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***MONKEY 47 unveils its rare
Distiller's Cut 2025*** See p8-9



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*Interviews with
The Duppy Share
Rum, Guinness,
The Drinks Bureau,
& The Wine Group*

*The
on-premise
issue*

INSIDE

CGA by NIQ on how to win over Gen Z in the European on-premise

Revive your wine list! Vino may be down, but it's nowhere near out in the US dining channel

Spirits startup on a budget? This is how to approach the on-trade and get results

Hospitality is entering a golden age — let's empower those who deliver it

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COMMENT

Joe Bates

Mixers are now attractive prospects for multinationals that want to own the entire drinking experience

It wasn't so very long ago that mixers were an afterthought at many bars and restaurants. Often unbranded, served out of a mixer gun and disappointingly flat and tepid by the time they reached the consumer, mixers played a distant second fiddle to spirits, the undisputed stars of the show.

Today, however, as Henry Mathieu reports on p34, premium mixers are now playing a much more central role. It's a welcome trend driven by rising interest in cocktails and more moderate alcohol consumption. The category's rise to prominence is illustrated by two recent landmark deals that, while in different regions and involving different companies, tell much the same story.

First, there was the finalisation of the Carlsberg Britvic acquisition in January this year. This monumental GBP3.3bn (US\$4.5bn) deal created the largest multi-beverage supplier in the UK, fusing Carlsberg's beer portfolio with Britvic's broad soft drink line-up, which includes the Britvic and London Essence mixer brands. For Carlsberg, this wasn't just a diversification play; it was an acknowledgement that a significant portion of its on-premise and retail sales were directly tied to its ability to provide the 'other half' of a drink.

Then, in the same month, came the Molson Coors and Fever-Tree partnership, a strategic alliance that saw the global brewing giant take a significant stake in the UK premium mixer company and assume exclusive US distribution rights. Molson Coors' CEO Gavin Hattersley was

explicit in his reasoning: Fever-Tree "sits at the intersection of beer and non-alc" and perfectly complements the company's "'Beyond Beer' and premiumisation strategies".

These mega-deals are clear signals that major alcoholic beverage companies are no longer content to simply stay in their own lane. In this new 'total beverage' world, multinationals want to own the



The new 'total beverage' world: Carlsberg Britvic (top), plus Molson Coors and Fever-Tree

entire drinking experience. This is a direct response to a consumer base that is drinking more mindfully, experimenting more freely and, thanks to the boom in home mixology, is more interested than ever in the quality of their mixers.

Beyond the changing world of mixers, this issue takes a deep dive into the latest on-premise trends. On p42, Bar &

Restaurant's Maura Kelly takes a topical, if sometimes sobering, look at what's happening in the US on-premise.

She argues persuasively that the pandemic reset the expectations of both customers and bar operators, with the latter seeking value for money and authentic drinking experiences, while on-premise venues are watching the bottom line, often shrinking menus and turning to technology to make further efficiencies.

Meanwhile, Richard Woodard takes an incisive look at the latest global cocktail trends on p26, urging readers not to pay attention to every new spin on the spritz craze or latest twist on classic cocktails, but to pinpoint trends that gain real traction. He zeroes in on savoury cocktails, a move towards simplicity and the relentless rise of draught and premixed cocktails as trends with real staying power.

As for the all-conquering spritz, Woodard's feature suggests it could be in danger of losing its fizz. "Spritz culture is growing globally, but risks becoming sugary and flat," warns Eugenio Litta Modignani, founder & CEO of Tovaritch! Vodka.

My bet is that the spritz is here to stay for a while, but there's no doubt how fast the ground beneath the drinks industry is shifting. A few years ago, who would have thought mixers would have commanded billion-pound deals?

Bars and brands have never needed to be nimbler to adapt to changing tastes, which is why the contents of this month's *Global Drinks Intel* make for mandatory reading. **GDI**



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Olha Tsezareva

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News briefs

Catch up quickly on the global drinks stories that matter

FINANCIAL RESULTS

Australian Vintage's sales from 12 months to end of June decline 1% to AUD257m (US\$167.6m). However, the performance indicated a healthier showing in the second half of fiscal 2025, to the end of June.

Brown-Forman started its current financial year well (+1%), albeit somewhat artificially, as inventory was shifted to prepare for US distribution changes.

Carlsberg warned that the prevailing weak consumer sentiment will linger, although its Q2 sales improved on the previous quarter (+0.6%).

Lanson-BCC reported a second consecutive half-year of rising sales (+4.8% to EUR92m [US\$107.7m]), setting the scene for a possible return to full-year growth for the first time since 2022.

Pernod Ricard is entering what it has dubbed a "transition" phase ahead of a "new era of volatility and opportunity", after posting a relative improvement in sales performance (+0%) from its latest quarter.

Vranken-Pommery Monopole stemmed its sliding sales in the first half of this year — down 0.2% at EUR109.3m (US\$128.4m) — with the listed cooperative's top-line reaching parity with H1 2024.

COMPANY NEWS

BrewDog confirmed that co-founder Martin Dickie will step down from the business — and leave the alcohol industry — for "personal reasons".

Leanne Cunningham, the current CFO of **Brown-Forman**, notified the group of her plans to retire in May 2026. The Jack Daniel's owner is on the hunt for a replacement.

Calabasas Beverage Co, the parent of 818 Tequila, appointed Larry Goodrich as CEO and announced details of its latest investment round.

Carlsberg inaugurated a US\$90m expansion of one of its brewing facilities in Vietnam, increasing capacity by 50% and making it the group's largest production site in Asia.

Constellation Brands lowered its sales forecast for fiscal 2026, citing a continuation of weaker consumer demand and macroeconomic headwinds. The group now expects its sales in the 12 months to the end of February 2026 to come in down by between 4% and 6%, compared to previous guidance of 2% to 1%.

Diageo proposed an expansion to the brewery it is building in Ireland that would more than double its planned output. The company also confirmed it will close its bottling unit in Amherstburg, Ontario, by February next year. The site currently bottles the group's Crown Royal Canadian whisky brand.

Sticking with **Diageo**, the British multinational is reassessing the resource allocation process across its portfolio, according to interim CEO Nik Jhangiani. He said the group will look to reduce its historical over-reliance on a handful of brands and cut back on ineffective spending.

Kirin Group announced that Anubha Saharabuddhe will assume the position of CEO at its Lion division from the start of next month. She will succeed the soon-to-be CEO of Treasury Wine Estates, Sam Fischer.

Pernod Ricard overhauled its commercial structure in the US in a move designed to give greater attention to some lesser-established brands in its portfolio.

Stoli Group led a US\$3.6m Series B funding round for The Pathfinder, the non-alcoholic spirits company and brand in which it first invested two years ago.

Suntory Holdings announced the resignation of CEO Takeshi Niinami following a police investigation into "supplements" that he is alleged to have purchased.

Fifth Generation-owned **Tito's Handmade Vodka** launched in Argentina for the first time, while also expanding its distribution footprint in Peru.

A dispute between the founders of **Uncle Nearest** and a creditor led to the American whiskey business switching to neutral control, according to local reports.



Stoli Group backed fermented and distilled alc-free elixir The Pathfinder in a US\$3.6m funding round

Whyte & Mackay, the scotch whisky division of Philippines brandy giant Emperador, is preparing for a leadership switch. Bryan Donaghey notified the Fettercairn, Jura and The Dalmore brand owner of his intention to retire at the end of the year.

MERGERS & ACQUISITIONS

Portugal's **Casa Redondo** paid a return visit to Diageo's non-core portfolio, agreeing to buy the Sheridan's cream liqueur brand from the London-headquartered group.

Diageo agreed to sell its UDL and Ruski Lemon ready-to-drink brands to Australia-based Vok Beverages. The transaction — financial details of which were not disclosed — saw the Australian brands join the likes of El Toro canned cocktails and 23rd Street Distillery's gin and vodka mixed variants in Vok Beverages' RTD portfolio.

Southern Glazer's Wine & Spirits reached an agreement to purchase AB InBev's New York City distribution operation.

INDUSTRY NEWS

The percentage of American adults who claim to drink alcohol has sunk to 54%, the lowest figure since 1939, according to a poll by **Gallup**.

Trade associations **The Brewers of Europe** and the **Distilled Spirits Council of the US** (Discus) voiced concern following the EU-US joint statement last week, which did not secure tariff-free trade terms for their respective industries.

Wine and spirits continued to exhibit their downward tendencies in the US in the first half of 2025, according to data released by the **Wine & Spirits Wholesalers of America**.



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MONKEY 47

DISTILLER'S CUT
— 2025 —

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THE SALTY MONKEY:

a twist on the classic Salty Dog cocktail –
with MONKEY 47 Distiller's Cut 2025.

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DISTILLER'S CUT

2025

SCHWARZWALD DRY GIN

Handcrafted in the heart of the Black Forest, MONKEY 47 Schwarzwald Dry Gin is distilled from 47 meticulously selected botanicals and the softest regional water. Its unrivaled complexity and quality are fully brought to bear through masterly distillation and maturing in traditional earthenware vessels.



THE SPECIES RARA

Every year, driven by botanical curiosity and an obsessive pursuit for the utmost quality, we are on the hunt for the *Species Rara* – a carefully chosen 48th ingredient. When it meets our Schwarzwald Dry Gin, the MONKEY 47 Distiller's Cut is born: the annual limited release that sets the hearts of bartenders and gin enthusiasts racing.

FLEUR DE SEL – SEA SALT

This year's search for the *Species Rara* led our journey to the Camargue region in the south of France - known for its wild horses, flamingos, and centuries-old salt marshes. Here, seawater evaporates under the sun and mistral winds, leaving behind delicate Fleur de Sel – hand-harvested sea salt crystals treasured as the region's coveted white gold.



TASTING NOTES

The 2025 edition is piquant and elegant, with a touch of the sun's warmth and the slightest waft of salty sea air, balanced against deep layers of substance and complexity. A remarkable experience for the palate. When it comes to a signature serve what could be a better match than a Salty Monkey? Think highest quality MONKEY 47 Distiller's Cut 2025, fresh grapefruit juice and of course a Fleur de Sel salt rim – et voilà! A cocktail as fresh as a day in the Camargue.

CHEERS!

Rare but True



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BAR CONVENT BERLIN





New products

Take stock with our roundup of the latest drinks launches



Johnnie Walker Blue Label Rahul Mishra Limited Edition

Diageo's limited-edition bottle was made in collaboration with Indian fashion designer Rahul Mishra to symbolise "bright beginnings" and launched ahead of this year's Diwali, the Festival of Lights.

