mash, in February

With its home market in 'survival of the fittest' mode, US whiskey looks abroad

Whiskey distillers in the US are under no illusions about the challenges they face in their home market, but they continue to try to engage consumers and stimulate demand overseas.

Richard Woodard reports

When the going gets tough, companies sometimes play down the evident difficulties, insisting that everything is all right even as production is curtailed and workers laid off. Not so in the plain-speaking world of American whiskey.

"Right now, I'd characterise the US domestic market as being in a 'survival of the fittest' phase," says Joe Milner, MD of Milestone Beverages, owner of the Stateless brand. "We're seeing a bit of a perfect storm: a heavy downturn driven by high inventory levels, significant discounting and a general cooling of consumer demand."

"Premiumisation isn't necessarily over, but it's definitely hitting a wall at the top end. People are moving away from those US\$180+ bottles and looking for value. The new 'sweet spot' for premium spirits has really shifted down to that \$50 to \$70 range and even below."

The reasons for this shift are not specific

KEY TAKEAWAYS

■ American whiskey brand owners face tough trading conditions at home, with the value of the domestic market falling for the past two years in a row.

■ This has been exacerbated by the situation in Canada, where the ongoing political row has shut the category off from one of its most lucrative global markets.

■ Export strategies are diverse, with some players still heavily reliant on domestic sales, but others targeting high-potential destinations such as India, China and Brazil.

■ Through all this, many distillers are holding their nerve, maintaining production and highlighting growth areas such as age-stated whiskeys and American single malt.

to whiskey. "The market has faced a number of headwinds in the past year, with significant impact from the rising cost of living and historically low consumer confidence," says Heaven Hill Brands CMO Matt Blevins. "I believe that has influenced — at the margins — the number of occasions for a

consumer that is very intentional about their discretionary income."

The impact is all the more jolting given the extended period of growth that preceded it. According to figures from the Distilled Spirits Council of the United States (Discus), the value of the American whiskey market in the US soared by close to 300% between 2003 and 2025, topping US\$5bn.

The only two years in that timescale that showed declines? The last two.

"The American whiskey market seemed to operate on a single, unwavering trajectory — upward," says WhistlePig CEO Alex Roberts. "That has clearly changed. What we're witnessing now is a market that has decelerated, with growth concentrating among brands that consumers feel a genuine connection to."

US remains 'dynamic'

Describing the US market as "dynamic and challenging" Brown-Forman EVP & president Americas Michael Masick insists: "The appetite for authenticity remains robust," highlighting examples such as Jack Daniel's Single Barrel Heritage Barrel, which became a permanent part of the range in 2025 due to its popularity. »

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Campari Group has found success with age-stated whiskeys such as Russell's Reserve 13yo

» At Campari Group, Wild Turkey is proving “resilient”, according to House of Whiskey & Rum MD Raul Gonzalez, with revenues up 2% in 2025, thanks primarily to the US market.

“Our total category performance was offset by a demand-led shortage on some premium Russell’s Reserve whiskeys, but overall, we’ve seen positive indicators from the market,” he adds. “We’re continuing to see strong demand for our limited releases, like the Wild Turkey Master’s Keep Series and Russell’s Reserve Rickhouse Series.”

In similar fashion, Suntory Global Spirits’ Jim Beam and Maker’s Mark brands outperformed the American whiskey category last year, says Regan Clarke, the company’s VP American whiskey.

“We want to tap into the relevant occasions where our consumers are, such as leaning into fandom with sports partnerships like Jim Beam and the Cadillac Formula 1 team and US Soccer, and Maker’s Mark’s partnership with [women’s basketball league] Unrivaled,” she adds.

Strain on small distillers

Growth is not impossible, but brands are having to work harder to capture and retain the attention of consumers. “Premiumisation is not over insofar as truly unique releases continue to be prized by connoisseurs,” says Matt Magliocco, executive VP of Chatham Imports, which oversees Michter’s export business.

“However, at the mass-market level, there is an increasing consumer sensitivity to pricing and an awareness of how discretionary purchases fit into overall budgets that may be challenged by inflation and other economic factors.”

In a crowded market where growth is



Sagamore Rye: shut out of the Canadian market

elusive, the dangers are starker for smaller distillers, who tend to be at the mercy of rising costs and interest rates.

Blevins at Heaven Hill voices cautious optimism and a conviction that he has “a hard time seeing premiumisation stalling for an extended period”. However, he nonetheless acknowledges: “Where you see that pressure most acutely is with smaller, newer producers, particularly as consolidation continues in the middle tiers. Larger, more established operators tend to have more flexibility to navigate cycles, while smaller players feel those shifts earlier.”

The Canadian shutdown

One challenge that all exporters have had to deal with is the effective shutdown of the Canadian market as the political spat between Washington and Ottawa led to US products being removed from retail shelves.

“Our Sagamore Rye from Maryland has completely been shut out of the Canadian market since February 2025,” reports Disaronno Group global chief commercial officer & Disaronno International USA CEO Robert Cullins. “We continue to monitor the situation with the hopes that trade barriers will normalise in the future, and American products are welcomed back into Canada with a tariff or without.”

Magliocco admits that Michter’s has been “heavily impacted” by the situation, adding: “While it is gratifying that Alberta and Saskatchewan have reversed this regrettable policy in their respective provinces, the remainder of the country — including the powerhouse markets of Ontario, Québec and British Columbia — remains off-limits to us.”

He speaks for many producers when he says: “Canada was, and we hope will always be, an excellent market for American whiskey. We very much hope that the Canadian government lifts this unfortunate ban and allows their citizens to enjoy free choice.” »

Export Markets for US Whiskey 2025 '000s of Nine-Litre Cases

	1. Australia	2,813
	Shipment Shr: 11.4% ▲ 13.4% vs 2024	
	2. Brazil	2,805
	Shipment Shr: 11.4% ▲ 14.5% vs 2024	
	3. Spain	2,618
	Shipment Shr: 10.6% ▼ -13.3% vs 2024	
	4. Netherlands	2,406
	Shipment Shr: 9.8% ▲ 14.7% vs 2024	
	5. Japan	1,825
	Shipment Shr: 7.4% ▼ -34.7% vs 2024	
	6. United Kingdom	1,706
	Shipment Shr: 6.9% ▼ -6.8% vs 2024	
	7. Italy	1,237
	Shipment Shr: 5.0% ▲ 1.0% vs 2024	
	8. Germany	1,138
	Shipment Shr: 4.6% ▼ -50.0% vs 2024	
	9. France	1,025
	Shipment Shr: 4.2% ▼ -33.5% vs 2024	
	10. Mexico	938
	Shipment Shr: 3.8% ▼ -9.1% vs 2024	
	11. United Arab Emirates	621
	Shipment Shr: 2.5% ▲ 18.2% vs 2024	
	12. Türkiye	582
	Shipment Shr: 2.4% ▲ 43.8% vs 2024	
	13. Poland	492
	Shipment Shr: 2.0% ▼ -58.6% vs 2024	
	14. New Zealand	430
	Shipment Shr: 1.7% ▼ -20.0% vs 2024	
	15. China	338
	Shipment Shr: 1.4% ▼ -5.6% vs 2024	
	16. India	292
	Shipment Shr: 1.2% ▲ 55.2% vs 2024	
	17. Canada	270
	Shipment Shr: 1.1% ▼ -42.9% vs 2024	
	18. Latvia	259
	Shipment Shr: 1.1% ▲ 18.9% vs 2024	
	19. Panama	249
	Shipment Shr: 1.0% ▼ -44.2% vs 2024	
	20. South Korea	235
	Shipment Shr: 1.0% ▲ 5.2% vs 2024	
	Total	24,659
		▼ -10.7% vs 2024

Source: GDI calculations based on United States International Trade Commission data. All volume figures are '000s of nine-litre cases (at 40% ABV equivalence)



From left: WhistlePig Small Batch Rye 10yo; Stateless American Single Malt from Milestone Beverages; and Jim Beam Pineapple flavoured spirit drink

New frontiers

» With difficult trading conditions in the home market and Canada mostly a no-go area, it's little wonder that American whiskey makers are casting their eyes further afield, across the Pacific and Atlantic Oceans.

Here, strategies diverge: while the likes of Suntory and Brown-Forman have long pursued international growth, others, such as Heaven Hill, remain largely US-focused, for good or ill.

"Our international strategy is focused on disciplined expansion, rather than broad diversification," explains Blevins. "We are prioritising a select group of markets where our brands, and particularly American whiskey, have a strong right to win.

"A good example is global travel retail, where we have recently invested in building a dedicated team. This channel presents a strong opportunity for brand discovery, especially for premium American whiskey and tequila, and allows us to engage consumers in a highly experiential environment."

By contrast, Masick reports Brown-Forman

is pursuing "multiple runways for growth", including Mexico and Brazil — the latter is the top export market for Jack Daniel's flavours — alongside Poland and Türkiye.

He adds: "We are also nurturing high-potential countries like India, where we are looking to expand distribution to reach more of the population, and Italy and Japan, where our transitions to owned distribution are beginning to yield benefits."

India is the most obvious prize. Clarke says Jim Beam's business was up 20% in the country last year, while Milner describes India as "far and away the most exciting market" for Milestone, with Mumbai and Bangalore on his immediate radar — using local bottling to help the business target 50,000 cases in the next few years.

WhistlePig is available in 20 international markets, but Roberts warns that exporting is no easy fix. "What makes international markets genuinely different from the US is that domestic success doesn't automatically travel," he says.

"Many American whiskey brands rely heavily on the awareness and cultural momentum they've built at home. But internationally, that equity doesn't transfer in the same way. Consumers are less familiar with the brand landscape, the reference points are different, and the competitive set is entirely distinct."

Weathering the storm

These are tricky times for American whiskey, but distillers seem to be holding their nerve. Brown-Forman's significant investment behind Woodford Reserve is aimed at replicating the global value growth seen for Jack Daniel's over the past 25 years — but in only a decade.

Suntory's Clarke ticks off a list of consumer-friendly innovations, including Jim Beam Pineapple and the On The Rocks Whiskey Sour with Jim Beam RTD.

Meanwhile, Campari Group's Gonzalez highlights the success of age-stated whiskeys such as Wild Turkey 101 8yo and Russell's Reserve 13yo, and WhistlePig's Roberts points to the "real momentum" found by the fledgling American single malt segment.

Inventories across the industry are still bloated, but Cullins insists that Sagamore's production schedules remain "relatively unaffected", while Magliocco points out that Michter's inventory planning is based, in some cases, on sales in 35 years' time; its Shively and Fort Nelson distilleries continue to lay down spirit.

"Heaven Hill has weathered storms like these for generations," adds Blevins. "We are preparing for long-term growth while navigating near-term volatility.

"The pace of the market may be more measured in 2026, but we remain confident in the underlying strength of the category and are focused on ensuring we are all well positioned when conditions improve." **GDI**



Heaven Hill Brands has set up a dedicated team to promote brands such as Elijah Craig (left) in GTR, while Brown-Forman sees 'multiple runways for growth' for Jack Daniel's (14yo from its 2026 Aged Series, right)



US Whiskey Roundup

Amid difficult market conditions for distillers, innovation in the US whiskey segment continues unabated, from barrel-strength expressions to luxury releases



Slew of launches from Brown-Forman

Brown-Forman continues a programme of new releases, including Jack Daniel's Special Release Small Batch Rye, plus the brand's annual Aged Series, including 14yo, 12yo and 10yo expressions. Woodford Reserve has launched Woodford Reserve Double Double Oaked and a Cabernet Sauvignon Barrel Finish, part of its annual Distillery Series.



Heaven Hill's Deatsville release

Heaven Hill Distillery's new Deatsville 13yo Bourbon Whiskey is a limited edition drawn from the Deatsville campus, one of the most distinctive of the company's ageing sites and scheduled to transition out of active ageing shortly. With a mashbill of 78% corn, 10% rye and 12% malted barley, the release has an SRP of US\$199.99 a bottle.

Michter's explores Sour Mash

Michter's Distillery has released a barrel-strength iteration of its US*1 Sour Mash Kentucky Whiskey, paying homage to a style that was popular during the 1970s and 1980s. The average proof of the batches offered this year is 55.75% ABV, with an SRP of US\$120 per 75cl bottle in the US.



Ryes fit for a birthday from Sagamore

As Disaronno Group-owned Sagamore Whiskey marks its ninth anniversary, the company has released its second tranche of 10yo rye at 55.4% ABV, alongside a distillery-only Pot Still Series Rye Malt Whiskey, aged for seven years and bottled at 50% ABV. Next up is a high-rye bourbon, with other limited-time offerings to follow.

New Wild Turkey series

Wild Turkey has launched the Wild Turkey Austin Nichols Archives Collection, an annual series commemorating some of the most coveted bottles in the distillery's history. Gold Foil Edition is a 16yo, 60% ABV Kentucky Straight Bourbon that aims to capture the style of the "glut era" of the 1980s and 1990s, priced at US\$400 a bottle.





Wayne E Chaplin started with Southern Wine & Spirits in 1984 (it merged with Glazer's in 2016), while son Mark started at the company nine years ago

Q&A with Southern Glazer's Wayne and Mark Chaplin

Wayne, you've been doing this for more than 40 years, and Mark, you've been around the business your entire life. There appears to be more turbulence around alcohol distribution today than at any point over the last 25 years or so. **Wayne E Chaplin:** I'd say there's more turbulence now than I've seen in my decades with the business. There was a bit back in the early 1980s, when the economy was struggling a bit. What we're seeing is the trends of the last three years starting to soften and go backwards.

People are having a hard time getting their minds around what levers they need to pull in a down market versus a growing market. Everyone's focused on when the trends will change back — they *will* change back and this business will grow again. People have been enjoying spirits and wine for thousands of years and they'll continue to do so. When the economy turns, the business will grow again.

You sound quite relaxed. What's the cause of the challenges to the trading environment?

Mark Chaplin: Everyone's debating whether the issue is structural, or cyclical. There are factors on both sides, such as GLP-1 medication being more readily available for the consumers who are trying to be healthier, or a new competitive set in delta-nine [THC-infused beverages] through wider decriminalisation of marijuana.

Over the last 25 years, the business has grown pretty steadily at around a 2.5% in value. The pandemic period was outside that normal growth trajectory, and what

Southern Glazer's Wine & Spirits is the world's largest wine and spirits distributor, operating across 47 US states, Canada and international markets. President & CEO Wayne Chaplin and president commercial sales Mark Chaplin talk current challenges and opportunities with **Olly Wehring**

we're seeing today is a regression back to the mean growth rate. In all the data we look at, that's what is truly occurring.

All distributors like to complain about pricing at times. We saw prices tick up significantly over the pandemic time, as it was harder to get goods into the market. Right now, you really see the impact price has on the everyday American consumer.

As we see this normalise, the consumer will too. We're seeing lower price points drive some of today's growth, as well as a K-shaped recovery [where different parts of the economy recover at diverging rates] in the US.

How are brand owners faring at weathering these challenges? **WC:** Instead of delivering on what they believe their brand proposition should be, brand owners need to listen to the consumer more than ever before.

When people listen to the consumer — and reach consumers where they are today — brands grow because they meet the consumer's current needs, which might be different today than they were five or ten years ago. We're seeing certain brands deliver on their propositions well.

Affordability is also key, so we have to make sure we get the pricing strategy right.

Where does discussion around pricing leave alcohol's premiumisation bedrock? **MC:** There's

always this underlying feeling that people want to drink better and want brands that resonate with them. The ultra-premium and luxury sectors continue to grow in the US, so that has been relatively uninterrupted.

Some are turning their attention to pack-size changes. There are two sides to the coin here. One is that people are paying less, but still drinking the premium products they learned to enjoy during the pandemic when they had a couple more dollars in their pocket. The other is around the convenience opportunity to serve occasions that matter to today's consumer. We're seeing both of these trends coexist in smaller pack sizes.

You're sounding like a brand ambassador for RTDs! **WC:** People want to look at RTDs and think that it's a new category. We could go back and look at brands like Seagram Coolers or California Coolers and see how big that business was back then, before it totally went away. Some think this current trend is going to follow the same direction. I don't think it will.

A lot of the RTDs we have today are prepared cocktails in a can. While they've been mostly malt-based, we're seeing more vodka and tequila-based RTDs, which help bring consumers into the category. Eventually, I expect these consumers to want to drink full-strength bottled spirits. »

» **MC:** On the wine-based side, if played the right way, brands like BuzzBallz and BeatBox — both of which are just on fire here [in the US] — can help drive new consumers into the wine category, which has been a little harder than spirits and beer.

Doesn't the gateway theory for RTDs jar somewhat with the Gen Z health and wellness theory? **MC:** If you look at where BuzzBallz and BeatBox index from a consumer standpoint, it's with Gen Z. These are two of the fastest-growing brands in the US business.

We have these counterintuitive points — people want to be healthy, but they also want to indulge and have fun in the category. When you look at the brands that can speak to a younger consumer and also be fun, people are gravitating there. That's certainly behind some of the success we've seen with these two brands, as well as with brands like Michelob Ultra.

WC: I'd build on that and say if these young people that are so health-conscious had a little more disposable income, I think they'd go out with their friends and enjoy a drink.

Turning to the distribution side, what do you feel prompted RNDC's withdrawal from California last year [see p45]? **WC:** I think that people had become so used to the business growing that they built their structure around growth. Then, all of a sudden, that growth isn't there, but expenses and costs continue to rise, and you don't have the velocity or scale to cover that.

For distributors of pretty much anything, the margins are pretty thin, so you have to be nimble. Even a company with the scale of Southern Glazer's has to be able to change when the market changes. We've been adjusting the way that we do things, to tighten the belt and be prepared for when the market's going to re-engage.

Southern Glazer's has made several consolidatory moves of late, such as the purchases of New York's Clare Rose and Eagle Rock Distributing Co in Colorado. **MC:** We continue to see the consumer explore across categories, so it's about meeting our consumers and our customers where they are and being able to provide them with a total offering.

The average consumer drinks around eight different beverages a day and we're trying to meet that head on. That's really what this strategy is all about and why we continue to expand in this space. This allows us the

opportunity to get in front of many more of our customers and our consumers with the brands that we're fortunate to represent.

People think of us as new to beer, non-alc and RTDs, but we've been doing them at a smaller scale for many years in Nevada, South Carolina and a couple of other markets. Now, we'll do over 60m cases of these types of products across our network. Hopefully, that shows how committed we are to the space.

This sounds like you may need to drop 'wine and spirits' from the company name. **WC:** You must have been in our strategy sessions! We'll be celebrating the tenth anniversary of the merger between Southern Wine & Spirits and Glazer's in July. At that point, we'll change the name of our company to Southern Glazer's Beverage Co.

These lines have been crossed: we are no longer just a wine and spirits company.

Could the size of the company catch the eye of the monopoly authorities at some point? **WC:** We don't see that as an issue at all. Where we see the growth is in acquiring more beer distributors, and our share isn't very large at all in any state with beer.

How does Southern Glazer's view the consolidatory overtures playing out among brand owners? **WC:** We do watch it intently. Like you in the media, we're wondering what's going to happen, and we have no insight in what that will be. We always say that what we can control is what's within our control. That is representing the brand owners the best way we can, presenting their products to our customers, executing in local markets, and making sure that we're growing their brands faster than the rest of the market.

Doesn't it give you less to deal with if your supplier is as large as possible? **WC:** We represent suppliers from the largest multinational spirits supplier in Diageo to very small, family-owned, single-brand suppliers like Clase Azul. As a distributor, you want a portfolio of brands that allows you to deliver as much value as you can to your customer — come one, come all!

How can smaller companies catch your eye? **MC:** It's about having a good business plan to engage with consumers here in the US and a structure that can help collaborate with us. Those are the driving forces that we're looking for. We review thousands of brands every quarter. We're always on the lookout.



'We like to say the data will set you free. Let's all focus on one version of the truth!'

How confident are you in the survival of the three-tier system? **WC:** Whether there's a legal or a non-legal three-tier system, we always look at it as we have to provide the maximum value that we can to our brand owners to ensure that we're involved.

We have to be a distributor that builds brands, that provides data, that provides insights, that provides efficiency and a route-to-market for brand owners.

How engaged with today's — and tomorrow's — technology is Southern Glazer's? **MC:** We're embedding AI in a couple of different ways, as we look at inventory management and forecasting to ensure we have better product availability. We're also leveraging it in some of our data tools to help us make better decisions and advise customer partners.

My brother, David, is our chief growth & strategy officer and was the lead on driving our 'Proof Commerce' platform, the first B2B e-commerce platform in our industry. It's been an incredible success and we continue to invest behind it, to help our sales consultants be more effective at their sales call.

Given Southern Glazer's scale across such a fragmented market as the US, how do you locate the best solution to a business problem, when pretty much everything applies? **WC:** We really spend a lot of time on insights. The data is the data and therein lies the truth. Sometimes people don't want to accept what the data says, so they come up with a conclusion that fits their narrative.

We don't own the brands: we represent the brand owners. We want to tell them the truth about their brands — why they're doing well, or why they aren't doing well — so that we can continue to help them grow and advance in the marketplace.

We like to say the data will set you free. Let's all focus on one version of the truth! **GDI**

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



Nicaragua's Flor de Caña marked its 135th anniversary with a rum aged 'sustainably and naturally' for 35 years in American white oak barrels

Premiumisation offers rum a lifeline amid choppy seas in the Americas

In 2025, rum sales in the US dropped 6.2% year on year to 19m nine-litre cases, generating US\$2.1bn in revenue for distillers. The value (-5.1%), premium (-8%) and high-end premium (-1.1%) segments were all in the red, data from the Distilled Spirits Council of the United States (Discus) shows.

