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FOR THE GLOBAL DRINKS EXECUTIVE | JUNE 2025



Crystal clear

*Vodka & gin
ride out the waves
in choppy Americas
markets*

PLUS

More buzz, less booze:
three key markets driving
no/low-alcohol growth

Interviews with Heineken,
Scotch Whisky Association,
Fervinum, Craft Spirit
Capital & Virgin Wines

The US drinks
market tackles tariffs,
inflation and changing
consumer tastes

Why walking away
from ESG is a backward
step for the global
drinks industry

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COMMENT

Joe Bates

Tariffs slashed, spirits lifted: India leads a trio of UK trade deals, but which will bring the biggest reward for exporters?

According to a long-standing British joke, you wait ages for one bus and then three come along at once. For the UK drinks industry, last month delivered a full fleet: landmark trade deals with India, the US and, most recently, a new accord with the European Union.

After years of post-Brexit inertia, British trade negotiators have come up trumps. For alcoholic beverage companies long snarled in red tape, it's starting to feel like the traffic lights have finally turned green.

The UK-India free trade agreement is undoubtedly the most significant of the three agreements. The deal will see tariffs on UK scotch whisky and gin cut from a sky-high 150% to 75%, with a decade-long slide to 40%.

In theory, UK distillers will no longer feel exporting to India is like trying to win a boxing match with one hand tied behind their back. But the reality is that challenges will remain for firms wishing to succeed in this vast, fragmented and bureaucratic market.

In a timely interview this issue with *GDI* digital editor Olly Wehring, Scotch Whisky Association chief executive Mark Kent memorably calls the deal "transformational" (see p32), and so it is for everyone with a stake in the industry.

Big players Diageo and Pernod Ricard are already heavily invested in India so are well-placed to capitalise fastest. However, it's also clearly a gilt-edged

opportunity for smaller companies that have long been locked out of the huge Indian whisky market due to the high costs involved.

Of course, Indian producers aren't thrilled about the prospect of more competition. Some worry the allure of imported scotch at lower prices could overshadow India's own rising whisky stars, such as Paul John and Radico Khaitan. Yet, with a growing affluent middle class and room for local pride and imported prestige, most see the deal as a challenge worth meeting. Consumers, meanwhile, are the clear beneficiaries.

In contrast, the UK-US deal is more of a mixed bag. President Donald Trump's current 10% tariff may be less punishing than his first term's crippling 25% levy, which cost the industry at least GBP600m (US\$800m), but the threat of further hikes still haunts the industry.

Diageo has warned the annual cost of tariffs could hit US\$150m, even as it launches aggressive cost-saving measures. Scotch has already been losing ground to tequila and RTDs in the US, but it now faces the double whammy of unpredictability and inflation.

The EU is the UK's largest trading partner. Since Brexit, the UK has seen a 21% drop in exports to the EU and a 7% drop in imports from member countries.

The wide-ranging UK and EU accord promises to streamline food and drink

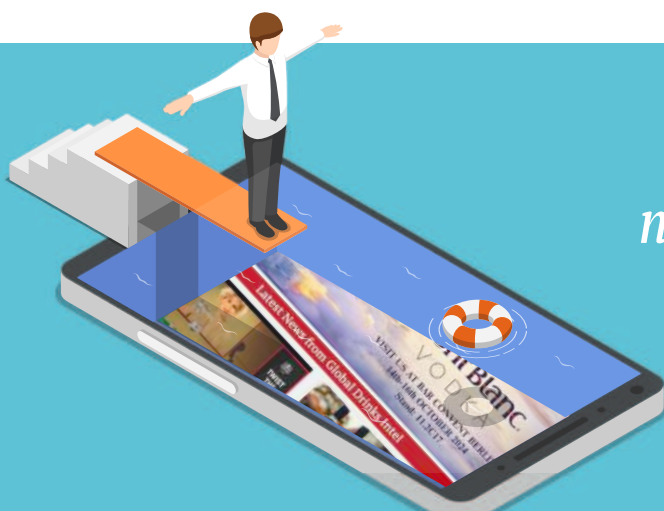
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exports between the two trading blocs, a deal which the UK government says will help boost its coffers by GBP9bn by 2040. Full details are still under wraps, but if it lives up to its billing, it could ease the post-Brexit burden that's weighed on cross-Channel exporters for almost a decade.

Which of the three deals is the biggest win for British drinks companies? India, unquestionably, is the game changer. It offers long-term growth, new consumers and massive potential for Scotch and gin producers in the world's biggest whisky market. Conversely, the US deal feels more like a step back than a step forward, a downgrade on pre-Trump trading conditions in 2024.

As for the EU agreement, it is a welcome step forward, but its true value will ultimately depend on the fine print. **GDI**



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News briefs

Catch up quickly on the global drinks stories that matter

FINANCIAL RESULTS

AB InBev booked a steady start to the year, with quarterly sales rising, albeit at a low single-digit rate. A 1.5% top-line lift from the three months to the end of March was described by the group as “solid”, although volumes were down in the quarter by 2.2%.

Healthy sales in the first three months of this year set the scene for **The Boston Beer Co.** A 6.5% showing for the group’s sales in Q1 was joined by a rise in volumes of 5.3%.

Campari Group posted an “as expected” slide in its sales from the three months to the end of March (-4.2%), with the current quarter displaying a “strong bounceback”.

Carlsberg flagged “a rather unique and uncertain external context” during the first three months of 2025, as quarterly sales ducked below the waterline, down by 1.5% on the year prior.

Heineken posted an ominous-looking set of Q1 results, with sales rising by their lowest rate in recent quarters, inching up just 0.9% on the corresponding period a year ago.

Henkell Freixenet emphasised the potential for prosecco, alcohol-free wine and aperitifs in its full-year results, which showed a slight lift on 2023 (+1.5%).

A near-double-digit sales slide in France undid **Marie Brizard Wine & Spirits’** successes overseas in the first quarter.

Moët Hennessy admitted to a “slow start” to 2025 — the three months to the end of March delivered a 9% sales decline on the corresponding period a year earlier, when sales were down by 12%.

A fourth consecutive quarter of negative sales (-10.4%) saw **Molson Coors Beverage Co** warn of troubled times ahead for the rest of this year.

Pernod Ricard maintained its sales declines for another quarter (-3%), with fiscal 2025 forecast to finish in the red.

Proximo Spirits picked up where it left off in 2024 with a fall in sales (-7%) from Q1.

Rémy Cointreau saw the US “rebound sharply” towards the end of its current fiscal year, but group sales stubbornly retained their negativity (down 18% for the full year).

MARKETING NEWS

Diageo penned a deal with FIFA for next year’s soccer World Cup, due to take place across 16 different host cities in North and Central America.

COMPANY NEWS

AB InBev announced plans to invest US\$3.6bn in Mexico through its Grupo Modelo business unit in the country.

The US division of **AB InBev** also revealed plans to invest US\$300m in its manufacturing operations across the country.

Australian Vintage promoted its chief commercial officer to the helm as Craig Garvin steps down after his latest six-month stint.

Brown-Forman concluded its sales and distribution arrangement with Korbel Champagne Cellars, with Henkell Freixenet poised to take charge.

Heineken announced that it plans to inject GBP40m (US\$53.3m) into its UK-based Star Pubs business unit this year.

A long-running legal row between two beverage alcohol distributors in the US state of Missouri over **Jägermeister** concluded, with Southern Glazer’s Wine & Spirits settling with Major Brands Inc.

Moët Hennessy is in the process of consolidating its employee headcount, according to reports, with around 1,200 jobs on the line.

Tim Ford will stand down as head of **Treasury Wine Estates** later this year after five years at the helm. Lion CEO Sam Fischer will replace him as CEO & MD.

Pernod Ricard’s sale of virtually all of its wine operations to the owner of Accolade Wines completed, leading to the creation of a global wine company, Vinarchy. The current CEO of Asahi’s Carlton & United Breweries business in Australia, Danny Ceroni, has been appointed chief executive.



Heineken entered the energy drink sector with a minority stake in the Tenzing brand

US wine business **Willamette Valley Vineyards** appointed Mike Osborn, founder of online retailer Wine.com, as its next CEO.

NEW PRODUCT DEVELOPMENT

Chile’s **Viña Concha y Toro** made its first foray into alcohol-free wine with the launch of Casillero del Diablo Zero in the UK.

MERGERS & ACQUISITIONS

The UK division of **Heineken** purchased an unspecified size minority stake in the Tenzing “natural” energy drinks brand.

Chinese beer major **Tsingtao Brewery Co** agreed to purchase traditional winemaker Jimo Yellow Wine for CNY665m (US\$92m).

INDUSTRY NEWS

An agreement between **India** and **the UK** will see the rate of tariffs on spirits exports from the latter to the former halved. The deal will see duty on scotch whisky cut from the current level of 150% to 75%. In ten years’ time, the rate will decrease further to 40%.

Shipments of spirits out of the US rose again last year: exports in the 12 months of last year were up 9.7% on 2023 to US\$2.45bn, according to the **Distilled Spirits Council of the United States**.

Global wine production last year fell to its lowest level since 1961. According to the **International Organisation of Vine and Wine**, 2024’s total output, which came in at 225.8m hectolitres, was down 4.8% compared with the previous year.

Data from **The Wine & Spirits Wholesalers of America** showed that in the first three months of this year, wine sales in the US were down by 10.5% in value terms on the corresponding period in 2024. Over in spirits, US value sales fell by 5.1% as volumes decreased by 6.3%. **GDI**



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New products

Take stock with our roundup of the latest drinks launches

Oyster Adriatic Gin

Noblewood Group describes the newest addition to its “super-premium portfolio” as an “intriguing blend of herbs and botanicals native to the Adriatic, particularly Montenegro”.

- Gin. Range comprises Adriatic and Wild Citrus iterations; both 42.5% ABV.
- Announced in March at ProWein and subsequently showcased at TFWA Singapore and Roma Bar Show; availability not yet disclosed.
- SRP not available, 70cl bottle.



Contraluz Cristalino Tequila

Three years after unveiling a cristalino mezcal, Casa Lumbre's Contraluz has added a tequila to its portfolio that has undergone charcoal filtration.

- Tequila, cristalino. A blend of filtered and redistilled tequila; 40% ABV.
- Released in the US last month ahead of a worldwide roll-out.
- SRP of US\$42.99 per 70cl bottle.

Blue Run Flight Series III

Kentucky's Blue Run Spirits, acquired by Molson Coors Beverage Co two years ago, has unveiled the third in its namesake brand's Flight Series line of bottlings.

- American whiskies; blends of Kentucky straight bourbon with Kentucky straight rye. Series comprises six expressions: Beach & Blooms (54.95% ABV), Buck & Brush (55.35%), Filly & Fiddle (55.65%), Fit & Flair (58.5%), Sails & Rails (57.5%) and Sun & Salt (55.1%).
- Released to 25 US states, including California, Florida, Illinois and New York in mid-May.
- SRP of US\$124.99 per 75cl bottle for each iteration.



Captain Morgan Muck Pit Brew

The latest RTD from the Diageo brand draws inspiration from the Caribbean rum-making process that sees overripe fruit tossed into a ‘muck pit’ and fermented.

- RTD made using “brewed fruit”, spiced Caribbean rum and hop flavours; 4% ABV.
- On sale since last month in the UK on-premise through LWC Drinks; to be made available in the country's off-premise next year. Also lined up for roll-out across Africa, Asia and Europe, although timescale not specified.
- SRP of GBP30 (US\$40) for 12x44cl cans.



Bushmills 18yo Single Malt Irish Whiskey

The Proximo Spirits-owned brand's global travel retail-exclusive World Wood series has a new triple distilled addition, but only in the Asia-Pacific region.

- Irish whiskey, single malt, 18yo. Aged for a minimum of 17 years in ex-bourbon and oloroso sherry casks, then finished in ex-Colheita port casks; 46% ABV.
- Debuted at TFWA Asia Pacific Exhibition & Conference ahead of roll-out exclusively to the GTR channel in the region.
- SRP of US\$140 per 70cl bottle.



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The Dalmore Luminary Edition 2025 Edition – The Rare

The third edition of the Luminary Series from the Whyte & Mackay brand is housed within a bespoke sculpture designed by British architect Ben Dobbin.

■ Scotch, single malt, Highlands. Aged for 52 years; 40.3% ABV.

■ Two sets available. One was offered at auction via Sotheby's Hong Kong in May, with all proceeds to be donated to V&A Dundee. The second set will feature in a display at the brand's distillery.

■ Successful bid value not disclosed, available in a 70cl bottle.

Gibson's London Dry Gin & Tonic

This extension to the Gibson's Gin portfolio into RTDs will be promoted by brand owner La Martiniquaise-Bardinet with a social media-led digital activation and POS.

■ RTD, gin-based, contains Gibson's London Dry gin; 5% ABV.

■ Released in May to "more than" ten markets, including Cyprus, Italy, Mauritius, the Netherlands and Sweden.

■ SRP not immediately available.



Jawbox Apple & Ginger

Drinksology Kirker Greer has expanded its Jawbox range with a gin liqueur featuring "unusual" Echlinville apples and Belfast Black Mountain heather.

■ Liqueur, gin-based, features 11 botanicals; 20% ABV.

■ Available to on and off-premise operators, as well as wholesalers in the UK and Ireland.

■ SRP of GBP25.50 (US\$34) per 70cl bottle.



Oishii Spritz

The four-strong line comprises a sake base, which has been brewed in the US, and is positioned as a 'better-for-you' RTD offering.

■ RTD, sake-based. Range comprises Lychee Lemon, Mango Yuzu, Coconut Lemongrass and Watermelon Lime; all contain zero sugar and come in at 6% ABV.

■ Available now in the US, initially in California, Florida, Georgia and New York prior to a nationwide roll-out in Q3.

■ SRP of US\$5 per 35.5cl can.

On The Rocks Sparkling Cans

The On The Rocks premix cocktail line is debuting in cans, with three variants featuring Suntory Global Spirits brands as their bases.

■ RTDs, sparkling. Range comprises Mango & Mint Mojito, Sparkling Lime Margarita and Cucumber & Lemongrass Mule; all 10% ABV.

■ Released nationwide to the US market in May.

■ SRP not immediately available.



Minoki Single Origin Japanese Rum

The two iterations from Yoshino Spirits Co are distilled from sugarcane grown in Japan and the liquid has been filtered through coral.

■ Rum, Japan, finished in mizunara oak; 8yo and 15yo expressions; both 40% ABV.

■ Available worldwide since last month on a "first come, first served" basis.

■ SRPs not immediately available, on sale in 70cl bottles – 1,900 units of the 8yo and 1,200 of the 15yo.



Edinburgh Gin Raspberry Collins

The low-ABV cocktail is targeting "today's moderation-minded drinker", according to brand owner Ian Macleod Distillers.

■ Raspberry flavoured gin liqueur-based RTD cocktail; 2% ABV.

■ On sale in the UK's off-premise channel through multiple retailer Tesco and via Edinburgh Gin's website.

■ SRP of GBP1.50 (US\$2) per 25cl can.



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MARKETING TRENDS

Chris Tyas

Creating desire: why the future of luxury drinks is being written in fashion and design

Gone are the days when a luxury Johnnie Walker experience meant splurging an extra tenner to upgrade from Red to Black. Earlier this month, the world's biggest scotch whisky brand unveiled a new limited-edition range carrying a rather high-end price tag of US\$20,000 a bottle.

Created in collaboration with French fashion designer Olivier Rousteing, Johnnie Walker Couture Expressions is the latest in a series of intriguing brand initiatives by Diageo following the creation of its luxury group last September. For GBP50,000 (US\$66,450), Johnnie Walker lovers can splash out on experiences like a private blending session at its tasting vault in Edinburgh.

Stablemate Guinness, meanwhile, was recently seen strutting down the catwalk at Milan Fashion Week in a collab with British label JW Anderson (a comparative bargain — just GBP890 for a sweatshirt).

It's not just Diageo going big on luxury either. Over at LVMH, Glenmorangie has teamed up with luxury Indian design brand Shivan & Narresh to create the Delicious Living collection, a range of homeware inspired by the distillery — including a GBP4,800 couch.

Fellow LVMH brand Hennessy has taken the idea of the limited-edition bottle to a whole new level in its partnership with Spanish fashion house Loewe, which has created a knotted-leather carafe for Paradis Cognac that takes 33 hours to make. As for the cost — it's POA (if you have to ask, as they say).

Of course, the prices aren't the point — it's all about how big the luxury trend has become in drinks, and how much it has evolved in our industry.

At one time, the luxury strategy for alcohol brands was very straightforward: stick a redesigned label on a limited-edition bottle containing an aged version of the usual liquid and sell it at a premium price.

But that just doesn't work with Gen Z and Millennial consumers, who aren't drinking as much as their predecessors and



Johnnie Walker master blender Emma Walker and Olivier Rousteing developed the Couture Expressions

are not as impressed by stories about rare or aged liquids.

Fashion has understood for a long time that luxury isn't a fixed set of characteristics — it's a constantly shifting idea, rooted in culture and influenced by many external factors. So it's no wonder that the alcohol industry is looking towards fashion and, indeed, collaborating with the designers who've become celebrities in their own right.

It's not just spirits either. A recent report from US management consultants Bain & Company shows the fine wine and restaurant market has bounced back in a big way and is now worth over US\$58bn, while wine producer Penfolds says its goal is to be "a luxury item that's mentioned in the same breath as Hermès".

It's really exciting to think about where the trend can go next. Can premium beer and RTD brands make the leap to luxury?

I don't see why not. Non-alcoholic categories are managing to do it. Coffee, for example, is reaching new heights with both the product and the technology that produces it — super-high-end machines which let you control the temperature of the water, the fineness of the ground, and so on.

Matcha brands are leaning into the cere-

monial element of brewing a cuppa, and all the accoutrements that go with that process. So why not an RTD experience that feels like a designer handbag or a limited-edition sneaker?

Because that's where this is going: luxury in drinks is no longer about exclusivity for its own sake. It's about cultural relevance. It's architecture, fashion, music and streetwear, and how the brand lives in the world, not just on the shelf.

To stay ahead, brands need creative partners who understand this. Agencies that can see where the cultural conversation is going and help position brands at that intersection.

Because while the bottle still matters, the story around it — the collaborations, the aesthetics, the experiences — is what defines luxury today.

Luxury values substance, but it thrives on style. And most importantly, it's moving fast. Blink and you'll miss the next cultural crossover. But get it right, and you're not just selling a drink. You're creating desire. **GDI**

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



On our radar

Five drinks campaigns bringing the heat

From sun-soaked beaches to bar-hopping apps, these five marketing initiatives aim to pour fresh energy into tackling issues as varied as overdevelopment and overwork

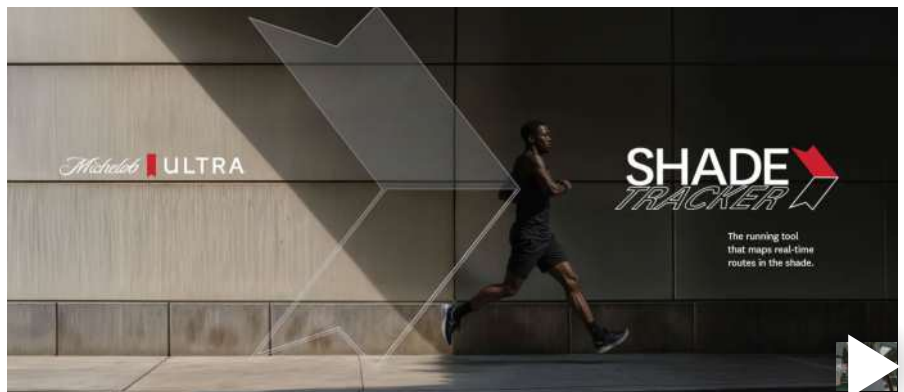
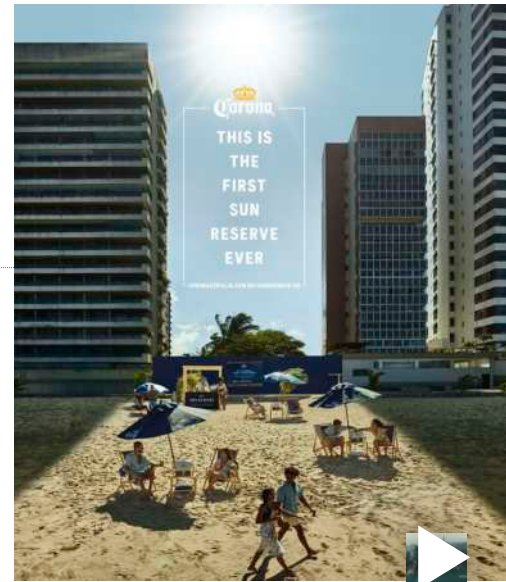


Mix & mingle Heineken

Heineken is shaking up bar culture with a new campaign in Brazil and Italy designed to get young adults out of their social ruts. It has launched two new apps — Bar Dating in Italy and Hei App in Brazil — that feature ‘dating profiles’ for different venues to inspire Gen Zers and Millennials to support the on-premise and forge real-world connections one pint at a time.

Chase the sun Corona

Corona has created the world’s first ‘sun reserve’ to preserve access to sunshine on public beaches. As coastal populations climb, towering structures are encroaching on waterfronts and casting shadows on the sand. The AB InBev brand is now leasing land along Brazil’s Piedade Beach “to cap building height” and let the light in.



Cool running Michelob Ultra

Runners can beat the heat with Michelob Ultra’s new Shade Tracker app. Syncing with Garmin and other platforms, it maps out routes that avoid direct sunlight for smarter training. The AB InBev brand is also offering 35 athletes the chance to join ‘Team Ultra’ at the NYC Marathon. The message? Every smart run deserves a cold reward.

Beach, please Malibu

Malibu has a timely message for overworked Americans: “Clock off.” The latest chapter of its ‘Do Whatever Tastes Good’ campaign sees Scottish actor Brian Cox urge consumers to reclaim their free time — ideally with a coconut-laced cocktail in hand. Pernod Ricard’s light-hearted push comes as a OnePoll study reveals that Americans work an average of 15 hours extra a week.



Finer things Finlandia Vodka

Finlandia Vodka’s ‘It’s Soooooo Fine’ campaign marks the Finnish brand’s first major campaign under Coca-Cola Hellenic Bottling Co ownership since it was acquired from Brown-Forman for US\$220m in 2023. Crafted with DDB Paris, the activation comprises three 20-second video spots targetting younger LDA consumers “seeking moments of joy and shared experiences”.





ESG roundup

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

ENVIRONMENTAL

Heineken partnered with the Ellen MacArthur Foundation on a new reusable packaging drive, part of a wider bid to reduce the company's use of new packaging materials and increase reusable packaging under its 'Brew a Better World' programme. By combining its knowledge of reusable packaging with the foundation's ability to convene, Heineken will drive adoption at scale and contribute to a circular economy.

In **Japan**, **Suntory** established a new water stewardship company to help businesses and local communities secure water supplies by providing scientific expertise. 'Water Scape' will assist in securing sustainable water supplies by visualising groundwater conditions based on data and evidence from hydrology, supporting individuals and organisations facing water security and management challenges as water issues intensify globally.