- Scotch whisky, blended. Contains Johnnie Walker's Blue Label iteration; 40% ABV.

- Available in global markets in time for the "Indian festive season".

- SRP not immediately available. On sale in unspecified limited quantities.

Uncharted Kentucky Wheated Bourbon

The Ingram Distillery's namesake River Aged portfolio has been joined by this wheat-sourced American whiskey that has also been aged in a floating barrelhouse moored on the banks of the Mississippi in Columbus, Kentucky.

- American whiskey, bourbon, Kentucky, no age statement; 46% ABV.

- On sale in seven US states, including Kentucky, Minnesota and Texas, since September. Also on sale online for domestic delivery.

- SRP of US\$39.99 per 75cl bottle, \$44.99 for 1L format.



Hard Rock Cocktails

The six premix cocktails aim to deliver "the same unforgettable experience as the drinks served in Hard Rock Cafes", says brand owner Hard Rock International.

- RTDs, premix cocktails. Range comprises Classic Mojito, Peach Punch, Mango Mojito, Coconut Breeze, Passionfruit Martini and Piña Colada; all 5% ABV.

- On sale since 8 September in the UK, online for domestic delivery.

- SRP of GBP2.40 (US\$3.25) per 25cl can; also on sale in individual flavour 12 and 24-packs of 25cl cans.



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



Cointreau Citrus Spritz

Rémy Cointreau's first premix extension for its namesake orange liqueur taps into the growing spirits-based ready-to-serve cocktail market in the US.

- Premix. Cointreau liqueur base with French white wine and fruit flavours. Two SKUs — Orange & Blood Orange and Lemon & Lime; both 10.5% ABV.

- Released in select regional US markets in September, with plans for broader distribution in 2026.

- SRP of US\$19.99 per 75cl bottle for both variants.



Angel's Envy Distillery Series 2025

Bacardi's Kentucky-based Angel's Envy has unveiled this year's pair of bottlings in its line of limited editions.

- American whiskey, two expressions: Two Grain Bourbon, Kentucky straight bourbon (90% corn, 10% malted barley), 56% ABV; Peated Cask Rye, 6yo Kentucky straight rye finished in ex-scotch whisky barrels from Islay, 50% ABV.

- On sale since mid-September as exclusives from the Angel's Envy Distillery in Louisville.

- SRPs of US\$54.99 each per 37.5cl bottle. Limited to 17,592 units of the Two-Grain Bourbon and 7,200 of the Peated Cask Rye.

Bunnahabhain 12yo Cask Strength 2025 Edition

The annual 12yo cask-strength iteration from CVH Spirits' distillery returns for a fourth time, after last year's hiatus.

- Scotch whisky, single malt, Islands (Islay), 12yo. Matured predominantly in second-fill ex-oloroso sherry; 56.4% ABV.
- Available online for delivery worldwide since late September.
- SRP of GBP90 (US\$121) per 70cl bottle.



Port Ellen 200th Anniversary Edition

The 42yo is Port Ellen's first limited bottling since Diageo reopened the Islay distillery in 2024 after a 40-year silence.

- Scotch whisky, single malt, Islands (Islay), 42yo. Matured in European oak; 52.5% ABV.
- On sale at the Port Ellen distillery on Islay from October; also available through Diageo's 'private client' team in Scotland.
- SRP of GBP7,500 (US\$10,050) per 70cl bottle. Limited to 150 numbered units.

Yellowstone Limited Edition

This tenth anniversary release from Limestone Branch Distillery contains whiskey from both its own distillery in Kentucky and Ross & Squib's facility in the neighbouring state of Indiana.

- American whiskey, bourbon, Indiana and Kentucky, 10yo; 52.5% ABV.
- On sale since September — "just in time for Bourbon Heritage Month" — in the US off-premise channel.
- SRP of US\$99.99 per 75cl bottle. Limited to 120,000 units.



Jack Daniel's Heroes Selection 2025

The third annual bottling in the Brown-Forman brand's Heroes series was "selected by US Army veteran twin brothers and long-time Jack Daniel's employees JB and LB McGowan".

- American whiskey, Tennessee, single barrel. No age statement; 62.5%–70% ABV.
- On sale since September as an exclusive in US military retail outlets.
- SRP of US\$69.99 per 75cl bottle. Unspecified limited quantities available.



Coppa Cocktails White Choc & Passion

MG Destilerías has unveiled the first Coppa Cocktails variant since it acquired the brand 18 months ago. The limited release also marks Coppa's global travel retail debut.

- Premix, cream liqueur; 11% ABV.
- Rolled out in September to markets including Germany, Lebanon, the Netherlands, Spain, the UAE and the UK.
- In European markets, SRP of EUR17 (US\$20) per 70cl bottle (also on sale in 10cl). Available for an unspecified limited period.



Buichladdich Octomore 16 Series

The 16th series from Buichladdich's Octomore extension is — once again — "a powerful line-up featuring sky-high PPMs, traceable barley and a unique selection of fine casks from all over the globe", said the Rémy Cointreau-owned distillery.

- Scotch whisky, single malts, Islands (Islay). Line comprises: Octomore 16.1 (59.3% ABV), Octomore 16.2 (58.1% ABV) and Octomore 16.3 (61.6%), all matured for five years.
- On sale since September in the US, online for domestic delivery and through specialist spirits operators in the off-premise.
- SRPs of US\$204.99, \$244.99 and \$279.99, respectively.



Fireball Blazin' Apple

Blazin' Apple is the first-ever flavour extension of Sazerac Co's Fireball Cinnamon Whisky, which launched in 2007.

- American whiskey, flavoured, cinnamon and apple; 33% ABV.
- Rolled out nationwide across the US in mid-September.
- SRP of US\$14.99 per 75cl bottle. Also on sale in "a variety of sizes", including 5cl.

Celebrating a classic and helping hospitality

Elijah Craig's annual Old Fashioned Week is not just a celebration of the cocktail loved by so many — it's also a chance to support those who pour it

Deceptively simple, endlessly versatile and richly satisfying, the Old Fashioned is a timeless classic for good reason, regularly voted among the top cocktails worldwide by bartenders and customers.

Heaven Hill Distillery will elevate this iconic drink yet further with the sixth annual Elijah Craig Old Fashioned Week, from 10–19 October. The ten-day celebratory event will showcase the iconic Old Fashioned cocktail and support a worthy cause — bar and restaurant workers in need.

A global toast with a local impact

The Old Fashioned's origins are shrouded in mystery, but tales of its creation stretch back to the 1800s. The drink's simple recipe — a combination of spirit, sugar, water and bitters — allows for endless experimentation. Yet it's hard to disagree that the rich flavour and full body of Elijah Craig Small Batch Kentucky Bourbon, with its signature warm spice and subtle smoke flavour, is the perfect complement to the sweetness and spiciness of the cocktail's accompanying ingredients.

Elijah Craig Old Fashioned Week is going global in 2025. Launched in the US in 2020, during the pandemic that caused so much hardship to the hospitality sector, the campaign expanded to Canada in 2022. In 2024, it hopped over the pond to the UK, and this year on-premise venues in over 15 countries will be uniting to celebrate the Old Fashioned.

More than just a great drink

Elijah Craig Old Fashioned Week has always been about more than just enjoying a great cocktail. The campaign has a strong charitable focus, raising more than half a million dollars for organisations that support bar and restaurant workers facing hardship since its inception. These employees are the



Heaven Hill National Portfolio Mixologist Lynn House is 'inspired by the breadth and depth of bartenders' who take part in Elijah Craig Old Fashioned Week

backbone of the hospitality industry, and Elijah Craig Old Fashioned Week supports and champions their vital role.

For every Old Fashioned sold in the US, Canada and the UK during this year's event, Elijah Craig pledges to donate \$1, \$1 or £1, respectively (up to a maximum donation of \$100,000, \$25,000 or £10,000).

The money will be distributed among three organisations:

■ **The US: Southern Smoke Foundation** provides mental health resources and emergency relief grants to service industry workers. Since 2023, with the help of Elijah Craig, the foundation provided close to 2,000 no-cost mental health counselling sessions and distributed more than \$150,000 in emergency relief grants.

■ **Canada: Bartenders Benevolent Fund** supports bartenders in facing financial hardship or crisis. In 2024, \$25,000 donated from the Elijah Craig Old Fashioned Week was allocated to the Emergency Relief Fund and the Hospitality Workers Mental Health Fund.

■ **The UK: The Drinks Trust** provides financial assistance, mental health support and skills development programmes to people working within the hospitality industry. In 2024, Elijah Craig was proud to donate £10,000 to The Drinks Trust to give back to the vital UK hospitality community.

Bars and restaurants in the US, Canada

Canvas for creativity A New Era of the Old Fashioned Cocktail Competition

While enjoying a classic Elijah Craig Old Fashioned is always a pleasure, the Cocktail Week also encourages experimentation. Bartenders are invited to enter a competition in the US to showcase their most innovative riffs on the classic serve. Winners will receive a prize of \$15,000. The winner and semi-finalist's cocktails will be published in the upcoming *Elijah Craig Cocktail Book*.

Join Elijah Craig in celebrating the Old Fashioned, supporting a worthy cause and experiencing the artistry of mixology.

To enter, US residents can visit OldFashionedWeek.com

and the UK that are keen to take part in this year's Elijah Craig Old Fashioned Week can find out how at OldFashionedWeek.com.

Thousands of bars took part in last year's event, with participating venues adding their own twists on the Old Fashioned and bringing local flair to the global celebration.

"I'm inspired by the breadth and depth of bartenders participating in Old Fashioned Week," says Heaven Hill National Portfolio Mixologist Lynn House. "From beloved neighbourhood dives to the most renowned bars across the globe, these bars are serving Old Fashioned cocktails that honour the history and legacy of the classic alongside innovative riffs that push the bounds of the category." **GDI**



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WEEK®**

OCTOBER **10** TO **19**

Join in the celebration and toast to Elijah Craig Old Fashioned Week. Find out how to register your bar or restaurant in the United States, United Kingdom or Canada by going to OldFashionedWeek.com.



MARKETING TRENDS

Chris Tyas

Daytime is the new prime time for drinking. Best take note if you want to reach Generation Z

With autumn well and truly here, it's hard to believe that only a few weeks ago I was sitting on a balcony in the Mediterranean sun, thinking that life is pretty great when you can crack open a beer at 11:35 in the morning without feeling like it's a bad thing. In fact, on holiday, it almost feels encouraged.

I'd assumed that sort of thing was a rare indulgence for most of us. But there's plenty going on that suggests otherwise.