According to IWSR, four of the top five markets for rum in the Americas by volume — the US (-3%), Cuba (-8%), the Dominican Republic (-2%) and Canada (-1%) — all suffered volume CAGR declines between 2019 and 2024. Mexico, rum's fourth-largest market by volume ahead of Canada, was the only exception, posting 5% growth over the same five-year period.

"Brands face a deteriorating commercial landscape on multiple fronts," says IWSR market research analyst Matias Fonolla. "Distributor and trade investment has shifted decisively toward tequila, whisky and RTDs in Mexico and Colombia, reducing rum's activation and shelf visibility in two of the region's larger markets.

"In Canada, the partial boycott of Puerto

Gone are the days when sea monsters, pirates and palm trees were the defining images of rum, but can the flavoured subcategory follow the same premiumisation path set out by aged expressions? **Eloise Feilden** reports

Rican-origin rum by provincial liquor boards disrupted distribution materially, with limited cross-brand trading to compensate.

"In the US," adds Fonolla, "the redirection of idle bourbon distillery capacity into domestic rum production" has introduced a new "competitive dynamic at accessible price tiers at precisely the moment import tariff exposure is raising the cost base for Caribbean and Latin American producers."

There's no denying the gloomy picture these figures paint, yet there remain some bright spots for rum brands operating in the Americas.

Super-premium opportunity

The super-premium segment was the only positive outlier in the US in 2025, with volumes up 2.9%, according to Discus. Indeed, in recent years, rum has been reshaped by premiumisation, with dark

and aged liquids in the highest price tiers outperforming the category as a whole.

"Within a category declining across all tiers at the Americas level, the clearest story of relative outperformance is at the premium end," says IWSR's Fonolla.

As consumer preferences shift upwards, so too do expressions from key producers operating in the Americas. In early 2026, Nicaragua's Flor de Caña debuted its oldest release to date: a 35yo rum aged in American white oak barrels within the family's private reserve. Only 350 crystal decanters (70cl) will be available globally at a price of US\$4,000 each, accompanied by an individually numbered certificate of authenticity.

Then, in March, Brown-Forman-owned Diplomático revealed Chancellor. The ultra-rare expression, which has an SRP of \$2,533, is the brand's most exclusive rum to date, with just 900 decanters released. »

MARKET INTEL RUM

» In May, family-owned Dug Group repositioned Venezuelan brand Ron Tepuy — which has existed in its domestic market since 2009 — globally as a super-premium rum. The redesigned brand relaunched with two 40% ABV expressions: Ron Tepuy Monumento, made with liquids aged for up to 12 years under tropical conditions in American oak ex-bourbon barrels, and Ron Tepuy Destino, made from rums aged for up to eight years in American oak and finished in amontillado sherry casks.

Uphill battle

At Louisiana's Bayou Rum, second generation rum maker & master distiller Reiniel Vicente Diaz believes the premiumisation of other spirits categories has paved the way for rum's upward climb.

"Consumers who already appreciate bourbon, tequila, scotch or single malt are starting to look at rum with the same level of curiosity," he explains. "They are paying attention to age, barrel influence, production method, origin and authenticity."

Premium-and-above rum brands still face an uphill battle to be seen as such.

Global rum ambassador Ian Burrell says that "there are still people that think the word 'premium rum' is an oxymoron". However, he argues that despite falling volumes, "it's a false representation of the rum category to say that it is in decline", as more consumers reach for bottles delivering "better on quality more than quantity".

Palm Republic Rum co-founder Brad



Clockwise from top left: Diplomático Chancello; Ron Tepuy Destino and Monumento; Bayou White and Spiced Rum; global rum ambassador Ian Burrell, who says it is 'false' to say rum is in decline

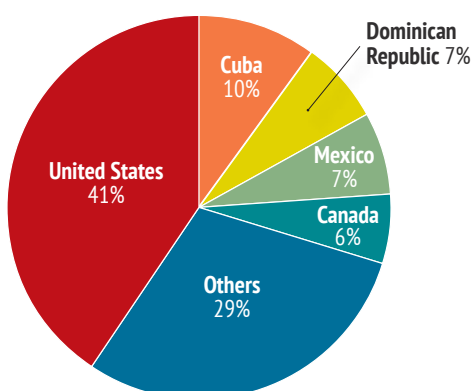
Parkes is confident that the premiumisation shift will boost the category in the long run.

"We view rum as the next 'it' spirit, poised for the same explosive growth we saw with tequila 15 years ago," he says. "This shift is being fuelled by a more sophisticated consumer palate; a gener-

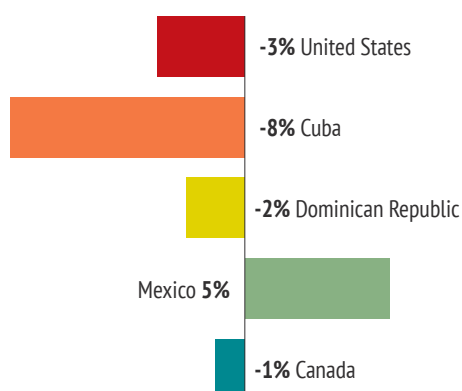
ation of drinkers educated by the craft cocktail movement and the premiumisation of agave is now turning their curiosity toward rum. They are asking nuanced questions about provenance, production methods and terroir — details that weren't on the radar a decade ago." »

DATA DROP

Rum in the Americas: Top 5 Domestic Markets % Share of Volume Total 2024



% CAGR Volume 2019–24



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

KEY TAKEAWAYS

■ In 2025, US rum sales dropped 6.2% year on year, with the value (-5.1%), premium (-8%) and high-end premium (-1.1%) segments all in the red.

■ The super-premium segment was the only positive outlier in the US in 2025, with volumes up 2.9%.

■ Premiumisation has reshaped rum, with dark and aged liquids in the highest price tiers outperforming the wider category.

■ Spiced and flavoured rum is the third-largest subcategory in the Americas by volume, accounting for more than 56% of all rums sold in the US in 2025.

■ Use of natural flavourings and better base spirits suggests a similar premiumisation trend could be brewing for flavoured expressions.

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Clockwise from top left: Peruvian rum brand Sechura, produced by London to Lima Spirits; Palm Republic Rum co-founder Brad Parkes, who reports 'a clear move' toward more premium flavoured expressions; and Bouvil Rhum, which has been crafted by the Vilbon family in Port-au-Prince since the 1850s

On-trade essential driver

» The on-trade plays a critical role in driving the message home. Palm Republic's Parkes sees cocktail culture as the engine behind rum's resurgence.

"Bartenders are the ultimate gatekeepers and as they experiment with aged expressions and regional styles, rum benefits from that advocacy," he says. "A well-crafted rum cocktail on a curated menu does more to elevate the category and convert customers to rum than any traditional marketing campaign could."

Swiss spirits company Origen X Group launched Bouvil Rhum, the 'oldest-surviving' Haitian rum brand, in the UK and eight European markets in early 2026. Its second stage of global expansion has prompted "active discussions with select distribution partners" across the Americas as part of a planned 2026–27 roll-out.

Origen X Brands CEO Zak Oganian says in many markets in South America "rum is still largely associated with either local heritage or volume-driven commercial brands", meaning "targeted on-trade activation" is an essential way in.

IWSR's Fonolla agrees. "Colombia's on-trade is investing actively in white rum mixology to build category presence," he says, while Peru's developing cocktail scene has spurred double-digit growth for some imported brands.

At Nicaragua's Flor de Caña rum, regional brand ambassador for South America Karen Álvarez Seijas has witnessed first-hand the premiumisation happening across the continent's cocktail bars. "You have bartenders making cocktails with a 10yo aged rum — that didn't happen a few years ago," she says.

Still, premiumisation has its limits. Fonolla believes that "the broader premiumisation momentum in the category belongs firmly to aged dark rum", with other subcategories failing to benefit.

Premium hope for flavoured rum

Spiced and flavoured rums make up the third-largest subcategory in the Americas by volume. In the US alone, they accounted for more than 56% of all rums sold in 2025, according to Discus.

Despite making up such a significant proportion of sales, spiced rum "is in accelerating structural decline with no meaningful evidence of premiumisation", according to Fonolla. Canada is the one exception, where "locally produced, craft-style spiced rum, particularly in Quebec, is building volume through an artisanal, provenance-led positioning."

Yet producers are seeing the tide begin to turn in other markets, signalling the early stages of a burgeoning trend. At Costa Rica's Ron Centenario, international business executive Paola Gutierrez says spiced

rum "continues to play an important role within the category, both in terms of volume and value," arguing that "there is a growing appreciation for products that achieve this naturally, without added flavourings".

At London to Lima Spirits, which produces Peruvian rum brand Sechura, CEO, founder & distiller Alex James agrees. "There is a clear move toward more premium expressions, better base spirits, more balanced profiles and a shift toward natural flavouring rather than overly sweet or artificial styles," he says of demand in South America.

According to James, this shift is one which began in other spirits categories and has trickled down. He says curious drinkers are making a natural shift "from botanical gin into botanical or spiced rum", arguing that "consumers who are already comfortable with flavour-led spirits are exploring rum through that lens".

There is hope for the subcategory yet. Fonolla says that spiced rum's success in the Canadian domestic market demonstrates that "a premium flavoured rum narrative is achievable". However, he believes it remains market specific.

Producers will, therefore, have to focus their efforts if they want spiced and flavoured expressions to follow the same premiumisation trend as dark and aged rums before them. **GDI**



Rum Roundup

From debut brands linked to Hollywood stars to high-end releases to pair with foie gras, here's what's new in the world of rum-making



Flor de Caña's premium range gets a reboot

To celebrate its 135-year anniversary, Nicaragua's Flor de Caña has redesigned its premium rum portfolio. Wooden stoppers nod to ageing in American white oak barrels, while the bottles have been redesigned to be 18% lighter. Packaging is now fully recyclable and produced using vegetable-based inks, with less paper waste during manufacturing.



The Last Drop offers demolished distillery rum

The Last Drop Distillers has released a 25yo Trinidad Rum as part of its 2026 Collection. Just 261 bottles have been made available using liquid drawn from two bourbon casks distilled at the Caroni Distillery in 1997 and 1999 prior to its closure in 2003.



Eminente releases second Gran Reserva Edition

Moët Hennessy-owned Eminente has released Edition N°2, a 10yo Cuban rum finished in sauternes wine casks. In a bid to bring rum closer to gastronomy, the brand has highlighted pairings including foie gras, blue cheese or grilled salmon, where the smokiness of the fish complements the spirit's tropical and floral notes.



Angostura Rum receives brand refresh

House of Angostura has given its rum portfolio a new look. In Trinidad, butterflies land on the sugarcane at harvest time, and each Angostura Rum label now features a butterfly logo at its centre. Plus, the brand's new lighter-weight bottles and the elimination of secondary packaging aim to reflect Angostura's green credentials.

Crossfire Hurricane Rum x The Rolling Stones

Preeminent rock band The Rolling Stones have announced the launch of Crossfire Hurricane Rum. Uniting rums from four of Jamaica's six remaining distilleries — Hampden Estate, Long Pond, Worthy Park Estate and Clarendon — the brand is being positioned as a super-premium spirit, launching first across the UK, the US and parts of Europe.





From left: Diageo's Ypióca Cachaça; BarSol Pisco founder Diego Loret de Mola; Suyu Pisco co-founders & creators Ian Leggett and Alex Hildebrandt; ProChile masterclass in France featuring Mistral Pisco. The government body says Chile and Peru must work as a category to promote the grape spirit

Poquito a poquito: cachaça and pisco make slow progress on global stage

Bad Bunny's half-time Super Bowl show was more than musical spectacle — it was a vote of confidence in growing international fascination with Latin American culture. But can this momentum, thus far concentrated in northern hubs like Mexico and Puerto Rico, trickle down as far as spirits producers in Brazil, Chile or Peru?

Distillers are, of course, hopeful. Despite it being an oversimplification to lump all of Latin America together, Suyu Pisco co-founder Alex Hildebrandt says the “growth in interest in Latin American culture is a really exciting thing for us as Latinos that we can benefit from.”

Brazil & cachaça

Brazil accounts for around 99% of cachaça's volume sales and 92% in value terms (IWSR). “Cachaça culture is introduced to Brazilian people from an early age,” says bartender & owner of São Paulo's Guarita Bar, Jean Ponce. “It is present in music, art, gastronomy — Brazilians grow up understanding that cachaça is the Brazilian spirit.”

The sugarcane-based spirit is traditionally drunk neat, but Ponce says Brazil's cocktail culture “has accelerated a lot” in the last decade. Serves “revolve around” the caipirinha and rabo de galo, as well as local stars the gabriela (a spiced cachaça and passionfruit cocktail from Rio de Janeiro) and macunaíma (a São Paulo creation with Fernet-Branca).

“Cachaça consumption in Brazil is evolving in an increasingly sophisticated way,” says Diageo's Jamyle Façanha, marketing manager for the Ypióca cachaça brand. “We are seeing a movement beyond traditional

As Latin American culture rises in popularity across the world, can cachaça and pisco producers jump on the bandwagon? **Jessica Broadbent** investigates

drinking occasions into cocktail culture, gastronomy and more curated social settings.”

Diageo has been investing in Ypióca marketing activations at Brazilian festivals, such as São João, and partnered with soft drink brand São Geraldo to create the Ypigerald cocktail. “Initiatives like this help recruit new consumers, expand occasions and position cachaça as a dynamic spirit,” Façanha says.

IWSR senior market analyst Luciano Anavi describes his category outlook as “cautious”. He adds: “Consumers in Brazil are gradually moving towards whisky, gin and RTDs, and cachaça is struggling to keep pace. Younger LDA consumers in cities are increasingly looking elsewhere.”

Ponce also notes a drop-off in interest for LDA consumers, but feels this is a cyclical trend. “People reconnect with cachaça in their 30s once they begin to better understand and appreciate the product,” he says.

Cachaça in export

At Brand Venture, which looks after export logistics and operations for Yaguara Cachaça in Europe, Asia and the Middle East, partner Luca Cardillo says the market for cachaça outside the Americas is “tiny” and requires a category-wide push.

Cardillo is targeting “premium” accounts in city hubs and notes a growing trend for fusion Latin American restaurants in major cities, which is “helpful” for gaining listings — especially if the bartender is Brazilian. But he says cachaça is “anchored to the

concept of caipirinha” in export, which “is limiting growth”. He advises positioning cachaça as a versatile “premium white spirit made from sugarcane” to expand its horizons.

IWSR's Anavi is candid about the category's export limitations. “Honestly, cachaça isn't there yet,” he says. “Unlike tequila or rum, it doesn't have the international brand presence or bartender culture behind it to turn that interest into actual consumption. It would take serious long-term investment to change that, and we're not seeing it happen.”

A tale of two piscos

Despite intrigue in Latin America, pisco is not an easy spirit to grow internationally. It is made with different grapes which — like wine — are crucial to geeks, but alienating to the uninitiated. Beyond this, its dual origin — produced in both Peru and Chile — is confusing for consumers and creates headaches for producers.

“The ongoing dispute between Chile and Peru over the denomination of origin for pisco distracts from brand-building,” warns Peru-based IWSR consultant Jessica Ibarra.

The two liquids are indeed distinct. Chile and Peru grow their own varieties and have different laws guiding production. Drinking culture differs: Chileans commonly mix pisco with cola in a piscola, while Peruvians are more likely to make a chilcano with ginger ale, lime juice and bitters.

But “for the international campaign, »

» we need to work together”, argues Nicolás Poblete Bravo, commercial director of government body ProChile. “Pisco is not a famous spirit yet. We need to work as a category, and then people can decide which [country’s] pisco they want to buy.”

Growing exports

In the last few years, ProChile has stepped up promotional efforts in focus markets including Germany, the UK and US, through masterclasses, trade fairs and consumer events. While Poblete Bravo doesn’t see pisco reaching the lofty heights of tequila, he is confident the category “can grow a lot”.

Peruvian pisco exports outpace those of Chile despite distilling less volume. This can in part be attributed to the country’s flourishing gastronomic scene. IWSR’s Ibarra views pisco as a “liquid ambassador” that has “long been leveraging” Peru’s “culinary prestige and heritage on the global stage”.

Ica Valley-based Barsol has distribution in over 50 countries, but founder Diego Loret de Mola has a selective export strategy. “I’m not going for volume, I’m going for quality,” he says. “I want the best bars in the world to be talking about [pisco], so that they can influence other bars.”

Loret de Mola is looking to grow in the Caribbean and Central America, and says “Costa Rica is getting us excited”. In Europe, he says Spain and the UK have become “hotspots” for Peruvian restaurants, opening the way for pisco.

“There’s more demand than supply”, according to Loret de Mola, but insufficient grape availability in Peru is a major barrier to category growth. Barsol produces around 50,000 nine-litre cases of pisco a year and is looking for capital investment to purchase vineyards and expand production capacity.

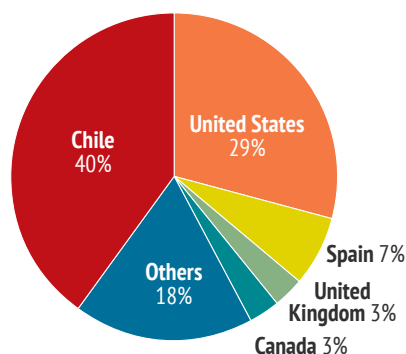
Premiumisation in Peru

Domestically, pisco has become a “saturated” market with a “race to the bottom” for larger-scale producers capitalising on the popularity of the pisco sour, Suvo’s Hildebrandt says, especially in tourist hotspots. However, he sees opportunity for smaller, “premium” brands to displace more commercial ones.

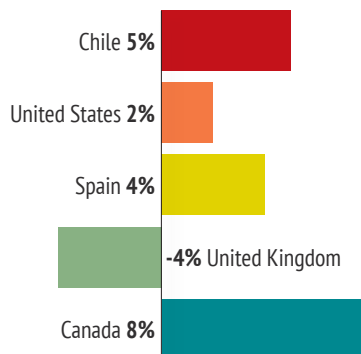
“It’s [about] going upstream a little bit in positioning and price point,” he says. “Despite some of the macro headwinds that we’re seeing in the alcohol world, premium categories are the ones that are succeeding. That’s where the space is for Peruvian pisco too.”

Loret de Mola says investing in on-trade education is key for category growth. “A lot of our competitors have pulled back their

Pisco Exports: Top 5 Countries Share of Exported Pisco Volume 2024

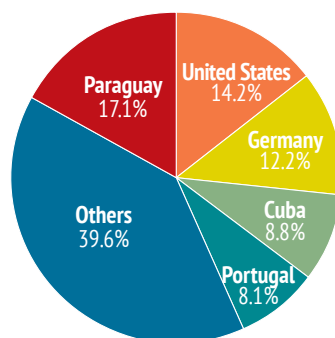


% CAGR Volume 2019–24

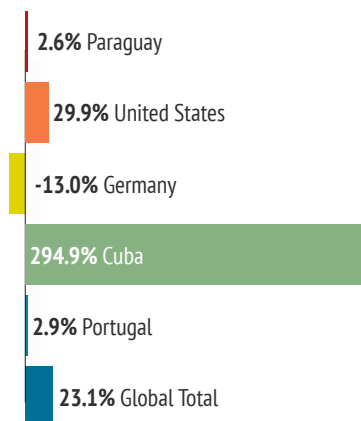


Source: IWSR, the global leader in beverage alcohol data and insights. Figures rounded to the nearest whole number

Cachaça Exports: Top 5 Countries Share of Exported Pisco Volume 2025



% Volume Change 2025 vs 2024



Source: GDI calculations based on Comex statistics. All volume figures are in '000s nine-litre cases

investment in marketing of that sort, and they’ve gone to try to depress the price, so they can compete with lower prices,” he says.

“But pisco is not a price-competitive product. You need to keep on getting the trade more comfortable understanding the category, so that they can explain it to the consumer. I am still an old-school believer that brands are made at the bar.”

Ibarra, however, paints a sobering picture of the domestic pisco market. “The category has offered consumers few reasons to get excited, with little innovation, a fairly weak presence in bars and restaurants, and inconsistent promotional support,” she argues.

That “void”, Ibarra says, has been filled by categories that seem “more vibrant”, like tequila, liqueurs and RTDs.

Furthermore, she adds, a “dense network of small, low-cost producers has kept prices low across the category, making it nearly impossible for formal players to invest in a quality-based premiumisation strategy”. Brands that have found success “through well-targeted executions” have been “isolated bright spots rather than signs of a broader turning point”.

Beyond the pisco sour

While the pisco sour has been a useful gateway cocktail for pisco exporters, Hildebrandt feels it has also “limited several of the legacy pisco brands that have gained traction in the US”.

“A lot of consumers don’t even realise that they’re consuming pisco when they’re drinking a pisco sour,” he says. Additionally, it is tricky to replicate at home, has “a lot of sugar” and contains egg white, “which makes it a little less approachable”.

Suyo’s signature serve is the pisco punch, a blend of pisco, pineapple juice and lime. Hildebrandt has also seen traction with classic-cocktail twists like negronis and martinis, but notes tequila drinkers have proved “by far, the biggest conversion as a category [that] we’ve seen. I’m not saying that agave spirits are done, but they are becoming much more saturated. [Pisco could] scratch that itch for discovery”.