SOCIAL

In **Brazil**, **Zé Delivery**, overseen by AB InBev's Ambev division in the country, distributed free bottles of water and alcohol-free Corona Cero to Lady Gaga fans ahead of a much-anticipated free beach concert in Rio de Janeiro. Fans waited for several days before the concert, and Zé used the event to highlight the importance of staying hydrated while having fun.

In **South Korea**, Asahi opened a new no/low-alcohol pop-up bar in Seoul for a limited period, expanding its '#SmartDrinking' initiative outside Japan for the first time. The Sumadori Bar offers drinks at 0%, 0.5% and 3% ABV, making no/low drinks available to a wider audience. Asahi also opened three more of the pop-up bars in Japan.

Carlsberg's Tuborg brand launched its big-

gest responsible drinking campaign in **Denmark** to date. Recent research shows that 77% of young people in the country feel that alcohol consumption is "expected" at social events. The 'Drink With Respect' campaign will raise awareness through films, advertisements and initiatives at party venues, inspiring young people to drink responsibly.

Diageo's Uganda Breweries launched 'Eyo Red Card', a call to action for consumers in **Uganda** to make smart choices like pacing themselves while drinking, setting limits and never drink-driving. The Uganda Red Cross Society praised the unit for running strong responsible drinking initiatives that stress the importance of a society-wide approach to road safety.

In the **Philippines**, **Pernod Ricard** is rolling out digital QR code labels across all of its brands, directing consumers to transparent, accessible information that will help them make well-informed and responsible choices. The QR codes will provide consumers with detailed information about ingredients and responsible drinking guidelines.

Suntory relaunched its **DrinkSmart** website, which provides consumers with location-specific macro-nutritional information for brands, guidance on standard serving sizes and responsible hosting tips such as always planning for responsible choices.

Drinkaware partnered with retired soccer player & commentator Chris Kamara for a Mental Health Awareness Week initiative in **the UK**. Polling found that over half of 45 to 64-year-old men think middle-aged men use alcohol as a coping mechanism. The 'It's okay to talk about drinking' campaign encourages men to talk and share experiences.

In **Australia**, **DrinkWise** partnered with Australian rules footballer Gavin Wanganeen to promote responsible drinking at



sports events. Wanganeen (above) told fans how important it is to "drink wise" in the crowd at a game, so that they can look after themselves and respect other fans.

GOVERNANCE

Asahi, Bacardi, Brown-Forman, The Coca-Cola Co, Diageo, Kirin's Lion division, Moët Hennessey, Pernod Ricard, Suntory and William Grant & Sons were among the founding signatories of The Drinks Association's 'Respect in Drinks' charter in **Australia**. The signatories pledged to make a positive difference in the drinks industry by adopting a new commitment on respect and inclusion that includes zero-tolerance to discrimination, clear standards for professional conduct and promoting responsible drinking.

In **the US**, **AB InBev** celebrated a significant milestone as its Anheuser-Busch division produced its 100 millionth can of emergency drinking water since its disaster relief programme was founded in 1988. The group frequently leverages its infrastructure to respond quickly to natural disasters by pausing beer production to produce clean drinking water for communities in need.

Bacardi expanded its global 'Shake Your Future' free bartender training programme, which offers young adults the skills necessary for a career in hospitality. It has pledged to train 10,000 young mixologists by 2030.

Finally, **Molson Coors Beverage Co** committed to doubling its emergency canned water production in **the US** to 830,000 a year in response to an increase in natural disasters. The company has produced over 3m cans of drinking water since 2017. **GDI**



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



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SUSTAINABILITY MATTERS

Rosie Davenport

Why walking away from ESG is a backward step for the global drinks industry

Has the axe fallen on ESG? Scanning recent headlines, it's an easy conclusion to make when screeching declarations in the mainstream media tell us ESG is "dead".

Political row-backs stateside, regulatory U-turns in the EU, resurgence of fossil fuels amid faltering progress on sustainability targets have raised significant questions. But the narrative that ESG (environmental, social and governance) has lost its relevance is premature and short-sighted.

For global drinks companies navigating a complex web of operational, reputational and geopolitical risks, ESG is not a distraction. It is a lens for making smarter, more resilient business decisions. Far from a passing trend, ESG remains a vital framework for safeguarding long-term value, responding to investor and consumer expectations and future-proofing supply chains.

The backlash is real, but so is the business case

One thing is certain: the ESG mood music has changed. The EU has delayed the roll-out of the Corporate Sustainability Reporting Directive, and the US Securities and Exchange Commission has dropped its defence of climate disclosure rules. In the US, the second Trump presidency is further undermining regulatory progress.

But ESG goes beyond an exercise in regulatory compliance; it's a strategic risk tool. Heavily reliant on agriculture and water resources, the drinks industry is uniquely exposed to the effects of climate change. Extreme weather patterns threaten crop yields for barley, grapes and sugarcane. Water scarcity is forcing breweries to rethink operations. And social issues — ranging from responsible consumption to supply chain ethics — remain under intense scrutiny.

There are many high-profile examples to point towards. Heineken has implemented water stewardship projects across 41 high-risk sites, while Diageo is investing in regenerative agriculture to protect long-term ingredient supply. However, it's clear these are not just acts of ESG compliance — they are business survival strategies.

Investors expect transparency around ESG strategy

Despite the regulatory headwinds, investor interest in ESG remains robust.

Morgan Stanley data from 2024 shows 80% of global asset owners expect to see growth in sustainable investments over the next two years. This reflects continued confidence in ESG as a long-term value driver despite shifting regulatory and political landscapes.

But investors no longer reward vague commitments. They want to see measurable progress on emissions, supply chain traceability and water use. They want credible transition plans, not just carbon pledges without capital allocation. For companies in the drinks sector, this means ESG disclosure must become more data-driven, transparent, tied to financial performance and focused on what's material to their business.

Consumers want brands with ESG-driven values

Those ringing the death knell for ESG also overlook the role of consumers in forcing the agenda. At a time when populations around the world are growing increasingly distrusting of their politicians, they are still expecting brands to step up.

Sustainability is a key driver of purchase decisions, particularly among Gen Zers and Millennials. And, as the industry desperately tries to stem the trend among this audience towards drinking less, sustainability is proving to be a prized attribute.

According to a joint McKinsey and Nielsen IQ report, products making ESG claims averaged cumulative sales growth of 28% over the five-year period to 2022, versus 20% for brands not leaning into sustainability credentials. Consumers want to know where their drinks come from, how they're made and whether the brand aligns with their values.

No/low drinks growth (p34), sustainable packaging innovations (p37) and ethically sourced ingredients are not incidental, they are fuelled by demand. If ESG is "dead," consumer behaviour tells a very different story.



ESG is evolving

The reality is that ESG is evolving, accompanied by a shift in language and positioning. Companies now talk about "sustainable business", "responsible growth" or "climate resilience", but the guiding principles remain unchanged. What's emerging is a more pragmatic, integrated ESG approach: one that focuses on business-critical outcomes, not just reputational wins.

Smart players quickly grasped that sustainability-led operational shifts in water use, energy reduction and circular packaging cut costs, as well as environmental impact. Heineken's water efficiency efforts have reduced use by 11% across its operations since 2018, which is better for the planet and the P&L.

Why retreating isn't an option

Beyond the headlines, there is no denying that ESG needs a reset. Targets must be achievable, language must be clearer, and reporting must focus on measured actions, not intentions. Despite the challenges, walking away from ESG is a backward step.

Global drinks companies have an enduring responsibility, not just to shareholders, but to their ecosystems of farmers, suppliers, distributors and consumers. At a time of extreme global turbulence, ESG provides the framework to manage these interdependent relationships, mitigate risk and highlight opportunities.

The winners in the changing ESG landscape will be those who stay the course and recognise that it isn't dead, it's maturing.

And in an industry where natural resources, brand trust and consumer loyalty are king, it should continue to sit at the heart of the business agenda. **GDI**

Rosie Davenport is the founder of specialist sustainability and communications agency Impact Focus. [impactfocus.co](https://www.impactfocus.co)

Tariffs, inflation and changing tastes mobilise the US drinks market

The US alcohol beverage market is enduring a very challenging period of considerable volatility. After years of growth driven by premiumisation and a booming cocktail culture, this lodestar drinks market is now grappling with declining sales, inflationary pressures, a marked consumer shift towards more mindful consumption and, above all, the looming spectre of ever-higher tariffs.

Even before the new Republican administration took office in January this year, the cracks were showing. According to data from the Wine & Spirits Wholesalers of America (WSWA), spirits sales by value fell 4.3% in 2024, while wine revenue dropped 6.3%.

The association labelled 2024 as one of the “most challenging years in collective memory”, blaming much of the slump on a shift away from alcohol consumption.

Premiumisation's hangover: what's still selling?

Bright spots were few. According to figures from the Distilled Spirits Council of the US (Discus), vodka sales were flat across the country last year, while American whiskey sales fell 1.8% to US\$5.2bn. However, pre-mixed cocktails, including spirits-based RTDs, were an outlier, growing 16.5% to \$3.3bn. Tequila and mezcal also held their corner well, growing almost 3%.

As tariffs rise and fall, inflation bites and drinking habits evolve, the US beverage alcohol market finds itself at a crossroads, forcing brands to adapt quickly or risk being left behind. **Joe Bates** reports

The impact of the Trump government's chaotic tariff policy has not helped. At the time of writing, a blanket 10% tariff had been imposed on imported goods from most countries, with the threat of much higher charges on markets such as the EU and China possible after a 90-day pause expires. (The EU currently faces a 10% charge, reduced from 20%, and China a 30% levy, lowered from 125%.)

Spirits revenue dropped 5.1% in Q1 2025, according to the WSWA, while wine revenue slipped back even further, down 10.5% year on year.

Economic uncertainty, potential tariff implications and inventory adjustments by distributors have combined to weigh heavily on the Q1 sales results of many overseas drinks companies.

LVMH's spirits division plunged 17%, a steep fall blamed on the soft demand for cognac in both the US and China, while Marie Brizard Wine & Spirits saw its US sales plummet 51.3%, due to tariff uncertainty and inventory reduction by distributors. Similarly, Campari saw its stateside sales dip, reporting an 11% decline.



Michael Correra: 'Prices are already over the top and tariffs are going to push consumers to buy less'

Retailers feel the pain of tariffs

While the full scale and breadth of the US government's tariff plan still is far from clear, the financial strains are already being felt among retailers.

“Prices are already over the top and tariffs are going to push consumers to buy less,” warns Michael Correra, the owner ➤

» of Brooklyn-based Michael-Towne Wines & Spirits, a three-generation family-run liquor store established in 1934. “Consumers have a budget and if prices get higher, they’re going to buy less wine, maybe from four bottles a month to two or three.

“Some products are out of stock, because importers are putting them on hold and consumers are seeing certain products not on the shelves as a result,” he adds. “Twenty-five per cent of all Italian wine made in Italy is exported to the US, so price changes are surely coming.

“Domestic importers buy bottles and corks from outside the country, so the whole supply chain is being impacted. There is no way the supplier, wholesaler and retailer will be able to absorb these tariffs. Retail pricing must increase.”

Yet where there’s disruption, there’s also opportunity. Dee Robinson, the founder of Good Trouble Kentucky Straight Bourbon, sees a potential silver lining for American producers. “Tariffs on imported wine and spirits help level the playing field for American brands like ours, encouraging consumers and retailers to ‘buy American’,” she says. “It’s a promising moment for US spirits — there’s a renewed pride in supporting local products.”

Another company determined to see the upside of the situation is Miami-based Premium Blend, which produces lower-strength wine-based alternatives to traditional spirits, many manufactured in the States.

“We anticipate that the recent tariffs will drive even greater demand for cost-effective, innovative solutions like ours,” say



Gino and Henry Santos: ‘Restaurants and bars will increasingly seek high-quality domestic options’

co-founders Gino and Henry Santos. “With imported spirits expected to rise in price, restaurants and bars will increasingly seek high-quality domestic options.”

Mindful drinking gains ground

While tariffs squeeze the margins, another longer-term trend is reshaping the market: American consumers are drinking alcohol more thoughtfully or abstaining from it altogether. The no/low-alcohol category is gaining ground (see p34), while competition is increasing from legalised cannabis and cannabis-based products in the 24 states where they are permitted for recreational use.

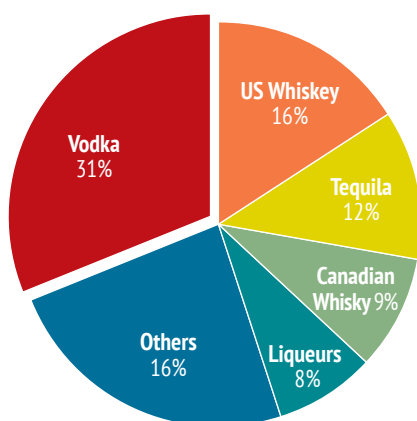
In terms of the alcohol they do buy, Ola Sol Agave Wine CEO Alexis Beechen believes buyers aren’t necessarily trading down — they’re just being more selective. “Brands need to work harder to be the drink of choice for that smaller share of »



Dee Robinson: ‘Tariffs on imported wine and spirits help level the playing field for American brands’

DATA DROP

US Spirits Market Top 5 Categories Market Share (Vol) 2023



Source: IWSR

Chg Vol 2022–23



Key Takeaways

- Tariff pressures are reshaping pricing strategies, with some importers absorbing costs and others pivoting to premium positioning or domestic alternatives.
- Mindful consumption is rising, with consumers prioritising health, authenticity and lifestyle alignment over volume.
- No/low-alcohol, lighter-style drinks and cannabis products are gaining ground.
- Traditional categories, such as whisky and vodka, are stagnant or declining.
- Premixed cocktails and RTDs are showing double-digit growth.

» wallet,” argues the winemaker, which contains half the alcohol and calories of traditional tequila.

“All consumer choices reflect the customer’s values,” she says. “If someone is going to spend the time and money to work out regularly and eat well, she isn’t going to disconnect with those priorities when picking a beverage. It’s up to brands to show consumers how their product fits into their lifestyle.”

Giuseppe Gallo, the Italian founder of Italicus Liqueur and Savoia Aperitif, is encouraged by what he sees as a move towards “more mindful Mediterranean-style drinking habits”. He believes the US consumer is more informed than ever and, while economic pressures remain, brands that deliver “real authenticity and experience” will thrive.

Later this year, Savoia will introduce a new line extension, Savoia Orancio, into the US, partnering with restaurant chain Eataly and e-commerce retailer Curiada. “The response in Europe has been fantastic, and we’re confident US consumers will embrace it just as warmly,” he says. “Considering the existing trends of natural wines, Savoia Orancio — with its unique orange wine base — is set for success.”

Correra has also noticed shifting tastes at his Brooklyn store. “Flavour profiles are changing,” he says. “I have noticed that the desire for Japanese sake, aperitifs and spritzes has grown. Also, we have customers who drink lighter and not as highly alcoholic, preferring crisper wines that are less alcoholic with higher acidity.”



Mary Sadlier: ‘Tariffs will increase the cost of Coole Swan, but we don’t see this resulting in lost sales’



Giuseppe Gallo: Encouraged by a US move towards ‘more mindful Mediterranean-style drinking habits’

Exporters adapt to survive

The threat of tariffs may hang heavily over brands reliant on exporting to the States, but many of the companies interviewed for this feature remain committed to what remains the world’s biggest premium wine and spirits market. James Gin, a UK-based brand founded by former *Top Gear* TV presenter James May, is absorbing the tariffs for now — currently 10% despite the signing of a UK-US trade deal last month.

“We are currently absorbing the additional cost of the tariffs and therefore not passing them on to US consumers,” says James Gin CEO Vishal Patel. “In fact, we’ve gone further and actually reduced our direct-to-consumer [D2C] prices to broaden the appeal of our brand online, while competitors are increasing their prices.”

Much is at stake. James Gin relies on the US for more than 50% of its total revenue. California, Texas and Florida are the key states for the brand, but Patel says it’s the gin’s vibrant online community and D2C business in 42 states which is helping James Gin connect with customers more meaningfully than relying solely on the traditional three-tier distribution system.

Other exporters, such as super-premium Coole Swan Irish Cream, are leaning into their premium positioning to justify price hikes. “The cost of the tariffs will have to be passed on to the American consumer in the same way that duty is passed on,” says company CEO Mary Sadlier. “Yes, tariffs will increase the cost of a bottle of Coole Swan,

but we don’t see this resulting in lost sales. Our American customers won’t disappear — they buy Coole Swan because of the quality.”

Not everyone is taking such a sanguine view. La Clandestine Absinthe brand ambassador Alan Moss is “cautiously” watching and waiting for the 90-day tariff suspension period to end. Moss draws comfort from the fact that European absinthes, including his Swiss company’s highly rated hand-distilled La Clandestine and Butterfly brands, have traditionally performed better stateside than US-made absinthes.

“The US administration has also provided a more pleasant surprise — it plans to ban some unnecessary artificial colourings,” he says. This will benefit his absinthe brands which champion “a completely natural approach to colouring”, unlike some others which Moss labels “fauxinthes”.



La Clandestine and Butterfly absinthes will benefit from US bans on unnecessary artificial colourings

Looking ahead, the WSWA predicts that 2025 could be a year of stabilisation in negative territory, but so much depends on Trump’s capricious trade policy. Challenges abound: price sensitivity may push US consumers towards cheaper brands, while supply chain bottlenecks for in-demand items like corks and glass could worsen.

Yet it is also clear that more opportunities will arise for US wine, beer and spirits producers as the on and off-premise channels look to fill gaps in their offer. More widely, there will also be rewards for agile, authentic brands. As Coole Swan’s Mary Sadlier memorably puts it: “The future belongs to brands that deliver real value, real quality and real connection.” **GDI**

Gin and vodka will remain ‘essential’ to the ‘evolving consumer palate’

Vodka and gin are heading down a bumpy road in the Americas, but brands have plenty of trump cards left to play. **Jessica Broadbent** reports

With every peak must come a trough, and so it is for vodka and gin in the Americas. IWSR forecasts both spirits will decline in the US between now and 2028 — even before taking into account the added tumult of US tariffs.

Gin may buck the trend in Central America, while vodka is expected to grow slightly in South America. The Caribbean also holds promise, IWSR data shows.

But the size of the market, particularly the US, is still alluring. Brand owners are focused as ever on finding distribution and gaining share of throat. The Americas have certainly not lost appeal.

Just the tonic... or not

The US is a late adopter of the premium-G&T phenomenon — partly due to a sweeter palette and lack of G&T heritage — but UK-based Salcombe Gin says success there hinges on it.

“If there’s no adoption of the gin-and- tonic culture, you’re not going to see big growth, because it will remain a cocktail ingredient,” says co-founder & director Angus Lugsdin.

Michael Giardina, vice president of marketing for Hendrick’s Gin, says low-quality tonic water and the dreaded post-mix gun are largely to blame for the slow uptake.



Texan brand Waterloo Gin redesigned its bottles and labels this year under its new ownership

“The gun is terrible,” he says. Hendrick’s steers away from the G&T serve during promotional events in the US, preferring its signature cucumber lemonade.

“It is changing,” notes Lugsdin, who’s seen an uptick in G&T menus in the on-trade and an opportunity for brands to position the G&T “as a lifestyle drink”.

UK import Fever-Tree is blazing a trail here. In January, Molson Coors bought a small stake in the tonic maker and took over its US distribution, where year-on-year revenues are strong. Fever-Tree

communications & ESG director Oliver Winters notes “major opportunity” for tonics in the country.

Flavour NPD

Flavour development is “going to be particularly important” for attracting younger consumers looking to “explore”, says Hendrick’s Giardina.

The distillery launched its sixth limited-edition Cabinet Of Curiosities gin, Oasium, in March. The range “brings new people in” and acts as a “recruitment item” for Hendrick’s original.

Away from botanical experimentation, a trend for barrel ageing is maturing in the US. TikTok is awash with drinks recipes for barrel-aged-gin twists on classics like old fashioned.

“The subcategory is taking off,” says Justin Meigs, CEO at Waterloo Gin, the Texan brand acquired by Patrón Tequila co-founder John Paul DeJoria last year. “We just launched in Georgia and the amount of excitement for the barrel-aged was infectious.”

While financially “a lot of gin producers probably struggle with the thought of putting back barrels when the subcategory hasn’t fully been proven out yet”, Meigs is confident in aged gin’s long-term potential. >>



Experienced brand-building is ‘one of the roots of Hendrick’s success’ and it will promote Oasium with a tour of The World’s Most Utterly Inefficient Cocktail Bar

Premium and pink

» As the UK's fervour for pink gins wanes, Lugsdin says the US is "rosé mad". "We've seen [a repeat of] what we saw in the UK a few years ago: innovation and an interest in coloured and flavoured liquids," he says.

Meigs, who has this year rebranded Waterloo Gin and bolstered national distribution, hints an "innovation SKU" due to launch later this year could well be pink.

US labelling restrictions mean gins must have a minimum ABV of 40% and limit colouring and artificial flavours. While for well-established brands the name alone can suggest 'gin' — Diageo simply labels its 37.5% ABV Gordon's as a "premium pink spirit drink" — the restrictions push smaller brands towards higher-ABV, 'cleaner' products.

Lugsdin sees pink gin as a gateway to premiumisation in the US, and Salcombe has been "on a mission" to get bars serving its 41.4% ABV Provence-inspired Rosé Sainte Marie in wine glasses. "It immediately elevates the gin-and-tonic serve," he says. "They see it as an instant cocktail."



Bars are asked to serve Salcombe Gin's Rosé Sainte Marie pink variant in wine glasses

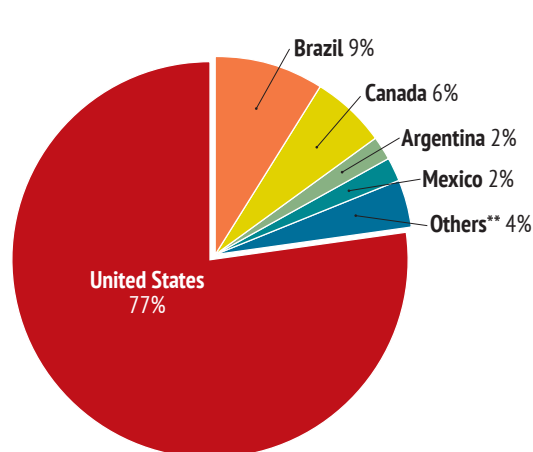
The gin 'experience'

As the on-trade remains crucial for trial and brand awareness, more brands are using experiential marketing to gain a foothold in the US.

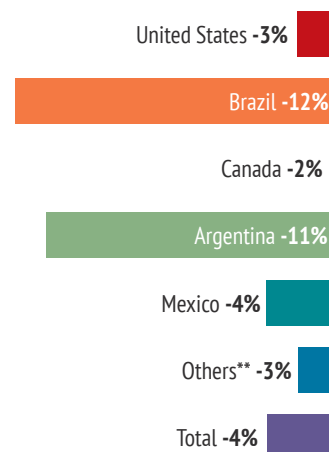
Waterloo says being an experiential brand is "how you win" — but what does it mean? "We want every interaction with the brand to be immersive, sensory and emotionally resonant," he explains.