As a strategist, the stats that grab me most are usually the ones that conflict with my own habits. Which is to say that my 11.35am beer hasn't become a daily ritual — and that I sympathise with marketers in their 40s whose instinct is to project their mid-noughties drinking patterns onto younger audiences.

But also speaking as a strategist, I also know that's a mistake — Gen Zers and younger Millennials are setting their own rules when it comes to how they drink, and sticking to marketing campaigns centred on the idea of drinking as something that goes on in nightclubs in the wee small hours isn't going to cut it.

Research published by The Oxford Partnership in September shows drinking is shifting away from late nights and weekends towards the daytime, especially in dining-focused venues. Break the share of beer sales down hour by hour over the past two years and you see a small decline for each hour after 5pm, and strong growth between 11am and 5pm.

The UK Slug & Lettuce chain of bars revealed recently that their busiest time has gone from 9pm to 10pm on a Saturday to between 3pm and 4pm, and that instead of happy hours, customers are showing up in droves for bottomless brunches. Other British chains, including TGI Fridays, All Bar One, Ping Pong and The Botanist, now make their bottomless brunch part of their offers, as do countless indies.

Related to day drinking is 'zebra striping',



Instead of happy hours, Slug & Lettuce customers are showing up in droves for bottomless brunches

where people alternate between an alcoholic drink and something non-alcoholic when they visit pubs and bars.

Research by KAM shows that a quarter of UK drinkers practise the habit now, but if you include people who aren't strictly alternating but who do swap between alcoholic and soft drinks, that figure rises to two in three UK adults, and 78% of 18 to 24-year-olds. In the US, there has been a 975% rise in Google searches for the term 'zebra striping' over the past 12 months.

At a time when you still hear people claiming that Gen Z "doesn't drink", it's clear that alcohol continues to play an important role in how people like to switch off and relax (see CGA by NIQ p57).

What zebra striping and the rise in day drinking reveal, in my opinion, is that younger people are wanting to do this without the downside of feeling bad the next day.

But these changing habits, and the impulse driving them, mean that drinks brands need to show up differently in their messaging.

We've discussed no/low-alcohol variants previously, but US hard seltzer brand System has taken it further by designing what it calls "the first inclusive drinking system". It's tailor-made for zebra strippers, promising "flavour and aesthetic continuity", whether drinkers choose the 5% ABV or the 0%.

A recent campaign by Heineken took a nice approach. Called 'Afterwork Refreshed' and rolled out in markets including Indonesia, Thailand and Singapore over spring and summer, its aim was to help workers separate their business and personal lives, starting with the very basic idea of leaving the office on time to get to various Heineken experiences.

Then again, and proving that everything old is new again, you could just turn the clocks back to the 1970s and Smirnoff's 'The Bedroom Brunch' ad. It shows a couple still in bed in their pyjamas, enjoying a day of "... no plans, no visits. Just lots of pillows, food to nibble on and beautiful Bloody Bullshots". Yes, that was a new one to me too — a bloody mary with added beef bouillon.

The point isn't trends being new, it's every generation pushing against the previous one. Take the Smirnoff ad, switch the bouillon for bone broth and you'd probably be on to a winner.

Or do your own thing — just as long as it's not happening in the same kind of high-tempo, night-time environment that was the setting for your pivotal 20-something drinking moments. **GDI**

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On our radar

From football pitches to vodka robots, these global drinks initiatives blend creativity, celebrity and digital innovation



Johnnie Walker *Short n' sweet*

Diageo has teamed Johnnie Walker up with US pop star Sabrina Carpenter in a multi-year partnership blending music and mixology. Timed with her new album and tour, the collaboration spotlights Carpenter's own takes on Black Label cocktails, backed by global digital activations — bringing fresh energy to the brand's iconic 'Keep Walking' message.



19 Crimes *Break convention*

19 Crimes makes a bold statement with its biggest-ever UK and Ireland OOH campaign. Backed by nearly GBP712,000 (US\$965,000) in media spend, the push spans digital billboards, roadside screens, vans, social and in-store activations. Targeting bustling city hubs, the brand aims to deliver 30m impressions and broaden consumer reach.

Guinness *Off the bar*

Diageo kicks off Guinness's second year as the English Premier League's "official beer and non-alcoholic beer" with a major global campaign, 'Lovely Day for a Guinness'. The push showcases fans from all 20 clubs and includes a Guinness 0.0 spot airing during more than 200 UK and US broadcasts this season. Guinness is also launching 'Hope', a Gary Neville-narrated social film in the US, alongside new partnerships with Arsenal, Aston Villa and Newcastle United.



Chivas Regal *Pit stop*

Chivas Regal puts the spotlight on teamwork with its latest short film, 'A Tribute to the Scuderia Ferrari HP Pit Crew'. Premiered at the Italian Grand Prix in Monza, the piece is written by British spoken-word artist George the Poet and narrated by teammates Charles Leclerc and Lewis Hamilton, celebrating precision and passion as part of the brand's tie-up with Ferrari's Formula 1 team.

Svedka *Bot-tle service*

Sazerac Co has brought back Svedka Vodka's iconic robot mascot after more than a decade for its new US campaign, 'She's Got a Tab'. Timed for Labor Day weekend, the push covers the first drink for 1,000 consumers via Venmo and features playful digital ads like 'Don't Drink and Hard Drive' and 'Thirst Trap of the Future'. Developed by Sazerac's in-house agency The Shop with Silverside AI, the campaign encourages drinkers to ditch their phones and be fully present.





with Guinness global marketing director Somnath Dasgupta

His full title may be a bit of a mouthful – marketing director (VP) global sports partnerships & regional Africa – but Somnath Dasgupta says he has *the* best job in the world.

Olly Wehring finds out why

Guinness has kicked off its second year of being the official beer of the English Premier League (EPL) with a major global sports campaign [see p15]. How does the partnership work? The sponsorship was a function of having the right opportunity at the right time. Guinness has been in football for a long time, in different parts of the world. Previously, we took a by-market approach.

At the same time, while Guinness has enjoyed strong growth over the last three or four years, the opportunity over the last couple of years has been around expanding into new occasions and getting new consumers into the franchise. Recruiting new consumers in new occasions has been the strategic imperative. Within that context, the time was right for us to look more expansively at our sports participation.

Coincidentally, the EPL was also looking for a new partner. When we were approached, we decided this was the time to make a big play that was global in nature – the Premier League is a truly global platform, reaching around 920m households across 189 countries. The scale of the activation opportunity is material and significant, and that was behind our thinking.

Being the official beer partner of the Premier League gives us access to a host of IP rights that we can use as a claim and as a communication medium. Last season was the first of our four-year arrangement.

Where have you seen success outside the UK? I'll go region by region! We've been activating against the Premier League in Africa for almost ten years, through a partnership with the EPL's media broadcaster. During



Somnath Dasgupta: 'The opportunity with the EPL is massive – it's up to us how we keep it fresh'

that time we've seen the power of the EPL in Africa, which is immense. The communities around particularly the top clubs are massive. We have a very strong presence during the football-watching occasion.

In Asia, there are markets such as Indonesia, where our history – and the supporter communities – is similar to that in Africa. We've embedded ourselves in the sport there, but the partnership has provided an opportunity to expand significantly. We recently launched three new club partnerships and chose Asia as the location to announce one of them – with Arsenal – because the club was on tour there at the time. It was a symbolic gesture for us.

In North America, the Premier League has executed multiple fan-focused events the last couple of years. [This year] we partnered with them through the 'Summer Series' featuring four clubs playing in the US, which was hugely successful. There is such momentum in football/soccer in the US and the EPL activations keep reinforcing that.

In Continental Europe, the last data point I've seen is of more than 8,000 activations. That's the thing about the Premier League: the scale takes it everywhere.

What's your return-on-investment metric? The commercial metric is a really impor-

tant part of it, but it's not the only thing. The kinds of metrics we look at include lines such as Guinness having risen from joint-third in the football-viewing occasion in the UK to No.1.

Another metric is what we call 'brand love', which looks at how consumers view the Guinness brand as a result of our activations. We've seen very positive social engagement and chatter around year one – social listening plays an important part here – but we're still learning how that translates into brand love. All the signs are positive, but this is still a work in progress.

The third one, which is a softer measure, is around how we're giving back to sport. How we are paying back to make sport inclusive and more accessible to all is a really important thing for us.

Do marketing arrangements of this scale have a natural life cycle? We have been in rugby for around 20 years; our Six Nations partnership started in 2007. We do things for the long term, and we're incredibly focused on ensuring that consistency of messaging and how we show up with our partners is right. We're in this for the long run. The opportunity with the EPL is massive – it's up to us how we keep it fresh as we go along. Being at the heart of every footballing occasion and paying back into the sport will take years for us to reach where we want to reach.

You work in the alcohol industry and sport at the same time – are you at risk of having too much fun? I like to say I have *the* best job in the world! It's really important we stay focused on our objectives based on the metrics we talked about earlier. If we're not delivering what we're supposed to deliver, then the fun will quickly go.

Who's going to win the EPL this season? This is the toughest question you've asked! I've been a Manchester United supporter my whole life. All I can say is it's not going to be my club. **GDI**

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





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There is 'increased demand for layered shot serves' across many of Greene King's wet-led pubs, with the baby Guinness 'a highly requested option'

Aperitifs and creams open the way to growth in Europe's liqueur market

Achieving perennial demand is one *problème du jour* for many of Europe's liqueur brands.

Traditionally huddled in seasonal comfort zones, liqueur sales in the region have remained flat for decades, but innovation in flavours, serves and lower-alcohol alternatives could bolster momentum.

"While overall category growth has been modest, there are exciting opportunities for expansion, particularly by addressing health-conscious preferences and introducing innovative ways to enjoy liqueurs," says Javiera Moller, Europe marketing manager at Heineken Beverages International.

"With efforts to broaden drinking occasions beyond the classic after-dinner moment and to counteract seasonal peaks, the future holds promise for generating consistent, year-round demand for liqueurs."

Godelief van Erve, global marketing director at De Kuyper Royal Distillers, notes "a shift towards more casual, at-home and convenience-driven occasions". In the on-trade, she says: "There are good opportunities in premixed and ready-to-serve cocktails, as well as in premiumisation and convenience." De Kuyper launched a 0.0% batched-cocktail hospitality range (see p34) at this year's ProWein Düsseldorf.

On the ground, bartenders are seeing a

With rich heritage in Europe, liqueurs are laden with presumptions over how and where they *should* be drunk. Producers and bartenders are shaking things up, reports **Jessica Broadbent**

natural evolution of drinking moments for liqueurs in their European heartland and an increasing interest in locality, as well as 'experiential' drinking.