With few blockbuster brands and a lack of category awareness, cachaça and pisco may remain confined to domestic markets and speciality restaurants abroad for the immediate future. “Ultimately, the brands that succeed will be those that make consumers feel that choosing pisco is choosing an authentic part of Peru’s identity,” advises Ibarra. “Producers must go beyond selling a spirit, and start selling a world.” **GDI**



Eduardo, Alex and Eduardo Jr Orendain inspect some of the Blue Weber agave cultivated to produce Tequila Arette at the family's farms in Jalisco, Mexico

New era for tequila in North America

The tequila gold rush in North America is ending. After 20 years of seemingly unstoppable growth that saw tequila and mezcal volumes in the US more than triple, the category is beginning to resemble a more mature spirits segment.

Crucially, this sector is no longer immune to the broader forces impacting the beverage alcohol business. Mexican spirits firm Becele, which owns major brands such as Jose Cuervo, 1800 Tequila and Maestro Dobel, reported a steep 36.1% drop in organic sales in the US and Canada in Q1 2026.

The family-owned tequila behemoth attributed the decline to a “more competitive environment”, the unfavourable exchange rate between Mexico and the US, and disruptions stemming from its departure from its crumbling distributor Republic National Distributing Company (see p44).

The end of the US boom

Last year's category figures tell a less alarming, but still concerning, story. Distilled Spirits Council of the US (Discus) data reveal that US tequila and mezcal volumes slipped marginally, falling from 32.199m cases in 2024 to 32.106m in 2025. Revenues, meanwhile, declined from US\$6.715bn to \$6.441bn.

Reflecting the country's worsening economic position and consumers' declining discretionary income, the super-premium category was hit more severely, with supplier revenues declining nearly 8% to \$2.934bn. In contrast, the much-smaller value tier recorded an increase of 8% to \$363m.

It was a more positive picture in Canada, where Grand View Research values the total tequila market at just \$239.1m. In volume terms, the category grew a healthy 7.4% in 2025, according to IWSR. Yet it remains a

Savvier US consumers are increasingly squeezing out inauthentic tequila brands as the power of celebrity wanes as a primary sales driver. **Joe Bates** reports

much smaller piece of the spirits pie in Canada than in the US, only accounting for 8% of Q4 2024 spirits sales at the country's largest state-controlled alcohol monopoly, the Liquor Control Board of Ontario.

Back in the States, tequila's easy-growth era is over. Between 2003 and 2025, tequila and mezcal volumes leapt more than 300% (Discus), propelled by a potent combination of cocktail culture, social media visibility and celebrity backed launches. High-profile names such as George Clooney, Dwayne Johnson and Kendall Jenner dragged tequila into the mainstream, introducing millions of US consumers to premium agave spirits.

Celebrity power wanes

But the power of celebrity alone is no longer enough to guarantee success. Retailers, bartenders and increasingly educated consumers are now demanding more than just famous ownership and pretty packaging.

Amid a recent regulatory crackdown on ‘additive-free’ claims, litigation over agave adulteration and calls for industry transparency on production, the conversation has shifted sharply towards demonstrable authenticity, openness and craft values.

“We've been saying for a while that the US tequila market is entering a more mature phase,” says Tequila Arette sales & marketing director Eduardo Orendain. “What that really means is that the consumer is catching up to the category. It's no longer just about trying tequila; it's about understanding it.”

For family-owned Arette, produced at the historic El Llano Distillery in Jalisco, Mexico, Orendain says “the shift plays

directly into who we've always been — Arette is not a brand that was created for marketing; it's a brand that comes from a place with rich history and tradition”.

Orendain says the company is doubling down on transparency and education. “We are opening up more about our process, our family and our history, because today's consumer is asking better questions and we have real answers,” he says.

Inquiring consumers

At Los Angeles-based online retailer Sipsy.com, founder Hala Shamas says her tequila consumers have grown more discerning. “Discounts don't drive sales the way they used to,” she explains. “Customers are more educated and savvier. Thanks to wellness awareness, people care more about what's in their drink, and thanks to social media, there's a lot more information available on ingredients and production.

“So, while Casamigos and other popular brands are trying to win customers back with discounts, additive-free brands are focusing on story, tradition and process.”

On-premise venues report similar behaviour. Dallas-based mixologist & beverage programme leader Sanwar Mal Khokhar says guests arrive at bars with much deeper category knowledge than even a year ago.

“Añejos are definitely getting most of the attention from guests who a year ago would have defaulted to a blanco margarita,” he says. “Curiosity is growing — people want to understand what they are drinking. A lot of people are asking questions before ordering anything.” »



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Issue of additives

» Of course, one of the things consumers ask about is additives. The answer is: it's complicated. Partly because of ongoing dispute over the use of additives (four are permitted in any tequila up to 1% by volume without disclosure), and partly because tequilas that don't use additives aren't allowed to say so on their labels.

Cazcabel Tequila managing director Chris Richards believes the debate is evolving beyond simplistic binaries. An independent 100% agave brand, Cazcabel launched in the US in 2024 and is now expanding on a state-by-state basis, with Texas, California and New York its biggest sales drivers so far.

"We are clear that additives themselves aren't the problem," Richards argues. "It is when additives are being used to cover up poor practices in the production process. All our range uses our additive-free blanco tequila as its base. The 'additive-free' conversation is moving on to be more about overall transparency of production processes."

That demand for transparency is creating what some describe as the "hollowing out of the middle". Large brands still dominate volume sales, while small craft producers are gaining credibility among engaged consumers. Brands without a clear identity or production story are increasingly vulnerable.

Need for a compelling USP

The winners in this environment are often those with a distinct point of difference. Some are highlighting heritage and terroir, while others are focusing on sustainability, organic certification or cultural storytelling.

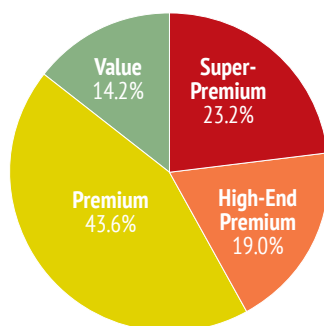
Lalo Tequila, which Tito's Handmade Vodka acquired a majority stake in last September, has built momentum through its blanco-only, additive-free positioning, while growing craft labels such as Alma del Jaguar are benefiting from rising interest in small-batch tequila.

At Loca Loka, an additive-free tequila co-founded in 2024 by Indian actor Rana Daggubati, composer Anirudh Ravichander and entrepreneur Harsha Vadlamudi, a mix of Mexican craftsmanship and Indian cultural influences helps the brand stand out.

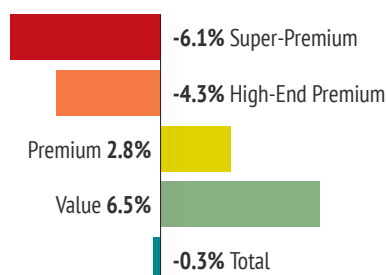
"Our India-Mexico intersection offers a fresh angle that feels authentic and ownable," says global business head Rajiv Ghuman. "For distributors, this makes Loca Loka easier to position as a conversation starter rather than just another tequila on the shelf. It helps them speak to a broader set of buyers and spirits specialists, because the brand can be framed around cultural fusion, not just flavour profile or bottle design."

DATA DROP

Sales of Tequila & Mezcal in the US % Share Sales Volume 2025

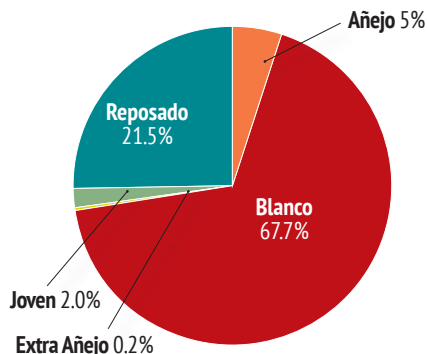


% Sales Volume Change 2024-25

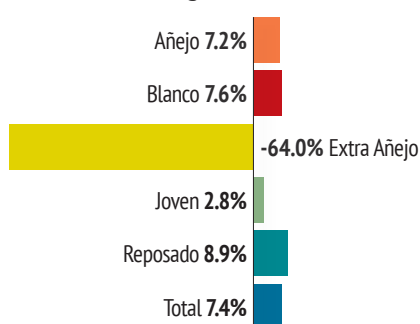


Source: GDI calculations based on Distilled Spirits Council of the US data. All volume figures are in '000s nine-litre cases

Sales of Tequila in Canada % Market Share Volume 2025



% Volume Change 2025 vs 2024



Source: GDI calculations based on Consejo Regulador del Tequila data. All volume figures are in '000s nine-litre cases

Organic labels gain traction

Organic brands are also gaining momentum as consumers increasingly associate 'clean labels' with quality. Pantalones

Organic Tequila, backed by Hollywood actor Matthew McConaughey, launched in late 2023. It has positioned itself around USDA-certified organic production while deliberately avoiding the seriousness often associated with luxury tequila.

"What has resonated for us is the balance between quality and personality," says co-founder & chairman Andrew T Chrisomalis. "We're delivering USDA-certified organic, award-winning tequila, but we're also reminding people that tequila should ultimately be about having fun and celebrating life's moments, big and small."

That tension between celebrity visibility and genuine product credibility now sits at the heart of the category stateside. Consumers may still discover brands through famous names, but repeat purchases increasingly depend on what is inside the bottle.

Operational focus

A good example is Gran Coramino, founded by comedian Kevin Hart and Jose Cuervo CEO Juan Domingo Beckmann, which has generated over \$200m in cumulative retail sales since its 2022 launch (\$85m last year alone). Crucially, the brand has framed its success around a well-executed business strategy and the quality of the liquid rather than Hart's undoubted pulling power.

That operational focus matters increasingly in a softer market where distributors and retailers are becoming more selective about which brands deserve shelf space.

"We are seeing some very aggressive pricing in the market," says Cazcabel's Richards. "We have a long-term strategy, and our pricing strategy has remained consistent in that we want to offer the best-value high-quality additive-free tequila in the marketplace."

At family-owned producer Casa Maestri, global business development VP Jose Coira says the market has fundamentally changed. "A few years ago, celebrity and big marketing budgets could carry a brand pretty far," he says. "Today, buyers and consumers ask better questions. They want to know where the product comes from, how it's made and whether the brand actually has a point of view."

"The brands that are working right now tend to have three things dialled in: a clear identity, a product that delivers in the glass and a pricing strategy that makes sense for repeat purchase."

Tequila Arette's Orendain agrees: "People are more informed. They're experimenting at home. They're looking for the same quality and value that professionals look for." **GDI**

Tequila defies market headwinds in Mexico

The spirits market in Mexico is moving into two opposing directions as the midway point of a volatile 2026 nears.

One brightly lit path is illuminated by Mexico's growing reputation as a dynamic, culturally influential drinks market, reflected in its globally admired bartending talent (Mexico City's Handshake Speakeasy was ranked second in the latest World's 50 Best Bars list), deeply rooted agave heritage and the growing international cachet of luxury brands like Clase Azul. Not for nothing did Bacardí choose Mexico to become the latest location to roll out its international 'Shake Your Future' programme to foster young bartending talent last month.

At the same time, mainstream producers and distributors are navigating a second, more challenging path beset by the country's slowing economic growth, intensifying regulatory scrutiny, wallet-emptying inflationary pressure and an increasingly crowded, competitive landscape.

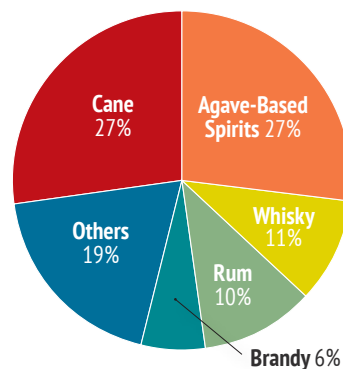
According to figures from the Imarc Group, Mexico's overall alcoholic beverage market is valued at US\$24.82bn, growing at a modest 2.28% CAGR through to 2034. With price a key factor, it's worth noting that beer, not spirits, remains by far the country's most popular choice, accounting for 94% of total consumption volumes.

Mexico's wider economic backdrop is becoming increasingly difficult to ignore despite the fillip co-hosting the Fifa World Cup this summer will likely provide. The economy contracted by 0.8% in Q1 2026, underperforming expectations and reinforcing concerns that the country has entered a prolonged low-growth phase. Inflation remains elevated, pressuring consumers' disposable income.

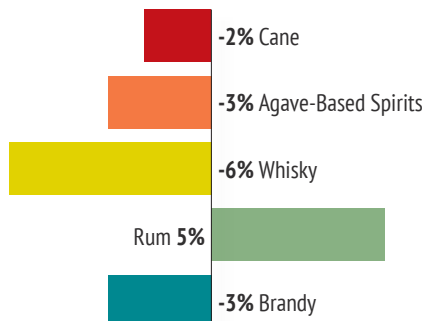
Crashing agave prices and cheaper 100% agave tequilas have given the category a boost, but Mexico's wider spirits business faces challenges despite the promise of this summer's Fifa World Cup. **Joe Bates** reports

DATA DROP

Mexico Domestic Market: Top 5 Spirits % Share of Volume Total 2024



% CAGR Volume 2019–24



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

Increased regulatory scrutiny

Notably, 2026 has also brought a significant hardening of the regulatory environment for Mexico's beverage alcohol market. Proposed health warning legislation on

drinks packaging, sustainability mandates under Mexico's circular economy framework introduced this January, and tougher digital marketing oversight are signalling the end of what has been — by international standards — a relatively permissive era for alcohol packaging and marketing.

Tightening regulatory scrutiny on the drinks sector is not the only way in which Mexico is falling into line with global trends. As with so many markets, RTDs are rapidly gaining ground, driven by their popularity among younger Millennial and Gen Z consumers. RTDs grew 6.2% in volume and 12% in value year on year in 2024, with the category predicted to grow to a value of over MXN16.5bn (\$957.9m) by 2029, according to Euromonitor International data.

El Jimador and Herradura owner Brown-Forman noted its "huge RTD business" in Mexico at its Investor Day last October, revealing its tequila-based New Mix brand enjoyed annual sales there of 12m cases.

No/low disappoints, whisky gains

Despite the progress of RTDs, Mexico is an outlier in its lacklustre take-up of no/low products. "Mexico is well behind the developed world in this trend," confirms IWSR Central & South America research director José Luis Hermoso.

"While there is definitely strong growth in percentage terms, the base is still tiny. Beer is probably the category showing more growth — much driven by the major brewers pushing their international no-alcohol marketing." »

» Alcohol-free sparkling wine has also broken through, says IWSR's Hermoso, as "no-alcohol sparkling wine is perceived to taste better than no-alcohol still wine". But, he adds, "in still wine and spirits, the no-alcohol category remains tiny".

While no/low remains stuck in second gear, whisky, whether of Scotch or American origin, continues to gain traction. The Mexican whisky market is set to grow from \$905.2m this year to \$1.47bn by 2034, according to the Imarc Group, with demand in cities like Mexico City, Guadalajara and Monterrey driving a healthy CAGR of 5.52%.

Producers are taking note: Brown-Forman has flagged the country's potential for its flagship Jack Daniel's — the market is now the group's third-largest after the US and the UK — and unsurprisingly, Irish whiskey producers are also eyeing possible growth.

The Irish Whiskey Association (IWA) held a tasting event in Mexico City last October and took part in a conference on Geographical Indications, a badge of provenance that both Irish whiskey and tequila enjoy. Exports by value have grown fourfold over the past four years, albeit from a very small base, according to the IWA, with director Eoin Ó Catháin, hailing Mexico's "bright opportunity" given its "growing middle class" and "strong, proud spirits tradition".

Agave price collapse

It's been a volatile period for tequila, by far Mexico's most popular spirit, where a dramatic collapse in the price of agave has seen major tequila makers reduce prices on key value and standard brands.

This discounting allowed tequila to grow in volume in 2025 — the only major spirits category to do so, according to IWSR's Hermoso. The agave correction has created very different dynamics across different price tiers. While lower-cost tequila brands have benefited from reduced raw material costs, he argues that premium tequila's pricing structure remains more insulated.

"Agave prices have a much smaller impact on the price of premium tequilas than they do on standard or value tequila brands," Hermoso explains. "Whether they're buying for at home or in the on-trade, consumers choose premium brands for status. Also, ageing, taste, bottle design, packaging and marketing are much more important cost components for premium brands."

That emphasis on experience and identity is increasingly central to how major tequila players are positioning themselves domestically. At Pernod Ricard's House of

Tequila — home to Olmeca, Código 1530 and Altos — premiumisation is being framed less as a linear trading-up story and more as an expansion of consumption occasions.

"In Mexico, our portfolio is deliberately structured to serve different occasions and consumer needs, from accessible premium to ultra-prestige," says the division's digital & communications director North LatAm, Israel Salgado. "Growth is not happening at one single end of the spectrum: it's happening across occasions. Accessible premium continues to drive scale, while prestige segments — particularly extra añejo — are growing faster, fuelled by consumers trading up and seeking more distinctive, high-quality experiences."

More adventurous tequila buyer

Salgado is at pains to highlight that Mexicans are not "just trading up" but "exploring". He says: "Categories like cristalinos, jovens and mezcal reflect a broader appetite for new flavour profiles and more diverse consumption occasions."

"We are responding to this by expanding beyond traditional tequila formats and embracing the full agave spectrum. Mezcal, for example, plays a key role in this strategy. With brands like Ojo de Tigre, offering joven and reposado expressions, we are addressing consumers who are already familiar with agave, but are looking for more complex and distinctive experiences."

Meanwhile, at lower price points, the sheer proliferation of brands has intensified competition, especially within the blanco and reposado segments. Andalusí Beverages international director Francisco Ruiz believes the overproduction of agave led to a "minor crisis" of brands "flooding the market". In this challenging climate, he says Andalusí's tequila-based cream liqueur line, Peligro Catrina, has found favour with younger LDA consumers.

Is 2026 sotol's year?

While tequila remains dominant, Mexico's alternative agave spirits are also gaining ground, following in the footsteps of mezcal, now a global category. Once considered niche, regional spirits, the likes of bacanora and raicilla are enjoying double-digit growth, while sotol has been feted as a breakout high-end 'wild' spirit for 2026.

Sotol Romo founder Claudia Romo Edelman describes sotol as "one of Mexico's most authentic and least understood spirits". She says: "It is often referred to as the 'third pillar' of Mexican spirits, alongside



Ultra-premium, additive-free Sotol Romo made its global debut during Super Bowl week in February

tequila and mezcal, but it is fundamentally different," she explains. "It is made from the Dasylirion plant, not agave. It grows wild in the deserts of Northern Mexico, maturing over 15 to 20 years in extreme conditions."

Sotol's limited scale is both an advantage and constraint. "The supply is naturally constrained," Edelman says. "These are wild plants that take many years to mature, but that is also part of the category's value." Consumer education remains the primary challenge: "Most simply do not know what sotol is. That is where the real work is: education, storytelling and creating experiences that allow people to discover it."

World Cup opportunities

Edelman sees the Fifa World Cup, which Mexico is co-hosting in June and July, as a "major moment for Mexican culture globally". She says: "We are actively exploring ways to be part of that moment authentically, whether through partnerships, curated experiences, or targeted activations."

The tournament, which the government predicts will attract 5.5m visitors to Mexico, is generating a wave of commemorative releases and marketing campaigns. Clase Azul recently unveiled a limited-edition Spirit of Champions release, while Diageo has launched World Cup-themed limited editions for several brands popular in the Mexican market, including Don Julio, Smirnoff, Johnnie Walker and Buchanan's.

Rather than focusing purely on visibility, companies are increasingly using the event as a platform for cultural storytelling. The House of Tequila's Salgado says: "Major cultural moments like this are an opportunity to showcase the richness of Mexican culture and its connection to agave spirits."

Of course, mega sporting events don't automatically translate into a sustained spending boom — the 2024 Paris Olympics offered a sobering reminder of that. But for a Mexican spirits sector battling several headwinds, the arrival of millions of high-spending visitors could just be the lifeline it needs. **GDI**

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Top shelf, to go — RTDs raise the bar

Creative innovators fundamentally transforming the RTD category in the US with a focus on ultra-premium ingredients and higher-ABV cocktails. **Maia Gosselin** reports

It's a new era for RTD cocktails. Once defined by sugary profiles, cheap ingredients and low ABVs, the category has rapidly evolved to that of top tier. With selections such as cucumber gin martinis, ginger mezcal margaritas and smoky old fashioned, today's labels read like a well-curated cocktail menu — and they have the quality ingredients and impressive proofs to match.

Across the US, this new level of RTDs is reshaping the category, moving it beyond light, sessionable seltzers into territory that more closely resembles an actual bar pour. For retailers and operators, these cocktail-specific RTDs offer a rare trifecta: premium positioning, strong margins and zero labour — making them one of the smartest (and fastest-moving) segments in beverage alcohol right now.

The question today isn't *whether* RTDs belong in the premium conversation, it's: how far can they go?

The industry's rising star

From hard lemonades and iced teas to spirits-based seltzers, canned beverages have been gaining momentum for years. While these products remain popular, most sit at lower ABVs — typically around 4.5% — leaving room for a new wave of more spirits-forward offerings.

Spirits-based RTDs have emerged as the industry's strongest growth category, according to the Distilled Spirits Council of the United States. Premixed cocktails reached US\$3.8bn in sales in 2025, up 16.4% year over year, and have more than doubled their market share since 2021.

There are RTD extensions from brands such as Jack Daniel's, Casamigos and Kahlúa.