And in practice? The team at Waterloo is developing "a series of on-premise activations that bring the Texas Hill Country to life with botanical garnishes, scent-driven

The Americas: Top 5 Countries for White Spirits* Market Share (Vol) 2023



Chg Vol 2022–23



The Americas: White Spirits by Category* Chg Vol 2022–23



*Based on sales of gin and vodka only.

**Others includes genever and other juniper-flavoured drinks (such as Steinhäger and Borovička).

Source: IWSR

Market Share (Vol) 2023



Key Takeaways

- Vodka and gin sales are anticipated to gently decline in the Americas between 2023–28.
- Cocktail trends are benefiting white spirits, particularly the resurgence of the espresso martini for vodka.
- The premium tonic movement is making its way across the Atlantic.
- Flavoured and pink gins are garnering attention, as are more complex aged gins.
- Vodka is veering towards pure expressions, leaving flavour NPD to the RTD world.
- Savvy, health-conscious consumers are demanding more transparency and "authenticity" from brands.

cocktail pairings and even soundscapes inspired by Austin," Meigs expands.

With its Phileas-Fogg-meets-Kew-Gardens aesthetic and the might of William Grant & Sons' marketing budgets behind it, Giardina says experience-led brand-building is "one of the roots of Hendrick's success".

The company once commissioned a cucumber-shaped blimp which took people on short flights; "A Hendrick's event is a theatrical experience!" says Giardina.

"It's becoming even more important as the younger generations that have grown up on digital and social media are really yearning for real-life, authentic and novel experiences," he adds. "Some of it is for their digital feed, but some of it's just because the social, digital world is not as fulfilling as real-life experiences."

Hendrick's The World's Most Utterly Inefficient Cocktail Bar is touring this year to promote just launched Oasium (see p17). »

Vodka outlook

» “The projection of vodka consumption always needs to be taken with a pinch of salt,” says Giulio Dorrucchi, founder & director of Swiss-made Vodka57 (right). He highlights the impact of RTDs, which are “slowly cannibalising” — and thus potentially skewing — pure-vodka sales figures, and of economic uncertainty in the US that may be driving people to trade down to cheaper categories momentarily.

Behemoth brand Tito’s Handmade Vodka, meanwhile, is putting “significant focus” on GTR, scooping listings “as stores pare back on the space they once gave to gin”, according to international MD John McDonnell.

Outside the US, McDonnell says there’s great opportunity in Costa Rica and Caribbean islands like the Bahamas and Aruba — and “not just among tourists” either. “The Caribbean will always be a strong rum market, but consumers are always looking to discover new drinks,” he says. In Mexico, Luma founder Jesse Dev-

lyn is equally stoic: “While vodka remains the most-consumed spirit in the Americas, growth has stagnated and given up ground to agave-based spirits and whisky.

“That being said, we see pockets of growth in differentiated premium brands and flavoured expressions. We don’t foresee vodka’s role as a staple to change anytime soon.”



Martini madness

The espresso martini: it’s in, it’s out, it’s... in again. And it’s tasting better than ever thanks to rising interest in coffee and a blooming craft vodka movement.

“We’re seeing considerable gin fatigue from some consumers and bartenders,” says McDonnell at Tito’s. In light of this, people are “rediscovering the versatility of craft vodka — especially in an espresso martini”.

He estimates it’s now the US’s second most-popular cocktail, behind the almighty margarita. “The drink’s popularity has been driven particularly by



Luma Vodka is part of an emerging trend in Mexico towards producing non-agave spirits

female consumers and coffee culture, which only continues to grow stronger,” he says.

With its tasting room a short drive from NYC and the Hamptons, Long Island Spirits (LIS) has a front-row seat for one of »



Tito's PALOMA

50 mL TITO'S HANDMADE VODKA
50 mL GRAPEFRUIT JUICE
50 mL SPARKLING WATER
15 mL LIME JUICE

Add all ingredients to a glass with ice. Stir and garnish with a grapefruit and lime slice.

TITOSVODKA.COM • CRAFTED TO BE SAVORED RESPONSIBLY.
DISTILLED & BOTTLED BY FIFTH GENERATION, INC., AUSTIN, TEXAS 40% ALC./VOL.
DISTILLED FROM CORN. © 2025 TITO'S HANDMADE VODKA.

MARKET INTEL WHITE SPIRITS

» the US's most-vibrant cocktail scenes. "We're seeing a strong shift toward cleaner, more elevated vodka cocktails; drinks that highlight quality ingredients and artisanal production," says founder & master distiller Richard Stabile.

"The resurgence of the espresso martini has been especially prominent, and we're seeing growing interest in lighter vodka spritzes, vodka-based negronis and herb-infused highballs."

More authenticity, less flavour?

"Authenticity" is constantly on the lips of brand owners as drinkers become "more value-conscious, but also more discerning".

"In a tightening market, authenticity and depth matter more than ever," says Stabile. "Consumers are looking for spirits that deliver not only quality and flavour, but also a compelling story and transparent production."

For Devlyn, authenticity is also about connection. "Consumers are tired of the usual marketing ploys for vodka and gin," he says. Luma, which is made from Mexi-

can sugarcane, "seeks to appeal to Mexicans or individuals passionate about Mexican culture".

With a growing interest in ingredients, health and authenticity, flavour variations must be introduced thoughtfully.

In Latin America, Devlyn says market-specific innovation from the major players, such as Smirnoff's launch of Spicy Tamarind last year, "has become extremely popular". But Luma, like Tito's, has no plans of expanding beyond unflavoured vodka.

"Looking ahead, we see flavour ex-

pansion happening primarily within the RTD space, where consumers are eager for variety, but still expect craft quality and authenticity," Stabile says.

"It's a way for us to innovate while staying true to the integrity of our core LiV Vodka [left]."

From his vantage point on Long Island, he summarises: "We see both spirits as essential parts of the evolving consumer palate; vodka for its clean canvas, and gin for its storytelling potential through botanicals." **GDI**



Tito's on sale in JFK Airport duty free – the brand has made a significant push into GTR



global
drinks

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White spirits roundup

Five new launches that caught our eye this month

Thoughtful flavour NPD, ingredient transparency and the quest to connect with drinkers on a deeper level through things like charity pervade gin and vodka launches



Moët Hennessy's Belvedere Dirty Brew

Moët Hennessy has taken Belvedere into coffee with this 30% ABV vodka-based coffee liqueur. Marketed as a sipping vodka, the name pays homage to the dirty coffee — a photogenic drink made by pouring a shot of espresso over cold milk, believed to have originated in Japan.



Deep Eddy's tropical launch

Austin, Texas-founded distillery Deep Eddy has added a pineapple vodka to its stable of spirits and RTDs. Made with “fresh, real pineapple and all-natural ingredients”, the company says the 35% ABV drink “reflects the brand’s dedication to high-quality, natural ingredients” and, here’s that word again, “authenticity”.

Barrel-aged gin from Wales

Last month, Welsh singer Katherine Jenkins released a barrel-aged number under her gin brand Cygnet. Cygnet 77 is aged for 12 months in whisky barrels with manuka honey. Launched in London department store Harrods for GBP130 (US\$172), Cygnet 77 will soon be available in luxury accounts in the UK, Singapore and Dubai.



Gallo's furry NPD with a charity tie

Wine giant E&J Gallo's spirits arm, Spirit of Gallo, launched this fun RTD in April in collaboration with Instagram's viral rescue pit bull Miss Peaches. Lucky One Lemonade is a vodka-based, non-carbonated hard lemonade. Founders have promised to donate US\$1m in proceeds to animal charities this summer.



Celeb-backed blood orange spritz

Margot Robbie's Aussie gin company Papa Salt and Fever-Tree join forces for this blood orange spritz. The 5% ABV RTD is only available in the UK, but there are plans to take it further afield. Robbie, of *Barbie* and *Neighbours* fame, and industry friends launched Papa Salt in 2023.

You've been with Heineken for almost 16 years, the last 16 months of which have been as global innovation director. I've been in drinks my entire career. I started out in a wine and spirits company that was owned by C&C Group in Ireland. When I wanted to move home from my position in the UK, I joined Heineken, where I moved around, but always in marketing. My position prior to this one was as global brand director for Amstel, another Dutch institution.

What's always been interesting to me is to see how we can address consumer pain



Jules Macken: 'We've been the first in a lot of things'

Q & A with Heineken global innovation director Jules Macken

points and barriers, and how we innovate. I like to have a problem in front of me that I can find solutions for. For me, they're always consumer problems first.

Your job title sounds quite overarching. Where do your responsibilities and priorities lie? I'm the director of innovation for the Heineken brand. I work very closely with the director of innovation for the Heineken company, Sarah Maddock, who looks across brands, opportunities and categories.

We look at innovation in a couple of different ways. We want to elevate the fundamental experience around beer, making sure it's beautifully served, treated and delivered to consumers, depending on moment and occasion. That can be in packaging innovation or ritual and serve.

We also look at how we can overcome the challenges that consumers might have for beer. With Heineken 0.0, for example, that's meeting the needs of consumers who don't want alcohol, but want a great-tasting beer.

Another area of focus is fuelling exploration for consumers who are looking for

Visitors to the Heineken Experience in Amsterdam can glimpse the future of beer at the brewer's new 'experimental' studio, but Jules Macken has the inside track. The global innovation director for the group's flagship brand shares the company's NPD process with **Olly Wehring**

more excitement. Just this April, we released one of our first limited-edition brews out of the Heineken Studio, Mokum750, which is a white lager that features coriander and citrus.

For us, it's about working on those three pillars to always make sure we're finding ways to better address consumers' needs. We call it 'quality socialising' — how people come together and how they connect over a beer. We look to do that in progressive and interesting ways.

How do you avoid diluting the core message of a brand as well-established as Heineken?

The history and heritage of the brand gives us the licence to operate from an innovation point of view. Heineken was the first brand to export at scale and the first brand that introduced new draught dispense systems. It was also the first brand to land in the US

after Prohibition. So we've been the first in a lot of things.

Having done wonderful things in communications, we have the opportunity to push the boat out more to embrace the brand's pioneering credentials. The next frontier for us is to bring that to the brews and to the beer itself.

The original Heineken is known the world over and fuels the majority of the growth for the business. Heineken 0.0 is now in 117 countries and has been an enormous success. We see continued opportunity to grow, and to outgrow the category. We're the ones fuelling a large part of the [no-alcohol] category's growth. You should come and talk to me next month, when we can talk a bit more about some of the new things we're doing on 0.0.

With Heineken Silver [a 4% ABV light beer that comes in at 95 calories with just >>

» 2.9g of carbs] has been an unbelievable success in Asia, but less so in Europe. Seventy per cent of beer consumed in Asia is sessionable — it's consumed with food — and they prefer a less bitter profile. Silver is addressing that need for a premium, pure malt beer that goes well with food and still has a progressive brand attitude to engage with consumers. We need to be rooted in consumer needs, but Silver didn't hit the mark in Europe as it has in Asia.

We've taken learnings from that and we'll bring those with us as we look at what's next for the brand.

What's the process within Heineken for identifying consumer needs? Overall performance gives us a baseline indication of how well we're doing. We also look regularly at penetration, frequency and intensity — how many consumers are choosing to drink our beers and when they are choosing to do that.

When we start to see gaps, we undertake qualitative research with different partners to better understand why those gaps appear. That helps us get closer to the problems that consumers face.

With 0.0, we partnered with [experimental psychology] Professor Charles Spence at University of Oxford to understand why the growth of the [no-alcohol] category wasn't commensurate with so many consumers claiming to moderate. Around 78% claim to moderate their consumption, but the category has only grown 4% in the last five years.

We unpacked that and found that the fundamental barrier to non-alcoholic beer was that consumers couldn't find it. That's something we can address through normal business operations. Also, there's still a lingering taste perception barrier that we see with something like 0.0, but that's legacy — ten to 15 years ago, no-alcohol beer didn't taste great. So we do a lot to give people the opportunity to try it.

The biggest barrier we found was that a social stigma still persists; people are a little bit judged when they choose a no-alcohol beer. [The perception is that] you must *need* to

'The biggest barrier we found was that a social stigma still persists; people are a little bit judged when they choose a no-alcohol beer'



Heineken Studio Mokum750, an unfiltered wheat pilsner featuring coriander seeds and citra hops, was created in collaboration with five Amsterdam bar owners to mark the city's 750th anniversary

choose a 0.0 rather than *want* to choose a 0.0. Draught is a hugely important area for us in normalising the consumption of non-alc beer and overcoming that social stigma.

The use of additional researchers is really helpful to get under the skin and see why consumers do the things that they do.

But Heineken 0.0 works for those with an existing relationship with beer. What opportunities for Heineken have you identified with younger consumers? You're right — the people who drink 0.0 are the same people that will drink beer. For us as an industry, it's really important to talk about that. There's this suggestion that non-alcoholic beer is a way for us to drive a communication agenda for alcohol, which is demonstrably not true.

For younger consumers, we're seeing a return to simplicity. They don't want to be distracted by their phones, they just want to go to the pub and connect with friends over a beer. That's one side of it. Then, for many consumers, their palate has become sweeter over time. We need to find ways to better address that palate.

We're fortunate to have multiple brands that allow us to address different taste profiles. It's about trying to understand what they're looking for and how we can better meet that need, then considering whether that's the right opportunity for the Heineken brand to go after.

Which consumer need states have you struggled to let go of for brand Heineken? None yet. I have good relationships with all the other brand leads. Besides, you don't want

your brand to jump around too often. Doing things that make sense for your brand is really important.

It's relatively easy to pass over ideas that don't make sense for the Heineken brand.

You opened the Heineken Studio in Amsterdam in April. Is this your innovation pipeline being played out in public? The studio is a play space for us to experiment, to see not what might be for tomorrow, but for the week after. It's like a concept car — not everything is intended to be scaled and exist the world over. When we talk about getting closer to consumers and their pain points, this is a brilliant way to do that.

The concept has been designed to allow us to be faster, more agile and more responsive to the things that are going on. It allows us to test and learn in real time. Some of the things you'll see in the studio are not terribly scalable, such as foam infusions that inject new flavours into a beer. That's quite an involved process.

We call it a play space, but it's a genuine innovation and learning vehicle, with a constant feedback loop that allows us to see what consumers are reacting to.

How much can you share about your current projects? Until they're out, not a lot!

Non-alcoholic beer is a huge opportunity for us. But if you look at the current growth of the category, we're not doing a good enough job of addressing those needs. So that is something I spend a lot of time on. **GDI**

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



Diplomático believes 'the rise and development of cocktail culture in recent years has positively impacted premium rum category growth'

Closing rum 'knowledge gap' crucial for future North American growth

Rum has had its challenges across North America in the past couple of years, with IWSR data showing volume declines for the US, Canada and Mexico in 2023, and all styles impacted. Nor has the US spirits scene, in particular, fared much better since then, with further contractions expected from IWSR 2024 data due for release as *Global Drinks Intel* goes to press.

According to Lisa Pfenning, Americas vice president of Bacardí Rum, "2023 proved to be a particularly challenging year across North America, with mainstream white rum feeling the effects as consumers increasingly turned to tequila and whisky. The broader spirits landscape became more competitive, putting additional pressure on the rum category in terms of volume and brand visibility".

A similarly downbeat note is sounded by Raul Gonzalez, managing director of Campari Group's House of Whiskeys & Rum, who reports a "softening" in the US and Canada during 2023 in line with post-pandemic shifts in consumer spending and be-

While the recent past has been challenging, rum is reasserting itself in North America, buoyed by its inherent diversity and versatility – not to mention its ability to win over bartenders. **Richard Woodard** reports

haviour. As for 2024, he says: "[It] was a unique case for us as a major hurricane in Jamaica led to supply disruptions, but we are seeing an initial rebound in Q1 2025, with organic sales growth of our Jamaican rum portfolio up 5% globally."

As the US tequila boom cools, there are signs that rum is beginning to reassert itself. "By mid-2024, we started to see the tides turn," says Pfenning. "According to *2024 Bacardí Trends Report*, the mojito and rum-and-Coke hold a spot in the top 10 cocktails globally, driving renewed momentum in the US on-premise scene through festivals and premium retail."

Rum's travails are in any case relative. For certain sections of the market and particular brands, the downturn never happened. "While IWSR reports challenges across the rum category in North America, our experience with Bumbu has been

markedly different," says Sovereign Brands CEO Brett Berish. "The US and Canada remain two of our top-performing markets globally, with Bumbu achieving strong double-digit growth in both countries this fiscal year." Importantly, he expects this momentum to continue for at least the next three years.

Premiumisation powers on

Berish's faith in rum's higher price echelons is shared by David Palacios, global PR manager, emerging brands, at Brown-Forman, owner of Diplomático. "We're observing a significant and sustained increase in consumer interest and engagement within this [super-premium] segment," he says.

"The US market remains a key focus for us, and we are optimistic that the super-premium category will maintain its performance there. In Mexico and Canada, we ➤



Dive into

SUMMER OCCASIONS

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in our next edition

'Tis the season of the spritz and the aperitif — in the northern hemisphere especially — as consumers embrace warmer evenings for low-key pre-dinner meet-ups over drinks. Next month in *Global Drinks Intel*, we explore the opportunities these occasions are creating for drinks categories ranging from aperitifs and prosecco to agave spirits and vermouth.

We also report on RTDs — easily the most successful global drinks category of the past five years — and assess the state of the UK drinks market on the back of trade deals with India, the EU and the US. It's going to be a bumper issue, and we'd love your brand to take part. **To advertise, email felicity@drinks-intel.com**



1998, the fourth release in Appleton Estate's Hearts Collection, debuted last July with an SRP of US\$650

» are intensifying our efforts, and this year will be crucial in evaluating the brand's progress in both markets.”

Anyone doubting rum's luxury credentials need look no further than Edrington-owned Brugal, which recently launched a US\$3,000 limited edition, Andrés Brugal Edition 02 (see p28). “In 2025, we see some of the most exciting opportunities for rum in the ultra-premium and prestige tiers,” says brand ambassador Georgia Balson. “More and more collectors and discerning consumers are discovering the craftsmanship, heritage and nuance that ultra-premium-and-above rums can offer.”

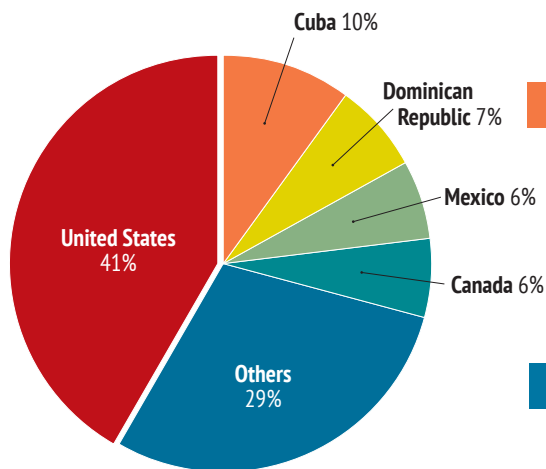
At Campari, Gonzalez is hopeful that Appleton Estate's 275-year heritage, Jamaican provenance and minimum ageing standards, influenced by the island's tropical climate, can help build a compelling narrative for rum-curious consumers.

“Looking ahead, we anticipate the category as a whole will remain flat, but we're seeing continued momentum for premiumisation and encouraging signals at the top end of the market,” he observes. “While consumers are being cautious with their spending, they are also demonstrating a willingness to invest in higher-quality products or ‘spend better’ for rum.”

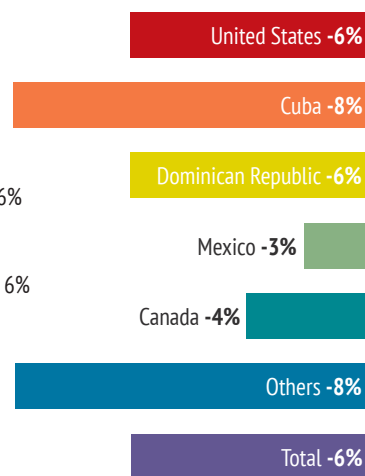
Like Gonzalez, Bacardi's Pfenning sees most potential in the premium and super-premium tiers, especially for aged and dark expressions. “The US consumer is evolving with a clear shift toward more thoughtful consumption, where people are seeking authenticity, quality ingredients and connection with brands and people in the real world,” she argues.

“We're also seeing strong momentum in

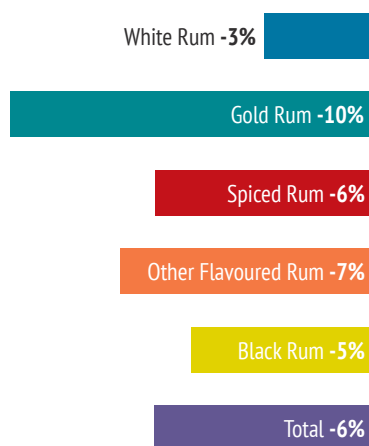
The Americas: Top 5 Countries for Rum Market Share (Vol) 2023



Chg Vol 2022–23

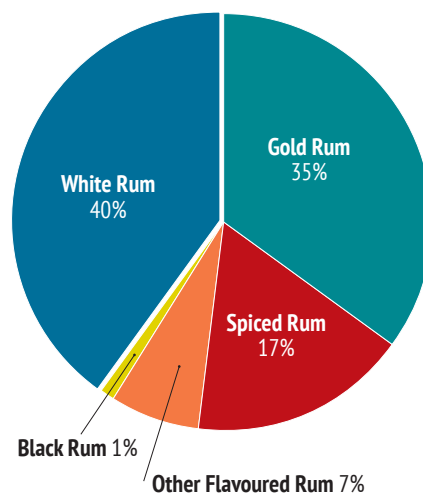


The Americas: Rum by Category Chg Vol 2022–23



Source: IWSR

Market Share (Vol) 2023



Key Takeaways

- Rum's fortunes are beginning to improve in North America, driving renewed momentum in the on-trade.
- Higher price tiers are likely sources of future growth as the overall category remains flat.
- Consumer education and targeting rum newcomers are seen as key to unlocking future North American growth.

- With a broad range of styles – from mixable white rum to long-aged sipping expressions – one of rum's greatest assets is its versatility.
- Brands are investing big money in on-premise education and training, and creating ambassadors to shore up bartender engagement.

the cocktail space, where aged rums are taking centre stage in elevated serves and even replacing traditional serves in classic recipes.” One example, says Pfenning, is Bacardi's twist on the espresso martini, the Bacardi x Bigface Café Con Ocho cocktail, which combines Bacardi Reserva Ocho with Bigface El Porvenir espresso. »

Aged rum is being used in reinvented classics like Bacardi and Bigface's take on the espresso martini



Versatility: rum's super-strength

» This hints at what remains perhaps rum's greatest super-strength: its sheer diversity, and therefore versatility. Palacios sees a "significant opportunity" in the US for Diplomático Planas, an aged white rum with the daiquiri at the heart of its appeal.

"The rise and development of cocktail culture in recent years has positively impacted premium rum category growth," he explains. "Rum is an incredibly versatile ingredient, and new trends show that consumers are particularly interested in experimenting."