"Guests are seeking more curated, intentional drinking moments," says Nikos Tachmazis, manager of Avra Bar at the Four Seasons Astir Palace Hotel Athens.

"Liqueurs are no longer tied to strict categories like digestif or aperitif — they're becoming fluid elements in a larger story. I've seen a shift from rushed pre-dinner drinks to more slow, immersive experiences."

The spritz evolution

Having blossomed throughout Europe in recent summers, is the aperitivo category showing any signs of slowing?

"Far from stagnating, the aperitif moment is evolving," says Andrea Neri, managing director of Campari Group's newly formed House of Aperitifs. "Consumers are embracing a broader repertoire of flavours and formats — from classic bitter profiles to fruitier and even non-alcoholic options. The rise of the spritz as a cultural

ritual continues to fuel this momentum."

Indeed, aperitifs were a bright spot on Campari's first-half results in August — with Aperol-alternatives Sarti Rosa and Crodino boosting performance in key markets including Italy and Germany. »



Paris bar CopperBay features 0% ABV aperitif Crodino in its non-alcoholic monsieur cocktail

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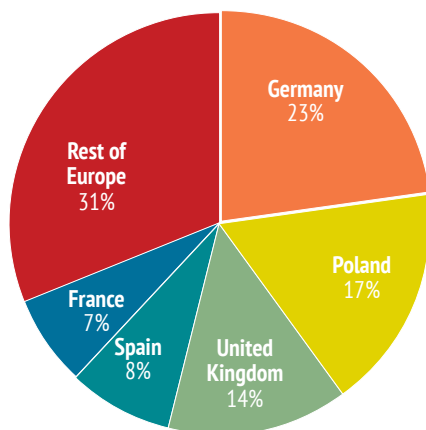
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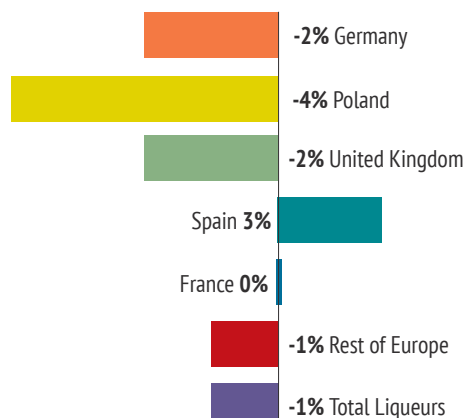
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DATA DROP

Top 5 Markets for Liqueurs in Europe Market Share (Vol) 2024



Market Share Chg (Vol) 2023–24



Source: IWSR, the global leader in beverage alcohol data and insights. Figures rounded to the nearest whole number. Europe is defined as all of Europe except for Belarus, Ukraine, Moldova and Russia.

Key Takeaways

- The market remains generally flat for liqueurs in Europe as macroeconomic pressures continue to deflate consumer confidence.
- Producers are focusing on generating year-round demand for liqueurs, snapping them out of seasonal ruts.
- Europe's aperitif culture is as strong as ever, with plenty of new entrants nipping at the heels of Aperol, Campari and even limoncello in the spritz category.
- Makers of shot liqueurs, like Jägermeister and sambuca, are upping the ante in the on-trade with immersive events and activations.
- Cream liqueurs are holding their own in Europe through product innovation and capitalising on the no/low trend.

» Campari's Neri also notes a shift towards casual, earlier spritz-drinking moments, adding: "The post-pandemic landscape has accelerated the trend toward sessionable, lower-ABV drinks that fit into a broader range of occasions."

At UK pub group Greene King, Aperol remains the best-selling liqueur in volume — but competitors are hot on its heels. Drinks category manager Nathan Boyes says hugo and limoncello spritzes are "becoming staple alternatives on menus". The brewer added the limoncello spritz to around 700 sites' menus this summer.

In Venice, meanwhile, ordering an Aperol spritz is tantamount to ordering a Guinness in the west of Ireland. If you wish to order like a local, ask for Venetian aperitif Select, "a top request here, given its local heritage", according to Lorenzo Di Cola, bar manager at the city's Experimental Cocktail Club. Di Cola is seeing "strong interest in locally rooted products", particularly from American tourists.

Deep red Select Aperitivo was founded in



France's Le 300 cocktail bar features melon liqueur Manguin in its new *identité spritz*

1920, a year after Aperol, and is made with 30 botanicals, with rhubarb, orange and cardamom in the mix. Parent company Gruppo Montenegro unveiled Ca' Select, an 'immersive' production facility and visitor centre dedicated to the brand, in Venice's Cannaregio district two years ago.

Limoncello and beyond

As curious drinkers move beyond Aperol, limoncello has taken full advantage — and sales are on the up in Europe. According to IWSR, the global leader in beverage alcohol data and insights, the subcategory saw a volume CAGR of 7% and a value CAGR of 11%, from 2019–24.

Greene King says Aperol competitors, such as the hugo spritz, are gaining ground in the UK

Nicola Dal Toso, CEO of Rossi d'Asiago Distillers 1868, puts limoncello's success down to the perception of Italian products abroad, oozing "quality, craftsmanship and lifestyle". Its Rossi Limoncello "is experiencing very positive sales performance".

In Italy, meanwhile, Dal Toso says limoncello's place remains in traditional drinking moments like after-dinner shots.

At Le 300, the cocktail bar in The Maybourne Riviera Hotel in the south of France, limoncello is the most popular-selling liqueur by volume, fuelled by spritz sales in warmer months.

Director of bars Julien Lecharpentier says Aperol remains "a go-to option for many", but "we've noticed a growing curiosity and demand for variations". To that end, the spritz on Le 300's new menu, *identité*, combines local melon liqueur Manguin, Noilly Prat, a house-made verbena lemon distillate and cherry tomato soda.

Avra Bar's Tachmazis says the spritz category is "incredibly strong" in Athens, but limoncello "hasn't taken over the menu" yet. "Aperol still leads, but we're seeing more demand for creative variations using Italicus, St-Germain and Greek products like mastiha," he says.

In Paris, Aurélie Panhelleaux, co-owner of CopperBay at Hotel Lancaster, says spritzes remain a "must-have, especially in spring and summer" and "people are increasingly specifying their preferred bitter". Elderflower and bergamot are popular.

"However," she caveats, "the spritz is now facing growing competition from highballs and the paloma, which has been very popular over the past two to three years." »



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MARKET INTEL LIQUEURS

Shots: new way of thinking

» Moderation trends, coupled with macro-economic strife impacting nightlife, mean shot-brand owners have their work cut out.

“While nights out may be happening less frequently, they are very much still happening,” reassures Berndt Kodden, board member of Mast-Jägermeister. “The ice-cold shot remains our signature and most popular serve.”

He adds: “Despite the difficult trading environment, we have seen great opportunity for growth in the Czech Republic and Hungary, driven by innovation. In classic vodka-drinking markets such as Poland, we also see some positive opportunity to grow, which is a shift for us as, until a few years ago, bitters were far less prominent there.”

A player in the thick of Europe’s club scene, Mast-Jägermeister has been working to expand its namesake brand beyond the traditional late-night shot. Jägermeister Orange, launched last year, has “unlocked new opportunities to extend the nightlife window to earlier in the evening — the pre-gaming moment before the high-energy night out — and day parties”, Kodden says.

“We see new formats, hybrid experiences and a growing demand for high-quality, immersive events shaping the future of nightlife,” he adds. These “hybrid experiences” include Jägermeister Night Embassy — a series of lectures, workshops and parties that promote “emerging nightlife talent”.



The release of Jägermeister Orange has helped unlock new consumption opportunities



Heineken aims to position Amarula as ‘a year-round, lower-ABV, light and easy drink’

Similarly, the aim for Rossi d’Asiago-owned herbal shot brand Antica Sambuca is to move “beyond the traditional category and provide innovative serves and exciting brand experiences”.

Dal Toso says: “Antica Sambuca has been able to grow, both in volume and in market share, thanks to its capacity to stay relevant to our consumers’ community. Our aim with Antica Sambuca is to go beyond the traditional category and provide innovative serves and exciting brand experiences.”

Asked about health trends conflicting with the shot category, Kodden says: “Ultimately, for us it’s about remaining true to our brand purpose while also staying consumer-centric — our consumers will always want to enjoy that moment of ‘release’, so we need to understand what that moment looks like for them now and show up in a way that is authentic and engaging.”

Cream liqueurs slowly rising

IWSR data suggest cream liqueur sales are growing in Europe (+6% volume CAGR and +9% value CAGR from 2019–24), a trend Moller, at Amarula-owner Heineken, puts down to “a younger consumer choosing cream liqueurs over higher-ABV spirits or other categories”.

She adds: “The sweet, easy-drinking profile of cream liqueurs makes them an easier entry into the alcohol category. The rise of shot culture with lower ABVs and the baby stout boom has also been a driving force. Our goal is to position Amarula as a year-round, lower-ABV, light and easy drink.”

Breaking out of being pigeonholed as a ‘winter treat’ is a key strategy for cream

brands, with many working to extend shelf life through NPD — take Diageo’s Baileys Chocolate, aimed at the Valentine’s-Easter period; Mozart Chocolate Liqueur’s tropical coconut variation launched in June; or Kahlúa Dunkin’ Caramel Swirl Cream Liqueur. The coffee liqueur brand’s tie-up with American doughnut chain Dunkin’ hit the US in August and was described by French brand owner Pernod Ricard as its “largest investment” in the creams subcategory.

In the UK, Greene King’s Boyes says cream liqueurs “continue to show performance ahead of the wider liqueur market”. He puts this down to “the popularity of drinks such as strawberry tequila, as well as layered shots including the baby Guinness serve, part of a wider steer towards sweeter, more mellow flavour profiles”.

Maybourne’s Lecharpentier points out the sipping-liqueur trend is nuanced: “There’s also a demand for balance, so [cream liqueurs] are often paired with fresher, lighter elements in cocktails to avoid overwhelming sweetness.”

Le 300, for example, serves a white chocolate and basil highball using crème de cacao, basil distillate and cucumber soda water.

On-trade crystal ball

Looking forward, bartenders predict low-ABV options, Japanese liqueurs like umeshu and innovative ageing techniques will gain traction in Europe.

Experimental’s Di Cola says brandy-based liqueurs are “set to become a major trend”, while CopperBay’s Panhelleaux says French herbal and fruit liqueurs, such as RinQuinQuin and Noix de la Saint Jean, are “becoming new classics”. Meanwhile, Lecharpentier notes an emerging trend for lacto-fermented liqueurs.