Image: Andrew Thomas Lee

Atlanta-based Tip Top Proper Cocktails was founded in 2018 by childhood friends Neal Cohen and Yoni Reisman. Its RTD cocktails are now available in the on and off-trade in more than 25 states and for shipping to 40-plus states nationwide

Anheuser-Busch InBev acquired the wildly popular Cutwater Spirits and added it to its Beyond Beer portfolio, while Sazerac and Beam Suntory have similarly launched or acquired RTD cocktail lines.

But it's the top-shelf segment grabbing increased shelf space and dollars. This is evidenced by the success of new brands from creative innovators aiming to take the category to the next level with ultra-premium ingredients and higher ABVs.

'Eye-catching packaging and branding get you noticed on a crowded shelf, but what builds a loyal customer is quality and originality in flavour'

The Wandering Barman's Roxane Mollicchi



Upscale in a down economy

Massachusetts' liquor superstore chain Yankee Spirits reports that RTDs continue to have strong momentum, with a noticeable upswing in the past 12 to 18 months.

"We're seeing sustained growth in RTDs, but the biggest shift has been toward premiumisation," says Morris Karraz, store manager & spirits buyer for the chain's Norwood and Swansea locations. "Consumers are moving beyond malt-based seltzers and into spirits-based cocktails with higher ABV and more authentic formulations.

"Products that emphasise real spirits, classic cocktail formats and bartender-quality execution are outperforming." At the same time, he notes, convenience remains a key driver of sales. "Brands that can balance quality with portability are seeing the most traction."

While demographics range from Gen Z to Millennials, the criteria for purchasing have changed. "Today's consumer is well rounded," says Roxane Mollicchi, co-founder of The Wandering Barman, which has an extensive line of 10cl cocktails. "Eye-catching packaging and branding get you noticed on a crowded shelf, but what builds a loyal customer is quality and originality in flavour. You have to earn the repeat purchase.

"Most buyers are price-conscious but refuse to compromise on experience. It comes down to finding the sweet spot: craft quality at a price that doesn't break the bank. Thoughtful sourcing makes that possible." >>

Selective buying, selective drinking

» Mixology enthusiasts have high standards for the integrity of their cocktails and convincing them to go the prepared route is a viable challenge.

Tip Top Proper Cocktails co-founder & chief brand officer Neil Cohen addresses this: “What matters most is whether the drink actually delivers on what it’s supposed to be. Many people come into the category with low expectations, because they’ve been trained to expect something overly sweet, watered down, or a loose interpretation of a classic. The reaction we hear most often is some version of, ‘Oh, this is a real cocktail.’”

This comes down to a few things, explains Cohen. “First is balance. The cocktails aren’t too sweet, so they drink the way they would at a good bar. Second is strength. They taste like real cocktails. And third is loyalty to the original recipes. We’re not reinventing these drinks; we’re making them the way they’re meant to be made.” Tip Top Proper Cocktails range from 44 to 74 proof.

At MG Destilerías, which added Coppa Cocktails RTDs to its portfolio in 2024, global head of marketing Solène Bruna-Fiorentino cites a more selective consumer. “As drinking occasions decline and health awareness rises, consumers are choosing more carefully — prioritising quality and making sure what they buy feels worth the spend,” she says.

That shift is also influencing how consumers evaluate convenience and RTD formats. “Demand is growing for bar-quality experiences straight from the can or bottle as more shoppers look to recreate the on-premise experience at home,” says Bruna-Fiorentino. “In that context, a \$6 canned cocktail feels like strong value compared to an \$18 bar drink.”

Yankee Spirits’ Karraz points out that this mindset also ties in with the ‘small indulgences’ factor, noting: “There’s a ‘treat’ mentality at play; people may be going out less frequently, but they’re willing to spend a bit more for a premium at-home experience. Trust in the brand and consistency of the product are key factors in justifying that higher price point.”

Quality vs convenience

For years, the RTD conversation has centred on a trade-off between quality and convenience. According to Tip Top’s Cohen, that dynamic is beginning to shift. “For a

long time, you had to choose between quality and convenience — that’s what’s changing,” he says. “Even at some of the best bars, batching is used to improve precision and consistency.”

That same logic is increasingly resonating with consumers at home, where the appeal of playing bartender can fade as the night goes on. “At home, it’s similar: making one or two drinks can be enjoyable, but over the course of a night, it becomes a chore,” Cohen explains. “That’s where prepared cocktails fit in — you can keep things moving without stopping to build every round.”

Importantly, he notes, convenience does not have to come at the expense of experience: “You can still elevate it by shaking or stirring and serving over ice with proper glassware and garnish.”

Trading down or up?

There is an argument that the popularity of spirits-based RTD cocktails is having a negative effect on spirits sales; that rather than buying a bottle of vodka or tequila, consumers are ‘trading down’ with RTDs.

“That may have been true in the early days, but it doesn’t reflect where the category is today,” asserts Karraz at Yankee Spirits. “The premium segment, in particular, is more about trading across rather than down. Many of these products are priced similarly to mid-tier spirits, because they’re offering a different kind of value — consistency, convenience and a well-executed cocktail without the need for additional ingredients or skill.

“For many consumers, especially those entertaining or looking for ease, that’s a worthwhile trade-off rather than a compromise in quality.”

MG Destilerías’ Bruna-Fiorentino sup-



Tip Top Proper Cocktails co-founder Neil Cohen

‘Many people come into the category with low expectations... What matters most is whether the drink actually delivers on what it’s supposed to be’

ports this, noting: “Our mission is to make cocktails accessible and joyful to all, in an easy and convenient way, offering the highest-possible quality while we meet the standards of industrial production and the distribution and retailing constraints. We only use real spirits and natural ingredients and aromas.

“Cocktail bars and spirits will always be the benchmark, and they convey the whole experience, the craftsmanship, the history. One cannot substitute the other, but RTD cocktails can open the way to a cocktail culture where it was nonexistent.”

The Wandering Barman’s Mollicchi understands the concern. “Honestly, I get it,” she says. “Most RTD brands aren’t making quality cocktails, so the assumption is fair. But we do things differently: real ingredients, bottled in-house, obsessing over every detail.” »

Coppa Cocktails has 16 ready-to-serve products in its line and was rolled out to the US in 2022



Coffee cocktails with kick

» There's more to the coffee cocktail conversation than just the espresso martini. Cobblestone Brands has entered the US RTD space with Irished Up, a nitro cold brew Irish coffee packaged in a 20cl can.

Launched just ahead of St Patrick's Day, the product is positioned as a year-round offering, with particular appeal in the summer months when cold brew consumption spikes. "The reaction to Irished Up has been phenomenal and has exceeded our expectation," says head of commercial for the US Donal O'Gallachoir.

"Week by week, distribution is expanding and real momentum is building. Irished Up sits at the intersection of coffee culture and premium whiskey, and we see a clear opportunity for it to become the definitive 'whiskey and coffee' RTD."

He notes that the product's visual presentation — especially the nitro cascade when poured — helps convert first-time buyers. The brand is now targeting expanded on-premise placements, including golf courses, hotels, ships and train service.

On-premise... the next frontier

Perhaps the greatest potential for the category lies in the on-premise.

Noted spirits specialist & brand consultant Sailor Guevara believes the opportunity is just beginning. "All the data show the RTD cocktail category is on a strong upward trend," she says.

'It won't take long until the hospitality industry realises that gain of time, money, speed, recruitment through a new offer and consistency in the serve are all benefits'

MG Destilerías global head of marketing
Solène Bruna-Fiorentino



"Quality will be the next big driver. Many craft and emerging brands are making a real impact with genuinely top-notch products." The challenge, she notes, is positioning. "How do you work premium RTDs into a higher-end bar programme? They can help manage costs, consistency and speed of service, but they need to be used intentionally."

Tip Top's Cohen points to espresso martinis as a clear example. "They're one of the most in-demand cocktails, but difficult to execute consistently at scale," he says. "Bars either end up with inconsistent versions or get backed up trying to make them. Offering a solution that improves both speed and consistency is a strong entry point."

More broadly, Cohen says RTDs work best where execution is complex. "We focus on cocktails that are high-touch, require fewer common ingredients, or are easy to get wrong. In those cases, having something that's already dialled in can make a lot of sense — especially for venues where cocktails aren't the primary focus."

Mollicchi believes it's not the bartender who needs convincing but the bar owner. "Many don't realise they're leaving money on the table. Not every bar is cocktail-forward, but every bar needs a cocktail offering today," she asserts.

"Whether you're a brewery, a wine bar or a music venue, that 20% of guests ordering cocktails might be the difference between people staying or walking out the door. We've been building this category since 2018 and were truly the first premade cocktail brand focused on on-premise."

Mollicchi's co-founders Darren Grenia and Julian Mohamed built a reputation for top-shelf prebatched cocktails at their bar, Yours Sincerely in Brooklyn, New York (Mollicchi was bar manager), which focussed on cocktails pulled from a tap. The trio rolled out their first bottled RTD cocktails under The Wandering Barman label in December 2017.

QiQi bar in New Orleans, Louisiana, carries The Wandering Barman's Mezcal Margarita and Pineapple Sling. "The quality is



The Wandering Barman's bottled RTD cocktails come in nine flavours and are available online and in restaurants, bars, hotels and stores

superb," says owner Angela Haber. "I love the variety, it offers something extra, especially when we're in the weeds," she says.

While Haber's bartenders make most drinks from scratch, the RTD options offer something different, featuring ingredients QiQi doesn't necessarily keep onsite. "It was an excellent choice to do this," she adds. "Honestly, I wish we had done it sooner."

Sky's the limit

MG Destilerías' Bruna-Fiorentino sees limitless possibilities for RTD cocktails in the on-premise. "It's very promising: bars, festivals, sports games, pop-up venues... all are going to pick up," she says. "The super-premium tier of RTDs will find their spot on menus. It won't take long until the hospitality industry realises that gain of time, money, speed, recruitment through a new offer and consistency in the serve are all benefits to the operations of a bar."

"There's a whole new segment of bars, day eateries, coffee shops, that don't have bartenders yet could serve premium RTD cocktails, as the consumer is curious."

For operators facing staffing challenges or consistency issues, the appeal is increasingly practical. However, Guevara emphasises that premium RTDs shouldn't be mistaken for shortcuts.

"Take Hoste Cocktails' Gold Fashioned," she says. "It retails for around \$150, or about \$15 per cocktail, with packaging that fits right into an upscale setting. RTDs could be a game changer. I wouldn't dismiss the category — the demand is obvious." **GDI**

White Claw owner ‘in a position of real strength and momentum’

EXCLUSIVE Many people have never heard of Mark Anthony Brands, but they know its bestsellers: White Claw and Mike’s Hard Lemonade. We caught up with company president **David Barnett** just after the hard seltzer pioneer bought spirits RTD brand The Finnish Long Drink

Mark Anthony Brands is a privately held company founded in 1972 by Anthony von Mandl, who pioneered high-end winemaking in British Columbia’s Okanagan Valley. Today, it is the No.1 beverage alcohol RTD company in the world and No.4 beer company in America. How are things going right now? We’re in a position of real strength and momentum. We’re still very focused on being the flavour leader in beverage alcohol, and we’ve really tightened up our portfolio, our marketing and how we show up commercially.

We’ve steadily grown share — up 10 basis points in 2024, 15 in 2025 and another 21 year to date in 2026 — and we’ve hit some milestones we’re genuinely proud of, like surpassing 1bn cases in lifetime sales and returning White Claw to volume growth. Most recently, we are excited about our announcement [in April] to acquire and scale The Finnish Long Drink brand.

What’s been keeping you busiest over the past year? A lot of my focus has been on making sure our core brands are set up to win long-term — getting White Claw back into growth, sustaining Cayman Jack’s double-digit momentum, continuing to evolve Mike’s Hard Lemonade, holding Harder steady in an incredibly competitive high-ABV single-serve space, and building for the future with brands like Dillon’s and MXD.

Integrating The Finnish Long Drink has been a major focus — bringing it into the Mark Anthony system thoughtfully while continuing to grow the brand and stay true to what its passionate fans already love.

What are your most significant growth drivers? The flavoured beverage alcohol space continues to be the primary growth engine for the industry, and it’s where we’ve built a clear focus and competitive advantage. Core brands like White Claw and Cayman Jack continue to outperform the category,



Mark Anthony Brands president David Barnett

with White Claw Surge driving incremental growth in higher-ABV occasions and White Claw Zero Proof expanding our reach into non-alcoholic moments. Those segments are helping us grow by meeting consumers where their preferences are evolving.

We’re [also] navigating broader macro pressures — from economic uncertainty to more moderated consumption trends across certain consumer segments. Those dynamics reinforce why staying disciplined around flavour, innovation and occasion-based relevance is essential to sustaining growth.

How is performance trending between retail and on-premise channels? We’re seeing

The ‘Make it a Couple of Claws’ promotion saw White Claw literally pick up US\$1m in bar tabs

strength across both off and on-premise, though they’re playing different roles. Off-premise continues to be the largest driver of volume, while White Claw, in particular, is showing growth in both channels — especially on-premise, where maintaining and building on the momentum we’ve created is an important focus for us.

As occasions evolve, our priority is making sure the brand shows up in the right moments — whether that’s at home or in bars, restaurants and live experiential settings — so we continue to earn relevance across both channels.

What strategies are you using to strengthen your on-premise presence? It starts with understanding how people actually behave in social on-premise settings. Programmes like our White Claw ‘Couple of Claws’ \$1m Bar Tab were designed to interrupt default ordering behaviour and drive real trial in moments where group influence and shared experiences matter most.

Beyond that, it’s about showing up meaningfully in culture through the right partnerships and experiences, so White Claw isn’t just listed on a menu, but actively shaping how and when people choose to drink in those occasions. >>

» Von Mandl is known as an insatiable innovator. Mark Anthony is a global business with a portfolio across wine, spirits and RTDs. Describe its DNA. We're an innovation-led company at our core, with a relentless focus on quality and craftsmanship. We operate with a sense of humility and curiosity that allows us to keep learning and evolving. Being privately held gives us the freedom to think long-term, take smart risks and challenge conventions in ways that larger, more traditional players often can't.

Before joining Mark Anthony in 2022, you spent 18 years at Diageo. What prompted the change? My 18 years at Diageo were spent across a range of leadership roles, which gave me a strong foundation in building global brands at scale and understanding the dynamics of a large, complex organisation.

What ultimately drew me to Mark Anthony was the chance to take that experience and apply it in a more entrepreneurial environment. One that moves fast, shapes emerging categories and isn't afraid to take bold bets. It felt like an opportunity to be closer to where the industry is heading and to have a more direct hand in building what comes next.

What differentiates your brand-building approach compared with legacy spirits and beer companies? We take a very focused, consumer-first approach to building brands. It starts with a deep understanding of how people are actually drinking and socialising, then building products and experiences around those occasions rather than chasing short-term trends.

We operate with an entrepreneurial mindset by testing, learning and moving quickly, which allows us to create and scale new categories. You see that in innovations like Mike's Dirty Lemonade. In testing, it ranked in the top 20% of innovations, with 92% of people saying they were likely to buy and 63% saying definitely. This gave us confidence we were landing in the right place.

Sales for Mike's Hard Lemonade, a brand that launched in 1999, surpassed 1bn this year. What do you credit the brand's endurance to? Mike's has stayed relevant by staying true to what made it work in the first place — bold flavour, originality and a point of view that's always been a little unapologetic. As one of the brands that helped establish the FMB [flavoured malt beverage] category, it's continued to evolve as consumer tastes have changed, without losing that core spirit. I've also been pretty open that the brand



Mike's Hard Lemonade's 'Made with Real Character' campaign debuted in March and features a trio of animated lemon mascots designed to resonate with younger LDA consumers craving authenticity

needed a real shot in the arm and we're confident we have the right plans in place to deliver that. You're seeing it come to life through a strong new campaign with 'Made with Real Character', alongside innovation like Mike's Dirty Lemonade. It's inspired by the dirty soda trend and each flavour delivers more personality and more originality in a way that feels unmistakably Mike's.

How are you prioritising investments? It comes down to focus and diversification. We're investing behind the brands and innovations with the greatest potential to drive impact, while expanding into new areas like non-alcoholic offerings, including White Claw Zero Proof. The Finnish Long Drink acquisition is a prime example of this diversification. It strengthens our portfolio in a complementary space and positions us to capture new occasions and consumers.

What role does premiumisation play in your strategy? We've always believed our brands earn their place through quality, flavour and the overall experience. As the industry evolves and people drink more selectively, that becomes even more important — every product has to truly deliver.

If there's one thing we're confident in, it's our liquids. Flavour is our real foundation and what gives everything else — packaging, marketing, partnerships — real credibility. For us, premiumisation isn't about charging more, it's about delivering something distinctive and great tasting across occasions that people are excited to come back to.

Last year you focused on streamlining your portfolio. Why? It really came down to focus and discipline. We made deliberate choices to double down on our core brands and the parts of the business delivering the greatest impact, which allows us to move faster and

invest where it matters most. We're also one of the few companies willing to make the hard call to quickly exit brands or businesses that aren't working, rather than letting them distract from core priorities, and our distributors and retail partners genuinely appreciate that clarity and rigour.

What are you most proud of across your brand portfolio right now? There's a lot across the portfolio that makes me proud, but if I'm being honest, getting White Claw growing again really stands out. After the early hyper-growth phase, many people doubted whether the brand — and even the category — could reaccelerate, and proving that wrong has been incredibly rewarding. Staying close to culture, continuing to evolve the brand in meaningful ways, and seeing that momentum return has been energising. It reinforces just how much runway White Claw still has ahead.

Are there any newer or smaller brands in your line-up that people should pay more attention to? There are a couple building real momentum: MXD is resonating with a younger, more expressive consumer with higher ABV and bolder flavours, and Dillon's is growing quickly with an emphasis on premium, craft-quality cocktails. Each is solving a different need, which is what makes them compelling. »

'Growing quickly': Dillon's vodka and gin RTDs



» **White Claw launched in 2016, now holds over 50% share of the malt-based RTD category and is still growing. How does it stay fresh?** We've built White Claw as a portfolio that meets different needs, from core refreshment to higher ABV and non-alc. That breadth keeps the brand relevant as consumer needs evolve and we're extending that into culture through partnerships like Teddy Swims, where we're creating more opportunities for people to come together over music and shared experiences. At the same time, we're continuing to refine flavours and formats, and we're seeing that land, with newer offerings like White Claw Surge delivering double-digit growth nationwide.

There's a lot of talk about hard seltzer 'cooling off' in the US. What's your take? The category has matured, but the fundamentals are still strong. After several years of rapid expansion when thousands of brands tried to chase what White Claw created, we're seeing the category settle into a healthier place and even get close to growth again.

Consumers continue to look for options with choice in flavour, format and ABV, often as an alternative to beer. White Claw continues to be a clear favourite — 73% [of US LDA adults] say they would drink White Claw if it was available [according to a January–February 2026 survey by Edelman Data & Intelligence with YouGov]. What we're seeing now is less like a slowdown and more like the next phase, where demand is shifting into new occasions and need states, and brands like White Claw that truly resonate will continue to lead.

What do people get wrong about the state of hard seltzer? There's a tendency to look at it as a single occasion product, when in reality there's still meaningful opportunity as people look beyond their default drink choice. A significant portion of consumers still default to beer (52%), but 29% would deviate if a better option were available.

During college basketball's biggest tournament in March, we leaned into that behaviour with the 'Make It a Couple of Claws' programme that I mentioned earlier, directly challenging beer in high-energy social occasions. Our focus is continuing to intercept those cultural moments in a deliberate way and earn incremental share.

Are spirits-based RTD cocktails the biggest threat to hard seltzer? They're really serving different occasions. In many ways,



White Claw has partnered with Grammy-nominated artist Teddy Swims for a global campaign

spirits-based RTDs are expanding the overall space by bringing in new consumers and use cases, rather than taking away from hard seltzer. From our perspective, it's less about a zero-sum game and more about how the category continues to evolve. We see them as complementary, with each playing a distinct role in how and when people choose to drink.

What changes are you seeing in how younger consumers approach alcohol? They are more intentional in how they drink. They're not necessarily opting out, they're just making more deliberate choices about what, when and where. That shift is real, but some headlines oversimplify it. What we're seeing is a push toward more variety, better experiences and more flexibility across occasions, which is creating opportunity for brands that understand those behaviours and meet consumers where they are.

How are your flagship brands evolving to stay relevant? For us, staying relevant starts with evolving with culture and consumer behaviour, not chasing trends for the sake of it. With Mike's Dirty Lemonade, we introduced something genuinely new for the brand and for the FMB category — a smooth, non-carbonated hard lemonade inspired by the dirty soda trend that builds on Mike's reputation for flavour-forward innovation.

Brands like White Claw continue to evolve by expanding across occasions and moments where consumers are drinking today. We're pairing strong innovation with programming and partnerships throughout the summer and beyond, so both brands are showing up in the right places at the right times.

Is the zero-proof White Claw working to keep consumers engaged in the brand when they are not drinking alcohol? The feedback we get from consumers is clear — they love having the choice. Across the country, social lives are evolving, and so are the ways

people drink — [they are] calling for choice, flexibility and flavour in alc and non-alc. People are grabbing drinks on trails and pickleball courts just as much as they are in bars and backyards, and in every situation, we want to deliver quality, convenience and choice, designed for how people drink today. With the rise of zebra striping, we've seen success with White Claw Hard Seltzer and White Claw Zero Proof offering the same flavour profiles in both alc and non-alc.