This underpins the diverse collection of rums sold under the Planteray banner by Maison Ferrand — from what marketing & communications director Angélique Jullienne describes as "bartender staples", such as Planteray Original Dark, pineapple-infused rum Stiggins' Fancy and overproof offering OFTD (old fashioned traditional dark), to aged examples such as Planteray XO 20th Anniversary — dubbed by Julienne as "a beautiful bridge for those discovering rum through whisky or cognac".



Planteray XO 20th Anniversary pays tribute to Alexandre Gabriel's 20 years as master blender

The company also has limited editions from collaborations with other distilleries and rum-makers, including vintages, cask finishes and historic parcels. "We don't chase trends," says Jullienne. "Our approach is to keep making rums with character, transparency and soul, and to let that speak to people across the bar, around the table or from the back of the shelf."

In the case of Bacardí, rum's diversity has led to the creation of a vast brand fran-



Bacardí hopes 'standout flavour expressions', such as Mango Chile, will accelerate growth

chise that takes in rums of every hue and price point, as well as increasingly influential RTD spin-offs such as Bacardí Rum & Cola, now a major growth driver. However, says Pfenning: "While RTDs have contributed to our broader portfolio — especially during peak moments like summer festival season — we're currently focused on accelerating growth through standout flavour expressions and cocktail-led experiences." One example of this is the use of Bacardí Mango Chile in the mango fuego cocktail that fuses spicy and sweet flavours.

On-premise spotlight

A diverse market it may be, but it's also crowded, with a plethora of brands vying for bartender attention. In this context, engagement programmes are a vital way of winning over new on-premise ambassadors, listings and placings on cocktail menus.

Pfenning says Bacardí prioritises "education, collaboration and celebration" through training, in-bar takeovers and industry nights. She adds: "What truly drives impact is staying hyper-local: giving bartenders a platform to express their creativity while equipping them with the tools, visibility and authentic brand connection that fuel long-term engagement."

She highlights the brand's upcoming Bacardí Colada Club, activating in 14 US markets, with five bartenders per city creating their own colada riffs; and the Bacardí Premium Rum Army — a collective of influential bartenders and industry leaders.

Bartenders have always been at the core of Planteray's strategy too. The brand celebrated the third Planteray Tropical Week in May, bringing together 650 bars from around the world, and has launched a new competition, 'Fancy a Stiggins', in association with the Tales of the Cocktail Founda-

tion, targeting bartenders across the US and Canada, with a trip to the Stiggins' Ball in Cognac on offer to the winner.

Education key to growth

The breadth and depth of the rum market in North America illustrates what an established fixture of the spirits scene it is, but brand owners know that there is more work to do, and more consumers to win over. "We believe it's essential to also continue to educate about the rum category to reach our full potential," says Campari's Gonzalez.

"We find that many dark spirits drinkers are unaware of the craftsmanship in rum-making, the challenges and opportunities with tropical ageing, and the mastery required to bring high-aged rums to the market. Closing that knowledge gap and welcoming in new consumers will be key for unlocking further growth."



With rapper Lil Wayne as its brand ambassador, Bumbu is focused on recruiting rum newcomers

Bumbu's strategy, meanwhile, is to use the versatility of the category, and its own range of Bumbu Original, Bumbu XO and Bumbu Cream, to recruit rum newcomers.

"We are not bound by traditional consumer segmentations," says Berish. "Instead, we focus on inviting new audiences into the rum space, many of whom are discovering Bumbu as their first rum and embracing it as their go-to spirit for every occasion."

"As we continue to expand into new markets like Mexico and beyond, our strategy remains consistent: build awareness, drive trial and create emotional resonance through storytelling and unforgettable taste." **GDI**



Rum roundup

Five brands making some noise in North America

While rum brand owners are still launching new products across the NAM region, there is an even greater emphasis on marketing initiatives designed to drive engagement among trade and consumers



Brugal looks to luxury

Edrington-owned Brugal has launched Andrés Brugal Edition 02, a US\$3,000, 416-bottle global release, with a “limited allocation” for the US market. The rum, a tribute to founder Andrés Brugal, was blended by fifth-generation *maestra ronera* Jassil Villaneuva Quintana from four American oak casks, and comes in a hand-blown crystal decanter with two glasses.

Diplomático's artisanal advocacy

‘Artisans of Taste’, Brown-Forman-owned Diplomático's global advocacy platform for professionals, has been activated in 12 markets over the past year, delivering more than 60 educational and “immersive experiences” and reaching more than 600 hospitality professionals. The goal, says the company, is to deepen the Venezuelan rum brand's on-trade presence and prestige.

Bacardí brings Puerto Rico to NYC

In a move inspired by its Casa Bacardí brand home in Puerto Rico, Bacardí is launching a pop-up series called La Placita, recalling San Juan's La Placita de Santurce — where locals gather for music, food and celebration. With live music, Caribbean cuisine and Bacardí cocktails, the initiative began in New York in May, with events in Chicago to follow.



First release under new Planteray name

Maison Ferrand has announced its first launch under the new Planteray name — coconut-infused rum Planteray Cut & Dry. The result of four years of development and 97 test recipes, it combines Barbadian rum with the natural essence of hand-cut, sun-dried local coconut — said to be the perfect way to elevate the classic piña colada.



Bumbu makes for Mexico

Sovereign Brands' Bumbu Rum is set to enter the “high-potential growth market” of Mexico this year, with company CEO Brett Berish explaining: “As we introduce the brand to Mexican consumers, we see a significant opportunity to connect with a new wave of rum drinkers eager to discover something unique, authentic and elevated.”

Tariffs may not happen, but tequila producers are bracing for impact

As the North American tequila market surges in popularity, producers face both opportunity and upheaval: from the rise of cristalino and flavours to tariff uncertainty. **Henry Mathieu** reports

The threat of renewed US tariffs on Mexican goods, including tequila, under a second Trump administration has reignited concerns across the spirits industry. A proposed 10% levy on tequila imports to the US — worth US\$5.2bn last year — could significantly disrupt pricing structures, margin expectations and consumer demand.

Industry leaders are preparing for potential economic turbulence. While some brands remain confident in the category's resilience, particularly among consumers less price-sensitive to quality offerings, others acknowledge the possibility of downtrading or delayed purchasing decisions.

With tequila one of the few spirits categories still in growth in North America, any policy shift impacting cross-border trade poses not only financial risk, but also reputational and supply chain complexity. As negotiations unfold, producers are bracing for impact while seeking opportunities for agility and strategic adaptation.

"We are focused on a multipronged approach to mitigate financial impact," says El Tequileño VP of business development Steffin Oghene. "This includes optimising logistics, improving operational efficiencies and leveraging our existing infrastructure to maintain margins without sacrificing quality."

Johanna DeJoria, VP of sales at Bandero Tequila owner Rokit Drinks, echoes the need for agility: "It is to be expected to have fluctuations in the economics surrounding



Cazcabel opened a US\$44.9m brand home and distillery in San Francisco de Asís, Jalisco, last November

logistics and production when working internationally. We strategically put plans in place to mitigate any rapid fluctuation in the market to protect our partners."

Chris Richards, global marketing director at Vamos Spirits, owner of Cazcabel Tequila, notes that while tariffs could affect premium options, value remains a core strategy. "Our principle has always been to be able to offer high-quality tequila at the most affordable price, which we're able to do by having full ownership of our supply chain from growing agave in our own fields through to distilling and bottling our tequila at our brand home," he says.

Despite potential pricing pressures, Richards remains confident in consumer loyalty: "I don't expect switching out of the category as a result of any potential tariffs. However, we could see some consumers looking for more affordable alternatives."

Celebrity brand reckoning

Once a significant growth driver, the celebrity-backed tequila phenomenon is facing increased scrutiny from both trade and consumers.

"Celebrity-backed brands have undeniably played a role in growing the category by keeping tequila in the cultural spotlight and introducing new consumers to the spirit,"

says Oghene. "However, long-term loyalty is built on authenticity, quality and heritage."

DeJoria agrees: "At the end of the day, the consumer is looking for something reliable that adds value to their life. Bandero is committed to inspire our partners, employees and world to live adventurously. We strive to create premium, Old World-style tequila, requiring many more resources, but delivering more in the bottle and beyond."

Richards believes the tide is shifting for those relying "purely on having a celebrity as the face of the brand" with "nothing more tangible to back up the authenticity story", as there is "a vast choice of other more credible brands consumers will switch into".

Mike Dolan, CEO & co-founder of Mijenta Tequila, is more direct. "Celebrity tequilas had a moment, but that moment is quickly passing," he says. "It's becoming disqualifying at this point to be associated with a celebrity, because the market has grown more sophisticated."

Cristalino trend 'here to stay'

A clear and often misunderstood expression, cristalino tequila is gaining traction in the US, with varying degrees of optimism about its long-term viability.

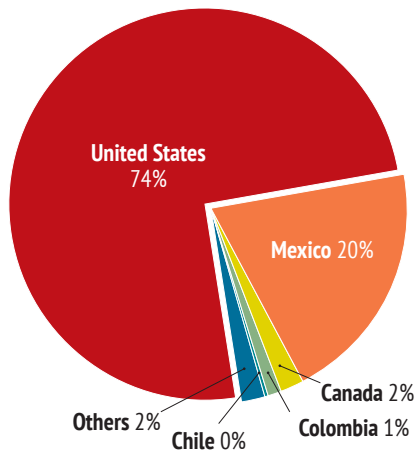
Cristalino is a relatively new subcategory of aged tequila filtered to remove its colour, resulting in a clear spirit with the complexity of a reposado, añejo or extra añejo, but the appearance of a blanco. »



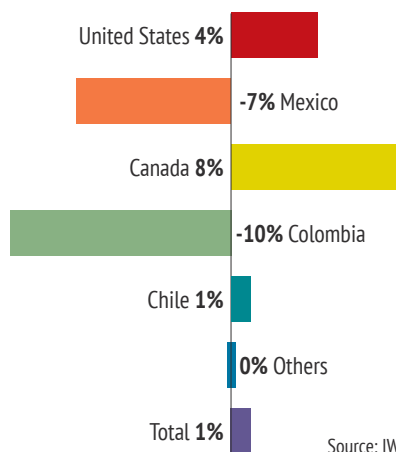
Available in more than 40 markets worldwide, El Tequileño celebrated its 65th anniversary last year

The Americas: Top 5 Countries for Agave-Based Spirits

Market Share (Vol) 2023



Chg Vol 2022–23



Source: IWSR

Key Takeaways

- Mexico exported US\$5.2bn of tequila in 2024 (Distilled Spirits Council of the US [Discus] data).
- In response to US tariff uncertainty, producers are focusing on supply chain control and market diversification.
- The celebrity-backed tequila wave is waning.
- Innovation in subcategories like cristalino and flavoured tequila is drawing new audiences.
- 'Complementary spirit' mezcal continues to grow – last year, the US imported \$93m of mezcal (Discus).

» “Cristalino tequilas have found appeal in North America due to their visual elegance and approachable flavour profile,” El Tequileño’s Oghene notes. “While it may have started as a trend, we see it evolving into a legitimate subcategory with staying power. Our approach is always rooted in honouring traditional techniques while welcoming innovation.”

At Mijenta, cristalino represents both an educational challenge and a strategic play. “There is education that needs to happen – beginning with the first question we always get: ‘Why bother filtering out the colour?’” says Dolan. “We took an approach that was laser-focused on recruiting vodka drinkers [to create] something clear, with a surprisingly rich and deep flavour profile.”

Bandero’s DeJoria underscores the cultural variability in reception: “Cristalino’s process of production itself is different from what the domestic consumer is used to seeing. The North American market has historically been very receptive towards new-to-them spirits.”

Flavours: gateway or gimmick?

Flavoured tequila has emerged as a point of divergence – some producers embrace it as a recruitment tool; others reject it entirely.

“We already have three flavoured tequilas as part of the Cazcabel offering – Coconut, Coffee and Honey,” says Richards. “They can play a key role in bringing new consumers into the category. Over time, they migrate towards 100% agave tequila.”

Bandero has also ventured into flavour, but with a twist. “We bridge tradition and innovation with Bandero Café [Coffee Liqueur],” DeJoria says. “Built upon our additive-free Bandero Blanco, we add Jalisco-

sourced coffee concentrate and sweeten it with agave honey.”

Others remain staunchly opposed. “In our view, using flavourings would defeat the purpose, so it’s not something Mijenta would ever consider,” says Dolan. “I think adding flavourings to tequila is a gimmick – a poor substitute for true innovation.”

Oghene shares a more nuanced stance: “We believe there is room for premiumisation within flavoured tequila, especially when flavours are natural and enhance rather than overpower the spirit, but at this stage, it’s not part of our path.”

Mezcal’s complementary ascent

While still small in volume, mezcal continues to earn praise as a complementary force in the agave spirits landscape.

“Mezcal’s rise reflects a growing consumer interest in authenticity, regionality and artisanal spirits – values we share at El Tequileño,” says Oghene. “We see mezcal not as a competitor, but as a complementary spirit that broadens the agave category.”

Mezcal is definitely gaining momentum, according to Tiffany Jay, head of partnerships at The Lost Explorer. “Its growth is

being driven by consumers seeking something more artisanal, more expressive and more rooted in tradition,” she says. “In our portfolio, mezcal plays a vital role as the soul of the brand – it’s where we started, and it continues to offer a way to tell rich stories about origin, process and culture.”

For Cazcabel’s Richards, the dynamic is synergistic: “Mezcal complements tequila. Tequila is very suited to mixed drinks, while mezcal is more a sipping occasion.”

The path forward

Despite divergent strategies, the tequila category’s leaders are united by a shared belief in the importance of authenticity, transparency and consumer education.

In February, for example, Bacardí rolled out a campaign in the US for its Patrón Tequila brand highlighting its “clean-label” approach. The ‘100% Additive-Free Tequila’ activation placed emphasis on three ingredients – Weber Blue agave, water and yeast – in a move to educate consumers.

Credibility is also a key focus at Bandero. “We align ourselves to be in adherence with the CRT [Tequila Regulatory Council] to ensure all of our agave and tequila is grown, bottled and produced in the Tequila Valley,” says DeJoria. “It is imperative to do everything we can to maintain consistency for all markets, not just in quality and quantity, but price as well.”

As tequila continues its ascent across North America, the message from producers is clear: fame may fuel interest, but enduring growth belongs to those who blend integrity with the ‘right’ kind of innovation. **GDI**

Mezcal brand The Lost Explorer moved into tequila last year with this blanco expression





SPIRIT
OF
THE
EARTH

WE
CARE FOR
HER WONDERS

SPIRIT
FOR
THE
EARTH

SHE
REWARDS
US WITH AGAVE



with Scotch Whisky Association chief executive Mark Kent

After three years of talks, an India-UK free trade agreement was finally secured last month. Scotch Whisky Association chief Mark Kent tells **Olly Wehring** the 'win-win landmark deal' is not the end of the story

How does it feel to have this trade deal over the line, finally? It has certainly been a long-standing objective for the scotch whisky industry. India is the world's biggest whisky market — given that scotch accounts for 3% of the market, the potential for growth is very significant.

This is transformational for our industry. It's happened on my watch, but this is a process that's been going on for many years and many people have been involved in making this possible, including government negotiators, members of our industry and colleagues in India.

What's very encouraging is that we're working in partnership with the Indian industry. It's a clear win-win deal, which is going to promote more investment and jobs both in India and the UK, as well as more collaboration between the two countries' categories; some of our members already produce Indian single malts, for example.

It has a good feeling about it in terms of the benefits that will come to both countries.

What's the time frame? The text will be checked and go through a legal scrubbing process to ensure the right terms and references are used and understood. Then the next stage is for ratification on both sides.

The deal won't enter into force immediately. We stand ready to work with our partners in the UK and Indian governments to ensure that the ratification process is as smooth and as quick as possible.

Once this has been completed, will we see a flood of scotch into India? We export to 180 markets around the world and India is the biggest by volume. That's not to say that the signing of a trade agreement is the end of the story — it's not. This will be an ongoing process. We have other market access issues in India, which we'll be working on, but it's a good basis for proceeding. It gives



Mark Kent: The India-UK trade agreement is 'not going to solve all our issues, but it's a landmark deal'

us good potential to increase our exports and investment.

Over the coming months, I hope to go out to India and have further discussions about the category with our Indian colleagues.

How high are the remaining hurdles at a state level? A free trade agreement will reduce the external tariff, but then each individual state has its own rates and labelling requirements, for example. We'll carry on working with our colleagues in India to address these issues and hopefully increase our partnership.

There are always going to be ongoing discussions — we've seen that with states before the deal, whereby some brought down their excise duty rates and saw an increase in state revenue.

Again, this isn't the end of the story. It's not going to solve all the issues, but it's a very important landmark deal for us.

How ready is the scotch industry on the supply side? The potential for a deal has been well-known for a number of years. This isn't a question of simply turning on the taps and increasing our exports to India exponentially.

India is a growing market even without the free trade agreement. The deal improves market access especially for our

smaller members, many of whom up until now haven't been exporting to the Indian market. Now, we're going to see them looking very seriously at this and factoring that into their production and export plans.

There isn't going to be a sudden swamping of the Indian market with scotch. This will be a gradual repositioning as companies factor the new reality into their export plans.

Given the pressures on scotch elsewhere, could India offer an opportunity to maintain margin levels? Each company will take its own decision on that. This is very good news, but it's a challenging world situation at the moment. We also have challenges domestically, especially for some of the smaller producers, around excise duty and the regulatory environment. We'll continue to engage with the UK government on these.

We're also very supportive of the UK government in markets like the US, where we have a traditionally very strong partnership with the industry, including importing GBP300m [US\$399m] of barrels a year.

It's not something that's going to solve all of our challenges overnight, but it's a welcome development. **GDI**

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More buzz, less booze: three key markets driving no/low growth

A youthful demographic, energetic NPD and multinational investment are driving sales in the no/low-alcohol category's fastest-growth markets, writes **Joe Bates**

The no/low-alcohol category's rise to prominence is now a global phenomenon. Yet, on closer inspection, it transpires that a handful of dynamic markets have been driving much of the sector's recent gains.

According to IWSR data, 37m new US consumers began drinking no-alcohol products between 2022 and 2024, while 13m people were recruited into the category in Brazil.

The UK is another star performer. Despite the country's well-documented economic problems last year, the total no/low market in the UK doubled in size, with 0% ABV beer (+20%) emerging as the fastest-growing subcategory.

Everleaf pushes for visibility

Sales may be moving in the right direction in the UK, but a lack of availability in the off-premise remains a barrier to growth.

Everleaf, a British brand known for its botanical non-alcoholic aperitifs, is enjoying double-digit growth in the UK on-trade, but is nonetheless frustrated by a widespread under-representation of alcohol-free options on menus across the country.

"We've seen consistent double-digit growth in the UK on-trade, particularly in venues that are starting to prioritise premium alcohol-free options," notes Dan l'Anson, the company's commercial direc-



De Kuyper's goal with Batched 0.0% was to 'set a new benchmark with bar-quality, alcohol-free cocktails'

tor. "Where Everleaf is listed and well-activated, especially with staff training and great menu placement, we see strong rate-of-sale and high repeat orders."

Recent research by Everleaf in collaboration with hospitality research agency KAM Insight shows that visibility is critical to success. The brand now offers guidance to bars and restaurants emphasising clear menu placement, pricing ideally at 75% of that charged for standard alcoholic cocktails and flavour-driven naming conventions like 'cherry blossom spritz' rather than the ubiquitous 'mocktail' or 'virgin'.

De Kuyper seizes 0% opportunity

A very different company targeting the UK non-alc market — alongside its home market of the Netherlands and Germany — is Dutch liqueurs specialist De Kuyper Royal Distillers. Earlier this year, the 330-year-old firm unveiled Batched 0.0% — a new non-alcoholic RTD range comprising three classic cocktail flavours: Pornstar Martini, Strawberry Daiquiri and Mojito.

"These are consistently the most requested cocktails in our key markets," says global marketing director Godelief van Erve. "By focusing on these favourites,

Batched 0% appeals to both cocktail lovers and those seeking sophisticated alcohol-free alternatives."

With the company's hard-earned reputation for quality and reliability among bartenders on the line, much was at stake with the launch of Batched 0.0%. "We saw many zero-alcohol options in the market fall short of the true cocktail experience, so our goal was to set a new benchmark with bar-quality, alcohol-free cocktails that don't compromise on taste, mouthfeel or authenticity," reveals Van Erve.

Targeted at a broad audience that includes Gen Z, the health-conscious and those wanting to moderate their alcohol consumption, the Batched 0.0% range is finding traction in both the on and off-premise channels. The UK, Germany and the Netherlands are the current focus for on-premise roll-outs supported by strong bartender engagement.

Also on the company's 0% ABV slipway is the upcoming release of Peachtree Batched Sex On The Beach 0.0% in the Netherlands (before a wider European roll-out). The new product taps into Gen Z demand for "nostalgic yet elevated" cocktail experiences, according to Van Erve. Globally, the drink ranks as the fourth most-popular cocktail and comes in at No.3 among Gen Z consumers, making it a strategic addition. »



Everleaf is expanding its reach across the UK and has landed listings in the US (see p36)

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Gen Z powers Brazil's moderation trend

» In Brazil, another high-flying market, it is Gen Z's preoccupation with health and moderation that is turbocharging the country's electrifying growth in the no/low-alcohol space.

According to recent CGA by NIQ data, almost a third (30%) of Brazilian Gen Zers now choose 'healthy' drinks when going out versus a year ago, outpacing the national average by three percentage points.

This trend marks a notable shift in the country's on-premise landscape. In terms of preference, virgin cocktails are growing in popularity, although non-alc beer still dominates the overall market.

Premiumisation is also taking root, with CGA by NIQ data revealing that 7% of these consumers are willing to pay more for high-quality, non-alc alternatives that align with their wellness goals. Additionally, calorie content is a deciding factor for 11% of Gen Z consumers when choosing no/low.

US market defies headwinds

In the US, the no/low category's robust performance continues to defy the country's increasingly gloomy economic outlook.

Rising inflation, a lack of consumer confidence and tariff fears may be affecting alcoholic drinks categories stateside, but according to IWSR's US Navigator database, the no/low category is set to grow at a healthy 18% CAGR by volume through to 2028, reaching US\$5bn in value.

Yet while the growth trajectory remains steep, it is also maturing, reflecting broader shifts in consumer behaviour and retail engagement. While still a few years behind Europe, the assortment of no/low products on offer is growing fast and now embraces everything from zero-proof spritzes to functional mushroom elixirs.

Brandy Rand, founder & CEO of US-based beverage industry business intelligence provider ThirstWell, attributes the no/low-alcohol category's resilience during this period of economic uncertainty to three intersecting consumer trends: premiumisation, socialisation and moderation.

"Alcohol, as well as alcohol replacement products, are seen by many consumers as a small indulgence to enjoy at home, especially if they are saving money by not going out for drinks or dinner," she says.

Rand believes consumers will continue to prioritise lifestyle-aligned products. "An organic or gluten-free shopper is unlikely

to change this preference based on price and instead may choose private label or trade down for cleaning supplies or paper goods instead," she argues.