Boyes summarises: “Despite [fragile consumer confidence], there is an opportunity for operators to elevate customers’ value perception of liqueurs, highlighting them as the perfect accompaniment to a range of different drinking occasions and tastes.” **GDI**



Rossi d’Asiago’s focus for Antica Sambuca is to ‘provide innovative serves and exciting brand experiences’



Liqueur roundup

Celebrity tie-ups and creative activations at outdoor events defined liqueur marketing this summer as Europeans donned their festival gear and jetted off on holiday



Rémy explores 'sonic seasoning'

Rémy Cointreau's "sensory experiment" explored the connection between sound and flavour at London's All Points East festival in August — something described as "sonic seasoning". Festival attendees were encouraged to sip and listen at the Cointreau-branded Margarita Bar. The rest of us can still try at home!



Martini on the dancefloor

Ilva Saronno joined forces with singer-songwriter Sophie Ellis-Bextor in June, kicking off a year-long Tia Maria campaign. In the 'first wave' of content Ellis-Bextor, of *Murder On The Dancefloor* fame, orders a Tia Maria espresso martini — her "favourite summer cocktail". Limited-edition merch and UK in-store activations are also planned.



Bacardí's hugo spritz push

Bacardí teamed up with *Game of Thrones* actor Sophie Turner this year for the second time to promote St-Germain Elderflower Liqueur. The 'Sip into something fresher tasting', advert shows Turner making a hugo spritz to impress dinner guests and was accompanied by social media content and activations at events across Europe.



Love Island x Tequila Rose tie-up

McCormick Distilling Company's Tequila Rose tapped into UK festival season with a pink vending machine installation in London's Paddington Station, dispensing festival 'glam bags' and fronted by *Love Island UK* reality TV contestant Tasha Ghouri. It continued the brand activation on Instagram with more swag giveaways.

Portugal's Licor Beirão stars in TV ad

Licor Beirão's advert jovially breaks down the pronunciation of the nasal, Portuguese ão sound — "one of the main barriers to entry" in non-Portuguese-speaking markets. Produced for the Netherlands, companies in countries including Belgium, Luxembourg and Germany have now requested to air the ad.





Distilled and filtered at sub-zero temperatures, VODKA57 is created with winter wheat from France and the purest Swiss glacier water

Introducing an unparalleled new voice in premium white spirits: VODKA57

The story of a spirit's origin is quintessential in the premium segment.

What is the genesis of VODKA57? Our journey began with our desire to bring back to life and modernise a historical distillation method from central Italy, home of my family's long heritage. The initial challenge was transforming this old recipe into a sustainable craft distillation process. This wasn't a quick endeavour; it involved half a decade of extensive experimentation. The final formulation is a testament to this persistence.

We source winter wheat from France and masterfully blend it with the purest Swiss glacier water. The entire production takes place at centuries-old distillery within the UNESCO Biosphere Reserve in the pristine Swiss Alps. The spirit undergoes a rigorous process of five distillations and seven filtrations at sub-zero temperatures. The result is what we believe to be an unparalleled product: a single-grain, handcrafted, 100% natural vodka with no additives or enhancers, certified vegan and gluten-free.

In a category often defined by mass production and flavour saturation, a new voice is emerging with a staunchly quality-first message. **VODKA57**, a handcrafted, single-grain vodka from the Swiss Alps, is preparing for a global launch after a meticulous five-year development period. We sat down with founder **Giulio Dorrucchi** to discuss the brand's heritage-inspired process, surprising trial results and strategy for entering the competitive premium space

Sustainability is a key purchasing driver today. How is it operationalised at VODKA57, beyond being a marketing point? For us, sustainability is foundational,

not ornamental. The distillery's location in the UNESCO Biosphere Reserve in Switzerland mandates operating under strict ecological standards. This isn't just a picturesque backdrop; it legally requires us to conserve biodiversity and develop sustainable practices. This ethos dictates every decision – from sourcing our alpine glacier water to waste management and local environmental stewardship. Our process is designed to meet specific ethical and environmental standards, which we see as non-negotiable for a modern craft producer.

With the product perfected, what was your strategy for market entry? We believe in data-driven brand-building. After R&D, we undertook a comprehensive global market study to identify our brand positioning. This led to the decision to design our own bespoke bottle, ensuring every touchpoint aligned with our brand identity. This was followed by year-long market and consumer trial in Singapore. The goal was to test the brand across segments and channels and analyse performance through deep consumer engagement.

Concurrently, we submitted VODKA57 to the world's most respected spirits competitions. The validation was swift and incredible: in under a year, we were awarded a line-up of gold medals and »

» accolades, culminating in being voted Europe Vodka of the Year 2024 and Switzerland Vodka of the Year 2025. We are now credited as the World's Most Awarded Swiss Vodka. We took the longest and arduous path, but the results have rewarded our commitment.

Why was Singapore chosen for the trial?

Where are your target markets? Singapore was the ideal strategic testing ground, not our debut market. Its English-speaking, multi-racial social fabric, high purchasing power and concentration of world-class venues provide a perfect microcosm of the global premium on-trade. Our findings there were invaluable. Our planned distribution targets are the US, the UK, Europe and Australia, with an official launch targeted for 2026.

The trial must have yielded fascinating consumer insights. Who is the VODKA57 consumer? Our target is firmly the premium and ultra-premium segment. Roll-out will be exclusively selective, focusing on

cocktail bars, five-star hotel lounges, restaurants and trend-setting nightclubs. Mass-market channels are excluded.

One of our most interesting discoveries was that women are a particularly strong demographic for VODKA57. We attribute this to its ultra-smooth palate and nose profile – it lacks the harsh burn commonly associated with vodka, even when consumed neat. This has informed our positioning.

In contrast to the flavour-base frenzy, we are advocating for vodka to be enjoyed like a fine blanco tequila: best appreciated chilled and on its own. If you desire a twist, a squeeze of fresh citrus is all it needs.

‘We created VODKA57 for the conscious drinker seeking a crafted pure spirit that captures the memory, not just another drink’

The vodka category is famously crowded.

How does VODKA57 intend to carve out its niche? Vodka often indicates the industry's direction, and lately, I've seen a decrease in passion for the craft of core spirit – making a pure, high-quality neutral vodka with the best ingredients. The focus has shifted dramatically towards flavour extensions and RTDs, leading to ultra-saturation.

We see a white space for a return to purity and premiumisation. Our strategy is to stay the course: making the best and purest neutral vodka possible, but engaging the market with more creative strategies and advertising campaigns that tell our story of origin and craft.

We created VODKA57 for the conscious drinker seeking a crafted pure spirit that captures the memory, not just another drink.

So you're betting on premiumisation through crafted purity. What does the future portfolio look like? Absolutely. Our flagship Pure Glacier Vodka line will always be the core. To complement it, we plan a selection of limited editions and master distiller collections. These will always retain the integrity of our original recipe and process.

As market studies confirm, today's premiumisation is about authenticity and bespoke creation. Our dedication to handcrafted quality will be the captivating factor for our target consumer.

Finally, having immersed yourself in the global spirits industry, what are your key observations? It's a period of intense and fascinating recalibration. Product segmentation is more pronounced than ever. The industry is navigating a prolonged post-Covid-19 demand shift, compounded by new traction from RTDs, the economic impact of weight-loss medications and the emergence of no/low and THC-infused segments. These are diverging trends all requiring attention.

Yet, despite these challenges, it remains an incredibly vibrant and dynamic industry, always striving to innovate and adapt. It's a complex landscape, but for a brand built on a solid foundation, it's full of opportunity. **GDI**

VODKA57 founder Giulio Dorrucchi: The global spirits industry is 'a complex landscape, but for a brand built on a solid foundation, it's full of opportunity'



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MARKET INTEL COCKTAILS

Success in the cocktail sphere isn't achieved by merely identifying and exploiting the latest trend: in such a dynamic and fast-moving environment, it's necessary to pinpoint which of these new developments has real traction. Just think of how many new spins and riffs the all-conquering spritz serve has spawned over the past few years. What's next?

"Savoury and umami-forward cocktails are growing, driven by the culinary cross-over between kitchen and bar," says Matteo Luxardo, export manager at Italian liqueur business Luxardo. "Think tomato water, miso, mushroom infusions, nori and fermented ingredients. This type of drink is more common in upscale bars in London, Tokyo and New York."

But how new is the trend? Stephan Berg, founder of bitters specialist The Bitter Truth, points out that it's 15 years since the company's Celery Bitters won a Spirited Award for best new product at Tales of the Cocktail. He says of the savoury trend: "It is gaining more and more traction, but it is still in its infancy."

One hazard here is that creative bartenders may push the envelope a little too far. Eugenio Litta Modignani, founder &



Elayne Duff: 'Bold flavours such as cheese, mushrooms and olive oil have gained traction over the past couple of years'

Large formats 'an Instagram-worthy moment that boosts the bottom line'

CEO of Tovaritch! Latvian vodka, says: "This space is full of creative energy, but the key is drinkability".

Elayne Duff, global director of advocacy at Heaven Hill Brands, goes further. While referencing pioneer venues like Dr Stravinsky in Barcelona (cheese-washed cocktails) and Sidecar in New Orleans (olive oil in

From umami cocktails to spritzes, from 0% premixes to large-format sharing drinks, the global cocktail scene never sits still – and brands are moving fast to keep up. **Richard Woodard** reports

Martinis), Duff says: "Fat-washing to add depth and complexity isn't new, but the recent expansion into bold flavours such as cheese, mushrooms and olive oil has

gained traction over the past couple of years.

"Personally, I'm not a strong advocate of this trend, as many bars take the technique too far, producing drinks that are intriguing in concept but fall short on flavour. For those exploring this style, I recommend restraint – small touches, like a few drops of olive oil atop a martini rather than mixing it in, can go a long way in delivering both nuance and drinkability."

Spritz fatigue?

If the umami trend appeals to the creative minds at the apex of global mixology, the spritz is far more populist. "The spritz »

The Bitter Truth Celery Bitters made waves 15 years ago, but the savoury trend is 'still in its infancy'





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 DEL PALIO



Rossi d'Asiago Distillers reports spritz variations featuring its Rossi Limoncello are on the rise

» remains incredibly popular across Europe and the category has been innovating with flavours,” says Nicola Dal Toso, CEO of Rossi d'Asiago Distillers 1868.

“We’re seeing spritz variations on the rise, particularly with our Rossi Limoncello, the base for the Rossi Limoncello spritz. The versatility of the spritz makes it perfect for customisation, allowing bartenders to mix different base spirits, liqueurs and flavour profiles to create refreshing and easy-to-drink cocktails.”