Are any flavour or ingredient trends about to take off? With Mike's Dirty Lemonade, we're drawing direct inspiration from the dirty soda trend and putting a distinctly Mike's Hard spin on it. Non-carbonated flavoured alcohol is up 12.4% year on year and nearing 100m cases [Circana 2025], which signals a real shift in how people are choosing to drink. We see that trend and the success of Mike's Dirty Lemonade as an opportunity to build on something that's clearly resonating with consumers, while staying rooted in bold flavour and originality in a way that works for the brand.

Are there new categories or adjacent spaces you're exploring? We're always looking at areas where consumer behaviour is evolving and where our capabilities can translate into differentiated growth. Spirits-based RTD is one space we're particularly mindful of, given how consumer preferences continue to shift across occasions, but our broader focus remains on being disciplined and thoughtful as we expand the portfolio.

When you look ahead a few years, what parts of the business excite you? How consumer preferences are continuing to shift toward lighter, more flexible ways of drinking. That opens up real opportunity for us to keep expanding occasions and formats. At the core, it's about staying very focused on the consumer and continuing to build brands that earn their place in more moments.

Do you think the alcohol industry needed a reset? It needed to refocus on the consumer. Growth will return, but it won't be uniform. It will come from brands and subcategories that meet real shifts in how people want to drink, like moderation and convenience. Hard seltzer changed expectations, and that's not going away. Going forward, the winners will be the brands that keep innovating against those needs and show up in the right occasions. [GDI](#)

Molson Coors: M&A ‘fundamental’ to ‘reshaping our portfolio to be broader’

He may operate in a ‘world of secrecy’, but Andrew Tchadovitch is a ‘part of the funnel that helps shape and steer’ Molson Coors Beverage Co. The VP of strategic relationships & M&A at the Canadian–American multinational speaks to **Olly Wehring**

What is your current remit? I’ve been with Molson Coors for coming up to three years and report to the group CFO, Tracey Joubert. Ultimately, I have ownership of anything that’s inorganic for the company — basically, the borrow-and-buy activity.

I lead on traditional M&A, like the Monaco deal we just announced. [Monaco is the leading independent canned cocktail brand in the US; Molson Coors acquired its creator, Atomic Brands, in March.] I also lead on our partnerships, like the Fever-Tree arrangement. [Molson Coors entered a strategic partnership with Fever-Tree to produce, sell and distribute its premium mixers in the US in February 2025. As part of the deal, Molson Coors bought an 8.5% stake in Fever-Tree for GBP71m (US\$95m).]

I’m not involved in the operational day-to-day of these; I manage the relationships with the partner. The partnership element’s the day job, while M&A becomes the night job!

Molson Coors Brewing Co became Molson Coors Beverage Co in 2020. Does the name-change influence which categories you’re busiest in? Beer is always the core of the business — we see ourselves as custodians of the category, so we’ll always look at opportunities in beer.

The focus, though, is how we become more to more people in the beverage space. That obviously leads towards thinking about how we build outside beer, across both alcohol and no-alcohol. For example, we recently plugged a portfolio gap in spirits-based RTDs, which is a space we were behind on, while Fever-Tree is a prime example of a non-alcoholic extension into more occasions.

All of this gives me a pretty broad scope: where do we have a right to play and where do we have a right to win? We can’t do everything, so we need to be selective. In some respects, I’m part of the funnel that helps shape and steer Molson Coors.



Andrew Tchadovitch: ‘Everyone’s trying to do more and be in a lot of categories’

What impact does the trading environment for Molson Coors have on the group’s M&A strategy? Inorganic is important for us, as we’ve laid out in our ‘Horizon 2030’ strategy. Probably for the first time in a long time, Molson Coors has been explicit around the fact that we want to drive 1% to 2% of our top-line growth through inorganic activity.

Portfolio transformation is an important aspect of what we’ve got to do. We see M&A as being more fundamental to what we need to achieve. The world’s changed a fair bit in recent years and the macro-environment is different. But there’s a realisation, particularly with Rahul [Goyal] as our CEO, that M&A will be more at the forefront of reshaping our portfolio to be broader. This applies globally — people are trying different things to reshape their portfolio. Carlsberg’s acquisition of Britvic [in January 2025] is a strong example of this.

Everyone’s trying to do more and be in a lot of categories.

With this more explicit level of expectation from M&A, does that increase the pressure for every transaction to be the right one? There’s always pressure around M&A. It’s so publicly scrutinised that you never want to get any of them wrong. It goes back to

having conviction in the strategy and the alignment internally on the categories we want to go after. You need to take a longer-term view on how you’re transforming the company.

It’s hard to say with hindsight whether a transaction was right or wrong. It’s more about whether it gives the business more relevance and more gravitas with the consumer.

What are the key elements on your checklist when considering a transaction? No one deal is identical — they’re all unique. There are a lot of factors that go into making sure something’s the right deal for us. Our broad-brush guidelines are pretty public in that we want them to deliver 1% to 2% top-line growth.

We also want them to be earnings accretive. Bottom-line profitability is of paramount importance. There are a lot of challenges in the new wave beverages that have come through that are driving a lot of top-line growth and trading on revenue multiples, but don’t have a lot of bottom line. If you don’t have that profitability, then you need to have an identifiable way to drive that profitability, whether at the COGS level or the SG&A level. »

» Then, we want to see a brand that's of a sufficient size in terms of volume that we can amplify through our network. Where do we have a real ability to take that brand into the next echelon of its growth and development?

Other considerations include portfolio fit — does it fill a portfolio gap that we need and how does it work with the rest of our portfolio? — and whether the brand has longevity in the marketplace. That's always a risk in the modern day and age of beverage M&A, that brands may not survive in the longer term.

Finally, there's the cultural compatibility between organisations. Making sure you're buying a brand or a company that resonates with your ethos and what you're trying to achieve makes a massive difference. If you have the right people on the other side of the table, you can make a success of a lot of it. If you have the wrong people in for the wrong reasons, it can go pretty pear-shaped pretty quickly.

How does the process work? Do you receive approaches, or do you go shopping? It's both. If there are categories that we want to build our portfolio in, the onus is on me to provide my connections in that space. If I don't have connections, then I have to make them. Then, there's a piece that goes the other way, where people are running a process and ask if we'd like to participate.

On the partnerships front, it's more about us approaching people rather than them reaching out, although we do get companies looking for distribution opportunities too.

You've had a change of CEO recently, with Rahul Goyal replacing Gavin Hattersley late last year. Has this switch made M&A more appealing to Molson Coors? For context, I

reported to Rahul when he was in his former role as chief strategy officer. In fact, he hired me. At that point, M&A was probably more at the forefront of the acceleration plan. As he's moved into the CEO role, it's been a natural step that Rahul's taken that with him is part of his ethos and strategy. I don't think the landscape changed overnight.

It seems it's a seller's market at the moment. Does that translate to the prices you're being quoted? There have been a lot of transactions in spirits-based RTDs in recent weeks, given the growth in that segment. But value expectations have had to be re-rated a bit, based on where the sector is trading. No one can afford to pay big multiples anymore. I'd say it's more a case of people being prudent, doing the right deals and seeing the value they think they can bring.

Looking at the category as a whole, the long-term standing buyers are the only ones that are really there. There aren't many external forces, such as private equity, driving competitive tension upwards.

Could you talk us through the Fever-Tree tie-up and the Atomic Brands purchase? With Fever-Tree, we saw how the brand had been performing and had reached a certain size and scale in the US where, through the power of our distribution capabilities and sales teams, we could take it to the next level and accelerate its next phase of growth. That's where it made a lot of sense for us, giving us a meaningful position in an area where we think we have the right to win, while also building out our portfolio.

With Monaco, you've got a brand that's been built over a 15-year period and is a meaningful player in the spirits-based RTD space. As well as having scale, Monaco also

has heritage in terms of having been built in a sustainable way. Again, this was a brand of a size and scale that we wanted to add to our portfolio and grow, in terms of our top line and earnings.

The common theme in both cases is that these were in categories that we weren't in.

Is there a fear that Molson Coors' diversification strategy strays beyond its established skill set? I don't think it's a fear. There are learnings that come with going into new categories and we're making the right investments to support that. We've also brought people into Molson Coors from Fever-Tree and Monaco to keep the brands growing in the right way.

We recognise that we need to bring the right expertise and capabilities in to build that skill set and that muscle. We're also cognisant enough to know there are areas that we need to preserve in these brands.

What in your role is the definition of success? Ultimately, I want to see the portfolio grow and for us to execute our strategy. I want to do that in a way that means the brand goes from strength to strength once it becomes a Molson Coors brand. Being able to leverage our skills and capabilities to take brands from point A to point B and be part of that journey is the real highlight of my role.

For most of what I do, I operate in a world of secrecy, so it's always nice to see the energy and excitement from the team when we go public.

What's top of your in-tray? In terms of what to do, or what to buy? I'm heavily focused on integrating Monaco into the Molson Coors network. Beyond that, I can't tell you what else is going on, but I'm busy building the pipeline for the next opportunity. **GDI**



The link between Molson Coors' Fever-Tree tie-up and acquisition of Monaco? 'In both cases, that these were in categories that we weren't in'



VIEW FROM THE ON-PREMISE

Charlie Mitchell

Can hospitality be the global safe haven from what feels like an avalanche of apocalypse?

If I am being honest, 2025 wasn't exactly a vintage year. We witnessed stifling and (to put it mildly) erratic trade tariffs, mounting geopolitical tension, market crashes, eruptions and escalations of armed conflicts, widespread and crippling perceptions of helplessness and, quite predictably, collapses in consumer confidence.

Hospitality suffered too, with a perfect storm of rising costs and economic uncertainty resulting in a balance sheet that was tough to balance, visitors who were reluctant to visit and drinkers ostensibly not drinking.

Reflecting on the seemingly universal sense of catastrophe, World Economic Forum president & CEO Børge Brende described the situation as "one of the most uncertain geopolitical and geo-economic moments in generations". Thank God we got past that.

Or not. 2026 swiftly arrived with a greeting that said: "Hold my beer."

Not even halfway in, we have witnessed new and reimagined trade wars, more utterly devastating and tragic conflicts, fresh economic turbulence, a crushing wave of universal anxiety and mentally exhausting soundbites every time we open our phones.

It feels as though we are constantly days away from cataclysmic disaster and you may be forgiven for thinking that perhaps eating and drinking out isn't actually all that important.

History, however, suggests otherwise. Take the example of the wartime British pub, the Cockney boozer that not only stayed open when the air raid sirens were wailing, but thrived as a community hub, offering familiarity, warmth and a sense of kinship. There are also tales from the immediate aftermath of 9/11 of strangers congregating in bars for a sense of humanity and of decency.

Fiction also agrees. In the 2004 British cult classic (and a personal favourite)



Shaun of the Dead, the escape plan from a zombie apocalypse is to "go to The Winchester, have a nice, cold pint and wait for all of this to blow over". In this sense, The Winchester isn't merely a pub, it is a symbol of comfort, safety and of human connection.

My take is that the 2026 version of apocalypse is in need of hospitality more than any other. An anxiety crisis, fuelled by doomscrolling and the ease and accessibility of retreating into the sofa to binge-watch trash TV, requires an antidote of in-person, real-life, human hospitality.

At times like these, the escapism of being looked after and being shut off from the outside world is particularly appealing. It comes as no surprise that, within this context, we have seen a rise in venues offering intimate experiences. Japanese-style listening bars, literally designed to shut out external noise, continue to grow in popularity, especially among younger consumers looking to immerse themselves in sound.

A similar theme has emerged in the annual James Beard US restaurant, bar and hospitality awards, which revealed its 2026 nominees at the end of March. Small, cosy venues in which the barrier between front of house, back of house and guest are often non-existent have secured the

most nominations. These are places in which visitors can cocoon from the outside world and enjoy pure, unfiltered eating and drinking experiences without distraction.

Alongside these ultra-exclusive, small-cover venues that provide a much-needed sense of escapism, there is a greater need for accessible, communal hospitality. And I believe drinks brands could — and should — play a part in this.

Brands with longevity need be about more than drinks sales. Suppliers to the on-premise sector should see their duty as not only a commercial one, but a civic one.

Along with providing the social lubricant to get people talking once in venues, brands should provide the reason for consumers to get off their phones and into bars. They need to bang the drum for human connection to help operators to fill the spaces that facilitate connection.

That's why my favourite campaign of the year so far has been Heineken's 'Praise the Bar' digital miniseries, spotlighting the bar as the place that "guarantees good times and great stories" and where "we meet ourselves and others".

Indeed, Heineken has led the way in promoting the value of the on-premise as a sector that delivers both community and commercial benefits, consistently referencing the sector as more than a sales channel.

The results so far? Well, the Dutch beer giant is far outperforming competitors in its latest results, bucking the trend in a globally uncertain marketplace to post growing net revenue and operating profits.

Because, at its best, the on-premise sector serves more than drinks, it serves communities. So who's coming to The Winchester with me? **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

What's driving cocktail choices at the bar?



Elayne Duff



Kevin Denton Rex



Meaghan Dorman

Heaven Hill Brands global director of advocacy Elayne Duff

"A few very real factors go into what someone orders. First, price. Guests are absolutely doing the mental math. Is this drink really worth US\$24? That question is happening at the table whether we like it or not.

Second is familiarity. Nostalgia and classic structures matter more than people admit. Most everyday consumers are far more likely to order something if they recognise a couple of ingredients. It gives them confidence. It gives them a sense of what it's going to taste like before it even hits the table.

Third, values. Locally sourced ingredients and sustainability make people feel good about their choices. If a drink supports something responsible or thoughtful, that can absolutely tip the scale.

By all means, elevate your drinks. Use interesting techniques. Play with obscure ingredients. But you have to give people something to latch onto — a flavour cue, a recognisable spirit, a clear reference point. They need to be able to imagine the drink without having to Google every ingredient, or interrogate the server. Because the moment it starts to feel like homework, they default to a tequila soda and call it a day."

The Spirits Authority director Kevin Denton Rex

"We collected data from more than 110 top bars from the most dynamic drinking cities around the US and found folks are going out far more intentionally. People are deciding where they would like to go well in advance of their visit; they're looking at menus and choosing drinks that look good in photos.

This builds anticipation and the payoff comes when you snap that photo and claim the 'yep, I've been here too' cred. This consumer is price sensitive in that they will get whatever that signature cocktail is, but

Now, more than ever, consumers are drinking with intention. Factors like price, nostalgia and mindfulness impact their choices and each holds an opportunity to improve sales. **Maia Gosselin** checks in with a trio of noted spirits industry experts for their insights on how best to maximise cocktail potential at the bar

maybe their frequency of going out isn't as much, because it has gotten so expensive.

Cost pressures coupled with cocktails becoming more complex equates to expensive cocktails that are a gamble for consumers. It seems like bar directors have been using advanced techniques, equipment and ingredients to justify high prices, but ultimately this can be detrimental to the drinker if the cocktail can't be customised — made from their chosen base spirit because drinks are pre-batched — or if it's so intense the guest will only order one.

Nostalgia speaks to non-threatening exploration. Given this 'gamble' mentality, when a guest reads a menu item that is a riff on something familiar or nostalgic, it takes the edge off the X factor of 'I don't know what that ingredient is'. Classic cocktails dovetail here, because there's a familiarity or baseline to what they are supposed to taste like. Riffing on a classic seems to be about 80% of what proprietary menus are in 2026 and that's not necessarily a bad thing.

The no/low movement has reached a tipping point where it's more about creating an inclusive experience than an afterthought for non-drinkers. Even though folks are drinking less, they don't want to have a 'lesser' experience. There's a food analog here — the vegetarian option used to be a combination of side dishes thrown together, not special and not on par with what the meat-eater was having. Chefs woke up to the opportunity to woo plant-based diners so that they weren't losing business. I'm very bullish on this trend and think when it's done well it can be one of the things that helps 'save' bars during these headwinds.

A trend I'm seeing that shows positive sales results is the resurgence of mixed shots. These act as an easy way for a guest who doesn't want to commit to another full drink to have something the bar has crafted rather than a simple neat pour. It's a great bartender handshake for fellow trade folks and regulars. The classic is the snauquiri — a half-sized daiquiri. It's a bartender favourite that goes down easy. When you see this on a menu, it says you're in good hands."

Raines Law Room & Dear Irving bar director Meaghan Dorman

"I have seen many 'tiny options' getting traction in spots. It's a fun, comparatively low-cost way to start an evening, or to have a toast moment in a group. Tiny martinis are especially cute and popular.

In our bars, guests seem invested in our creativity with the menu, asking questions about the style and flavour of serves. We give small descriptions on the menu and more in-depth info in training so that servers and bartenders have a lot of agency in helping to guide a guest.

People are more intentional about how they spend their time and money, but when they feel like they are getting a custom experience it's a plus and helps us create regular business.

There's definitely a nostalgia factor: lychee martinis and cosmos are back big time. Part of that is that they're delicious and reliable, and people are a bit risk averse when they've had spotty encounters with quality. The FIFA World Cup offers interesting potential to explore drinking rituals and flavours to build interest (see p42). **GDI**

America's 250th and Fifa set to boost drinks sales in vital US lodging sector

Anniversary celebrations, a packed slate of sport and a rise in domestic travel will fuel increased beverage demand in America's lodging and hotel sector this summer. NIQ's **Mike Rende** reports on the dynamics drinks manufacturers must understand to make the most of the peak season

A packed calendar of high-profile events in the US will create considerable opportunity for the drinks industry this summer — especially in the hotel and lodging sector, as more people will be encouraged to travel and spend time out.

On 4 July the US commemorates 250 years since the Declaration of Independence was signed, an important milestone not only in its history, but in the broader course of the modern world. Major festivities are expected across the country, from dedicated exhibitions to large-scale parades.

The Fifa World Cup, kicking off slightly earlier and overlapping with Independence Day celebrations (11 June to 19 July), will further amplify activity during a season which sees a natural surge in drinks sales.

The lodging sector has always played a central role in on-premise drinks consumption in the US, but such a busy schedule will significantly amplify its importance.

In addition, a new report from NIQ — the *Hotel Beverage Study 2026*, developed in partnership with the American Hotel & Lodging Association — shows a continued shift in US travel patterns, with an expected rise in domestic trips at the expense of international travel.

Drinks brands and hotel operators should prepare for this and the busy summer ahead by ensuring that every decision — where, what, how and when to offer a brand or category — is informed by data-led insights into the market.

Where are they staying?

American consumers engage with a wide range of accommodation types, from standard hotel chains to spas and resorts, though some are more popular than others.

NIQ research shows that standard and select-service chains are the most commonly visited, particularly among older



Just under a third — 30% — of American hotel visitors expect to drink cocktails during their stay

DATA DROP

- More than 40% of premium and luxury hotel visitors in the US opt for wine.
- Purchased by 43% of visitors, hot coffee is the most popular non-alcoholic choice in the US lodging sector.
- Over the next 12 months, 37% of US consumers expect to drink beer, 34% wine and 30% cocktails during hotel stays.
- 61% of US business travellers have combined a work trip with a vacation in the last year, turning a business trip into 'bleisure'.

demographics. Younger consumers, however, seem drawn to independent rentals and homestays, a segment that has grown by 5 percentage points (pp) year on year.

Other channels seeing notable increases include premium hotels (+9pp) and boutique properties (+5pp). For drinks brands looking to maximise on-premise sales, these growing channels (and the distinct demographics they attract) deserve close attention.

Most hotel visits are for leisure purposes, with just under 80% linked to vacations, or for specific celebrations involving an overnight stay (just under 50%). But there are other reasons Americans visit hotels, in-

cluding dining in their restaurants and bars, using amenities such as casinos and spas, or accessing facilities like sports courts.

While these clearly defined motivations will remain relevant in the future, NIQ's report shows that the boundaries between them are increasingly becoming blurred. For instance, 61% of business travellers have combined a work trip with an extended vacation in the past 12 months, effectively turning business travel into 'bleisure' (a dynamic explored in detail in NIQ's report).

For drinks brands and hotels alike, it is essential not only to consider traditional travel behaviours, but also to account for this evolving landscape to develop offers that maximise beverage sales.

Leading categories

Major alcoholic beverage categories offer the greatest opportunities for the industry in the lodging sector over the next 12 months, with 37% of consumers expecting to drink beer, 34% wine and 30% cocktails during hotel stays.

Hotels serve a broader range of functions compared with bars, pubs and restaurants. As a result, consumers drink differently in hotels, often prioritising premium, relaxed and indulgent experiences over faster-paced, social or 'session' drinking. »

» For example, the *Hotel Beverage Study* finds that while beer leads overall, wine becomes the top category among premium and luxury hotel visitors, with more than 40% engaging with it. Cocktails also rank highly, still behind beer, but showing a stronger preference compared to standard hotel visits.

It is not all about alcoholic beverages: lodging represents a strong channel for non-alcoholic drinks as well. Hot coffee is the most popular choice, with 43% of consumers purchasing it, followed by soft drinks (35%) and bottled water (32%).

Businesses should not underestimate these beverages: not only are both coffee and bottled water high-margin categories, but they also perform better in hotels than in other hospitality channels (11pp and 10pp higher, respectively).

Non-alcoholic alternatives to cocktails, beer and spirits should not be overlooked either. They still account for a smaller share overall (between 5% and 7%), but the report indicates they are set to grow significantly in the future.

Visit types

To refine drinks category strategies, it is also worthwhile cross-referencing beverage choices with visit type.

Wine is more commonly associated with visits not involving an overnight stay, such as one-day business trips, work events and occasions where a hotel's restaurant or bar is the primary focus of the visit. Beer, meanwhile, tends to perform more strongly during casual visits, including leisure activities, amenities and vacations.