Retailer engagement has also proven to be a key accelerator for the no/low category, adds Rand, with multiple Total Wine & More doubling its shelf space for non-alcoholic products. "Whole Foods and Target are also getting behind the category," she says.

Non-alc RTDs grow in popularity

Though no-alcohol beer still dominates in volume in the US, the fastest growth is coming from other corners. No-alc RTDs are surging, buoyed by convenience and crossover appeal. "The reason no-alcohol RTDs are growing is similar to why alcoholic RTDs are," says Rand. "Great taste, easy in a can, and a good cost-to-value ratio."

Spirits are also growing, albeit from a smaller base, up 18% CAGR to 2028, but they still face consumer education challenges around usage and taste quality versus their alcoholic counterparts. "Non-alcoholic spirits brands that have original taste profiles, particularly in the bitter/aperitivo segment, seem to be more approachable to consumers," Brand argues.

A new frontier is the emerging 'alcohol adjacent' category, comprising products that seek to replicate the buzz of alcohol, such as mushroom-based adaptogenic elixirs, THC-infused drinks and mood-altering functional beverages that activate the GABA system in the brain.

"The alcohol adjacent space is ripe for innovation as a lot of consumers expect beverages to offer a benefit — whether that be protein, electrolyte, adaptogens or THC," says Rand, pointing to a growing group of consumers seeking a buzz without alcohol but who are not into cannabis. IWSR data

shows that 34% of US consumers have already purchased a functional or "buzz-alternative" beverage, a figure that's expected to rise sharply as more players enter the space.

Celebrity stardust works its magic

The stigma once attached to not drinking is rapidly dissipating, a trend helped along by a growing number of high-profile celebrity-backed or founded brands, such as Bero 0% ABV beer (actor Tom Holland), functional beverage Kin Euphorics (model Bella Hadid) and non-alc agave spirit Almave (racing driver Lewis Hamilton).

A more recent example is functional beverage venture Iconic Tonics launched by the veteran US rap star Snoop Dogg in partnership with Harmony Craft Beverages. "People want drinks that do more than just taste good — they want benefits," said Snoop in the brand's launch statement. "This is more than a brand — it's a lifestyle."

Other brands in Iconic Tonics' portfolio include Klaus (an award-winning line of infused mocktails), Lifeblood by Love Yer Brain (with Wayne Coyne of The Flaming Lips) and Lift (a hemp-infused seltzer).

VIPs embracing the functional drinks subcategory is a sure sign that they are becoming a mainstay rather than a novelty.

Multinationals make their play

It's not only celebrities taking notice of the booming US market. UK brand Everleaf has headed over the pond, landing listings with premium accounts like The Ritz-Carlton and Double Chicken Please in New York.

Multinationals are also increasingly entering the US non-alc market with strategic intent. In April, French sparkling water brand Maison Perrier launched Maison Perrier Chic, a new line of 0% ABV cocktail-inspired spritzes, nationwide, with one flavour, Maison Perrier Chic Citrus Fizz, exclusively available with Whole Foods.

Similarly, in May, Campari Group launched its Italian non-alc spritz brand Crodino into six US states — California, Texas, Florida, Massachusetts, Illinois and Washington. "We're expanding the joy of spritz to even more consumers," said Campari America's head of marketing Allison Varone.

Despite its progress, the no/low category in the US continues to face challenges, as it does elsewhere. IWSR highlights price, taste and availability as the top barriers. **GDI**

Crodino non-alcoholic bitter aperitif, made from herbal extracts, has been produced since 1964



From cork to cans — how drinks packaging is getting greener

Faced with tightening regulations and eco-conscious consumers, the drinks industry is replacing heavy glass with aluminium, paper and even self-cooling cans. **Joe Bates** reports

The traditional 75cl glass bottle has been the go-to receptacle for alcoholic beverage producers for centuries. But amid growing environmental concerns and a tightening regulatory landscape, this time-honoured packaging format is being re-evaluated.

Across the globe, drinks producers are under mounting pressure to reduce waste, lower emissions and rethink the materials used to bring their products to market.

Government policies are accelerating the pace of change. The UK's Extended Producer Responsibility (EPR) scheme, which is currently being phased in, shifts the cost of dealing with packaging waste to the producers themselves. Updates to the Packaging and Packaging Waste Directive in the EU and legislation in US states like California and Oregon, are also pushing brands to adopt lighter, more recyclable and less carbon-intensive packaging.

Along with consumer pressure, this regulatory shift is catalysing a wave of packaging innovation across the drinks industry — from self-chilling cans to lightweight glass and paper-based alternatives. Companies that once relied on the weight, tradition and presence of glass are now embracing agility, portability and sustainability.

The rise of aluminium bottles

Glass isn't the only option with shelf appeal. In Argentina, Familia Falasco made headlines late last year by launching an award-winning aluminium bottle for its



Familia Falasco's eye-catching aluminium bottle for its Conejo Verde label scooped a Pac Global Award

Conejo Verde wine line, in collaboration with local firm Trivium Packaging. The design went on to scoop an award at the Pac Global packaging awards.

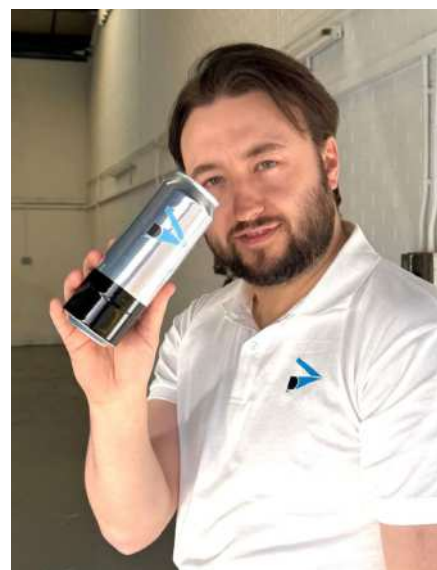
"Aluminium bottles are a scalable and sustainable option for smaller wine producers, offering durability and recyclability," says Santiago Hernado, director of sales at Trivium Packaging. "They are highly customisable through direct printing and unique finishes like matte or glossy coatings, allowing brands to create distinctive packaging that aligns with their identity."

Hernado says the initial consumer response to the Conejo Verde bottle has been very positive, especially among younger LDA consumers, with the winery subsequently launching another wine, Chacabuco, in the aluminium bottle format.

Legacy brands go lightweight

Traditional wine and spirits producers aren't being left behind. Symington Family Estates, which owns iconic port brands such as Graham's, Dow's and Cockburn's, recently redesigned its Cockburn's Port range with lighter bottles, significantly reducing both shipping weight and emissions.

"The new range's lighter bottle [right] will save 432 tonnes of glass and 256 tonnes of CO2 annually," notes a company spokesperson. "As a B Corp [company], we are assessed for the highest standards of environmental performance and transparency."



James Vyse claims the Cool Can will significantly cut emissions across the drinks sector

The self-cooling can

It's a packaging innovation brewing giants have pumped millions into developing, but a former London-based mixologist, James Vyse, the CEO of packaging firm DeltaH Innovations, has beaten them to it.

Earlier this year, he unveiled the Cool Can, a self-chilling beverage can. At the push of a button, the can cools itself to fridge temperature within two minutes without the need for ice or electricity. »



Closures innovation: small components, big impact

Closures may only represent only a small portion of a wine or spirits brand's packaging, but they are increasingly central to sustainability initiatives. A component once often overlooked by brand owners, closures are now being transformed through innovation and circular design.

Industry leaders are using technology, recycling infrastructure and smart materials to reduce waste and carbon impact, demonstrating that even the smallest parts of packaging can play a significant environmental role.

The industry's growing commitment to recycling is perhaps illustrated well by two major cork recycling initiatives gaining momentum on both sides of the Atlantic.

In the UK, supermarket chain Waitrose launched a pilot programme in partnership with Amorim, the world's largest cork producer, last year to collect and recycle natural wine corks across seven stores.

As the first major UK supermarket to introduce such a scheme, Waitrose aims to prevent millions of corks from ending up in landfill by giving consumers a clear way to return used closures. The corks are collected by Amorim and repurposed into valuable products such as insulation, flooring, mulch, coasters and footwear, reflecting the natural material's incredible versatility.

Across the Atlantic, Amorim is also involved in a complementary project in New York as part of the Cork Collective. The joint initiative, with Drinks distributor Southern Glazer's Wine & Spirits, sustainability specialist BlueWell and architecture and design firm Rockwell, collects and repurposes wine corks into "innovative, eco-friendly products that benefit communities and promote a greener future".

Partnering with wine retailers and hospitality venues in New York, the group has set up dedicated cork collection points throughout Manhattan and Brooklyn. These drop-off locations are designed for



Amorim, Southern Glazer's Wine & Spirits, BlueWell and Rockwell have partnered on the Cork Collective

both consumers and industry professionals to return used corks easily and responsibly.

The initiative, supported by grassroots environmental groups and industry bodies like the Cork Quality Council, promotes the value of natural cork as a renewable, biodegradable material. Once collected, corks are processed and repurposed in the US.

Amorim's wider cork recycling initiatives saw the company recycle 1,219 tonnes of cork last year, the equivalent of 271m cork stoppers.

AI-driven innovation

Beyond recycling, the latest technology is reshaping how closures are designed and manufactured. Portuguese cork specialist MA Silva has unveiled Nobeltech, a new closure line developed using artificial intelligence alongside high-tech anti-TCA processes to advance sustainability and performance.

Using the AI-based Bionic Eye, MA Silva employs ultra-sensitive cameras and machine learning algorithms to perform closure-by-closure selection and grading. The result is enhanced sustainability, as the

process requires fewer steps while optimising efficiency and achieving superior quality assurance.

MA Silva's wider sustainability initiatives, which have included the installation of solar mass and the adoption of biomass energy, have meant that the company can now boast a negative CO₂ balance of -267.7g per natural cork.

Premium and recycled

Luxury can also be sustainable, as demonstrated by Crealis, the global leader in the overcap market, with its Virtuo overcap, recently launched by the company's Rivercap brand. This premium overcap is made entirely from 100% recycled tin, boasting a 61% smaller carbon footprint compared to conventional tin capsules.

Recycled tin offers the same elegant appearance and durability as virgin material, but with a significantly reduced environmental footprint. According to Rivercap, this single-material cap offers personalisation possibilities, identical to all pewter caps, thanks to embossing and debossing techniques and top-of-the-range finishes.



» "Preliminary modelling shows the Cool Can [left] could reduce emissions by up to 80g–120g CO₂e per can by minimising the need for chilled storage and transport," Vyse claims. "Across the drinks sector, that represents a significant emissions cut."

The Cool Can's recyclable, mono-material con-

struction and reusable internal cooling module add to its green credentials. Future versions may incorporate compostable or bio-based materials.

"We're setting up manufacturing hubs in the UK, the US and Asia to keep freight emissions low," adds Vyse. »



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Paper bottles cross the Atlantic

» Paper-packaged spirits have been on the rise in the UK for several years, but the trend is finally making an appearance stateside.

In April, big-box retailer Target became the first major retailer in the US to introduce a wine range packaged in Frugalpac paper bottles. The country's seventh-largest retailer is stocking the bottles of "sustainably produced wine" in 1,200 stores, a move it says will save the equivalent of almost 100 tons of carbon dioxide.

The Collective Good range comprises Red Blend, Sauvignon Blanc, Cabernet Sauvignon and Pinot Grigio, each priced at only US\$9.99. The bottles are made from 94% recycled paperboard and contain an inner food-grade pouch. According to Frugalpac, the packaging format is five times lighter than a glass bottle and, crucially, uses six times less carbon and energy to produce and dispose of.

Florida-based craft distiller Distillery 98 has also adopted Frugalpac bottles for its Half Shell Vodka line, an eco-brand that uses locally sourced oyster shells and coconut carbon to filter its vodka to a high level of purity while trying to keep the distillery's carbon footprint low.

Reinventing glass: cleaner heat, lighter bottles

While alternatives flourish, glass remains essential for many premium and heritage brands. But even here, innovation is reshaping tradition. One key area of focus is production — an energy intensive process



This Kobei bottle is part of Stoelzle Glass Group's Japanese and craft movement-inspired Eco Line



Target's sustainable Collective Good wine is packaged in recycled paper bottles. Distillery 98 has also adopted Frugalpac bottles for its Half Shell Vodka (bottom left)



Key Takeaways

- Stricter laws (like the UK's EPR and EU packaging reforms) are driving brands to adopt lighter, recyclable packaging.
- Aluminium bottles, self-cooling cans and paper-based options are gaining traction.
- Legacy glass producers are cutting emissions via lightweight designs, electric furnaces and cleaner energy.
- AI and recycled materials are being used to improve the sustainability of closures.
- Recycling initiatives are repurposing corks into everything from insulation to footwear.



Stoelzle's update of the Monkey Shoulder Whisky bottle reduced its weight by 26%

that involves high temperatures and traditionally relies on natural gas, which releases CO₂ when burned.

Stoelzle Glass Group, one of Europe's biggest glass producers, reveals that it is currently evaluating alternative energy sources such as biogas and hydrogen.

"Electrification is particularly promising, since molten glass conducts electricity, heat can be generated directly within the glass bath through the targeted use of electrodes — a more efficient method than conventional gas burners," says Birgit Schalk, the company's sustainability & carbon manager, who reveals the company plans to commission its first fully electric furnace by 2030.

The company is also a leader in the production of lightweight glass bottles that retain a premium look and feel. Its Eco Line reduces the weight of a 600g wine bottle to just 490g, while the redesigned Monkey Shoulder Whisky bottle the company produced for brand owner William Grant & Sons is now 26% lighter in its one-litre format.

From aluminium and paper bottles to

AI-enhanced corks and recyclable cooling cans, drinks producers are embracing innovation like never before. What once might have seemed futuristic is fast becoming mainstream. Glass will likely retain its place for premium and heritage brands, but even here efficiency and lower emissions are now built into the design.

As regulation tightens and consumer preferences shift toward environmentally responsible brands, packaging is fast becoming not just a container, but a powerful symbol of a company's values. **GDI**

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InchDairnie and MacDuff form InchDairnie Whisky

Scotch whisky distiller InchDairnie Distillery has merged with Glasgow-based MacDuff International to form a new company, InchDairnie Whisky.

Financial details of the deal, effective from 1 May, were not disclosed.

Founded in 2015 by Ian Palmer, InchDairnie owns a distillery in Fife, in Scotland's Lowlands scotch-producing region. The distillery launched its first brand, single grain whisky RyeLaw, in 2023 and has produced whisky for MacDuff since its inception.

Established in 1992, MacDuff International was founded by Charles Murray, Stewart MacDuff and Edward Thomson, and is a leading independent scotch whisky company. It owns the Islay Mist, Lauder's and WaterProof blended whiskies and also handles the global sales and distribution of InchDairnie's RyeLaw brand (with the exception of the UK, where it has been dis-

tributed by Disaronno International since late 2023).

Palmer will chair the board of the unified company, while day-to-day operations will be led by Graham Glen (formerly MacDuff MD) as commercial managing director and Scott Sneddon (formerly InchDairnie MD).

"The formation of InchDairnie Whisky is the natural next step in our journey," said Glen. "We believe that working as one business, with one team and one clear vision, sets us up for long-term success across all areas of our operation."

The new business debuted its first single malt range — KinGlassie Double Matured 8yo and KinGlassie Raw 8yo — the week after the merger was announced.

According to its website, InchDairnie Whisky sells to global markets, including Canada, the US, the UK, Belgium, Switzerland, Australia and Taiwan.

A new look for Tequila El Mexicano

Foley Family Wines & Spirits has updated the pack look for its Tequila El Mexicano portfolio, timed to coincide with a US relaunch for the brand's Blanco expression.

Retaining its US\$40 SRP, Blanco sits alongside El Mexicano Reposado at \$45 (both bottled at 40% ABV) and Blanco 90, bottled at 45% ABV (SRP \$50).

The redesign aims to give El Mexicano a more premium appearance, with a "sleek and minimalist aesthetic" featuring a "glass symbol depicting an agave field, complete with a piña and the setting sun".



Foley Family Wines & Spirits has redesigned its El Mexicano line

'First' African gin/cider brand gains B Corp

Kenyan producer African Originals has become the continent's 'first' gin and cider company recognised with B Corp certification.

The Nairobi-based cider and spirits company becomes Africa's 81st B Corp — the certification from B Lab for companies meeting certain ESG standards — joining the likes of South African craft wine producer Lubanzi Wines.

African Originals said its "impact business model and variety of stakeholder-first commitments" helped it achieve the status.

Founder & CEO Alex Chappatte said: "We craft more than beverages — we craft change. Blending innovation with tradition, we're on a mission to create a positive

and lasting impact across Africa. We're proud to join the B Corp community at this crucial stage in our growth, as we expand rapidly in our home market of Kenya and enter new African markets.

Founded in 2018, the company produces ten SKUs that include ciders, gins, mixers and iced teas. The business reported 80m unit sales in 2024 while "expanding into new markets and launching new products".

In September last year, it raised US\$2m from Phoenix Beverages, a brewer in Mauritius. Bloomberg reported this month that the company is seeking to raise funds once more as demand for its products grows among younger consumers.

Hijos de Rivera buys control of Basqueland Brewing in Spain

Estrella Galicia brand-owner Hijos de Rivera has snapped up a majority stake in domestic peer Basqueland Brewing. The Spanish family-owned company did not disclose the size of the stake, but confirmed that Basqueland will still handle its brewing operations. The Galicia-based owner is aiming to broaden Basqueland's reach as it takes "a key step forward in our craft brewers project".

Kanpai Sake signs distribution tie-up with Speciality Brands

London-based sake craft brewer Kanpai has secured a UK distribution agreement with Speciality Brands. The deal marks Speciality Brands' first foray into sake as it looks to "increase Kanpai's footprint in the UK". Five iterations will be added to its roster: Sumi Junmai Sake, Sora Honjoso Sake, Tori Junmai Daiginjo, Kumo Nigori Sake and Hana Yuzu Fruit Sake.

High Basin Brands adds Can-Tini RTD to stable

US company High Basin Brands (HBB) has acquired Can-Tini, an RTD espresso martini brand infused with nitrogen. Founded in 2023 by the team behind On The Rocks Cocktails (acquired by Suntory Global Spirits in 2020), HBB officially launched in November. Its portfolio also includes whiskey brand Treaty Oak Distilling and Ghost Hill Organic Vodka.

Waterloo Gin readies wider US assault with new pack look

US-sourced Waterloo Gin has unveiled updated packaging for its flagship No.9 and barrel-aged expressions seven months after being acquired by Patrón Tequila founder John Paul DeJoria. Inspired by the beauty of Waterloo's Texas home, the redesign coincides with the brand's expansion into new US markets. The brand also revealed agreements with five additional US wholesalers.

Broken Shed Vodka announces leadership reshuffle

New Zealand's Broken Shed Vodka has reorganised its senior team, with president Steve Bellini moving to the newly created role of chief operating officer and Paul Criscuolo taking on the role of company president. Criscuolo assumed the position from 1 May and leads the company's North America operations, having served as chief commercial officer since 2019.

‘There’s nothing to analogise our business to within the drinks industry’

Framed as an industry disruptor along the lines of Airbnb and Uber, Ferovinum launched seven years ago. Co-founder & CEO Mitchel Fowler talks through how the London-based company’s platform works with **Olly Wehring**

How did you get to where you are today? I was born in the Hunter Valley wine region in Australia and have always had a really strong passion for the wine industry, though I’d never worked in it formally. I spent my career in commodity markets, helping both small and large businesses deal with moving their inventories around the world in a capital-efficient way, optimising their trading so that they could focus on the things that mattered to their businesses.

A few years ago, I realised that the drinks industry could benefit from the solutions that we used, to deal with the problems that affected commodity markets.

The two biggest barriers to scaling any drinks brand are accessing capital for working capital inventory and supply chain complexity. If you have a successful drinks brand, those two things don’t add any value for you to what your exit value might be or how your shareholders value your business. We saw a great opportunity to build a specialist platform for the industry to solve its two biggest problems, neither of which form their core business but are needed in order to succeed.

The concepts that apply to commodity markets have been really transferable and have massively moved the needle for our clients. Once people have realised what our business is, we’ve struggled to keep up with the momentum, so we knew we were on to something really early.

Because it’s a really competitive industry that’s going through a turbulent time, you need to be match-fit as a drinks brand. We feel like there’s never been a better time for what we’re building. The problems that we help to solve have never been more important for brands to have good solutions for.

What’s the business model for Ferovinum? It’s centred around inventories. We’ve built a platform that carries inventories for the client and from a financial standpoint, we



Ferovinum co-founder & CEO Mitchel Fowler: ‘We haven’t chosen to do this because it’s easy. We’ve chosen to do it because it’s difficult and challenging.’

assume most of the capital burden of those inventories.

We’re also building supply chain infrastructure to help clients buy, manage, move and sell those inventories. For retailers, distributors and wholesalers, that means that they can run their procurement programmes more efficiently. For brands, they can get closer to those buyers and work with them in a way that’s more efficient for both parties.

It’s almost like outsourcing your inventories and all of the problems that come with it, but keeping control of your supplier, distributor and retailer relationships.

How long has the company been running?

We set up the business in 2018. We worked with the industry — including the Wine and Spirit Trade Association and WineGB — to design the first version of the solution, which took a couple of years. Our earliest clients were wine distributors and wine and spirits producers.

Around the time of Covid in 2020, we started rolling the product out, and then attracted institutional investment in 2021, so that we could scale the product up over a larger part of the UK industry. We’re still

‘The two biggest barriers to scaling any drinks brand are accessing capital for working capital inventory and supply chain complexity’

relatively early in that journey, but we’ve been growing over the last two or three years at over 1,000% per annum. The industry uptake has been very rapid.

We’re launching in the US, mainland Europe and Australia this year, both for companies in those markets and for those exporting to them.

What’s the scale of the business? We’ve put around GBP300m [US\$399m] of product through the platform to date. In the UK, we have more than 500 active businesses that are buying via the platform. Our core client list will break 100 this year, I would say.

In terms of the industry uptake, we’re at least doubling in size every year. We’re speaking with clients at the large end of brand owners, as well as with large >>

» national retailers that are looking to help optimise their procurement. We're also speaking with brand-new businesses that are trying to sell their first 10,000 cases. We're lucky enough to be operating at different layers of the market.

Sometimes it'll just be a tactical component for a client. Our platform isn't an all-or-nothing solution.

Do you think the industry recognises it has the problem that you're looking to solve? In terms of intellectual engagement, that's been one of the biggest challenges — and the most enjoyable — of the exercise. Our solution is completely novel; there's nothing really to analogue to within the drinks industry.

It's not like borrowing money from a bank or buying services from a supply chain business. Ferovinum enables people to set up a new operating model for their inventories, which allows them to manage risk better, grow faster and be more efficient.

For an industry that's had to solve these complex problems on its own for such a long time, it's a big leap of faith for people to take. The approach we've taken is to build trust through delivering for our clients. We operate a partnership model — we don't disappear. The platform gives our clients access to not just the technology that we've built, but an incredible team of people that are using that technology to leverage how well they can serve clients. We deliver a multiple of the cost of our service to our distributor and brand clients.