But could the drink’s ubiquity create spritz fatigue? “It has indeed exploded, given the fact that spritzes existed for a

Around the world: where’s the next cocktail hotspot?

As export manager of liqueur business Luxardo, Matteo Luxardo spends his working life travelling the world to identify the latest cocktail trends. Here he gives his rundown of today’s emerging cocktail destinations.

■ **India:** “There is a rapid urbanisation and a growing, globally minded young middle class, [and a] boom in craft spirits, especially gin, whisky and rum. Brands investing in education, bartender development and local flavour innovation (think mango, spice, curry leaf) will thrive.”

■ **China:** “China is an attractive but complex long-term play. Premium RTS cocktails and simple, highball-style serves may be a more effective entry point than traditional cocktails.”

■ **Sub-Saharan Africa:** “Especially Nigeria and Kenya — they have some of the youngest populations in the world, with increasing exposure to global trends via mobile phones and social media. Still early days, but premium cocktails are seen as aspirational, especially in VIP/nightlife spaces.”

long time, especially in southern parts of Europe, and hardly anybody paid attention,” says Berg. “Now everybody seems to jump on it, and we might not be far off from being tired of them.”

For Litta Modignani, maintaining quality



Venues like Mexico City’s Handshake Speakeasy — last year named No.1 by The World’s 50 Best Bars — have helped transform Latin America into a cocktail hotspot

■ **Latin America:** “Cities like Mexico City, Lima, Bogotá and Buenos Aires are emerging as global cocktail hotspots. There is a growing interest in local ingredients fused with classic formats.”

■ **South East Asia:** “Already has high consumption of spirits, growing cocktail bar scenes, and is a hotbed for innovation with tropical ingredients. This region is already ahead of the curve — look to Tier 2 cities and non-capital nightlife hubs as the next frontier.”

is key. “Spritz culture is growing globally, but risks becoming sugary and flat,” he says. “Our approach is to revive the vodka spritz with citrus bitters, dry vermouth and soda, creating a crisp, refreshing alternative.”

Tovaritch!’s suggested serves are all branded with the ‘Ritch’ prefix, including the Ritch citrus rush, which has premium and ‘quick’ recipes to broaden its appeal.

‘Simplicity with soul’

As some strands of mixology become more esoteric, a countermovement embraces simplicity. The 2026 strategy for Zamora-owned Martin Miller’s Gin includes a global on-premise platform centred on ‘The Pursuit of Purity’, encompassing what global brand director Sergio de Malibrán terms “simplicity with soul: minimalistic, high-impact serves that celebrate the purity of the gin”.

The initiative includes innovations such as ‘The Glacial Spray’ (a fine mist sprayed over the glass before serving drinks such as the berjamór gin & tonic); and ‘the side-car ritual’ — serving a small, chilled pour »



Reviving the vodka spritz: the Tovaritch! sunset spritz is made with grapefruit soda

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» alongside a martini to create “a more immersive and shareable moment”.

“This trend is all about simplicity and authenticity,” says Dal Toso of the minimalist movement. “It reflects a move towards fewer ingredients, but better quality.” As an example, he highlights the company’s Kranebet Italian Botanical Gin and its hero serve, the KranebeTonic aperitif.

Rise of RTD/RTS and draught

Contrasting trends are inevitable in such a diverse and locally nuanced part of the market. As it becomes increasingly global and permeates a range of on-trade venues, mixology is adapting all the time.

“Premixed and draught cocktails are transforming the on-trade by making high-quality cocktails more accessible, consistent and affordable — even in venues without expert bartenders,” says Elena Branda, marketing manager at La Martini-quaie-owned sparkling wine and vermouth business Perlino. “This democratises the cocktail experience, expanding it well beyond specialist cocktail bars to mainstream hospitality settings.”

De Kuyper Royal Distillers has recently expanded its range of premixed cocktails, also making them available in no-alcohol versions to chase the moderation trend.

“Premixed cocktails for the on-trade, like our De Kuyper Batched and Draught cocktails, make high-quality cocktails accessible in a broader range of venues, not just in high-end cocktail bars,” says De Kuyper global marketing director Godelief van Erve. “They provide consistency, speed and ease for staff, enabling even busy bars, restaurants and events to serve premium cocktails.”

Premixes are also a boon for at-home consumption, where both De Kuyper and Perlino balance the convenience of RTD/RTS products with empowering domestic mixologists. “We offer both solutions: different consumers, different needs,” says Branda. “For example, we prepare a cocktail suggestion list for our brand Diva Di



De Kuyper says draught cocktails make high-quality serves accessible in a broader range of venues



Perlino's wine-based RTS cocktail Diva Di Sera infuses moscato with natural fruit flavours such as mango and pineapple

Sera, which is already a cocktail itself (mango and moscato/pineapple and moscato, etc), but with the addition of new ingredients it becomes totally reinvented.”

Double-edged sword?

According to Matteo Luxardo, the rise of home entertainment and the visibility of cocktail culture on social media is also exerting an influence here. “In this space, both ready-to-serve formats and DIY cocktail-making play critical roles,” he says.

“They are not just a pandemic-driven trend — they’re part of a long-term shift in consumer behaviour. RTS products remove barriers, while DIY cocktail experiences deepen engagement.”

Meanwhile, Berg highlights the appeal of The Bitter Truth’s portable Bitters Traveler’s Set and Bar Pack, but cautions that premixes could turn out to be a double-edged sword. “Premixed cocktails will probably not do a favour to cocktail bars in the long run, as these drinks tend to be a pale shadow compared to what is offered in cocktail bars, mixed to perfection on demand,” he argues.

“In our opinion, the cocktail experience is much more than just booze mixed with other ingredients in a can or bottle. It is the social gathering, the atmosphere, the decor and the human interactions that play into the whole experience.”

Shared serve trend

Large-format drinks, however, can still be part of that scene. “In today’s digital era, where people often spend more time with their phones than with each other, there’s a renewed craving for shared, in-person experiences,” says Heaven Hill’s Duff.

“While shared drinks aren’t new, they’re being done better than ever. Picture cocktail trees with drinks served in playful vessels, or oversized disco balls topped with flaming garnishes that turn heads as they’re carried across the room.

“These serves not only bring groups together, but also offer bars a win-win: an Instagram-worthy moment that boosts the bottom line.” **GDI**



The Bitter Truth’s portable Bitters Bar Pack comprises 2cl sample sizes of bitters in a metal box

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Cocktail roundup

From hop-accented bitters and high-ABV gins to cocktail pouches and no-alc batched serves, brands are innovating at a hectic pace to meet the latest backbar trends



Bitter Truth gets hazy with hops release

Hazy Hops Bitters is the latest addition to the range from specialist The Bitter Truth — made using a blend of spirits and Caribbean rums and said to “fuse citrusy, bitter hop notes with the sweet, earthy qualities of tea, dried fruits and selected botanicals”. The company says the bitters “elevate” classic cocktails such as the negroni and the manhattan.

De Kuyper ventures into no/low

De Kuyper Royal Distillers is tapping into the trend for no/low-alcohol choices with the launch of 0% ABV De Kuyper Draught cocktails, as well as a range of Batched 0% products. The company says they will enable bars to “offer creative, sophisticated alcohol-free options, reflecting consumers’ health and moderation trends”. >>



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Luxardo debuts herbal liqueur in the US

» Luxardo has introduced Del Santo, a green herbal liqueur it says is “suitable for the creation of classic cocktails” into the US. The liqueur was previously only available in Italy. The company also recently expanded its range of cocktail offerings with a line-up of bitters, including coffee, rhubarb, bitter orange and sour cherry, made with the same infusions used for Luxardo’s liqueurs.

Tovaritch! readies on-trade cocktail pouches

Latvian vodka brand Tovaritch! is preparing to launch 3L and 5L pouches containing batched serves of cocktails such as the Ritch Mule and the Ritch Vodka Martini, promising full traceability, speed of service and reduced costs. The new pouches are poised for launch in the first quarter of 2026.



Martin Miller's pushes Westbourne Gin

Zamora-owned gin Martin Miller's has positioned its Westbourne expression — a “bolder, more intense” gin bottled at 45.2% ABV — as ‘the master of the martini’. The push includes a repertoire of variations, from the minimalist Westbourne martini to twists such as the frost apple martini and the pickled ginger martini.



Tito's **CARAMEL CIDER**

60mL TITO'S HANDMADE VODKA
60mL SPICED APPLE CIDER
15mL LEMON JUICE
15mL CARAMEL SYRUP
1 BAR SPOON GRENADINE
1 APPLE SLICE, GARNISH

Add all ingredients to a glass rimmed with caramel syrup. Stir and serve over ice.

Mixers take centre stage: how the on-premise opportunity is evolving

Premium mixers are no longer supporting acts, but leading players in hospitality. London Essence, Double Dutch, Fever-Tree and Fitch & Leedes reveal how the category is reshaping the on-premise. By **Henry Mathieu**

The mixer category has undergone a dramatic repositioning. No longer seen as a secondary addition to spirits, premium mixers are now shaping entire drinking occasions, from cocktail menus to alcohol-free offerings.

Russell Goldman, MD of Breakthrough Brands at Carlsberg Britvic, which owns London Essence, highlights this transformation: “Cocktails continue to engage in the on-trade, with one in five UK consumers opting for cocktails in a pub or bar.”

This appetite for cocktails, combined with the rise of experimental flavour exploration, has meant that mixers are no longer fillers, but flavour drivers in their own right.

Fever-Tree director of communications Oliver Winters stresses that the on-premise remains foundational. “It’s where consumers often first discover Fever-Tree in its most elevated form,” he says. This platform for discovery has allowed brands to establish credibility, build trust with bartenders and create opportunities for guests to experience mixers as a premium component of their drinks, Winters notes.

Meanwhile, Double Dutch co-founders Joyce and Raissa de Haas add that consumers are now far more ingredient conscious.



Fitch & Leedes says it crafts its mixers to perform either ‘spirit-forward or standalone’



London Essence’s Crafted Sodas can be served as an elevated standalone drink or used in a non-alc spritz

“Consumers are more ingredient-aware than ever and are seeking quality,” they say. “Trends such as wellness, sustainability and no/low ABV are shaping how mixers are selected and served.”

For operators, this means rethinking how mixers are integrated into menus, ensuring that guests are presented with options that reflect premium quality and modern tastes.

Moderation, wellness and the rise of alcohol-free experiences

The shift towards moderation is one of the strongest forces driving change in hospitality. Goldman notes that “with one in two UK consumers moderating their alcohol intake, and one in three visits to bars, pubs and restaurants now not including alcohol, it is vital that bars offer appealing non-alcoholic options”.