Interestingly, beer is also highly popular on overnight business trips, suggesting it may play a role in longer, more time-intensive work travel. With three in four of these trips involving conferences or events,

beer is also associated with business trips that include a social element.

Reasons to go

Looking at the social context of hotel visits helps to better unpack drinking behaviour in the lodging market.

Business travellers are more likely to be alone, according to NIQ's report, while people on a vacation most commonly go to hotels with a partner or spouse.

Stays with friends tend to overlap with partner-led visits, but are noticeably more common in the context of a hotel bar or restaurant visit without an overnight stay.

These differences are not surprising. People visit hotels for a range of reasons, and the social context often determines the specific purpose of the trip.

Purchase drivers

Once consumers arrive on the premises, a range of factors come into play in their purchasing decisions. Happy hour menus and promotions are by far the most influential drivers, and are consistently a highly effective way to encourage trial and build longer-term brand loyalty.

This is supported by NIQ's drinking occasion data, where happy hour is the most common choice for nearly half of all hotel guests. When cross-referencing multiple data points, however, a more nuanced picture of the factors influencing purchasing decisions begins to emerge.

The availability of premium brands or drinks with a strong sense of place (whether through local producers or regionally rooted styles and recipes) can be decisive in luxury settings, for instance, although these factors tend to carry less weight for the average guest.

Visibility — especially on drinks lists — is always essential, yet to fully capitalise

THE RESEARCH

NIQ's *Hotel Beverage Study 2026*, available since at the end of May, offers a detailed overview of, and insights into the hotel landscape, helping American hotel operators and drinks businesses better understand the hospitality sector, track evolving trends and build more effective strategies. NIQ's expert team can also deliver bespoke analyses, pinpointing tailored opportunities for individual brands and hotel groups. To explore how NIQ's research can enhance your strategies, visit www.niq.com or contact Mike Rende, client solutions manager Americas, at mike.rende@nielseniq.com

on this, advertising must be strategically positioned. Placement near the bar or lounge is particularly effective, finds the *Hotel Beverage Study*, with nearly two-thirds of guests recalling drinks promotions in these areas.

Meanwhile, the front desk performs less well, likely because guests there might be focused on other priorities, like checking in or seeking information, rather than planning their next sip.

'When' and 'where'

There are also clear patterns in 'when' and 'where' guests prefer to drink within a hotel. Celebratory moments are especially important in outdoor bars and restaurants. In these settings, hotels should ensure premium offerings are front and centre to maximise engagement.

In contrast, in pool areas, it is the desire to unwind and relax that shapes decisions. Here, the focus should shift toward drinks and brands that align with a more laid-back, easy-going experience.

As for timing, the evening plays a central role in alcohol consumption in hotels, much as it does in other drinks-led venues. But since guests typically stay at accommodation for longer than just a few hours, other parts of the day present significant opportunities too.

Mid-afternoon, for example, is a key drinking moment for nearly 40% of consumers, particularly in pool areas and outdoor bars and restaurants. As the evening progresses, beverage consumption shifts indoors, concentrating later at night in bars, lounges and rooftop spaces.

Following guests along this journey and adapting the offer to each space and moment is essential to maximise sales in the events-packed US summer of 2026. **GDI**

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More than 40% of premium and luxury hotel visitors in the US order wine, compared with 34% overall



Wholesaler consolidation is redefining the three-tier alcohol system in the US

As mega-wholesalers consolidate and market volumes contract, the historic system is fracturing, creating challenges for smaller suppliers. **Joe Bates** reports

Since its inception in the early 1930s in the messy aftermath of Prohibition, the US three-tier alcohol distribution system has functioned like a well-regulated, if somewhat rigid, plumbing system.

Put simply: producers made it, wholesalers moved it, and bars and retailers sold it. For decades, this system worked well.

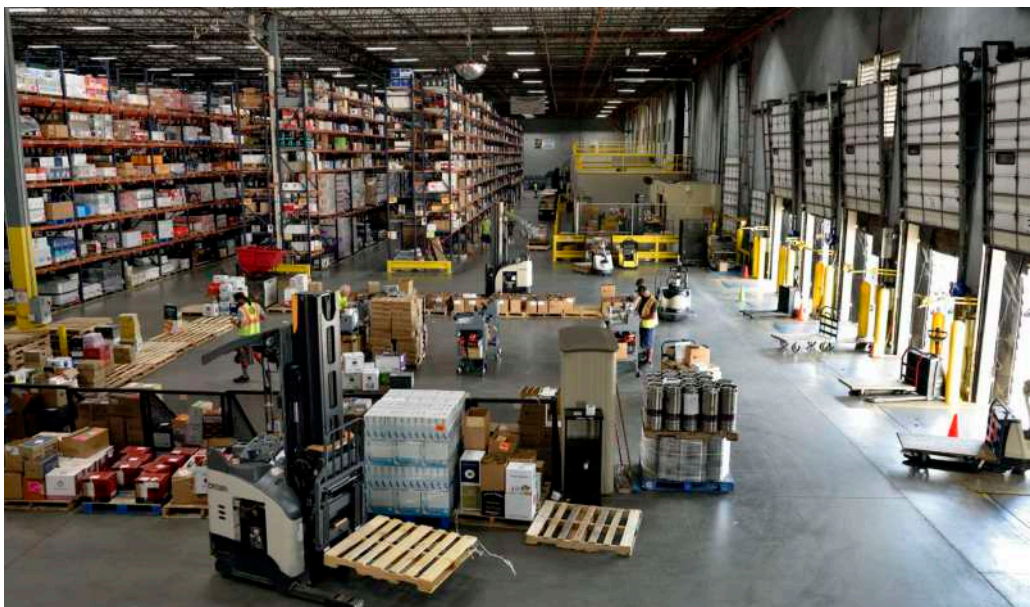
Forcing alcohol through a central choke-point — the distributor — allowed easier collection of excise taxes, a transparent paper trail prevented counterfeit alcohol from entering the market and, in theory, smaller producers could build distribution because wholesalers acted as their sales force.

However, by mid-2026, the three-tier system has sprung leaks, cracking under the pressure of multiple adverse factors impacting the country's drinks business. Trading conditions are tough: according to IWSR's US Navigator data service, total US alcohol beverage volumes contracted 5% last year, with wine (-6%), spirits (-4%) and beer (-5%) all suffering.

The rising cost of living pulled the brake on sales — 31% of US drinkers cited this as a reason for drinking less, IWSR discovered. Increased moderation is another drag on the industry, especially among younger Millennial and Gen Z LDA consumers, with nearly half of Gen Z consumers planning to reduce alcohol consumption, according to a major report on US drinking habits by Datassential released at the start of the year.

Throw rising production and labour costs into this toxic mix, then stir in US tariffs on imported brands, and it's no surprise the tectonics of the three-tier system shifted.

On one side, mega-distributors are consolidating power to handle heavyweight multinational-owned brands. On the other, small and mid-sized craft breweries, boutique spirits brands and independent wineries are finding themselves stranded in the logistical Death Valley of a consolidating wholesaler tier, struggling to find a distributor that recognises their worth.



A Southern Glazer's Wine & Spirits warehouse. While Republic National Distributing Company undergoes significant restructuring, Southern Glazer's is expanding its footprint (see interview p17)

RNDC hits the skids

The most visible fault line in the wholesaler tier has been the ongoing travails of the Republic National Distributing Company (RNDC), once the country's second-largest alcohol distributor.

Last year proved an *annus horribilis* for RNDC. Major players, including Tito's and Brown-Forman, ditched RNDC as their Californian distributor in Q1. Further departures saw RNDC pull out of the state, the country's largest alcohol market, entirely in June. This allowed competitors, such as Breakthru Beverage Group, Reyes Beverage Group and Southern Glazer's Wine & Spirits, to pick up displaced portfolios.

In January this year, RNDC seemed to rally, announcing it was securing new financing from lenders to stabilise operations. President & CEO Marc Sachs said the deal would allow the company to "deliver against" its priorities and "pursue opportunities" that strengthened its business.

Yet its break-up has continued at pace, with rival Reyes Beverage Group subsequently purchasing 11 markets from RNDC (Arizona, Colorado, Florida, Louisiana, Hawaii, Maryland, Oklahoma, South Carolina, Texas, Virginia and Washington DC).

A cluster of further announcements in April effectively confirmed a piecemeal

KEY TAKEAWAYS

■ **Range rationalisation.** Contracting volumes and rising costs have led mega-distributors to consolidate and purge slower-moving lines.

■ **Redrawing the map.** The ongoing break-up of RNDC has allowed rival distributors to grow their market share.

■ **Larger minimum orders.** To offset overheads, consolidated distributors are raising minimum order requirements, pushing inventory risk on to stakeholders in the other two tiers.

■ **Operational discipline.** Craft brands must now prove they can sell out quickly, or pivot to direct-to-consumer and retailer platforms.

liquidation strategy, with RNDC signing a deal to sell 17 control-state markets to Massachusetts-based Martignetti Companies, the country's sixth-largest distributor with operations in six New England states.

In the same month, RNDC agreed to sell its Oregon and Washington markets to Portland's Columbia Distributing, while its New York joint venture with fourth-generation, family-owned Opici Family Distributing unravelled and Manhattan Beer & Beverage Distributors swooped in to onboard some of the castaways. »

Short-term disruption and long-term challenges

» For small and mid-sized producers, this rapidly changing distribution landscape has created short-term operational disruption.

Nosotros Tequila & Mezcal, a brand with over 2,000 Californian customers, revealed it was given 90 days last year to find an alternative distribution solution following RNDK's exit — a dilemma which saw the company return to its previous distributor, Park Street.

"The biggest worry for us was really being able to take care of our customers," chief revenue officer PJ Dwyer recalled in a post on Park Street's website. "We understand that when a transition like this happens, you're talking about 500-plus other brands. You're going to have a lot of customers that are upset, confused and don't really know what to do."

Distributor consolidation also poses longer-term strategic challenges, cautions Los Angeles-based GHJ, an advisory, tax and accounting firm specialising in the drinks industry. "Many smaller and mid-sized brands have less leverage today," argues GHJ partner & CPA Maria Pearman.

"In addition to a larger portfolio, distributors are consolidating and prioritising high-velocity categories like tequila, RTDs and large national suppliers. Smaller brands are finding it harder to earn attention unless they can prove depletion velocity, geographic concentration and marketing support. The old pitch of 'we're a great craft brand' is far less effective than it was five years ago," she adds. "I might go so far as to say there's no value in that today."

Small brand owners repeatedly voice fears of a 'great purge', with larger distributors cleaning house, dropping non-core brands that don't move enough volume to justify precious warehouse space.

The founder of both Sicilian aperitif brand See the Elephant Amaro and South Carolina-based HTH Imports, Kyle Harder, has first-hand experience of this disconcerting process. After finding his brand buried in a New York distributor that was restructuring around volume, he recently made the difficult choice to pivot to a smaller, curated distributor (Massanois).

"Consolidation is bad for small brands in the short term — most founders in our position know that, but won't say it out loud," he ventures. "When distribution books get absorbed into mega-houses, niche brands get buried. The math is

simple: more SKUs, same number of reps, same number of selling hours. Something has to give, and it's never the high-velocity tequila brand paying for programming."

At functional adult energy drink Mōcean Drinkwerx, CEO Tony Vieira mourns the loss of sales rep expertise and dedicated focus that often arises as a result of wholesaler consolidation.

"A rep who actually knows your product can walk into an account and make something happen," he says. "But when that person is suddenly managing double the portfolio, your brand becomes an SKU number. Delivery problems you can work around. Losing someone who could actually tell your story? That takes a long time to fix."

Increasing drop sizes and sourcing issues

Beyond the loss of expertise, there is also a mounting financial squeeze for retailers in the shape of minimum order requirements. To offset rising labour and warehouse costs, consolidated distributors are increasing 'drop sizes' — the minimum amount a retailer must buy to get a delivery.

"It hits the smaller retailers hardest, which is exactly who carries brands like ours," says Vieira. "They're being asked to take on more inventory risk at the same time that their margins are getting squeezed. That's why we've kept our direct channels active. If the traditional route stops making sense for a retailer, we need another way to get them product."

The on-premise is also having to adapt to changes due to distributor consolidation. In Salt Lake City, the owner of The Break Downtown, a high-volume sports grill

across from the Delta Center (a major sports venue and home of the NBA's Utah Jazz team), says he has effectively become his own amateur logistics manager.

"To keep our taps flowing during distributor exits, I lean on our local character to foster direct relationships with regional breweries near our location," Ryan Oliver reveals. "When a mid-sized distributor exits the market, we prioritise local craft brands that can deliver to us directly, ensuring our guest experience remains consistent regardless of corporate volatility."

"Sourcing niche products like specific craft IPAs has required us to pivot toward direct-to-retailer platforms," he adds. "These platforms act as a necessary bypass to ensure our menu doesn't lose the premium variety that Utah Jazz fans expect when they visit us before a game."

Why D2C isn't a magic bullet

As the traditional middle tier has become more challenging for craft brands, many have switched to direct-to-customer (D2C) shipping as a much-needed safety valve.

Yet only a handful of states allow interstate spirits shipping. The situation is much better for wineries — most Americans can have wine delivered to their door — but GHJ's Pearman is sceptical of the channel.

She admits that D2C can be a useful way to "build customer data" and "reduce wholesale dependence", but says it carries the risk of aggravating wholesale partners who might view it as competition. "Other reasons that this is not yet a replacement for traditional distribution are regulatory friction, customer acquisition costs and limited scale," Pearman says. "In my opinion, D2C is unlikely to ever rise to be more than a small slice of the overall sales."

If there is a unifying theme, it's the disappearance of the 'comfortable middle'. Mid-sized distributors — like Long Island's Clare Rose, acquired by Southern Glazer's Wine & Spirits in March — are under pressure. Mid-tier brands are losing leverage, and the system is becoming less forgiving. For large suppliers, consolidation offers efficiency and control. For retailers, it delivers both convenience and constraint, but for smaller brands, it raises the stakes.

"The biggest winners will be the most operationally disciplined brands," observes Pearman. "The ones that know exactly where they win, protect their cash and avoid overextending themselves in unstable markets." **GDI**

"The old pitch of 'we're a great craft brand' is far less effective than it was five years ago. I might go so far as to say there's no value in that today"

GHJ partner & CPA Maria Pearman



Route-to-market strategies must be strengthened suggests newest ProSpirits Report

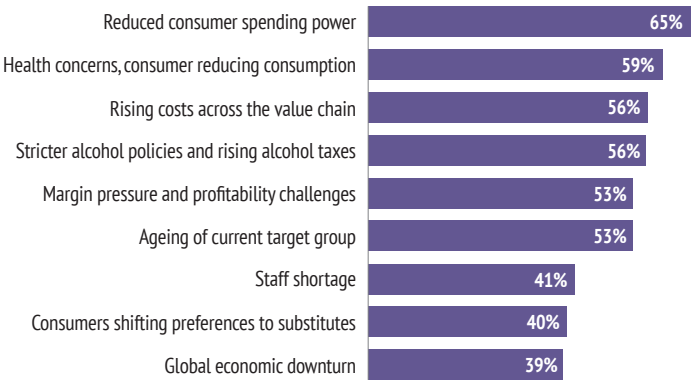
There is clear pressure on beverage alcohol volumes and pricing in certain parts of the global drinks market, with a lack of momentum expected in 2026, according to the second iteration of the annual ProSpirits Report from trade show ProWein.

The report identifies route-to-market strength and tighter partnerships between producers, retail and the on-trade as “critical levers” for resilience.

While managing decline seems to be the framing, due in part to the drinking-less-but-better phenomenon, ProWein director Frank Schindler commented: “Conscious consumption combined with the right opportunity can open new possibilities. We should also integrate product categories that do not traditionally fall within the spirits sector.”

Growth for retailers is concentrated in no/low alcohol, and RTD and convenience formats, while core spirits are expected to stagnate or decline. The report says that route-to-market and export diversification are therefore important “especially for producers operating in mature and saturated markets”. However, this remains risky and difficult to execute given ongoing economic uncertainty and geopolitical frictions.

Threats and Challenges for the Spirits Industry % of On-Trade and Retail



Source: ProSpirits Report 2026

Current conditions also suggest a tension between premiumisation and downtrading. “On the one hand, ‘less but better’ can support premium segments, [but] significant demand is moving toward lower price points.”

The report says the spirits sector is facing less of a cyclical downturn and more of a structural transition. Consumers have become more relevant as spirits shift from volume growth to a fragmented market.

Liquor overhaul at Heinemann as new SKU ‘assortment engine’ revs up

Liquor is undergoing a reset at Gebr Heinemann as the global travel retailer reviews all of its product categories to offer a more relevant — and more profitable — range of SKUs to shoppers.

In early May, the Hamburg-based, family-owned company announced a record EUR4.7bn (US\$5.5bn) in consolidated turnover for 2025, up 10% on the previous year’s EUR4.3bn, despite geopolitical instability and rationalisation in the Asia-Pacific.

Liquor, tobacco and confectionery (LTC) is Heinemann’s biggest underperforming segment and it grew by 8%, accounting for 45% of turnover last year. However, tobacco and chocolate were the key drivers, with liquor falling short.

Chief commercial officer Inken Callsen said that in both liquor and beauty “we have a lot of products”. She added: “Digging deeper in spirits, the growth came from celebrity brands, premiumisation and entry priced products. So last year we copied our base-priced model in beauty and brought it into spirits starting at EUR29, and it’s having tremendous success.”

With spirits under pressure globally, Heinemann is looking for answers in the subcategories, “for example, by creating ‘whisky worlds’ to excite the customer, and



Heinemann liquor offer at Keflavik Airport in Iceland. The retailer is assessing its SKUs at every airport

champagnes for gifting,” said Callsen. The ‘vivino’ concept, which includes the ratings of wines, has increased sales by 19% where implemented.

Moving forward, smaller assortments will be developed to combat ‘the paradox of choice’, seen as a core factor inhibiting growth across mid-priced lines. “More brands do not lead to more turnover,” said Heinemann CEO Raoul Spanger. “The offer has to be clear and focused, and that’s what we’re working on — the next generation of shops.”

This entails a deep dive into the 215,000 SKUs that Heinemann stocks, of which 30% are loss-making and 50% are cannibalising

others in-store, according to director of commercial effectiveness Oliver Kreft. He is the brains behind the ‘assortment engine’, which is identifying sweet spots in liquor at individual shops. Callsen said: “The goal is to turn data and insights into impact, thereby creating more relevant offers.”

Heinemann is examining its assortments and pricing for every airport to produce a product offer that appeals to specific passenger profiles. Kreft told GDI: “What will win is orchestration and curation, instead of overload.” The project was first piloted in Vienna Airport and is now rolling out across larger Heinemann locations.

US and Americas alcohol shoppers raise the bar for sustainability in GTR

EXCLUSIVE Sustainability is now a primary driver for shoppers in global travel retail, particularly alcohol shoppers from the US, reveals our latest alcohol shopper analysis by Swiss research agency **m1nd-set**

A significant 65% of global travel retail shoppers consider eco-friendly packaging a critical factor when browsing airport stores, according to the latest exclusive alcohol shopper analysis for *Global Drinks Intel* by Swiss research agency m1nd-set.

This sentiment is particularly pronounced in the Middle East & Africa region, where 69% of travellers prioritise sustainable packaging, followed closely by the Americas (67%) and Europe (63%).

Eco-friendly production is also increasingly important to shoppers, with 67% of general GTR shoppers globally now prioritising sustainable production processes, a figure that climbs to a staggering 73% in the Americas.

However, a closer look at category specific data reveals a notable 'sustainability gap' between general travellers and those specifically purchasing alcohol.

While general duty-free shoppers demonstrate a concern for sustainability globally, alcohol buyers are consistently less influenced by environmental attributes when making GTR purchases.

Only 58% of travel retail alcohol shoppers prioritise eco-friendly packaging, 7% lower below the global average across all shoppers. This disparity widens significantly when looking at ingredients and production, where alcohol buyers lag behind the general duty-free population by 12% and 15%, respectively.

Clear evolution in expectations

Despite this gap, the Americas remains the global leader in terms of sustainability, as alcohol shoppers in this region consistently outperform those from the Middle East & Africa, Europe and Asia-Pacific in their demand for sustainable options.

Focusing on the Americas region (North and South America combined), the insights show a clear evolution in consumer expectations over the last three years.

Importance of Sustainability % of Shoppers Who Consider Sustainability Important to Find in Duty-Free Shops (2025)



Source: m1nd-set.com

m1nd-set
RESEARCH BEYOND BORDERS

The importance of eco-friendly packaging for alcohol shoppers in the Americas has seen steady growth, rising from 58% in 2023 to 64% in 2025, representing a substantial 6% increase over the global alcohol shopper benchmark.

While interest in eco-friendly ingredients and production processes has experienced a slight decline since 2023, sustainability engagement across the region remains 4% to 5% higher than the global average among alcohol shoppers.

Millennials tend to be the most concerned about eco-friendly practices in the Americas, with 71% valuing sustainable packaging, while the Boomers-plus age group remains largely indifferent, with only 31% expressing interest.

Priority for US shoppers

Alcohol shoppers from the US demonstrate a major difference in attitude compared with the global average, with 70% prioritising eco-friendly packaging in 2025, 10% higher than global alcohol shoppers.

While interest in sustainable ingredients

in the US peaked at 68% in 2024 — up from 62% the previous year, before falling to 56% in 2025 — it remains 5% higher than the global average among alcohol shoppers.