Our growth to date has been organic. People will talk about what we've delivered for them and that then brings others into the network. Because of the nature of what we do, we interact with all of a brand's buyers to help optimise those flows into the buying relationship. We're nowhere near done. We're constantly reinvesting every single pound that we charge for the service

to make it better and build around the requirements of the industry.

Do you have any competition? This is a novel operating model for businesses. There are individual solutions that solve different parts of the pain points that come with carrying and selling drinks around the world. Our operating model comes at it in a unique way. In that respect, it's a world-first.

What's been your funding journey? Co-founder Dan Gibney and I started out of our own pockets, which forces discipline and focuses the mind. Our earliest group of private investors — made up predominantly of work connections — were joined last year by credit and venture capital funds through a Series A round. We've also had strong bank partnerships in the UK since 2021.

We also have some exciting things that we'll be announcing in the coming months that will allow us to massively scale up the participation of securitised capital markets.

Any industry 'veterans'? It's really been a sequential thing. One of our early categories was scotch and one of our first hires was Gregor Mathieson (as director of spirits), who had co-founded and exited The Edinburgh Whisky Co. We combine a few different disciplines: technology, finance, supply chain and the industry itself. Gregor sat on the client side of the table as we built the product and brought participants onto the platform.

We also have Helen Barugh, previously grocery channel director for Mangrove, who's helping manage our relationships with large retailers and distributors in the UK. As we've started to shape the infrastructure, we've brought more people from the industry onboard. We'll look to do the same in the US and Europe as we launch into those markets. We're almost at 50 people globally and we're reinvesting to grow the team.

How has the recent macroeconomic turbulence impacted the business? We have been working with some really interesting early brands. When there's big disruption in markets, like the recent tariff movements that have been percolating through, it creates a huge opportunity for brands that are entering markets for the first time. Being able to deliver into those markets quickly has been one of the exciting ways we've been able to deliver value.

While it has created a dynamic and challenging environment for our clients, with the right tooling, it's also created equal amounts of opportunity from what we've seen so far. While there is a lot of doom and gloom, there's also a lot of opportunity for people who are in a position to capitalise quickly on those opportunities as they arise.

On the inventory side, people are more focused than ever on things like liquidity risk — everyone's trying to be as lean and mean as possible. At the same time, the suppliers, the brands and the producers are all trying to keep revenue running at the pace they need it to, to make sure they're operating efficiently. We've acted as a kind of shock absorber on both sides of our client portfolio, so that they can ride out the storm.

What's been the biggest challenge for you so far? We need a lot of things to work together really well, so getting our timings right when we've been having very rapid growth — and good uptake from the industry — is one of the biggest challenges.

There's a big capital markets side to what we do, and the [Liz Truss government's] 2022 mini-budget [which included GBP45bn (US\$60bn) of unfunded tax cuts] created huge disruption in capital markets, particularly in the UK. At the same time, it was fantastic, because it forced us to get match-fit to make sure that we can weather the types of storms our clients may face.

We haven't chosen to do this because it's easy. We've chosen to do it because it's difficult and challenging.

What's your aspiration for five years from now? It's way too early to be thinking about an exit strategy — I don't want to get distracted by that side of the endgame.

The definition of success for us is becoming the natural choice for the industry to run its supply chain on. If that takes us decades to get there, we have a capable, determined and dogged set of people working for us that will fight until we achieve it! **GDI**



'Ferovinum enables people to set up a new operating model for their inventories, which allows them to manage risk better, grow faster and be more efficient'

‘Do your homework.’ How new spirits brands can innovate on a tight budget

In the competitive world of spirits, NPĐ isn’t just a growth strategy – it’s a necessity. But how can cash-strapped startups innovate without breaking the bank? **Henry Mathieu** reports

Speed, not size, is your advantage

For Elwyn Gladstone, founder of spirits creator and distributor Biggar & Leith, the key to competing with big players lies in agility. “Speed to market is a real commercial advantage,” he says. “We can come up with ideas much quicker than big companies.”

This speed is particularly valuable in a sector where demand for novelty remains strong. “There is something interesting going on in spirits,” Gladstone explains. “The market is saturated with products, but at the same time, there is an insatiable appetite from consumers for new things.”

Online channels have changed the game, allowing startups to launch quickly, test products and pivot as needed. “You can put your new innovations online immediately without having to wait for a listing with a retailer,” says Gladstone.

Limited editions done right

Limited-edition products can be an effective way for small brands to explore innovation and generate buzz. But, Gladstone warns, they only work when executed well. “Limited-edition releases in spirits got a bit overdone – they were no longer special,” he says. “But if done well, these can be a super-powerful tool.”

Grace Bryan, CEO & co-founder of product & innovation agency Juicy Brick, agrees. “Think limited runs,” she advises. “Seasonal drops or exclusive batches give you space to test ideas, gauge feedback and create hype, without venturing into external full-scale productions.”

Design: a premium differentiator

Design plays a disproportionately large role in the success of premium spirits brands. But top-tier packaging doesn’t have to come with top-tier cost, insists Guy Lawrence, formerly of La Hechicera Rum & founder of drinks advisory firm Craft Spirit Capital.

“Design is one of the most important things for premium and super-premium



Packaging needs to be ‘9.5 out of ten’, says Guy Lawrence, who exited La Hechicera when Pernod Ricard acquired a majority stake in the brand



Agility allows startups to compete with larger players, according to Biggar & Leith, whose portfolio includes whiskey liqueur Shanky's Whip

brands,” says Lawrence. “Your packaging needs to be 9.5 out of ten. There’s no point being eight out of ten. How do you get brilliant design right for next to nothing? It’s really difficult,” he concedes. “But great design is very powerful at cutting through.”

Bryan suggests cost-effective packaging hacks: “Explore off-the-shelf options you can customise. Think hand-labelled bottles, stickers on blank cans, or labelled pouches instead of custom-printed packaging. These small-scale hacks still allow you to look considered, artisan and on-brand without the massive spend.”

Innovate inside out

One way to innovate on a tight budget is to look inward. Bryan recommends mining production processes for untapped value. “Take a close look at your production by-products,” she suggests. “Is there anything you’re discarding that could be repurposed into something new?” Bryan points to the example of London cocktail bar Lyaness turning lemon peel waste into stylish coasters – proof that creativity and sustainability can go hand in hand.

Bryan also champions starting innovation from within. “Can you develop new flavours in-house through a bit of trial and error?” she asks. “Before you dive in, do your homework. There’s loads of insight out there if you’re willing to dig.”

Keep it simple, stick to core values

Holla Spirits founder Patrick Shorb believes focus is everything. “Stick to deeply penetrating your markets with a small number of SKUs to maximise impact,” he says. “Rationalisation is continuous.”

That focus should also extend to brand design. Simplicity is key, Shorb advises, to “make it ultra-fast for the consumer to know what you’re selling”.

Behind every successful innovation is a strong formulation and this is one area where cost-cutting is risky, says Shorb, whose company produces a range of “13-plus higher-quality” flavoured vodkas. “It’s essential to find a formulation partner who understands your ethos,” he explains. “Achieving the right mix and balance of flavour, calorie counts and ABV for your target consumer is a must.”

Community, collaboration & craft

Tapping into local ecosystems can help small businesses scale innovation without scaling cost. “Use your community,” Bryan urges. “Whether that be potential local suppliers who provide low MOQs, an audience to test products, or even small independent production partners like microbreweries, coffee roasters or vineyards.”

In other words, successful spirits innovation doesn’t have to mean isolation or heavy investment. More importantly, points out Lawrence, “it’s about being early, but not too early”. (See interview p46.) **GDI**



Five lessons from a drinkpreneur

Industry veteran Guy Lawrence

Craft Spirit Capital founder Guy Lawrence cut his teeth at Guinness, Bacardí, Mast-Jägermeister and Russian Standard Vodka, helped steer La Hechicera Rum and Brockmans Gin to success, and is currently working with Cazcabel Tequila. Interview by **Henry Mathieu**

Be early, but not too early

Innovation is essential, but timing is everything. Lawrence's first lesson came early in his career at Guinness, when he helped launch Smithwick's Alcohol-Free Bitter. The product was sound, but the market wasn't ready. "It was an unmitigated disaster," he recalls. "At the time, in the late 1980s, no God-fearing bitter drinker wanted to drink an alcohol-free bitter."

Contrast that with his next project — Guinness Draught in a can, which introduced the innovative widget. "It worked very, very well," Lawrence says. "The business went on to do GBP50m [US\$66m] in retail sales within two to three years."

He notes: "We all want to create products that are differentiated, but if they're too differentiated, they're not relevant. If they're not relevant, they've got no market. Now, what can happen is you can differentiate yourself into a position that you think the market is going to move to, and that's where the skill lies. If that market then opens up, you end up having the lion's share of that particular opportunity."

Build a high-performance culture

"It's all about the team," Lawrence insists. During his tenure at Bacardí and later as CEO of Mast-Jägermeister UK, he focused on developing people and culture.

"You can't achieve any spectacular success without a great team," Lawrence says. That meant empowering staff, encouraging constructive feedback and investing in de-



Guy Lawrence: 'You can't achieve any spectacular success without a great team'

velopment — even hiring a coach to instil a high-performance culture. Both Bacardí UK and Mast-Jägermeister UK became 'Sunday Times Top 100 Companies to Work For' under his leadership.

Now, as a board member & advisor, Lawrence sees the same principles at play: "Whether you're working with five or 100 [employees], it's the same — be collaborative, open-minded and relentlessly focused on ROI."

Success can happen quickly

While many entrepreneurs expect a long grind, Lawrence emphasises that rapid growth is not only possible — it's something to be prepared for.

He shared an example from his time at Russian Standard Vodka, which doubled sales in two years. "We went from 350,000 to 750,000 cases," he says. "That kind of explosion was a result of great route-to-market, focused distributors, the right pricing and some smart luck."

But luck favours the prepared. "You need

to have done your whole opportunity assessment," Lawrence says. "Understand the consumer, the trade and your financials. Then you work it — very hard."

Nail your route-to-market

Perhaps the costliest mistake new drinks brands make is expanding too fast — particularly internationally. "It's very tempting when you get that call from a French distributor," Lawrence warns, "but if you haven't built out your home market first, you're diverting funds and attention too early."

He stresses that route-to-market should be focused and sequential. "You need velocity; it needs to be multichannel," he says. That means establishing on-trade credibility, then building out retail and e-commerce once the brand has real traction.

And beware the US trap: "To launch in the States properly, you need serious money and capabilities. You can burn through cash quickly." In short, dominate your home turf before conquering the world.

Don't lose money

It sounds obvious, but in an industry known for glitzy campaigns and high burn rates, profitability is often neglected. Lawrence quotes the late Charlie Munger, who was vice chairman of Berkshire Hathaway: "Rule No.1: Don't lose money. Rule No.2: Don't forget rule No.1."

He's a strong proponent of 'bootstraping': "I don't believe in over-investing. You learn more that way," he explains. "Ask yourself, 'Where's the best place to spend this GBP10,000? How do I get the best return?'"

From using AI to reducing headcount to hiring fractional executives, Lawrence recommends getting scrappy early on. "If your brand has the DNA to be big, you'll see that without burning millions. Then — and only then — raise to scale."

He adds a final caveat: "Chasing growth in a declining category? That's a trap. I've seen businesses double down when consumer sentiment had already moved on. Don't throw good money after bad."

If Lawrence has one overarching message, it's this: Success isn't solely about having a great product; it's about having the right plan, people and principles to back it up. **GDI**



Lawrence is a non-exec board advisor at fast-growing Cazcabel Tequila

Teremana and Mast-Jägermeister GTR strategy pays off

Dwayne ‘The Rock’ Johnson’s Teremana Tequila is “well on the way” to brand internationalisation after just one year in global travel retail, its distribution partner Mast-Jägermeister has revealed.

Since its April 2024 GTR launch, the premium small-batch tequila has disrupted the category, entering all regions and engaging with more than 23m consumers in 16 markets. International airports remain the top priority this year, but distribution will expand into other channels, including ferries and border stores.

Mast-Jägermeister vice president GTR Tobias Witte commented: “The tequila category is seeing strong growth globally and this is reflected in GTR in both volume and value. Tequila is also gaining traction with increased space in-store.”

Teremana’s core products, Blanco (SRP EUR49.99/US\$45.99), Reposado (EUR54.99)



‘Share the Mana’ at Istanbul Airport. The campaign centres around spreading gratitude and positivity

and Añejo EUR64.99 for a one-litre bottle, are “performing strongly, especially the two more premium lines”.

Mast-Jägermeister marketing director GTR Stephanie Cleary added: “Our task now is to continue introducing the tequila category to a new global audience and engage consumers with Teremana.”

Teremana’s ‘Share the Mana’ campaign

will continue throughout 2025, with pop-up spaces inviting consumers to share positive stories on social media. Installations, like tasting bars, heavily feature Johnson.

The brand also launched into four new domestic markets in 2024, including the UK, Australia, the UAE and Germany. This year, 20 more are targeted across Europe, Asia-Pacific, South America and Africa.

Spirits to lead India’s duty-free charge

The fast-expanding Indian airport retail market is set to remain a spirits-dominated channel between now and 2030, according to a new study from Kearney.

The management consulting firm told TFWA Asia Pacific Exhibition & Conference delegates last month that the market’s expected high growth offers major opportunities for both global and local drinks brands.

Comparing five large emerging markets — China, India, Saudi Arabia, Turkey and the UAE — Kearney said India offers an 8% CAGR between 2024–30 for liquor, double that of Turkey and the UAE. The wine and spirits category in India already has a commanding share of the travel retail market at 58%; Turkey comes second at a distant 19%.

Given China’s recent poor travel retail performance, with both Pernod Ricard and LVMH reporting sales of spirits, including cognac, tumbling — due partly to sales being blocked as the country’s investigation into brandy imports from the EU plays out — India is emerging as a strong alternative in Asia-Pacific, especially for whisky.

Kearney senior partner Victor Dijon said: “India’s travel retail market could triple by 2030, with retail growth outpacing air passenger volumes.” The country will have more than 400 airports by 2047, up from 160, and

with 40,000 passports issued a day, there will be no shortage of travelling shoppers.

Kearney also noted that Indian airports do not leverage parts of their offer: only 25% of duty-free sales are captured in departures in the biggest airports (Bangalore, Chennai, Delhi, Hyderabad, Kolkata and Mumbai), while conversion rates are low at 10%–20%, much less than at comparable airports around the world. So the potential for revenue uplifts in liquor is strong.

Another senior partner at Kearney, Neelesh Hundekari, warned that it will not be enough for brands just to enter Indian airport retail — they need to understand the local shopper. “Indian consumers are value-conscious and look for prices they can’t get in domestic markets,” he said. “They are digitally savvy and will compare prices at airports around the world to get the best deals.”

Indian consumers are “value-conscious, yet aspirational”, Delhi Duty Free CEO Ashish Chopra told TFWA delegates. “This group will define the next decade of growth,” he said. “Our strategy focuses on making premium products accessible using curated price points, multi-brand bundles and digital-first engagement. India’s middle class is not just about volume — it is a value market in transition.”

Dubai Duty Free’s liquor sales surged by 13% in April

Wine and spirits sales at Dubai Duty Free (DDF) hit AED92.50m (US\$25.34m) in April, up by a respectable 13% and helped by a revamp of the retailer’s arrivals stores, where liquor is a big segment. However, the increase fell short of the 18% seen across all categories.

DDF’s total sales reached AED713m (US\$195.4m) in April, the fourth-best month since operations began. Managing director Ramesh Cidambi said: “November and December 2024 were record months, joined by January 2025, so it is great to see that April is in the top four rankings now.”

The MD added that April sales outstripped passenger numbers “as far as we know”, helped by the Eid holidays. While liquor underperformed average growth, it remains the No.2 category (after perfume) for DDF, which is the core retailer at the world’s busiest international airport, Dubai International.

Virgin Wines targets GBP100m in revenue as it celebrates 25 years

The UK e-commerce wine retailer has returned to profitability and has an ambitious five-year plan to take its business to the next level. **Joe Bates** talks strategy with CEO Jay Wright

The road back to profitability has proven challenging but ultimately rewarding for Virgin Wines, the UK's leading direct-to-consumer online wine retailer.

After a company-wide cost-cutting programme that netted annual savings of GBP1.4m (US\$1.9m), the streamlining of its operations and the launching of several new customer propositions, Virgin Wines is looking to make 2025, the company's silver jubilee year, a memorable one.

In the British retailer's most recent set of H1 2025 financial results covering the last six months of 2024, pre-tax profit rose 20% to GBP1.3m, and customer acquisition grew 29%. Moreover, sales during the key December Christmas trading period surged 9% year on year.

This solid performance follows on from a pre-tax profit of GBP1.7m for the 12 months to the end of June last year — a notable turnaround from the GBP700,000 loss recorded the previous financial year.

Virgin Wines CEO Jay Wright attributes the negative performance of FY 2023 to temporary “teething issues” implementing a new warehousing system. “Our biggest focus moving forward is achieving our five-year growth plan, which means reaching GBP100m in revenue with a 7% EBITDA margin over the next five years,” he reveals.

Four pillars of progress

The retailer plans to achieve this target by concentrating on four strategic areas: further customer acquisition, developing more commercial partnerships, growing Warehouse Wines (the company's budget-friendly sub-brand selling wines under GBP10), and, finally, completing the development of a new mobile app.

For Wright, one obstacle to Virgin Wines achieving these targets is the UK government's recent decision to alter the country's duty regime, which has led to increased taxes on a bottle of wine of up to 54p, depending on its alcohol content. “This is a



Jay Wright: ‘Our biggest focus moving forward is achieving our five-year growth plan’

sector-wide issue,” he admits, “but we are mitigating the impact through our unique open-source buying model, as well as benefiting in the short term through pre-paying duty on stock ahead of the change, leveraging our strong balance sheet.”

Leveraging clubs

Central to Virgin Wines' recent diversification strategy has been the launch of Warehouse Wines, which by the end of last year

had already attracted 17,600 customers. In the price-sensitive UK market, where inflation and faltering economic growth have sapped consumer confidence in recent years, such a move was a smart play.

At the other end of the price spectrum, Virgin Wines has been leaning heavily into premiumisation through its Vineyard Collection and Five O'Clock Somewhere (5OS) Wine Club. The former showcases small-batch wines made from Virgin Wines' own vineyard plots in South Africa, England, France and Australia.

With this move, Virgin Wines is transforming from a wine retailer into a co-creator — curating exclusive products that align with evolving consumer expectations around provenance, craftsmanship and authenticity.

“This project has been our most ambitious venture into bespoke winemaking, allowing us to create a selection of wines made from Virgin Wines' very own vines across the globe,” says Wright.

“It's been an incredibly exciting initiative for our team, one that reflects our passion for crafting high-quality, distinctive wines that our customers can't find anywhere else.”

The relaunched 5OS club is another initiative aimed at wealthier consumers. The offer features “renegade” small-batch >>

Sales trends: pinks, crémant and smaller pack sizes prove star performers

» wines crafted by winemaker Steve Grimley and his team in Australia's renowned McLaren Vale winemaking region.

Wright says the response to the relaunch of 50S has been fantastic, with almost 2,000 members joining, gaining early access to each new release. "We're continuing to expand the 50S range, and customer feedback has been overwhelmingly positive," says Wright.

Despite all these innovations, Wine-Bank remains the beating heart of Virgin Wines' business. With over 126,000 members, the retailer's core subscription-style scheme accounts for the lion's share of revenue. Customers earn 20% interest on their deposits and enjoy perks like free delivery — an attractive offer, especially as wine inflation continues to pinch.

Expanding reach through collaboration

If cost-cutting got Virgin Wines back on its feet, strategic partnerships are expected to power its next phase of growth.

Chief among these is the retailer's partnership with Ocado Retail, the UK's only dedicated online supermarket, announced last October. For the first time, 55 Virgin Wines are listed as individual bottles available alongside customers' weekly shops. Previously, Virgin Wines operated exclusively through multi-bottle case sales. The tie-up represents both a major change in format and a canny distribution move.

"Ocado's model aligns well with our direct-to-consumer [D2C] approach, as both

Rosé wine is proving a star performer for Virgin Wines. "It's become a key focus for us," reveals company CEO Jay Wright. "We're also in the process of refreshing our beaujolais range, which I'm really excited about."

Wright says classic wines continue to do well, but notes that French crémant sparkling wines are gaining momentum and even posing a challenge to prosecco and champagne. "Our new Blanquette de Limoux has a lot of potential; I think it could be a real hit this summer," he says, also tipping Greek wines as an up-and-coming country of origin.

Virgin Wines is also having success with smaller pack sizes, such as three-bottle cases and taster packs of mini 18.75cl wines, a one-glass serving sometimes referred to as a 'split'.

"This is a great stepping stone for younger customers who may not have thought of buying wine by the case to sample the quality of wines," says Wright. "[They can] experience the value that we offer, alongside the convenience of delivery to the customers' door."

are built around convenience, personalisation and a strong online customer experience," says Wright. "By partnering with Ocado, we're able to extend our reach to a wider online audience that values quality and curated selection, core principles of our D2C offering."

Virgin Wines has also extended commercial partnerships with Moonpig, a UK e-commerce site selling personalised cards, flowers and gifts, as well as UK train operators, such as London North Eastern Railway, Avanti and Great Western Railway. These collaborations have allowed the retailer to expand into the gifting and travel retail sectors, channels where convenience and premiumisation often intersect.

Lighter bottle pledge

Virgin Wines is also stepping up its sustainability agenda. In 2023, the retailer joined the Sustainable Wine Roundtable (SWR) — a collaborative global platform promoting sustainable practices across the wine value

chain. As part of this initiative the retailer has agreed to meet the SWR's goal of reducing 75cl bottle weight to 420g by 2026.

Virgin Wines is also making progress with sustainability in other areas of its operations. "Currently, 45.35% of our products are shipped in bulk through Greencroft Bottling, a BRC Grade AA+ facility known for its sustainable practices," says Wright. "Across our sites, we operate strict recycling protocols, with 0% of waste going to landfill. In 2024 alone, 175 tonnes of waste were recycled or redirected to energy recovery."

Celebrating 25 years in style

Virgin Wines is marking its 25th anniversary in 2025 with a year-long celebration. The company was founded in 2000 by UK entrepreneur Richard Branson's Virgin Group before it was acquired by Direct Wines five years later. In 2013, CEO Jay Wright, Mobeus Equity Partners and Connection Capital successfully completed a management buyout.

Silver jubilee festivities include a commemorative range of 12 exclusive wines — among them, a red grape-only champagne and a premium Argentine malbec.

Despite its recent wins, Virgin Wines faces challenges moving forward. Revenues in the last reported financial period were flat, and the wider global macroeconomic backdrop remains turbulent. Yet steady progress is being made. The retailer has recalibrated its business model, doubled down on digital infrastructure and is navigating post-pandemic consumer realities with a more nimble, curated approach.