The days of a token alcohol-free beer or soda at the bottom of a menu are gone. Premium mixers, with flavour complexity and sophisticated presentation, now underpin the growth of adult non-alcoholic occasions.

Winters observes that this trend has strengthened Fever-Tree’s role in hospitality. “Increasingly, we’re seeing demand for longer, lighter drinks; spritz-style serves or simple highballs with lower ABV where our

KEY TAKEAWAYS

- Premiumisation trend means mixers now drive flavour, value and consumer experience across alcohol and alcohol-free serves alike.
- Moderation trends are making mixers central to wellness-led and mindful drinking occasions.
- Future growth lies in diversification, emerging international markets and experiential venues.

mixers play a central role in delivering flavour without heaviness,” he says.

For Double Dutch, the opportunity lies in collaboration with non-alcoholic spirits and bartenders: “We’re regularly collaborating with non-alcoholic spirit brands, designing signature no-ABV serves and supporting venues with tools and training to elevate their no/low-alc menus.”

UK-based mixer business Fitch & Leedes has positioned itself squarely within this shift. Founder Dave Morton explains: “Guests want the same sense of craft and occasion in alcohol-free serves as they do in cocktails. Our mixers are crafted to perform both ways — spirit-forward or standalone.” This adaptability allows operators to keep menus relevant for both drinking and non-drinking occasions, maximising value from every visit. ➤



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Innovation, flavour and format

» Flavour innovation and format flexibility are central to keeping the category fresh and engaging.

Double Dutch has staked its reputation on creative combinations, with the De Haas sisters citing the popularity of their Cucumber & Watermelon and Pomegranate & Basil mixers as evidence of consumer appetite for flavour-forward experimentation.

Format also plays a key role in positioning. “We’ve just launched a redesigned glass bottle — a more premium, tactile silhouette that enhances visual appeal and bar presence,” they add, highlighting how packaging itself can elevate the drinking experience.

Operational needs are equally important, particularly in venues under cost pressure. Fitch & Leedes’ Morton points to the advantage of compact formats: “Our Perfect Pour 20cl cans are bar fridge-ready, stack neatly and avoid waste.”

London Essence, meanwhile, places emphasis on versatility. Goldman explains: “Our ever-expanding range of ‘Crafted Sodas’ can be enjoyed as an elevated standalone drink over ice or used in a non-alcoholic spritz serve.”

Beyond liquid and format, mixers are also becoming central to experiential engagement. Winters underlines how Fever-Tree has broadened its partnerships: “We’ve deepened our partnerships, moving into co-creating menus, delivering training and developing seasonal campaigns.”

Morton adds that Fitch & Leedes is investing in advocacy and loyalty, “building the Fitch & Leedes Mixology Circle — a loyalty engine with rewards, merchandise and mixologist recognition programmes”.

London Essence, meanwhile, has focused on “experiential activations such as



Double Dutch's new bottle offers 15% higher carbonation for a longer-lasting pour

themed menus or cocktail masterclasses, offering moments of connection and elevated experiences”, says Morton.

Beyond gin: diversification and new spirit pairings

The decline in gin’s explosive growth has not diminished demand for mixers; instead, it has broadened the playing field.

Goldman acknowledges that “despite long-running gin declines, our London Essence Indian Tonic Water remains our most popular product”, but stresses that consumers are “experimenting with flavour when mixing with a spirit, through products such as our Blood Orange & Fig and Raspberry & Rose crafted sodas”.

This willingness to try new combinations signals a shift from reliance on one spirit trend to a more diversified mixology culture.

For Double Dutch, the gin slowdown has been a catalyst for opportunity. “While gin is decreasing, it still remains a core spirit, but we’re now seeing more serves with tequila, dark spirits and non-alcoholic spirits,” they explain.

Morton emphasises that this diversification protects brands against volatility. “Vodka, rum and whisky are booming, and

our range is crafted to pair across all these categories,” he says. “We’re not just a gin mixer — we’re a cocktail portfolio partner.”

This broadening of spirits and serves aligns with the growing consumer interest in discovery and exploration. It also creates headroom for new marketing narratives, seasonal menus and operator partnerships built around more than just gin.

Future potential and global growth

Looking ahead, premium mixer brands remain confident about untapped opportunities in the on-premise.

Goldman sees scope in overlooked regions: “Regions like central England, Wales and Scotland still present major growth opportunities.” He also highlights experiential spaces such as “our partner Sixes Social Cricket, where guests are engaging in interactive, shared experiences”, as fertile ground for elevated serves.

Double Dutch identifies global momentum: “We see strong potential in markets where cocktail culture is still developing, but consumer expectations are quickly rising — particularly parts of Southern and Eastern Europe, the Middle East and Asia-Pacific.”

Morton outlines three growth avenues: “[UK] premium hotels and pubs outside London, luxury events and corporate hospitality, and the no/low-alcohol movement, where guests still want premium experiences without compromise.”

While alcoholic RTDs continue to gain traction, category leaders view them as complementary rather than competitive. Goldman suggests that RTDs are geared towards “convenience-led moments like festivals, outdoor events or casual get-togethers”, whereas premium mixers remain central to more elevated social occasions.

Double Dutch echoes that “the two categories can co-exist and even complement each other.” Morton adds: “If anything, RTDs are expanding the repertoire. They are convenient, but they don’t replace the social theatre of cocktails or the role of mixers in premium serves.”

Mixers have decisively shifted from background players to essential components of hospitality. By tapping into moderation, diversifying beyond gin and innovating in both flavour and experience, brands are cementing mixers at the heart of modern drinking culture. For operators and guests alike, the message is clear: mixers are not just there to support the spirit — they are redefining the very nature of the serve. **GDI**



Fever-Tree has ‘moved into co-creating menus, delivering training and developing seasonal campaigns’ in the on-premise

Q&A with Nicola Dal Toso, the CEO of Kranebet Gin producer Rossi d'Asiago

Kranebet Italian Botanical Gin 'offers not just an aperitif, but a journey into the history of the Rossi d'Asiago Distillery', says the company's CEO Nicola Dal Toso

Rossi d'Asiago has been celebrating a huge milestone — the centenary of Kranebet Italian Botanical Gin. Can you share the story behind the brand? Kranebet is one of the oldest Italian gins: its long history starts around 101 years ago in 1924, when it was created by the pharmacist Dr Rossi in Asiago, an enchanting mountain location in the Veneto pre-Alps, in North-East Italy.

The name of the product comes from the Cimbric word *kraneweta*, which literally means 'bitter grains', this is what the ancient population of Asiago called the juniper berries from which Kranebet is made.

The product soon became very popular at a local level, also thanks to iconic adverts, and in recent years the Rossi d'Asiago Distillery has reinterpreted the ancient recipe into a more up-to-date, botanical version, Kranebet Italian Botanical Gin, that perfectly fits the taste of today's consumers.

What differentiates Kranebet in the crowded gin and aperitif categories? In the vibrant world of Italian aperitifs, Kranebet stands out for its rich history, authenticity and unparalleled taste. With over a century of tradition, it has remained true to its roots



Nicola Dal Toso: 'Consumers seek both quality and authenticity in their drinking experiences'

while evolving to meet the demands of a modern, global audience.

At the beginning of 2025, Kranebet was recognised in Italy as a *marchio storico* — or a 'historical brand'. This official acknowledgment highlights its long-standing and established presence in the Italian market, its tradition and the value it has gained over time. It also adds prestige to the brand, emphasising its history, continuity and connection with the community and region where it operates.

There's been a huge rise in the consumption of botanical-forward drinks... Absolutely, this growing interest in botanical spirits is the perfect playground for Kranebet. It is made by the distillation of an infusion of juniper berries and selected botanicals — such as gentian root, wormwood, coriander and quassia bark — which give it a unique aromatic flavour and is a 100% natural liqueur without any artificial flavouring or colouring.

In fact, what truly sets Kranebet apart is its exceptional taste. Kranebet's flavour profile is defined by a carefully balanced blend of balsamic, herbal and sweet notes that makes it instantly recognisable. The result is a drink that is both aromatic, refreshing and complex, with a depth of flavour that can be appreciated on its own or as the perfect base for the Italian aperitivo: KranebeTonic, a delicious and refreshing botanical aperitif, characterised by a sweet taste with botanical notes.

Made by adding one part of Kranebet Botanical Gin to three parts of premium tonic, KranebeTonic is Kranebet's signature serve and is our ultimate expression of the Italian-style aperitif.

Consumers can't seem to get enough of gin-based cocktails, with G&Ts, negronis and martinis leading the charge. Has this boosted Kranebet's presence outside its domestic market? Aperitif culture has significantly evolved in recent years and gained immense popularity, especially with drinks like spritzes. This has created new opportunities for Kranebet beyond Italy.

Our KranebeTonic strategy in the aperitif segment is a testament to the brand's ability to stay true to its origins while embracing the future. By maintaining a commitment to its core values — quality ingredients, timeless recipe and authentic Italian craftsmanship — Kranebet is a product that resonates with aperitif enthusiasts.

Consumers are seeking both quality and authenticity in their drinking experiences. In every sip of Kranebet, there is a story of alembics, craftsmanship, tradition and the joy of bringing people together over an exceptional drink. For those seeking an authentic taste of Italy, Kranebet offers not just an aperitif, but a journey into the history of the Rossi d'Asiago Distillery. **GD**



Then and now: an old advertising panel (left) and Kranebet Italian Botanical Gin today

Q&A with Milestone Beverages founder Joe Milner

With a new distribution partner in place, industry disruptor **Milestone Beverages** predicts France could become the biggest market for its Japanese whisky brand **Onikishi**

You have just secured a French distribution deal with Maison Villevert. Why is this partnership so significant? Maison Villevert is a really big company with major distribution power and has had some huge success stories with other well-known brands, including Diageo's Cîroc.

So it's a partnership I really want to shout loudly about, because we're very proud of it and I feel that France could be our biggest market – it is the biggest importer of Japanese whisky except for the US, with 160,000 nine-litre cases last year, according to IWSR. We all worked really hard on getting this relationship together – there was a lot of compliance involved in developing

European back labels and dealing with European laws, and Maison Villevert is very disciplined around that. We worked hard to get this important deal and it's going to be very big.

How did your expansion from Asian markets into Europe originally come about? Three years ago we were one of the first Asian companies to exhibit at ProWein in Germany – it was one of the first shows we did. We showcased our Japanese whisky Onikishi [which means Demon Knight] there and we weren't expecting anything because we had zero presence in Europe then, but just from that show, it unexpectedly exploded for our small business. We had so much demand from so many different countries. Everybody loved the packaging and off the back of that,

through our learnings, we said, 'Let's double down. Let's triple down on the process of developing Onikishi in Europe'. And it's been a great success so far. So when the opportunity with Maison Villevert came up, we were really excited.