Similarly, the 64% of US shoppers who valued sustainable production in 2025 represents a considerable 12% lead over the global alcohol buyer average.

Demographically, the US market is driven by a powerful coalition of Gen X and Millennial shoppers that shows engagement levels exceeding 70% across most sustainable criteria.

This is a sharp contrast to US Boomers, only 25% of whom express an interest in sustainable production processes, while just over 30% are concerned about eco-friendly packaging and ingredients.

As for gender, men in the US are slightly more focused on eco-friendly packaging and ingredients, while US women show a higher concern for eco-friendly production processes than men. **GDI**

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



MARKETING TRENDS

Chris Tyas

There's a difference between building a world and hiding behind one. Can brands own their truth?

There's a habit in drinks marketing of overdoing it. Everything turned up. Lighting. Pour shots. Packaging that looks like it belongs in a gallery. You can almost feel the budget before you've even clocked what the product is. It's impressive, just not always convincing. Sometimes it feels like the work is trying a bit too hard to prove something, and in doing that, loses the thing you actually came for.

A lot of younger drinkers have got pretty good at spotting when something's been overworked. It comes from growing up in a feed where half the content is engineered and the other half might not even be real. AI faces. Fake comments. Reviews that don't quite ring true. Influencers who feel more like actors than people. After a while you stop taking things at face value. You assume there's something behind it.

The Edelman Trust Barometer has been pointing in that direction for a while, showing younger audiences trust brands less than older ones, while consumer insights platform GWI suggests they're far more likely to question claims outright. You can see it in behaviour. Faster scrolling. Quicker judgement. Less patience. If something feels off, it's gone.

This is why honesty, just being straight, can do more work than polish. Take this line from the 'Refreshing Stuff' campaign for soft drink brand Oasis: "It's summer. You're thirsty. We've got sales targets." It shouldn't work. You're not supposed to say that part out loud. But everyone already knows it, so pretending otherwise feels more dishonest. It cuts through because it resets the relationship. The brand isn't trying to charm you or convince you it's something bigger than it is. It's just clear about the exchange.

The execution follows through. Not overshoot. Not too neat. It doesn't feel laboured, which is probably why it works. It doesn't try to impress you and in doing that, it becomes more likeable.

That's where the idea of premium starts to shift. For a lot of the industry, premium still means control. Precision. Everything



exactly right. For younger audiences, it can mean something more self-aware. Less polished. More in tune with how things actually feel.

You see that again with Hooch. Instead of updating itself, the hard lemonade leaned back into where it came from for its 'By Your Side Since '95' campaign. Last year's work around the Oasis reunion concert tour moment could have gone wrong. Nostalgia often does when it's overthought. But lines like this don't feel overthought: "When your fingers did more than scroll." It speaks the truth, but paired with visuals that genuinely feel like they belong to the mid-1990s, it lands with a bit more weight. It doesn't try to reposition the brand. It just owns it.

Then there's RTD brand BuzzBallz, coming at it from a completely different angle. Its most recent interactive activation, for the April UK launch of its Berry Cherry Limeade flavour, saw a giant capsule toy vending machine loaded with samples stationed on London's Southbank. No nostalgia. No references. Just the product. Bright, loud, slightly ridiculous packaging. Big flavours. High ABV. The sort of thing most brands would have toned down to look more serious.

They didn't, and that's the point. It's

now the biggest-selling single-serve pre-mixed cocktail in the US and one of the fastest-growing RTD brands in the market. Not because it refined itself, but because it didn't. There's no gap between what it looks like and what it is.

All of this sits slightly awkwardly next to the industry's push towards premiumisation. For years, everything has been moving upwards. Better ingredients. Better stories. Cleaner design. It has worked, up to a point. But a lot of brands have started to look the same. A bit too controlled. A bit too careful.

At the same time, the outside world has become less certain. AI is speeding things up while making things harder to trust. The more perfect something looks, the more people question it. Perfection starts to feel like a signal in itself.

So the work that cuts through often does the opposite. It relaxes. Says what it is. Leaves a few edges in place. It feels more like something made by people than something engineered.

There's a practical side to it as well. People are still thinking carefully about what they spend on. If they're going to buy something, they want to feel it. A clearer payoff. Less ambiguity. That carries through to how brands talk. If you're asking for someone's money, being straight about what you're offering goes a long way.

That doesn't mean stripping everything back. Brands still need character. But there's a difference between building a world and hiding behind one. Oasis and Hooch don't pretend. BuzzBallz doesn't dress anything up. They assume the audience already understands what's going on and act accordingly.

In doing that, they earn a bit of trust. Not the big, overclaimed kind. Something smaller. More immediate. More believable. Right now, that's doing more work than most perfectly put-together campaigns. **GDI**

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



On our radar

Five spirits brands offering an antidote to the slew of World Cup-themed campaigns by sprinkling a little screen star magic on their latest activations



Glenmorangie *Harrison Ford heads home*

Harrison Ford and LVMH's single malt scotch Glenmorangie wrapped up their partnership by launching a limited-edition whisky in the final chapter of their 'Once Upon a Time in Scotland' campaign. Shot in the actor's home state of Wyoming and directed by Joel Edgerton, Episode 13: The Epilogue sees the actor don a kilt to taste the whisky on camera for the first time — all in all, a very "nice" note to end on.

Espolòn *From one 'short king' to another*

Campari Group teamed up with US comedian & actor Ken Jeong for a tongue-in-cheek Espolòn Tequila push to mark 'Short King Week', an "annual cultural celebration" of shorter men at the start of May. The aim? "To make one thing clear: you don't need to be the tallest to stand out." *Hangover* franchise and *Community* star Jeong said he felt "very seen" by the social media-led campaign which saw the 5ft 5in tall star call for consumers to say "toodle-oo to short tequila".



Hibiki *Anna Sawai celebrates artistry*

Suntory Global Spirits unveiled its first-ever global marketing campaign for Hibiki Whisky, placing *Shōgun* star Anna Sawai at the centre of a project that draws parallels between kimono-making and whisky blending as two crafts shaped by heritage and artistry. 'The Masterpiece of Japanese Artistry' campaign launched with a 30-second spot that will air in "key markets" throughout the year and marks the actor's debut as Hibiki's first global ambassador.



Laphroaig *Willem Dafoe is smokin'*

Suntory Global Spirits-owned Laphroaig and actor Willem Dafoe have evolved their collaboration beyond storytelling and into NPD with the release of the limited-edition 14yo single malt, Willem by Willem. Positioned as the latest chapter in the brand's global 'Unphorgettable' campaign, the expression was developed in blind tastings by Dafoe and Laphroaig's senior whisky maker, Sarah Dowling.

St-Germain *Sophie Turner keeps them guessing*

Bacardí has recruited British actor Sophie Turner to promote a spritz serve featuring its St-Germain elderflower liqueur for the third year in a row. The launch film for the new global campaign sees the *Game of Thrones* star — soon to appear as Lara Croft in Amazon's serialisation of *Tomb Raider* — "chase the clouds away before enjoying a St-Germain spritz as the sunshine returns".





New products

Take stock with our roundup of the latest drinks launches



Cimbroni 33 Classic & Coffee

Cimbroni 33 Sambuca was founded by Julian Hearn, who created plant-based meal-replacement brand Huel.

- Sambuca, UK. Aged for 33 days in oak. The Classic expression has an ABV of 40%, Coffee is 38% ABV.
- Available since earlier this year online for worldwide shipment.
- Both SKUs have an SRP of GBP45 (US\$61) per 70cl bottle.

Green River Honey Finished

The finish in Green River's bourbon extension comes from Kentucky honey that is added to the barrel, "rather than relying on additives and sweeteners".

- American whiskey, bourbon, Kentucky straight. Aged for four years before being blended with locally sourced honey in the barrel; 46% ABV.
- Rolled out across the US in May.
- SRP of US\$24.99 per 75cl bottle, also on sale in a 20cl bottle size.



Image: Elidh Cameron Photography

Ledaig Castaway

Sales of this third Ledaig limited edition produced at CVH Spirits' Tobermory Distillery will result in a donation to local charity the Mull & Iona Community Trust.

- Scotch whisky, single malt, Islands (Mull). No age statement; finished in ex-rum and tequila; 61.1% ABV.
- On sale in limited quantities since last month. Available worldwide in spirits-specialist off-premise outlets.
- In the UK, SRP of GBP65 (US\$89) per 70cl bottle.

Beluga Noble Summer Monaco

Noblewood Group has collaborated with the Principality of Monaco to create a limited-edition destination bottle that reflects Beluga's

"presence within high-summer, resort-led occasions". The label design draws inspiration from Monaco's coastal landscape and architectural features.

- Vodka. Distilled in Latvia from the "finest winter wheat", blended with pure spring water and rested for 30 days; 40% ABV.
- Available in 70cl and 1L formats, from June.
- SRP "in line with the standard Beluga Noble range".



House of Rum Diablo Spiced

UK bottler House of Rum claims to have "listened to our customer base who have asked us for a high-quality rum that they can use for a longer drink experience than we offer with our single cask range".

- Rum, UK, spiced; 37.5% ABV.
- Available online for domestic delivery in the UK since May. Will "shortly" be available to the wider off-premise channel through wholesale businesses.
- SRP of GBP24.99 (US\$34) per 50cl bottle.



Freixenet Solare Alcohol Free

Less than three months since debuting the new-to-market Solare extension under its Freixenet brand, Henkell Freixenet has commenced the roll-out of a 0% ABV version of its lemon-led aperitif.

- Aperitif. Botanicals include "Spanish citrus fruits" along with rosemary and thyme.
- Launching in June in Austria, Belgium, Germany, Poland, Switzerland and the UK.
- SRP not available; on sale in 70cl bottles.



Edinburgh Gin Spicy Chilli & Lime Liqueur

Designed to capitalise on the "fast-growing demand for bold, heat-led serves", Ian Macleod Distillers has added a spicy extension to its gin brand.

- Liqueur, gin-based; 20% ABV.
- Launched in Scotland's on-premise in late April, "with further retail, on-premise and Amazon listings to follow".
- SRP of GBP16.50 (US\$22.35) per 50cl bottle.



Enter the era of ultra-lightweighting

Regulatory, sustainability and cost pressures are the driving forces behind a spate of eye-catching ultra-lightweight bottles, but technical execution remains key. **Joe Bates** reports

Lightweighting is hardly a new concept in beverage alcohol packaging, but the past couple of years have ushered in an exciting new era of ‘ultra-lightweight’ bottles.

Brand owners and their manufacturing partners have pushed technical boundaries while still minding the classic considerations for any successful bottle design — that it remains structurally stable, cost-efficient and looks good on the backbar.

The result has been a flurry of eye-catching ultra-lightweight bottles that have helped push the often functional world of glass manufacturing to the forefront of brands’ efforts to become more sustainable.

The pressure to transition to ever-lighter bottles is no longer solely a green initiative, of course. It is also a response to two simultaneous pressures that are making heavier glass bottles an economic liability.

Regulatory pressures

The first is regulatory: in the UK, the Extended Producer Responsibility (EPR) and 2026 eco-modulation (RAM) schemes are making lighter bottles a no-brainer. Under RAM, ‘red-rated’ packaging already incurs a 20% surcharge, a penalty that is set to rise to 60% in 2027 and 100% by 2028. Lightweighting aligns commercial and environmental incentives, as per-unit fees are increasingly calculated by weight.

The UK is no outlier, of course. Other European countries have introduced similar reward-penalty schemes, and in August, the EU’s Packaging and Packaging Waste Regulation (PPWR) will begin to harmonise these rules across all 27 member states.

Meanwhile, seven states in the US, the world’s biggest premium wine and spirits market, have already introduced EPR-style legislation, including the country’s most populous state, California, while more than ten others are considering following suit.

Compounding this pressure is a much more recent and urgent energy shock caused by the Middle East conflict. With the Strait of Hormuz effectively closed since the end of February, wholesale gas prices have skyrocketed, pushing gas up by



Johnnie Walker’s limited-edition Blue Label Ultra bottle cut whisky packaging weight by more than half



Telmont’s bottle won Green Packaging Initiative of the Year at the Global Drinks Intel ESG Awards 2025

20% in key glass production hubs like India. Because glass furnaces require constant gas-fired heat, brands that fail to lightweight are now effectively paying an additional ‘Persian Gulf Tax’ on every shipment.

At global agency Equator Design, whose drinks clients have included Molson Coors, Schnucks bourbon and Morrisons supermarket’s ‘The Best’ own-label wines, creative director Nathan Ball believes the conflict could even catalyse a shift away from glass. “Heavy glass carries a cost premium, but many brands accept that trade-off, because the weight signals quality, permanence and luxury,” he says. “When that cost premium is compounded by inflation, the equation starts to look very different.

“I think the current crisis might accelerate something we were already seeing: a move towards lighter glass used more creatively, and a shift to alternatives like aluminium, which carries sustainability credentials.”

Champagne Telmont and Johnnie Walker light the way

Two notable ultra-lightweighting projects threw a spotlight on the trend last year.

In the challenging sparkling wine category, Rémy Cointreau’s Champagne Telmont unveiled an 800g bottle, reduced from 835g — a huge engineering feat by manufacturing partner Verallia, given that a sparkling wine bottle must withstand six bars of pressure.

With manufacturing accounting for 30% of the champagne industry’s carbon footprint, the bottle could be a game changer — Telmont claims that if the bottle is adopted across the industry, it could eliminate 8,000 tonnes of CO2 emissions a year.

Meanwhile, in the once-conservative world of scotch whisky, Diageo launched Johnnie Walker Blue Label Ultra in April last year, a 180g bottle billed as the “world’s lightest 70cl scotch whisky” glass bottle.

Developed with Turkish glass manufacturer Şişecam and limited to only 888 bottles, the handblown teardrop shape relies on advances in glass-forming and structural design to reduce weight by over 50% without compromising strength. Unusually, Diageo decided to open source the bottle patent royalty-free to encourage other producers to innovate with lightweight bottle designs. ➤

Is 300g the new standard?

» The primary concern for producers is whether ultra-light glass can survive high-speed filling lines without breakage. Johnnie Walker's limited-edition 180g concept bottle was filled on a specialised 'white gloves' line, because it was currently impractical for high-speed production. However, a flurry of new releases is now finding success at the 300g mark.

In April, McGuigan Wines launched its new 300g lightweight burgundy bottle — a 25% reduction on its predecessor, developed in partnership with Verallia.

"There were no changes needed to the line or materials," says McGuigan Wines UK brand manager Emily Waterston. "After extensive trials at different line speeds — especially in high-pressure areas like capping and accumulation points — both the work done at Greencroft Bottling Company and the improvements Verallia made in glass manufacturing ensured the bottles performed consistently with the design."

The 300g burgundy bottle follows a 300g bordeaux bottle, released by McGuigan last year. Waterston says she was surprised at how little consumers noted the change. "There's an assumption that weight signals quality, particularly at premium price points, but acceptance was strong across both consumers and retailers," she says.

Other manufacturers are also now pushing 300g as the new industry baseline.

Last July, Spanish glass manufacturer Vidrala unveiled an even lighter 260g 70cl bottle at Expo 2025 Osaka, using up to 80% recycled glass and ultra-thin walls to reduce its surface area by 20%. A month later, Luxembourg-based sustainable glass and metal producer Ardagh Group launched a 300g bottle designed to perform on high-speed lines while maintaining premium shelf appeal.

Meanwhile, family-owned UK glass packaging and closure supplier Croxson's released its Rightweight solution in March this year. The culmination of more than 16 years of development, it says the solution can reduce the weight of glass bottles (and jars) by 30%.

The company's premium-quality Apollo 70cl spirits bottle, suitable for gin, rum, tequila, vodka and whisky, now benefits from the Rightweight technology, with its weight reduced substantially from 575g to 400g.

"It's not a race to the lightest-possible container," says managing director Tim Croxson. "It's about achieving an optimum balance between material reduction, strength and high-performance logistics, with consumer experience and brand presentation."



McGuigan Black Label Sauvignon Blanc in the new 300g burgundy bottle



Glass Dice bottles from Rockwood Glass



Croxson's Rightweight Mountain Bottle



Martell Cognac's 'glass origami' bottle

700g 'commercially realistic'

At China-based glass and ceramic bottle manufacturer Rockwood Glass, maximising visual impact and structural performance take precedence over achieving the lightest-possible weight. Even so, the French-owned company has heavily invested in its production lines and processes to help clients achieve a premium feel without resorting to a heavy-base bottle design.

"This includes lower-temperature melting methods that reduce energy consumption while improving glass workability, allowing the material to better reach complex angles and detailed contours," says founder & CEO Henri Berthe.

Recent projects where Rockwood lowered production weights include its Patriot Eagle and Glass Dice bottles. "Both designs feature complex geometries and strong visual presence, while remaining within commercially realistic production weights of approximately 700g," says Berthe.

"These projects demonstrate that premium perception is increasingly driven by originality of form, technical execution and shelf impact, rather than simply maximising bottle weight."

Prestige acceptance

Nonetheless, ultra-lightweight advances are winning over many — even prestigious names from the French wine world, such as Château Galoupet, a sustainability focused cru classé estate in Provence, and part of Moët Hennessy's stable of brands since 2019.

The maison recently launched the second vintage of its G de Galoupet organic rosé line in a 300g bottle made from 85% recycled glass. Managing director Nadine Fau explains: "Knowing that the bottle alone accounts for 40% of a winery's carbon impact, we chose to reduce its weight and use recycled rather than clear glass."

Perhaps the most radical example of innovation within ultra-lightweighting is the move toward flat-glass formats. Pernod Ricard-owned Martell Cognac and Chinese high-tech material supplier Vitalink Technology unveiled a sleek prototype 'glass origami' bottle made of flat glass as thin as 0.7mm in January. Vitalink vice-president at Xu Ren describes the process as "folding and lasering advanced flat glass to create an ultra-lightweight, almost surreal bottle".

Equator Design's Ball notes that flat formats are "good for design because the squarer profile gives you more surface area, more shout-out on shelf, and formats that work for direct-to-door delivery".

With its use of high-precision techniques and processes not unfamiliar to the smartphone and watchmaking sectors, the Martell bottle proves that 'light' in the context of packaging no longer needs to mean 'basic' in terms of bottle design. **GDI**

Barbera Imports

Stand 7-BW-603

Barbera Imports specialises in bringing “artisanal producers” into the US market, working with international producers across distribution and route-to-market strategy, as well as helping them navigate the three-tier system. At the show, the company will spotlight Tarsier Spirit’s Yuzu Marmelade Vodka, Calamansi Citrus Gin, Chilli & Lemongrass Gin, Lychee & Pink Raspberry Gin and Southeast Asian Gin. The team will also be pouring Lanique Spirit of Rose, a pink liqueur made from steam-distilled attar of rose petals and recommended served in a spritz.



What to expect at Bar Convent Brooklyn 2026

Bar Convent Brooklyn returns to Industry City in the Upper New York Bay area from 9–10 June. The two-day, trade-only event brings together bartenders, buyers, brand owners and distributors for a programme of tastings, training and networking opportunities. This year’s show will feature live demonstrations, panel discussions and keynote talks from the likes of the American Craft Spirits Association, Brown-Forman-owned Jack Daniel’s, Campari Group, Diageo, E&J Gallo Winery’s Four Roses Distillery, Pollen Projects and Teremana Tequila. Sustainability remains a central focus for organisers, who have pledged to plant ten trees for each visitor who registers for the event. Below (and on p54–p56), we highlight a selection of stands worth visiting at the 2026 event

**Bubba’s Whiskey**

Stand 8A-512

Bubba’s Whiskey will showcase its range of dessert-inspired flavoured whiskey, including BS Burnt Sugar, Hot Honey, Pancakes & Bacon and Marshmallow Chocolate whiskeys. Sampling will be a central focus of the stand, with visitors invited to taste across the portfolio throughout the show. Bubba’s, owned by New York-based Chatham Imports, wants to build awareness and introduce more bartenders to the range of “Southern-style whiskeys”. Brand representatives will be available to meet at the stand.

Cazcanes Tequila Stand 8B-720

Cazcanes Tequila will present its full range of organic tequilas, including the Blanco and Aged collections. Limited editions Rosa Blanco and Rosa Reposado will also be available, alongside the latest annual release of Cazcanes’ Nuestras Raíces, the first spirit to receive a 100-point score from *Wine Enthusiast*. The Cazcanes



team will toast the new release at New York’s Manhatta bar on Monday evening. CEO Edwin Dolgopyat, president Jeff Kozak and brand ambassadors Wayne Cafariella and Drake Schaneberg will be available to chat at the stand.

Foley Family Wines & Spirits

Stand 8B-909

Foley Family Wines & Spirits will spotlight

Tequila El Mexicano, a family-owned brand that it imports and sells in the US. Tequila El Mexicano is produced by the Bañuelos family in Arandas, Jalisco. The range now includes three iterations — Blanco, Blanco 90 and Reposado, which was unveiled in September last year. Visitors will be able to taste the portfolio alongside cocktails created by Foley Family Wines & Spirits’ US spirits ambassador, Lucas Huff, while learning more about the distillery. »



SHOW PREVIEW BAR CONVENT BROOKLYN



Gruppo Caffo 1915 Stand IC19

» Italy's Gruppo Caffo wants to bring "the spirit of the Italian table" to this year's event, showcasing a range stretching "from aperitivo to after dinner". The group will be pouring Vecchio Amaro del Capo and marking the official US launch of new acquisition Cinzano, which it bought from Campari Group last June. Visitors to the stand will be able to try "refreshing vermouth 70/30 serves, aperitivo and signature cocktails and ice-cold Vecchio Amaro del Capo celebration shots, accompanied by Italian tunes". CFO Alessio Pane and other members of the team will be available to meet.