"Over the past 25 years, the wine industry has seen major changes," says Wright. "We've seen a shift toward more premium wines, lower-ABV options and the growing popularity of trends like Dry January. Through it all, we've stayed true to our unique approach; putting the consumer at the heart of everything we do." **GDI**



Virgin Wines finds taster packs of 18.75cl bottles are 'a great stepping stone for younger customers'

Key Takeaways

- Premiumisation and provenance are driving demand, with Virgin Wines investing in exclusive small-batch collections and co-created wines.
- Value-conscious consumers remain a priority,

as seen in the success of Warehouse Wines and smaller pack sizes.

- Strategic partnerships, such as the Ocado deal, and digital upgrades crucial to long-term growth.

Shaken and stirred: cocktail trends shaping the robust US on-premise

The wider cocktail category is arguably one of the most exciting and profitable segments in the US on-premise. CGA by NIQ's **Matt Crompton** explores the flavours, dynamics and behaviours shaping consumption

The cocktail and mixed drinks market is thriving in the US, particularly among younger consumers. About one in three Americans aged 21 to 54 enjoy cocktails, with even higher engagement among Gen Zers and late Millennials.

Cocktails are experiencing a wave of cultural momentum, with mixology gaining mainstream appeal and even spawning celebrity-style figures and dedicated shows on streaming platforms. This is no small feat, especially in light of the struggles faced by other alcoholic beverage categories, like wine and beer, and the broader trend of declining alcohol consumption.

The cocktail category's popularity translates directly into strong revenue potential for on-premise venues. According to BeverageTrak data, mixed drinks account for 34% of total spirits value in the on-premise, generating more than US\$14,000 in average outlet revenue over a 12-week period.

Cocktails also deliver the highest revenue per serve, with an average price of \$13.75. This is higher than wine and neat spirits, and nearly double that of beer, which shows just how critical this segment is for any on-premise business.

To fully capitalise on this lucrative market, however, operators and suppliers need to understand what motivates guests to choose a cocktail, which drinks they're gravitating toward and how they navigate the decision-making process when selecting what tipples to drink.

Cocktails in focus

Making a well-crafted and thoughtfully developed menu is essential to unlocking the full revenue potential of the category. A significant two-thirds of cocktail drinkers are likely to consult it before making a choice, especially younger to middle-aged consumers.

These engaged users are not only more inclined to explore cocktail options, but are also willing to pay more for serves that



Nearly three-quarters of cocktail drinkers turn to on-premise staff for drink recommendations

feature branded ingredients, so it's vital to clearly list what goes into each drink.

A well-designed menu may be a convenient, albeit somewhat passive, tool for driving sales, but it shouldn't be your only strategy. When unsure what to order, 72% of cocktail drinkers turn to the bar staff for recommendations, so employees must be knowledgeable and confident in upselling when engaging with guests directly.

Once guests have consulted the menu or sought staff recommendations, there are other factors that influence their final choice (or whether they return for another round). Taste is by far the most important driver, with 71% of cocktail drinkers selecting a drink based on how they expect it to taste. Just over half also consider price, meaning that drinks' pricing must strike a good balance of gross profit and affordability.

Two other key influences further reinforce the importance of providing detailed information on the menu or conveying it clearly through staff. Nearly half of cocktail drinkers say quality is a deciding factor (which they're likely gauging based on the listed ingredients, unless they've tasted a drink before).

Additionally, more than one in four are particularly brand-sensitive, meaning the appeal of specific ingredient names can strongly sway their choices. For operators, this underscores the need to ensure that

cocktail descriptions and ingredient lists are not only informative, but enticing.

CGA by NIQ's On Premise User Survey (Opus) reveals that the base spirit of a cocktail plays a major role in consumer decision-making too. Drinkers tend to gravitate toward cocktails made with their preferred distillate.

Tequila leads the way, favoured by 46% of cocktail consumers, followed by flavoured vodka and whisky, each preferred by nearly one in three LDA consumers. Plain vodka, light rum, sparkling wine, gin and flavoured or spiced rum follow closely behind.

These spirits should be staples on any back bar, as their popularity is also reflected in the top-performing classic cocktails. Indeed, the margarita remains the undisputed champion across all age groups, with a remarkable 55% of over-55s choosing it when drinking out. The mimosa follows, resonating strongly with under-35s, alongside other younger crowd favourites like the daiquiri and piña colada.

Cocktail performance, however, can vary significantly depending on the metric considered. While the margarita is the most popular choice overall, for instance, it ranks in the bottom half on check (bill) value, while checks containing a caipirinha generate the highest average spend, outperforming all other mixed drinks. »

» When it comes to revenue per item, the manhattan and negroni stand out as the highest-priced cocktails on average, costing nearly twice as much as a sex on the beach. This suggests a strong consumer willingness to pay a premium for these classic serves.

Meanwhile, the old fashioned, though not topping any single category, delivers solid performance across the board, consistently ranking in the top six for all key metrics, making it a reliable and well-rounded option for any cocktail menu.

Daypart trends

Understanding specific drinking occasions, as well as the times of day and week when particular cocktails tend to be most popular, can be crucial when strategising cocktail offerings.

It is no surprise that Friday and Saturday are the most valuable days for cocktail sales, with Saturday seeing more than twice the number of drinks sold compared with weekdays. On average, prices are slightly higher on Saturdays and check values are at their peak over the weekend too.

But with earlier dayparts gaining an increasing share of cocktail value velocity (average spend) in the US on-premise (see below), it is best to focus on the nuances rather than relying solely on broad averages.

Monday, for instance, may be the least valuable day of the week, but it outperforms Wednesday between 11am and 3pm, while Wednesday itself surpasses other weekdays during breakfast and brunch hours.

Thursday proves to be the most lucrative weekday across most dayparts, with the margarita and old fashioned performing particularly well, but Fridays generate the highest early evening sales of any day, and Sunday even outperforms Saturday in the first part of the day.

As for the performance of specific cocktail types throughout the week, top drinks tend to generate the most value on Fridays and Saturdays. That being said, drinks like the bellini, mimosa and bloody mary are more lucrative on Sundays, likely due to their association with brunch or daytime drinking. Conversely, drinks like the julep and collins are more valuable early in the week than on weekends, so operators should focus on those if weekdays are crucial for business.

Meanwhile, less popular cocktails, along with classics like the old fashioned, spritz, whiskey sour and, particularly, the mai tai, tend to perform consistently well throughout the entire week.

Dissecting consumption times further, CGA by NIQ data reveals that cocktail velocity increases throughout the day, peaking in the early evening. Between 6pm and 10pm, they generate nearly twice the value of the afternoon, with almost as many cocktails sold during this window as throughout the rest of the day combined.

Yet there are also opportunities to profit from the category during the day. For example, the bellini and the mimosa are more lucrative between 11am and 3pm com-

THE RESEARCH

CGA by NIQ's suite of research services provide brands and operators with an unrivalled view of the US on-premise sector and cocktail category dynamics. The *Cocktail Sales Tracker* and *On Premise Cocktails Report* are powered by CGA by NIQ's unique fusion of sales measurement data and consumer research. They provide an essential and holistic overview of the cocktail category, helping businesses measure current performance and achieve future growth. To learn more about CGA's capabilities across the US on-premise, visit www.cgastrategy.com

pared with other mixed drinks, likely because they are perceived as more suitable for daytime occasions.

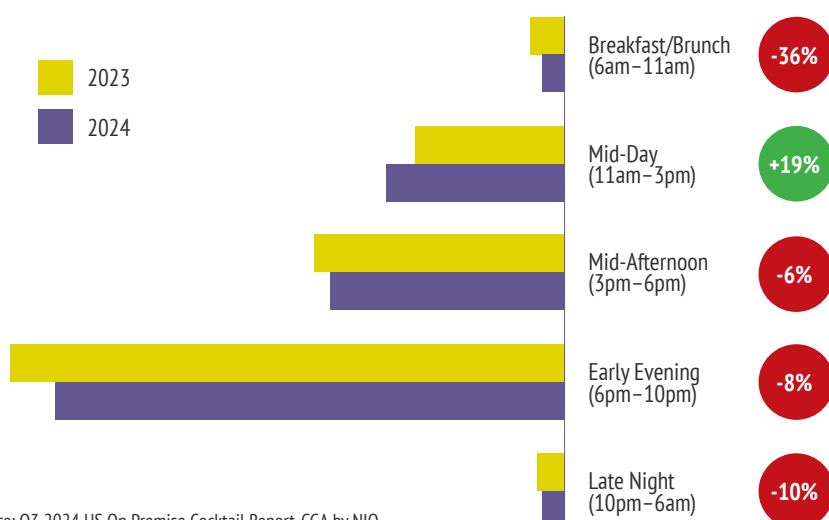
At first, such varied performances seem to suggest that cocktails may not represent a strong opportunity for every business. Yet the category has one major advantage over any other alcoholic beverage: an incredibly diverse range of tastes, mouth-feels and flavours. This diversity enables operators to profit from cocktails at any time of day or week and across all regions.

Success simply depends on identifying the right drinks for each occasion and location, and on clearly defining strategic priorities — whether the goal is to drive volume with popular serves or to maximise revenue per sale. **GDI**

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

DATA DROP

US On-Premise Change in Cocktails Value Velocity by Daypart



Source: Q3 2024 US On Premise Cocktail Report, CGA by NIQ

Key Takeaways

- Cocktail consumption in the US on-premise is moving towards earlier dayparts (see chart left).
- Mixed drinks account for 34% of total spirits value in the channel.
- Cocktails deliver the highest revenue per serve, with an average price of US\$13.75.
- 46% of cocktail consumers favour tequila-based drinks.
- The margarita is the most ordered cocktail, but the caipirinha generates the highest average spend.

Irish whiskey readies for TR take-off

With strong consumer appeal and growing momentum in domestic markets, the Irish whiskey category is well-positioned to scale up — if the retail strategy catches up. Shelftrak MD **Garry Stasiulevicius** reports

Irish whiskey has been quietly building momentum in the increasingly important global travel retail channel. But while the category shows promise, the data reveals a story of under-utilised shelf space, uneven brand visibility and regional blind spots — all of which point to the potential for smarter, more targeted strategies to elevate Irish whiskey’s role in the GTR offer.

Competitive but fragmented

Globally, Irish whiskey is present in travel retail through over 100 different variants across 20 brand owners, yet its shelf presence remains modest. On average, airport stores carry 18 Irish whiskey SKUs, but this varies significantly by region — from just 15 SKUs in the Americas to over 60 SKUs in parts of the Middle East (see above right).

In terms of brand breadth, Pernod Ricard leads the pack, offering around nine SKUs per store globally. Other key players include Proximo Spirits (Bushmills) with five, and Teeling with around two per store.

While variety is evident, the category suffers from inconsistency in execution. In Asia, major stores in Shenzhen and Beijing stock just one or two Irish whiskey SKUs, compared with more than 50 SKUs in hubs like Dubai and Sydney.

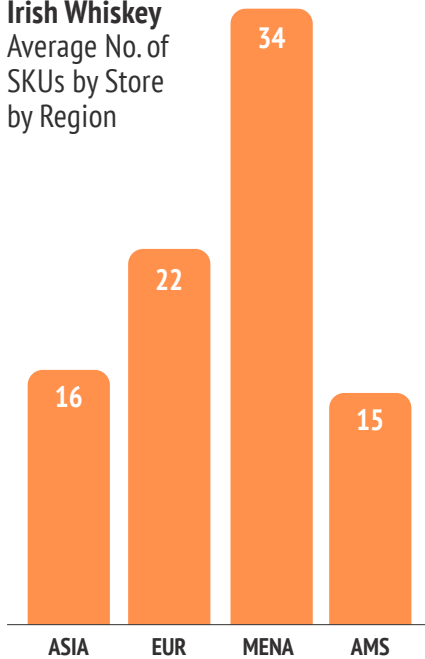
Fight for visibility

Despite its growing popularity, Irish whiskey holds a relatively small share of the whisky category, occupying just 6% of shelf facings globally. This is far below single malt (38%) and blended scotch (36%), and only slightly above Japanese whisky (5%).

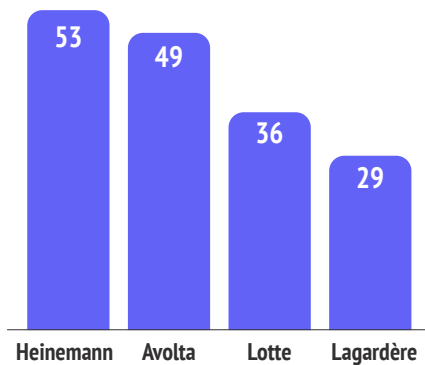
Yet, within this limited space, some brands are carving out strong positions. Jameson dominates with nearly 50% share of the Irish whiskey shelf, followed by Bushmills (19%) and Teeling (8%). Other names such as Tullamore Dew, Redbreast and Proper No. Twelve hold smaller but visible roles depending on the region.

Europe remains the strongest region for Irish whiskey, with an average share of nearly 10% of total whisky space, compared with

Irish Whiskey
Average No. of
SKUs by Store
by Region



No. of SKUs by Select Retailer



Source: Shelftrak Q4 2024



5% in the Americas and under 4% in Asia. These figures highlight huge growth potential in these regions, particularly in Asia.

Missed listing opportunities

Analysis of key travel retailers shows a difference in how Irish whiskey is represented. Heinemann and Avolta list the broadest ranges — up to 50 SKUs — while others list as few as three SKUs (see chart above).

This inconsistency represents a real opportunity for category leaders to engage with retailers and push for a more strategic, curated range that meets passenger demand without overwhelming the shelf. It’s not just about more SKUs — it’s about the right ones, in the right stores, supported by compelling brand presence.

Battle for branded fixtures

Beyond the number of SKUs, visibility matters — and branded fixture presence is a key competitive advantage. Jameson leads the way, with over 75% of its facings placed on branded promotional fixtures across regions. In contrast, other brands, including Teeling, rely heavily on unbranded shelf space, reducing their ability to cut through in crowded environments.

In major airport stores, especially in Europe and the Middle East, branded fixtures are crucial to commanding shopper attention. Brands that invest in these high-impact placements are not only more visible, but are also perceived as more engaging and trustworthy.

Promotions vary across borders

When it comes to promotions, around one-third of Irish whiskey listings are on promotion at any given time. The most common formats include multi-buy offers (14%), percentage discounts (12%) and single item discounts (6%).

While promotional strategies vary by brand owner, the category could benefit from a more unified approach to value messaging, particularly in stores where Irish whiskey is competing against heavily supported Scottish and American brands.

A category with room to rise

The story of Irish whiskey in GTR is one of potential. Key growth levers include:

- Improving shelf visibility through branded fixtures and stronger store execution.
- Strategically expanding listings in under-represented regions, especially Asia and MENA.
- Streamlining SKUs to focus on high performers and avoid over-ranged shelves.
- Aligning pricing to support brand positioning globally.
- Building compelling promotions to drive trial and conversion.

Irish whiskey has earned its place on the travel retail shelf. The next step is making sure it owns it. **GDI**

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

Biggar & Leith

Stand 8A-401

Shanky's Whip, part of Biggar & Leith's portfolio, brings its signature blend of Irish whiskey, toffee, caramel and vanilla to the spotlight, now available in all 50 states. Known for its smooth, indulgent flavour, Shanky's is gaining momentum in New York's cocktail scene, especially in the playful 'upside-down pineapple cake' serve: a slushy-style drink with pineapple juice. The brand's quirky charm is on full display with its touring animatronic ostrich, part of The Grand Ole Ostrich Tour, making stops at major festivals and trade events nationwide.

**Caffo**

Stand IC10

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



Thousands of bartenders and other drinks trade professionals are expected at Industry City this year

New York's finest: what to expect at BCB 2025

Bar Convent Brooklyn returns to Industry City on 10–11 June with a sharpened focus on industry relevance, strategic insight and professional development. This year's event features 14 Main Stage sessions curated by head of education Lynnette Marrero and a committee of leading bar operators and consultants, tackling everything from mental health in hospitality to cocktail costing and the rise of non-alcoholic spirits.

New additions for 2025 include 'VIP+ sessions' — intimate forums exploring topics like digital brand-building and independent spirits launches — as well as exhibitor-only education on the regulatory and commercial landscape of no/low alcohol. Meanwhile, the Liquid Lounge and Park Street University stages offer in-depth programming on spirits trends, market strategy and operational tools.

With thousands of trade attendees expected (more than 5,300 flocked to last year's show), BCB Brooklyn remains a critical platform for thought leadership and innovation in the global bar industry. Here are *Global Drinks Intel's* picks of the not-to-miss beverage alcohol stands at the show

Chinola Fresh Fruit Liqueurs

Stand 8B-819

Chinola Fresh Fruit Liqueurs expands its vibrant portfolio with the debut of Chinola Pineapple, a new tropical expression crafted from 100% fresh Dominican-grown MD2 pineapples and neutral cane spirit. Known for its Passion Fruit and Mango liqueurs, Chinola continues to set the standard for natural, additive-free flavour with this bold, low-ABV (21%) release. Developed after years of research to capture the true essence of pineapple,



the new launch offers bartenders an authentic, high-quality ingredient for tropical-forward cocktails. »



» Elijah Craig Bourbon Stand 7-BE-815

The first of two stands for Heaven Hill Brands sees Elijah Craig Bourbon paying tribute to its namesake, the Reverend Elijah Craig, who pioneered ageing whiskey in charred oak barrels back in 1789, laying the foundation for what defines bourbon today. The award-winning range, which includes Small Batch, Barrel Proof, Toasted Barrel and Single Barrel expressions, will all be on display. Known for its rich flavour, balance and meticulous craftsmanship, Elijah Craig set the standard for “small batch” long before the term gained traction.



Garrison Brothers Distillery Stand 8A-516

Garrison Brothers will showcase its award-winning bourbons — Small Batch, HoneyDew and Single Barrel — served neat or in signature cocktails like the stirred old fashioned and the shaken born to bee wild. Crafted in Hye, Texas, every bottle is made one barrel at a time using a homemade sweet mash — never sour mash — and distilled “just once to preserve the true grain flavour”. With Texas Hill Country rainwater as its secret touch, Garrison Brothers delivers “bold, authentic bourbon character in every sip”.

Hard Cut Vodka Stand 8A-613

Action star Dolph Lundgren — best known for roles in *Rocky IV* and *The Expendables* — unveils Hard Cut Vodka, a bold new spirit distilled in Idaho from local potatoes and Rocky Mountain water. Bottled at “45%

ABV with a clean, full-bodied profile”, Hard Cut stands apart with its generous “hard cut” distillation technique, delivering strength without sacrificing smoothness. Developed with industry veteran Steve Luttmann, the brand channels an unapologetically all-American identity. Visit the stand to meet Lundgren and taste a vodka that doesn’t pull its punches.



Hayman Distillers Stand A8-600

Hayman’s, the original London Dry gin distillers, will spotlight its new ‘Freezer Martini’ campaign, which showcases how “simple, elegant and consistent” the classic serve can be when pre-batched and frozen using Hayman’s. With over five generations of distilling expertise, the Hayman family continues to champion



traditional London Dry gin, using their original family recipe. Co-owner James Hayman says the campaign pays tribute to his father’s favourite cocktail — “refined, timeless and perfectly chilled”.

Heaven Hill Brands Stand 8A-520

Heaven Hill Brands’ second stand will



present two distinctive expressions of heritage and craft. Tequila Ocho, co-created by Carlos Camarena and agave authority Tomas Estes, is the world’s first single-field tequila — celebrated for “showcasing terroir and delivering pure, agave-forward flavour through slow, traditional production”. Heaven Hill Bottled-in-Bond Bourbon honours the distillery’s 1939 origins, crafted to the exacting standards of the 1897 Act. Off-site, Heaven Hill is set to host exclusive events across Brooklyn and Manhattan, spotlighting collaboration and innovation in American whiskey.



Mack Brands Stand 8B-919

Mack Brands will present a curated portfolio of premium spirits designed to “stand out on any back bar”. These include: Finvara Irish Whiskey, “celebrated for its smooth, refined profile rooted in Irish tradition”; Conte Camillo Negroni, a bottled cocktail that “elevates the Italian classic with balance and sophistication”; and Tequila Rosaluz, showcasing the “vibrant essence of Mexico’s finest agave”. Stand visitors will explore “distinctive, high-quality spirits that bring heritage and flavour to the forefront of modern drinking”.

Marie Brizard Wine & Spirits Stands 8B-804, IC21, IC19

France’s Marie Brizard Wine & Spirits will spotlight two flagship brands: Marie Brizard and Sobieski. A “vibrant outdoor spritz activation” will immerse guests in “French flair”, with a striking “flavour wall” showcasing the company’s all-natural liqueurs. Sobieski’s rye-based »

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» vodka takes centre stage at a dedicated ‘crush station’ featuring its flavoured range. Both brands are proudly celebrating wins at the San Francisco World Spirits Competition: platinum for Sobieski Clear Vodka and double gold for Marie Brizard Aperitivo.

Amaro Nonino Stand 7-BE-802

Amaro Nonino Quintessentia is a bittersweet Italian liqueur that blends aged grappa with a “secret infusion” of herbs made by Nonino, a renowned grappa distillery in Friuli, Northern Italy. Described as bridging “tradition and modernity”, the amaro has won “global acclaim” for its depth and balance. Nonino has been crafting spirits since 1897, with a focus on grappa and later developing its range of amari. It says Amaro Nonino brings “elegance and versatility to any back bar” and invites BCB attendees to experience “the spirit that helped define the contemporary amaro renaissance”.



Roner Distillerie Stand 7A-223

Roner Distillerie aims to “bring the spirit of South Tyrol to life” with award-winning liqueurs, gins and alcohol-free expressions. Founded in 1946 and still family-run, Italy’s “most-awarded distillery” blends “Alpine purity with over 75 years of tradition and innovation”. From classic fruit distillates, like gentian and blueberry, to modern non-alcoholic beverages, each product showcases the region’s “finest ingredients and Roner’s signature precision”. Visit the stand to explore a portfolio that “honours heritage while meeting today’s evolving tastes”.



Slammit Green Tea Shot Whisky Stand 7-BE-917

Slammit Whisky aims to redefine the green tea shot with the “first-ever” bottled version; no mixing, no measuring, no waiting — just crack it open, pour and serve ice-cold. Combining “bold notes of juicy peach, zesty citrus and smooth whisky”, Slammit delivers the punch consumers expect, without the bar-side hassle. Inspired by America’s No.1 shot, its makers say the innovation brings speed and consistency to high-volume service, making it a smart choice for busy venues looking to boost shot sales with zero fuss.



Tequero Tequila Stand 8B-757

Tequero Tequila showcases its premium 100% Blue Weber agave reposado, crafted in the Highlands of Jalisco by a family-run distillery. Aged nine months in oak barrels and triple-distilled after natural fermentation, it delivers a smooth, authentic profile. In a “world-first”, the brand also unveils its simplified, high-quality twist on the classic paloma cocktail for bartenders and enthusiasts alike.

Tequila El Mexicano Stand 7-BE-915

Tequila El Mexicano, founded by the Bañuelos family — creators of Cazadores Tequila — enters the market with a new range crafted at Hacienda El Mexicano (NOM 1588). The portfolio includes the El Mexicano Blanco, high-proof Blanco 90 and Reposado expressions, all distilled using just three ingredients: agave, water and yeast. In collaboration with New York



City-based bartender Mauricio Ramos, the brand is introducing signature cocktails to highlight the “purity and versatility” of the line. Third-generation *tequilero* Willy Bañuelos will present the launch.