Hayman Distillers Stand 8A-600

London's Hayman Distillers will be pouring its namesake gins at this year's show, ranging from the classic London Dry to Old Tom, Sloe Gin and the Peach & Rose Cup. Swing by to hear more about the company's no/low range, with a recently released 0.0% ABV iteration and Hayman's London Light, a 12.5% ABV gin designed "to create a new way of enjoying a low-alcohol G&T". Distiller James Hayman, fifth-generation of the family-owned, Balham-based company, will be at the stand to greet visitors.



Isle of Wight Distillery Stand EB23

The Isle of Wight Distillery will showcase its flagship Mermaid Gin, including the



classic, Pink Gin and Zest expressions. Mermaid was founded in 2015 by Xavier Baker and Conrad Gauntlett at the Isle of Wight Distillery and uses locally grown botanicals from the island, a designated Unesco World Heritage site. In January, the brand partnered with Soho Drinks in the US to support export expansion in the country. Mermaid is distributed by Southern Glazer's Wine & Spirits.



Laird & Company Stand 7-BW-513

New Jersey-based Laird & Company, producer of Laird's Applejack, will showcase its apple brandy portfolio alongside a range of imported spirits and liqueurs from France, Italy and the UK. The stand will also highlight the new Laird's Barrel Finished Series, including Bourbon, Irish Whiskey and Corn Whiskey expressions. Brands featured will include Laird's Apple Brandy, Lazzaroni Liqueurs, Moletto Gin, La Truffe Cognac, G&W Bourbon, Tarquin's Navy & Cornish Gin, Valdepablo Vermouth and Cherry Rocher.



Loca Loka Tequila Stand IC40

Indian-inspired tequila Loca Loka is a joint venture between actor Rana Daggubati, composer Anirudh Ravichander and entrepreneur Harsha Vadlamudi. The trio launched their first tequila in the US last year and have plans to expand globally. The stand will feature cocktails created by New York 'master mixologist' Cyllan Hicks, with activations centred around the Blanco and Reposado expressions. Northeast regional sales director Laura

Santana and tequila market manager Carlos Garay will be running 'tasting labs' at the stand. Loca Loka is rounding off the event with a one-day 'Añejo Hour Ritual' with music and cigars, spotlighting the aged expression.

Noblewood Group Stand 506

Beluga Vodka's Gold Line flagship will lead the line-up at Noblewood Group's stand. The wider Beluga range will also be there, alongside the US debut of Oyster Gin, a London Dry with botanicals from spots along the Adriatic Coast, such as Montenegro. Cocktail serves will be available for both brands, including a Beluga Gold martini paired with caviar, "an



iconic pairing that speaks to the growing on-trade interest in savoury, ultra-refined cocktail serves". US managing director Daniil Kurilov will be available to meet at the stand and says "the US is a strategic priority market for Noblewood Group".

Old Spirits Co Stand 8B-715

Old Spirits Co does what it says on the tin, sourcing and selling vintage spirits dating back as far as the 18th century. Much of its inventory dates from between the 1930s and 1980s, but current records for the oldest and rarest are a 1795 cognac, a circa-1800 madeira, a case of mid-19th century absinthes and an 1868 Pennsylvania rye whiskey. The London-based company works with the on-trade, private collectors and brands, supplying rare and discontinued bottlings across multiple categories. At the show, visitors will be able to explore and taste from the company's portfolio, including expressions from Canadian Club. »



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BCB Brooklyn - June 9-10, 2026 - Stand IC19

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Patrón Tequila (Bacardí) Stand IC32

» Patrón Tequila will be focusing on the 100 expression for this year's Brooklyn BCB event. Patrón 100 is a new, 100-proof blanco tequila released by the Bacardí-owned brand in April and positioned with bartenders in mind. The stand will feature activations with Chicago's Meadowlark Bar — which came in at No.38 in the North America 50 Best Bars list for 2025. Pop along to the stand to try cocktails from the Meadowlark Bar team and meet Patrón master distiller David Rodriguez.



Pollen Projects Stand 8B-729

Pollen Projects — the venture studio founded by Seedlip's Ben Branson and Emma Wykes — will showcase Sylva Orchard non-alc aged spirits and Seasn 0.0% ABV cocktail bitters. Seasn comes in two extensions: Light, for lighter drinks like soda, Seedlip & tonic, G&Ts, martinis and margaritas; and Dark, described as “full-on spice for your darker drinks like ginger ale, whisky soda or old fashioned”. The company is set to cut the ribbon on a “maturation lab and distillery” in New York's Hudson Valley this autumn.

Santa Cruz Organic Craft Bar Collection Stand 8A-511

TruRoots-owned Santa Cruz Organic Craft Bar Collection will be showcasing cocktail mixers in the ‘bronze showroom’. The range includes Paloma, Pressed Strawberry/Lime Margarita, Jalapeño Margarita, Chipotle Spiced Bloody Mary,

Lemon Citrus Sour and Cranberry Juice Cocktail mixers positioned as a clean-label, organic, preservative-free solution for the on-trade. Visitors can try cocktails and no/low serves like the Spicy Bloody Mary and Paloma Basil & Bitters mocktail. CEO Adam Carr, R&D lead Nicholas Van Campen and GM of food service Helen Mackey (creator of the bar collection) will be available to meet.



Suyo Pisco Stand 7-BW-601

Peruvian pisco brand Suyo will serve up signature cocktails and introduce the trade to its latest limited-release Exploratory Series: Andean Brandy. Pop along to taste the core Single Origin Quebranta and Single Origin Italia piscos. Co-founders Ian Leggett and Alex Hildebrandt, marketing director Maddie Bedder, brand manager Matt Conner, brand development manager Giancarlo Quiroz Jesus and brand ambassadors Isaiah Luís Sergeant and Alvaro Tello will be in attendance. Suyo is also hosting post-show events at Mr Melo in Brooklyn on Tuesday and Little More in Tribeca on Wednesday.

Veda Spirits Stand 7A-116

Veda Spirits will showcase its flagship Veda Mushroom Liqueur — an “umami-led spirit” designed for cocktails and digestif serves. Visitors can taste the Veda colada slushy serve and unleash their inner mycologist with a closer look at a shiitake mushroom-covered log. The brand is using BCB to build awareness around umami spirits within the trade while seeking new US distribution partners and export opportunities. Founders Jeremy Block and Adam Starowicz, alongside brand manager Andreas Sanidiotis, will be available at the stand.



Vermouth Mist Stand EB36

Described as “vermouth made for martinis”, Vermouth Mist comes in a spray bottle which is designed to last longer than a regular bottle does once opened, and to save waste. A new entrant to the market, Vermouth Mist was created for the on-trade but will also be available to buy D2C. “We're the best way to get the least amount of vermouth into your glass without wasting and while still legally calling it a martini,” its owners say. Comes in 10cl bottles at 18% ABV.

Volans Tequila Stand 8B-706

Founders Chad and Cristina Allen will showcase their range of “traditionally made” tequila: Still Strength Blanco, Blanco and Reposado. The family-owned business is based in Guadalajara and produces tequila in El Pandillo in the Highlands of Jalisco. The pair met at music college in LA and founded Volans in 2015, moving to Guadalajara in 2021. Their brand is named after “a constellation of the flying fish in the Southern Hemisphere”. If you wander past, ask them about Igor the Shredder!



Zacapa Rum (Diageo, Industrias Licoreras de Guatemala) Stand IC33

Zacapa's stand is in the courtyard between buildings 7 and 8, with Zacapa No.23 Rum taking centre stage. The stand will host rotating guest bartenders throughout the show, allowing visitors to taste cocktails from a range of professionals. Zacapa master blender Lorena Vásquez and global ambassador Vanessa Leon will also be on-site to offer a deeper look into rum-making. The brand, co-owned by Diageo and Industrias Licoreras de Guatemala, is using BCB to build awareness within the trade while deepening education around Zacapa's production, heritage and versatility in cocktails. [GDI](#)



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Impressive ‘quality and diversity’ at BISC

Judges at the 13th Annual Berlin International Spirits Competition were “excited by the quality as well as the diversity of the spirits submitted”. Organiser Adam Levy said this year’s competition featured more than 250 spirits in over 50 categories from 16 countries. Here, then, are the double gold, gold and individual winners of this year’s competition in the German capital. For the complete list, visit berlininternationalspiritscompetition.com



Berlin International Spirits Competition 2026 Double Gold Medal Winners



Company	Brand	Product Name	Product Type	Product Category	Price Category US\$
Aura Proizvodi	Aura	Premium Pelinkovac Victoris	Liqueurs & Other	Herbal/Botanical Liqueur	\$26–\$40
Bardinet	Depaz	Rhum Vieux Agricole Plantation	Rhum Agricole	Rhum Aged	\$25 or less
Hidden Ships Distillery	Hidden Ships Distillery	Barrel Rested Gin	Gin	Dry, New Western	\$26–\$40
Hidden Ships Distillery	Hidden Ships Distillery	Barrel Rested Rum	Rum	Other Rum, Up to 8yo	\$26–\$40
Milestone Beverages	Stateless	American Single Malt	Whisky/Whiskey	American Single Malt, Highlands, Up to 10yo	\$40 or less
PP Orahovica	Martin Albus	Liker Od Lješnjaka	Liqueurs & Other	Nut Liqueur	\$26–\$40
Proximo Spirits	Stranahan's	Mountain Angel 12yo	Whisky/Whiskey	American Single Malt, Highlands, 11yo–20yo	\$40 or less
Spyglass Trading Europe	Île Four	Ginger	Liqueurs & Other	Fruit Liqueur	\$25 or less
Uncle Nearest	Uncle Nearest	Cognac Cask Barrel 06	Whisky/Whiskey	Tennessee Whiskey, Highlands, Up to 10yo	\$101+
WhistlePig	WhistlePig	Double Double Rye 18yo	Whisky/Whiskey	Canadian Whiskey, Highlands, 11yo–20yo	\$101+
Wolfsbane	Wolfsbane	Limoncello	Liqueurs & Other	Fruit Liqueur	\$26–\$40

Berlin International Spirits Competition 2026 Gold Medal Winners



Company	Brand	Product Name	Product Type	Product Category	Price Category US\$
Aura Proizvodi	Aura	Limoncello	Liqueurs & Other	Fruit Liqueur	\$26–\$40
Bardinet	Rhum Dillon	Rhum Vieux Agricole 5yo	Rhum Agricole	Rhum Aged	\$25 or less
Bardinet	Old Nick	Caribbean Spiced	Rum	Spiced, Up to 8yo	\$25 or less
Bardinet	Sir Edward's	Finest	Whisky/Whiskey	American Blended Whiskey, Highlands, Up to 10yo	\$40 or less
Bernard Family Brewery	Bernard	Beer Spirit Barrel Aged	Liqueurs & Other	Unlisted Spirits	\$41+
Controvento	Sapori	Dry Gin	Gin	London Dry	\$25 or less
Distillerie L'Herbier	Le Secret De L'Herbier	Gin Original	Gin	Dry, Distilled	\$41+
Earl of Owlcrest	Earl of Owlcrest	Chill and Cheer	Liqueurs & Other	Unlisted Spirits	\$41+
Global Beverage Trade	Aznauri	Black Barrel	Brandy	Grape Brandy	\$30 or less
Global Beverage Trade	Aznauri	Gold Reserve	Brandy	Grape Brandy	\$30 or less
Hidden Ships Distillery	Hidden Ships Distillery	Rye Whiskey	Whisky/Whiskey	American Blended Whiskey, Highlands, Up to 10yo	\$71–\$100
JP Shot	El Patriarca	Raicilla	Agave/Tequila	Bacanora, Highlands, Up to 10yo	\$51+
Licores Bou	Pisco Bou Legado	Reservado 40° Guardado en Roble	Brandy	Pisco	\$30 or less
Modern Artisan	Citrivo	Limoncello	Liqueurs & Other	Fruit Liqueur	\$26–\$40
Montegrisa	Amaro del Carso	Amaro del Carso	Liqueurs & Other	Herbal/Botanical Liqueur	\$26–\$40
NSN-Brands	Nils Koenig	Gin	Gin	Dry, Distilled	\$41+
Old Ozarkian Distillery	Old Ozarkian Distillery	Hard Made Sour Mash Whiskey	Whisky/Whiskey	American Single Barrel Whiskey, Highlands, Up to 10yo	\$40 or less
One Eyed Spirits	Come Hell or High Water	XO	Rum	Dark, 9–15yo	\$26–\$40
PP Orahovica	Martin Albus	Liker Od Višnje	Liqueurs & Other	Fruit Liqueur	\$26–\$40 >>>

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Berlin International Spirits Competition 2026 Gold Medal Winners – Cont'd

Company	Brand	Product Name	Product Type	Product Category	Price Category US\$
Proximo Spirits	Stranahan's	Mountain Angel 10yo	Whisky/Whiskey	American Single Malt, Highlands, Up to 10yo	\$101+
Proximo Spirits	Stranahan's	Original	Whisky/Whiskey	American Single Malt, Highlands, Up to 10yo	\$41-\$70
Proximo Spirits	Stranahan's	Blue Peak	Whisky/Whiskey	American Single Malt, Highlands, Up to 10yo	\$41-\$70
Spyglass Trading Europe	Île Four	The Distiller 003	White Spirits	Soju/Shochu	\$25 or less
Spyglass Trading Europe	Île Four	Tōji Gin	Gin	Dry, Distilled,	\$41+
The Shed Distillery of PJ Rigney	The Shed Distillery	Gunpowder Irish Gin	Gin	Dry, Distilled,	\$26-\$40
Uncle Nearest	Uncle Nearest	Master Blend Edition No.072	Whisky/Whiskey	Tennessee Whiskey, Highlands, Up to 10yo	\$71-\$100
Uncle Nearest	Uncle Nearest	Toasted Single Barrel 3970	Whisky/Whiskey	Tennessee Whiskey, Highlands, Up to 10yo	\$101+
Vodka57	Vodka57	Pure Glacier Vodka	Vodka	Wheat	\$41+
WhistlePig	WhistlePig	The Boss Hog Collection (Boss XII Feather & Flame)	Whisky/Whiskey	American Blended Whiskey, Highlands, 11-20yo	\$101+
WhistlePig	WhistlePig	Estate Oak Rye 15yo	Whisky/Whiskey	Canadian Whisky, Highlands, 11-20yo	\$101+
WhistlePig	WhistlePig	PiggyBack 100 Proof Bourbon	Whisky/Whiskey	American Straight Bourbon, Highlands, Up to 10yo	\$41-\$70
WhistlePig	WhistlePig	Small Batch Rye 10yo	Whisky/Whiskey	Canadian Whisky, Highlands, Up to 10yo	\$71-\$100
Wolfsbane	Wolfsbane	Premium Vodka	Vodka	Wheat	\$41+
Wolfsbane	Wolfsbane	White Fae	Gin	London Dry	\$26-\$40
Zingara	Zingara	London Dry Gin	Gin	London Dry	\$25 or less

The 14th Annual Berlin International Spirits Competition will be held in summer 2027. berlininternationalspiritscompetition.com

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Berlin International Spirits Competition 2026 Individual Winners



Argentina
Gin of the Year
Zingara

Australia
Distillery of the Year
Wolfsbane

Vodka of the Year
Wolfsbane

Gin of the Year
Wolfsbane

Liqueur Distillery of the Year
Wolfsbane

Barbados
Rum of the Year
Come Hell or High Water

Canada
Liqueur of the Year
Sharab Spirits Patiala Peg

Whisky Distillery of the Year
WhistlePig

Chile
Pisco Distillery of the Year
Pisco Bou Legado

Croatia
Gin of the Year
Bogowski Vanilla Gin

Liqueur Distillery of the Year
Aura

Nut Liqueur Distillery of the Year
Martin Albus

Czechia
Liqueur Distillery of the Year
Bernard Family Brewery

France
Gin of the Year
Le Secret De L'Herbier

Spiced Rum of the Year
Old Nick Caribbean Spiced

Germany
Liqueur of the Year
Earl of Owlcrest

Limoncello of the Year
Citrivo

Greece
Gin of the Year
Nils Koenig

India
Liqueur of the Year
Tank No. 90

Ireland
Gin Distillery of the Year
The Shed Distillery

Italy
Amaro of the Year
Amaro del Carso

Gin of the Year
Sapori

Whisky of the Year
Collesi Whisky 5yo

Japan
Gin Distillery of the Year
Tōji Gin

Liqueur Distillery of the Year
Île Four

Shochu of the Year
Île Four The Distiller 002

Martinique
Rhum of the Year
Rhum Dillon

Mexico
Raicilla Distillery of the Year
El Patriarca

Spain
Gin of the Year
GinMachine

Switzerland
Vodka of the Year
Vodka57

Ukraine
Distillery of the Year
Aznauri

United Kingdom
Scotch Blend of the Year
Sir Edward's

United States
**American Single Malt
Distillery of the Year**
Stranahan's

**American Single Barrel
Whiskey Distillery of the Year**
Old Ozarkian Distillery

**Tennessee Distillery
of the Year**
Uncle Nearest

Gin Distillery of the Year
Hidden Ships Distillery

Rum Distillery of the Year
Hidden Ships Distillery



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Casa Redondo CEO Daniel Redondo

The third-generation, family-owned Portuguese company recently expanded with two acquisitions from Diageo — Safari and Sheridan's. CEO Daniel Redondo reveals the story behind the deals to **Olly Wehring**

Casa Redondo was founded by your grandfather... [He] started working at a small distillery before becoming a rep for Remington, selling typewriters. He was made unemployed during World War II, when Remington had to produce war machinery. In 1940, he bought the distillery and with it the Beirão [herbal] liqueur brand. Over the next 40 years, Beirão's relevance in Portuguese society grew and it became the country's top-selling liqueur in the 1980s.

When did you join the business? In 2000, just before my grandfather passed away in 2005. In 2007, Beirão became the biggest-selling spirit in Portugal. We were a one-brand company up until as recently as 2016, when we launched Beirão D'Honra, to mark the centenary of our grandfather's birth.

Around this time, we started buying smaller brands in Portugal and creating brands from scratch, such as The FoxTale Gin and Per Se Aperitivo. This was the main development process for the company until 2024, when we bought Safari [Exotic Fruit Flavoured Liqueur] from Diageo. Following that deal, we had the opportunity in 2025 to buy Sheridan's [Coffee Layered Liqueur], which is a much bigger brand.

What was Casa Redondo's scale prior to the Safari purchase? At that point, Beirão sold around 400,000 nine-litre cases annually — 80% in Portugal, 20% abroad. Where there are Portuguese people, there is Beirão!

We wanted to grow significantly outside Portugal, but this would have taken longer with just Portuguese brands.

What appealed about Safari? Firstly, Safari wasn't such a big brand, which means it wasn't something very risky. For Diageo, it was completely irrelevant — we're talking about 70,000 cases in six markets [the Netherlands, Belgium, Germany, Türkiye, Portugal and Denmark]. We saw the brand as an opportunity for us in these foreign markets.

For us, it's very important to be less dependent on our own market. We also



Daniel Redondo: 'There are a lot of opportunities in the market'

want to apply our marketing expertise to brands that previously didn't get much attention from Diageo. Our strategy is to show these brands some love and hopefully we can do some good things.

Where did the funds come from for Safari and Sheridan's? We're a very conservative company — on brand investment and on general costs. We prefer to use in-house cash instead of borrowing money. Our focus is on the long term: we need to make sure the next generation receives the company in better shape than we received it in.

How did the conversations with Diageo come about? We'd send a small pitch to key people explaining why we're a credible company to do business with. That was crucial, because I imagine Diageo receives hundreds of requests like this. The process went so smoothly that we were able to complete another purchase with them soon after the first one. Of course, Diageo weren't easy on the numbers, but they were very good to do business with.

What did you learn from the transaction with an international brand owner? I don't think we learned that much. What I would say is that we're being approached by many brand owners who are presenting us with deals. There are a lot of opportunities in the market.

The biggest challenge is forecasting the development of the category. We really don't know how the industry will be in ten years'

time. That's the big risk. Another challenge currently is the lack of money. All companies big and small — the smaller ones are even worse — have a cash problem. Then there are markets that are not in the right shape in which to launch new brands. It's not an easy time right now.

Have you had to dilute your family's ownership to grow Casa Redondo? No, not at all. We're 100% family-owned and that's the strategy for the future. We would be open to partnerships of certain brands or connected businesses, but not for our mother company. We don't need the money — we're not thinking of buying things that are out of our reach. We also want to retain our agility. Rigidity is something that we run away from.

How will you strike the balance between mature brands and younger consumers? That's the challenge for every brand owner. This new generation of consumers, which includes my daughters, has a different approach. They don't go out and socialise as much as previous generations — that's something that has to change, because there's a big mental health issue around the world that is very much related to that.

I believe alcohol plays a role in helping people to get together. It's a question of equilibrium. Every company has the challenge to get to this new generation. It's not easy and I don't have the answer. But we're going to keep on trying to reach them.

How will you refresh Safari and Sheridan's? In brand marketing, every company is doing the same. We need to do it better — we need to be more creative and be better at executing our strategy. There's no secret to this, it's just hard work and creativity.

Are you enjoying playing with your new toys? We have to make sure we're doing the right things with the right tools to help the brands grow. It's good to come to work, because the whole company is very motivated. I know that in the industry right now, not every company has this level of motivation. It's fun, but it's also a challenge. **GO!**

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

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