Veda Mushroom Liqueur Stand 7A-116

Veda Mushroom Liqueur is showcasing its distinctive shiitake mushroom beverage — an amaro-style spirit crafted in New York using fresh shiitakes, local honey and pure maple syrup. Founded by a chef and farmer duo, the brand highlights sustainability with a farm-to-glass ethos and zero-waste production. Visitors can sample the liqueur, explore inventive cocktail serves and learn about its earthy, umami-rich profile. Veda offers a bold new take on botanical spirits, bridging culinary creativity with modern craft and regional sourcing.



Vinolok Stand 7-BW-506

Vinolok will showcase its latest collection of premium glass closures at BCB Brooklyn, with a focus on design flexibility, functionality and sustainability. The company will debut its new Duet collection alongside its established Edge and Classic lines — suitable for a wide range of beverage categories, including spirits and no/low-alcohol drinks. Highlights include Vinolok’s certified “ready-to-recycle” closures, designed to meet growing demand for packaging that aligns with both environmental and aesthetic standards. **GDI**

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RTDs and American single malts show good form at New York spirits comp

The tentacles of tariffs appear to be capable of reaching everywhere. Adam Levy, the organiser of the New York International Spirits Competition, can attest to the theory.

“We saw a drop-off in entries from Europe into this year’s competition, especially from France, Ireland and Scotland,” he says. “We put that down to the uncertainty of tariffs [on imports into the US] at the time when companies were submitting their entries.”

On the plus side, however, others recognised an opportunity. “We saw an increase in entries from India and those countries who are not on the tariff watch list to get whacked by Trump,” he adds. “India is starting to get more of a footing in the US.”



This year’s iteration of the competition also provides encouraging noises from the American whiskey and RTD categories, according to Levy. “The quality of American single malts has been improving of late,” he notes. “This is also the case for RTDs

over the last couple of years. We’re seeing more use of natural juice and less synthetic taste. Producers are making more of an effort — from the small craft distiller to the established big brands.”

As for the competition’s longer-term prognosis, Levy remains bullish. “I believe our competition will ride out the current industry turbulence,” he notes. “We are trade focused, by category and by price. Our judges are the people who see everything and know what will move — and at what price.”

International Individual and Gold Medal winners are listed below. For other categories, visit nyispiritscompetition.com

New York International Spirits Competition International Individual Winners 2025

Non-Alcoholic

Non-Alcoholic Agave of the Year **Almave**

Argentina

Argentina Gin of the Year **Bosque**

Australia

Australia Brandy of the Year **Black Bottle**

Australia Rum Distillery of the Year **Beenleigh Artisan Distillery**

Australia Whisky Distillery of the Year **23rd Street Distillery**

Canada

Canada Whisky Distillery of the Year **Crown Royal**

Chile

Chile Gin of the Year **Malcriado**

Pisco Distillery of the Year **Bou Barroeta**

Denmark

Denmark Distillery of the Year **Stauning Whisky**

Dominican Republic

Dominican Republic Rum of the Year **Brugal**

Ecuador

Ecuador Rum of the Year **Zhumir Canuto Gold**

France

Armagnac Distillery of the Year **Larressingle Armagnac**

France Fruit Liqueur Distillery of the Year **Distillerie Merlet & Fils**

France Gin of the Year **André Brunel 13 Le Gin**

Germany

Germany Aperitif of the Year **Anna Famosa**

Germany Gin of the Year **Boar**

Haiti

Haiti Rum of the Year **Rhum Barbancourt**

India

India Whisky of the Year **Indri Single Malt**

Ireland

Irish Blended Whiskey of the Year **Wild Atlantic Way IPA Barrel – Kinsale Spirit**

Ireland Cream Liqueur of the Year **Two Stacks Double Irish Cream Liqueur**

Ireland Distillery of the Year **Glendalough Distillery**

Italy

Italy Coffee Liqueur of the Year **Borghetti Caffè Espresso**

Limoncello of the Year **Lucano Anniversario**

Italy Vermouth of the Year

Boissiere Extra Dry Vermouth

Jamaica

Jamaica Rum of the Year **Ten To One**

Japan

Japanese Blended Whisky of the Year **Onikishi**

Japan RTD of the Year **Maru-Hi**

Martinique

Martinique Rum of the Year **Saint James Rhum Agricole**

Mexico

Mexico Gin of the Year **Acrónimo**

Mezcal Distillery of the Year **Del Maguey**

Tequila Flavour-Infused Distillery of the Year **21 Seeds**

Netherlands

Netherlands Gin of the Year **Damrak**

New Zealand

New Zealand Gin Distillery of the Year **Rakiura Distilling Co**

New Zealand Vodka of the Year **The Reid Single Malt Vodka**

New Zealand Whisky of the Year **The Falcon – The Cardrona Single Malt**

Panama

Panama Rum of the Year **Palm Republic**

Peru

Peru Rum of the Year **Cartavio XO**

Poland

Poland Vodka of the Year **Belvedere 10**

Scotland

Highlands 12yo of the Year **Highland Park 12yo**

Highlands 14yo of the Year **Highland Park 14yo**

Highlands 15yo of the Year **Highland Park 15yo**

Highlands 18yo of the Year **Glenmorangie The Infinita 18yo**

Islay Distillery of the Year **Lagavulin Distillery**

Islay 5yo Distillery of the Year **Ardbeg Distillery**

Islay 10yo Distillery of the Year **Ardbeg Distillery**

Islay 11yo Distillery of the Year **Lagavulin Distillery**

Islay 16yo Whisky of the Year **Lagavulin 16yo**

Islay 18yo Whisky of the Year **Bruichladdich 18yo**

Islay Gin of the Year

The Botanist

Highlands 14yo Scotch of the Year **Oban 14yo**

Speyside 12yo of the Year **Tamdhu 12yo**

Speyside 15yo of the Year **Glen Moray 15yo**

Speyside 18yo of the Year **The Glenrothes 18yo**

Speyside 25yo of the Year **The Glenrothes 25yo**

Slovakia

Slovakia Distillery of the Year **Nestville Distillery**

Spain

Spain Brandy Distillery of the Year **Gran Duque d'Alba**

Spain Cream Liqueur of the Year **Crema de Alba**

Spain Rum Distillery of the Year **Dos Maderas**

Switzerland

Switzerland Vodka of the Year **Vodka57**

Venezuela

Venezuela Gin of the Year **Canaima**

Venezuela Rum of the Year **Santa Teresa 1796 >>**

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New York International Spirits Competition Gold Medal Winners 2025

Agave/Tequila

1800 Añejo
 1800 GuachiMonton
 21 Seeds Grapefruit
 Hibiscus-Infused
 400 Conejos Añejo
 400 Conejos Cuishe
 771 Blanco
 Almave Blanco
 Astral Añejo
 Astral Blanco
 Bandero Blanco
 Bribón Añejo
 Cambio Añejo
 Casafina Reposado
 Casamigos Blanco Tequila
 Casamigos Joven Mezcal
 Cazadores Añejo
 Ciento Private Collection Añejo
 Ciento Tequila Private
 Collection Blanco
 Código 1530 Blanco
 Código 1530 Reposado
 Creyente Azul Mezcal Cristalino
 Creyente Espadin
 Del Maguey San Luis del Rio Single
 Village Mezcal
 Del Maguey Vida de Muertos
 Single Village Mezcal
 DeLeón Añejo
 Desert Door Oak Aged Texas Sotol
 Dia De La Sirena Reposado
 Don Julio Blanco
 Don Julio Ultima Reserva
 Familia Camerena Añejo
 Gracias a Dios Piña Mezcal
 Gran Centenario Añejo
 Gran Centenario Leyenda
 Jose Leon Ultra-Premium Reposado
 Laelia Blanco
 Lobos 1707 Mezcal
 Loca Loka Reposado
 Los Hermanos 1978 Añejo
 Los Linderos Blanco
 Member's Mark Añejo Tequila
 Member's Mark Cristalino
 Olmeca Altos Reposado
 Oxomo Artesanal Mezcal
 Rainfire Agave Spirits Finished
 in Bourbon Barrels
 Tanteo Blanco
 TCapri Tequila Blanco
 Tears of Llorona
 Teremana Reposado
 Vago Espadin Emigdio Jarquin

Armagnac

Cardinal du Four 21 Rébellion

Larressingle Napoleon

Brandy

Black Bottle Classic
 Gran Duque D'Alba Solera
 Grand Reserva
 Nashoba Valley Spirits
 Farmhouse Apple Brandy
 Pisco Maria's Gran Pisco
 Luxstelle De Bou Barroeta
 Pisco Noor De Bou Barroeta

Cognac

Branson Flask
 Courvoisier VS
 Courvoisier XO
 D'Usse XO
 Delamain XO Decanter
 Honor Select Reserve
 Jules Gautret XO
 Merlet Brothers Blend

Gin

Acronimo
 André Brunel 13 Le Gin
 Bluecoat American Dry
 Boar
 Bosque Alta Montaña
 Canaima
 Clear Water Distilling Co
 Sophie's Gin
 Damrak Virgin
 Edinburgh Gin Classic London Dry
 Fifth State Madagascar
 Ginologist London Dry
 Glendalough Wild Botanical Irish
 Goldie's
 Holistic Spirits Company Harmony
 King Coil Spirits Dry
 Litchfield Distillery
 Malcriado
 Monson Ranch Distillers
 Feather & Folly
 Old House Vineyards
 Culpeper's Own
 Restless Spirits Distilling
 Builders Heritage Dry
 Royal Flush Luxe Noir
 Second Sip
 TenHead Woodland Dry
 The Botanist Islay Cask Rested
 The Free Spirits Company
 The Spirit of Gin
 Third Island
 Warfield Organic

Liqueurs & Others

Anna Famosa
 Antica-Formula Vermouth
 Atheras Spirits Sykophilos

Bergamotto Fantastico
 Boissiere Extra Dry Vermouth
 Captain Morgan Sliced Sweet
 vs Heat Jalapeño Paloma
 Captain Morgan Sliced Sweet
 vs Heat Peach on the Beach
 CleanCo Clean R
 CleanCo Clean T
 Fernet-Branca
 Il Golfo di Sorrento Limoncello
 Lancaster Imperial Jo Espresso
 Lucano Amaro
 Maggie's Farm Falernum
 Merlet Crème De Pamplemousse
 Subourbon Life
 Two Stacks Double Irish
 Cream Liqueur
 Washington Amaro
 Xplorer Peanut Butter
 Whiskey Liqueur

Mixers Carbonated

Fever-Tree Blood Orange
 Ginger Beer
 Fever-Tree Club Soda
 Fever-Tree Pineapple Ginger Beer
 Fever-Tree Sparkling Lime & Yuzu

Mixers Non-Carbonated

Fever-Tree Classic Bloody Mary Mix
 Fever-Tree Classic Margarita Mix
 Fever-Tree Light Margarita Mix

Ready-to-Drink (RTD)

2 Towns Ciderhouse Craftwell
 Hibiscus Lemonade
 2 Towns Ciderhouse Craftwell
 Top Shelf Purple Rain Drop
 Betty Booze Vodka Iced Tea +
 Meyer Lemonade
 Blade and Bow Kentucky Straight
 Bourbon Whiskey
 Hot Honey Lemonade
 Charbay Espresso Cocktail
 Cutty Sark & Ginger Ale
 Dio Cocktails Turmeric Ginger
 Lemon Mule
 Fisher Island Lemonade
 Nude Peach
 High Noon Hard Seltzer Peach
 High Noon Vodka Iced Tea Original
 High Noon Vodka Iced Tea Peach
 Lone River Lemonade Splash
 Lone River Lemonade Splash
 Classic Agave Lemonade
 Nütrl Orange
 On The Rocks Cocktails
 Espresso Martini
 On The Rocks Cocktails Margarita
 Salt Point Daiquiri
 Señorita Lime Jalapeño THC

Margarita

Señorita THC Paloma
 Maru-Hi
 The Free Spirits Company
 Kentucky Mule
 Via Carota Craft Cocktails
 Classic Negroni
 Via Carota Craft Cocktails
 White Negroni
 Via Carota Craft Cocktails
 Signature Manhattan
 Via Carota Craft Cocktails
 Signature Martini

Rhum Agricole

Saint James
 Rum
 Bacardí Diez
 Bacardí Gold
 Beenleigh Artisan Distillers
 XO Rare
 Brugal Maestro Reserva
 Captain Morgan Original Spiced
 Cartavio XO
 Dead Center XO Single Barrel
 Dos Maderas 5+3
 Palm Republic Silver
 Rhum Barbancourt 8yo
 Ron Millonario XO
 Santa Teresa 1796
 Ten To One White

Vodka

Aero Squadron
 Belvedere Organic
 Bond St
 D'Yavol
 Liberty & Plenty Slate Belt
 Luksusowa
 Neft
 Ora
 Origen Specialty
 Oxford Oaks Distillery Black Pepper
 Smirnoff Electric Guava
 Spy Trail Distillery
 TenHead Classic
 Vodka57

Whisky

15 Stars Artisan Collection
 15 Stars Private Stock
 15 Stars Three Ports
 1845 Distilling Co
 Preemption Reverence Texas
 Straight Bourbon
 1845 Distilling Co Preemption
 Reverence Texas Straight
 Four Grain Bourbon
 1845 Distilling Co Preemption

Reverence Texas
 Straight Wheated Bourbon
 23rd Street Distillery Australian
 Ampersand Opimus
 Angel's Envy Cask
 Strength Bottled-in-Bond
 Angel's Envy Cellar Collection
 Series, Vol. 5 Straight Rye
 Finished in French Oak Extra Añejo
 Tequila Barrels
 Angel's Envy Triple Oak
 Ardbeg Corryvreckan
 Augusta Distillery Buckners 15yo
 Balcones Texas Rye
 Bottled-in-Bond
 Bar Brands The Reverend
 Bear Fight Kentucky
 Reserve Bourbon
 Bearface Wilderness Series 3
 Wild Air
 Bernheim Original Kentucky
 Straight Wheat
 Bernheim Original Kentucky
 Straight Wheat Whiskey Barrel
 Proof A225
 Bib & Tucker 10yo Small
 Batch Bourbon
 Bird Creek Whiskey Cask
 Strength Baroness
 Blue Note Rye Straight Rye
 Blue Ridge Distilling Company
 Defiant Devil's Cut
 Blue Ridge Distilling Company
 Defiant One
 Branch & Barrel Colorado Gold
 Brother's Bond Bourbon
 Bottled-in-Bond Straight Bourbon
 Bruichladdich 10yo
 Cask & Coast Cabernet
 Cask-Finish Small Batch
 California Bourbon
 Chicken Cock Whiskey Double
 Oak Kentucky
 Chuckanut Bay Rye
 Conviction Double Oak 1929
 Straight Bourbon
 Cream of Kentucky Small
 Batch Bourbon
 Crown Royal 18yo
 Crown Royal Deluxe
 Cutty Sark Original
 Cutty Sark Prohibition
 D'Yavol Inception
 Dovetail Distillery BTLGGR
 Elijah Craig 10yo Private Barrel
 Elijah Craig 18yo Bourbon
 Evan Williams 1783
 Evan Williams Single Barrel
 Vintage 2016
 Few Bottled-in-Bond Rye >>



» *Few Straight Bourbon*
Few Straight Rye
Florida Straight Single Barrel Bourbon
Four Roses Single Barrel Bourbon
Four Roses Single Barrel OESO
Four Roses Small Batch Select Bourbon
Garrison Brothers Balmorea
Garrison Brothers Lady Bird
Garrison Brothers Small Batch
George Dickel Rye
George Dickel X Leopold Bros Collaboration Blend
Glen Moray 12yo
Glen Moray 18yo
Glendalough Double Barrel Irish
Glendalough Single Cask Burgundy Finish
Glengoyne 12yo
Glenmorangie Signet Reserve
Glenmorangie The Lasanta
Glenmorangie The Original 12yo
Glenmorangie Wee Beastie
Good Trouble North Star

Headframe Neversweat Bottled-in-Bond
Heaven Hill Grain to Glass Traditional Barrel Series Kentucky Straight Rye
Heaven Hill Grain to Glass Traditional Barrel Series Kentucky Straight Bourbon
Henry McKenna Single Barrel I Bourbon
Indri Trini Single Malt Indian
Jefferson's Marian McLain Bourbon
Jefferson's Reserve Cask Strength Bourbon
Kentucky Club
Kinsale Spirit Wild Atlantic Way IPA
Lagavulin 16yo Islay Single Malt Scotch
Lagavulin Sweet Peat Single Malt Scotch
Lagavulin The Distiller's Edition
Larado 8yo Cask Strength Rye
Larrikin Bourbon Bottled-in-Bond
Larrikin Decade Rye Cognac Finish
Larrikin Single Barrel Bourbon
Lionheart Whiskey Single Barrel Rye

Litchfield Distillery Straight Bourbon
Little Rest Classic IV American Single Malt
Member's Mark Pot Still Irish
Milk Street Distillery Murder Bourbon
Minden Mill American Single Malt
Nestville Whisky Blended 12yo 40%
Oaklore North Carolina Straight Rye
Oban 15yo Cask Strength Sherry Cask Finish Single Malt Scotch
Old Elk 9yo Straight Bourbon
Old Elk Slow Cut Blended Straight Bourbon
Ole Smoky Apple Pie Moonshine
Onikishi Sakura
Pendleton 1910 Bourbon
Pikesville Straight Rye
Pride of Indiana Straight American Whiskey Batch 001
Rainfire Bourbon
Rare Character Limited Release Rye Batch 2 2025
RD One Spirits KY Straight

Whiskey finished with Japanese Mizunara and French Oak
Redemption Barrel Proof Rye
Redemption Bourbon
Redemption High Rye
Rock Valley Spirits Applewood Smoked Single Malt
Sagamore Double Oak Rye
Seelbach's Private Reserve 8yo Kentucky Straight Bourbon Batch 001
Seelbach's Private Reserve Single Barrel SB300 120.2 Proof – Pro 2025
Signal Hill Canadian
Smokehead Original Islay Single Malt
Southern Star Bourbon Single Barrel
Southern Star Paragon Bottled-in-Bond Wheated Bourbon
Spirit Hound Palo Cortado Finished American Single Malt
Square 6 High-Rye Bourbon
St Augustine Florida Straight Bourbon Single Barrel Bourbon
Stauning Rye Sherry Cask Finish
Stranahan's Diamond Peak

Stranahan's Original
Tamdhu 12yo
The Busker Irish Single Malt
The Difference The Foundation
The Glenrothes 15yo
The Glenrothes 25yo
The Whiskey Blendery Double Jeopardy
The Whiskey Blendery Orange Juice
Two Stacks The First Cut
Uncle Nearest Master Blend Edition Batch 032
Uncle Nearest Premium Whiskey
Uncle Nearest Single Barrel Batch 3633
Untold Spirits Edmond's Honor
Warfield Organic American
Weldon Mills Select
Widow Jane 10yo Bourbon
Widow Jane Decadence Bourbon
Widow Jane Paradigm Rye
Wood's High Mountain Dawn Patrol Colorado Single Malt

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VIEW FROM THE ON-PREMISE

Charlie Mitchell

Does the age of wellness signal the beginning of the end for the on-premise? Or the start of the era of positive drinking?

We are officially living through the era of wellness and wellbeing. Between cold-pressed detox juices, Bikram yoga, gut-boosting probiotics and Alexa-integrated air filters, we are being inundated with products and services that revolve around personal betterment. The goal? To be *the* best versions of ourselves.

Fuelled by an increasing focus on physical and mental health, the sector has enjoyed a post-pandemic boom, with consumers tracking any *and every* metric possible to better understand how to improve their health and mood. Be it wearable fitness trackers, wellbeing journals or calorie-counting apps, we are never far away from our own personal wellness score.

The vernacular of wellbeing and wellness is so entrenched that in my team of nearly 30 Gen Z and Millennial researchers at CGA by NIQ, we set a 'weekly wellbeing priority', to keep us all mindful, positive and productive. These usually centre along the lines of increasing step-count, going to the gym or drinking more water than usual. It's rare that anybody sets a wellbeing priority around drinking more alcohol than usual.

Let's be clear, the context does not place the on-premise and beverage alcohol sectors particularly positively.

In fact, alongside stories of a new generation of teetotalers, weight-loss drugs that suppress the appeal of alcohol and a perceived social stigma around being drunk, it has led to many predictions (premature as they may be) of a cataclysmic collapse of eating and drinking out and, in particular, drinking alcohol.

The data does indeed reflect somewhat of a shift away from spending on drinking out and into wellness.

By CGA by NIQ's last count, annual global sales of beer and spirits are down 0.9%, while the Global Wellness Institute claims the global wellness economy has grown by 9% annually since 2020 and is now worth US\$6.3tn — a figure that places the sector above the likes

of the global IT and tourism industries.

Sector experts have even suggested that, rather than luxury alcohol or designer goods, it is wellness that is the latest status symbol. This is supported by reports from British healthcare company Bupa that the wealthiest consumers have increased their spending most on wellness and self-care (+20%).

However, it is somewhat difficult to pinpoint exactly what wellness is and where that money is spent.

Maybe I am being sceptical, but I can't help but think that some of the hype around wellness may be exaggerated, in much the same way the doom around drink may be.

The Global Wellness Institute figure is, at best, selective and, at worst, downright deceitful. It classifies the wellness sector as inclusive of cosmetics, personal care and beauty, but not of activities such as holidays, hospitality or the live experience sector.

I appreciate that I am not the target market, but given the choice between a vacation, a pint or a manicure, I know which of the three would least improve my wellbeing...

Despite (or, depending on how cynical you are, because of) the influx of new products, experiences and exposure to all things wellbeing, we are also starting to see a backlash.

Smoking is back, (as evidenced by my

personal favourite Instagram page, 'cigfluencers'), vegan restaurants and alcohol-free bars are closing and indulgent dessert parlours continue to expand their reach globally.

My take is that, in a world where concentration spans are ever-shorter and time is ever-more squeezed, wellness is more about time well spent than money well spent.

CGA by NIQ's latest global research shows that consumers are far more likely to value 'quality time with loved ones' as a treat than they are 'self-care and wellness', although that does appear on the list.

And, when considering that, perhaps wellness isn't the great threat to the on-premise sector after all. I would argue that, positioned correctly, the sector can lean in to the wellness trend and take advantage of the self-care needs that consumers continue to prioritise.

If wellbeing is about doing what makes you feel good, the on-premise should embrace it for the better. Certainly, wellbeing does not mean irresponsible drinking and the consequent regret, anxiety and social shame which that is increasingly associated with.

But what wellbeing can be, is a more deliberate and positive choice. The choice to enjoy a glass of wine with friends in a beer garden, the reason to stop the solitary doom-scrolling through social media and head out into the real world of bars and restaurants or the driver behind the mental health-boosting chat with a pal over a nice pint.

Perhaps then wellbeing isn't the beginning of the end for the sector, but a new and more progressive beginning — the era of positive drinking. **GDI**

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

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



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