Animé is very popular in France and you mentioned how the label is so eye-catching from that point of view, but what is it about Japanese whisky that makes it so appealing to French consumers? I asked the expert, Maison Villevert commercial director Yannick Perezan (pictured left), about this and he pointed out that the French

are very particular when it comes to food and wine, etc. So they have a huge appreciation of Japanese culture – its traditions, food pairing and craftsmanship in particular – because it aligns with their own cultural values and principles. Consumers, especially younger ones, are starting to move away from traditional categories like scotch, cognac, even wine – there's just structural decline in all those categories. What's coming through now is international whiskies, like Japanese whisky, which is a really popular category and growing. For younger consumers it's a lot more delicate than scotch, it's a lot more accessible in terms of consumption – very smooth and very sessionable, so there are high-volume opportunities. That's kind of the target we want to go for.



Joe Milner: 'I'd love to get into cocktail bars. That's where you build a brand'

In terms of the price point, does that chime with consumers as well? Japanese whisky has been growing quite significantly in France for many years, but the challenge with that has always been availability of the product and the price points, which have generally been quite extortionate. That's where the opportunity comes with Onikishi in that we're at a relatively accessible price point – about EUR49 [US\$42] for the Demon Knight expression, about EUR70 for the Sakura Cherry Blossom Cask and about EUR120 for the Tenbatsu.

How will French distribution shape up under Maison Villevert? The first channel will be the independents, or *cavistes*, which is a very professional, very experienced channel and obviously very different to the hypermarket or supermarket. That will be our big focus for the first year and it's a huge opportunity. We want Onikishi to be one of the leading Japanese whisky brands in the market, and Maison Villevert has the depth and the infrastructure to reach all those [more than] 5,000 shops in the first couple of years. In about six months, we want to start moving into the on-premise, where Maison Villevert is also very strong in terms of bars and restaurants. I'd love to get into cocktail bars. That's where you build a brand – it would be a bit of a dream to target these with our Japanese highball strategy, focused on the art of making our signature serve called the yuzu highball. The on-premise is a very tough channel when you're getting priced out by the big multinationals, but we have the capabilities and with a strong distribution network, there's definitely scope to do well there. **GDI**

Can innovation help to future-proof Germany's declining drinks market?

Germany's alcoholic beverage market is at a crossroads as traditional categories struggle and younger adult consumers seek new options. Can innovation save the day? **Joe Bates** investigates

Large parts of Germany's alcoholic beverage market are in worrying structural decline. Beer and wine, two cornerstones of Germany's drinks business, are being squeezed hard by demographic shifts that include a larger number of non-drinking Muslim citizens, an ageing wider population and more health-conscious behaviour among younger people.

The country's economy has also stalled. The Bundesbank expects GDP to stagnate in 2025, with growth of only 0.7% next year. Impacted by US tariffs, industries of all types are saddled with soaring labour, energy, packaging, machinery and repair costs.

Meanwhile, the beverage market's few bright spots, such as alcohol-free products and RTDs, highlight how fast the market is shifting as the tastes of Millennial and Gen Z consumers come to the fore.

Challenging times for spirits

If you want a snapshot of exactly how challenging the spirits market in Germany has been, a glance at the statistics for the on-premise for 2024, compiled by international on-trade insight consultancy CGA by NIQ, is telling. Sales fell 7.1% by value and 5.5% in volume in a channel which accounted for a dominant 54.5% of all consumer spending on spirit beverage alcohol.



Germany's alcoholic beverage market is in a period of transition as it grapples with demographic shifts, an ageing population and changing consumer tastes

There were steep declines for brandy (-17.4%), vodka (-11%), white rum (-13.2%) and gin (-8%), but there were significant gains for aperitifs, with double-digit gains in volume and value. RTDs were another strong performer, with 35% of German consumers noticing an increase in availability in the on-trade last year, according to a CGA by NIQ survey.

Orange is the new black for Jägermeister

Mast-Jägermeister, one of the country's largest spirits players, has defied the down-

turn by doubling down on innovation. Its latest launch in May this year, Jägermeister Orange, a citrus-flavoured variant of the famous herbal liqueur, has enjoyed "overwhelmingly positive" consumer and retailer reception, according to Torsten Römsch, CEO of Mast-Jägermeister Deutschland.

"This new variant resonates particularly well with consumers who prefer lighter spirits and are looking to carry that summer feeling into their night out — especially younger audiences like Gen Z and women, who are increasingly shaping trends in the spirits market," he explains. "It's a perfect example of how we're responding directly to current consumer needs — and a clear reflection of our commitment to consumer centricity."

The company is investing in premium extensions like Jägermeister Manifest, a super-premium, barrel-aged variant, and in portfolio diversification through Dwayne Johnson's Teremana Tequila, which Jägermeister distributes globally, and Gin Sul Limão Fizz, the latter a premixed cocktail.

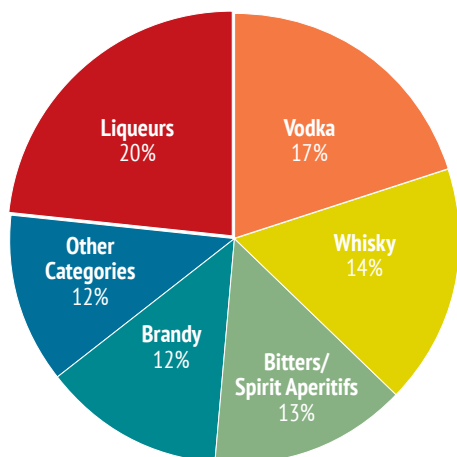
"Innovation is a key pillar of our strategy to strengthen brand relevance and future-proof our portfolio — especially in times of economic uncertainty," Römsch says. >>



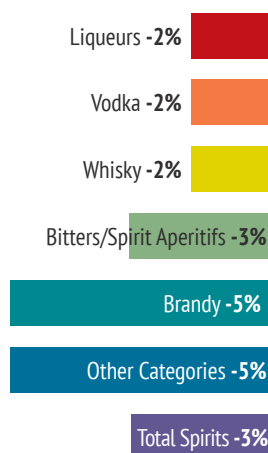
Torsten Römsch: Jägermeister Orange evidence 'we're responding directly to consumer needs'

DATA DROP

Germany: Top 5 Spirits Categories Market Share (Vol) 2024



Market Share Chg (Vol) 2023–24



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

KEY TAKEAWAYS

■ 54.5% of all consumer spending on spirit beverage alcohol in Germany took place in the on-premise channel in 2024 (CGA by NIQ).

■ Sales of spirits in the on-premise fell 7.1% by value and 5.5% by volume last year, with steep declines for brandy (-17.4%), vodka (-11%), white rum (-13.2%) and gin (-8%).

■ Beer sales in Germany fell 6.1% to 3.2bn litres in H1 2025, while exports dropped 7% (Federal Statistical Office).

■ Non-alcoholic beer has a 9% market share of overall beer sales and grew 8.4% in value in 2024.

■ 42% of consumers bought beer in the on-premise last month (CGA by NIQ).

■ Wine consumption in Germany dropped 4% in 2024, with domestic wine declining 5% in sales and 6% in revenue (Deutsches Weininstitut).

Stock Spirits leans into innovation

» Warsaw-based Stock Spirits, which acquired German spirits company Borco-Marken-Import Mattiesen, the producer of Sierra Tequila, in 2023, is also investing in innovation. Its Sierra Tequila Lime and Strawberry RTDs, introduced only this spring, are already matching the sales rotation of category leaders after just 12 weeks, a company spokesperson reveals.

In March, Stock Spirits launched Limoncé Aperitivo, a lower-strength 14.8% ABV lemon aperitif made with 100% Sicilian Femminello lemons. “We are building the brand in the on-trade ahead of an off-trade roll-out next year,” the spokesperson explains. “So far, we have secured almost 1,000 on-trade listings across the country.”

The company also has high hopes for Finsbury 0.0 (below), an alcohol-free version of its popular German gin brand. “Initial feedback has been strong, and we’re planning to grow its distribution in the coming months,” says the spokesperson.

Finally, Stock Spirits introduced Clan Campbell, the blended scotch whisky it acquired from Pernod Ricard in 2023, into the German market earlier this year. “As of June [2025], it already holds a 3% market share among scotch brands,” the spokesperson says. “The price point is right, and the brand resonates with consumers. The launch is supported by a strong cooperation with [mixed martial arts competition] Oktagon MMA to engage with a less traditional target group.”



Experiential marketing is key at Underberg, with its Asbach Brandy brand focusing on music festivals

Underberg: festivals, RTDs and mindful drinking

For Semper idem Underberg, best known outside Germany for its eponymous herbal digestive, innovation is equally central. Brand director Vera Donner-Sander says RTDs now play “an increasingly strategic role” for the company, thanks to products like canned caipirinhas from cachaça brand Pitú and Jartails cocktail jars, a new line of premixed cocktails served in reusable glass jars.

“The market’s reaction encourages us to continue thinking of convenience not as a compromise, but as a promise of quality,” says Donner-Sander, noting figures from IWSR which showed RTDs as the only spirits category

to grow in Germany last year (+4%, see chart above). “Convenience formats are also becoming increasingly important, particularly among the younger target group.”

Experiential marketing is another priority for the company. Asbach, Underberg’s flagship brandy, will generate over 1m live contacts through music festivals in 2025. “Festivals and live experiences are a key way for us to reach younger target groups emotionally,” notes Asbach international brand manager Steffen Ostendorf.

German brewers: under pressure

For centuries, beer has been a cornerstone of German camaraderie, tradition and celebration. There are still 1,459 breweries, according to the Federal Statistical Office, but this total has dropped 6% over the past five years as the population ages and »

» immigration alters the population mix. The clinking of steins is a still a regular sound in beer gardens up and down the country, but German beer is clearly struggling as a category. According to the Federal Statistical Office, beer sales in Germany fell 6.1% in the first half of 2025 to around 3.2bn litres, while exports dropped a disappointing 7%.

Responding to these lacklustre figures, the worst since the start of the Covid-19 pandemic in 2020, German Brewers Association CEO Holger Eichele warned in a press statement that “2025 remains an extremely demanding year”. He pointed to consumer restraint, rising raw material costs and shrinking distribution channels as the principal obstacles to growth. He went on to urge the German government to remove the 7% VAT tax levied on food to stimulate demand in the on-premise.

A much-needed silver lining for brewers is the growing demand for non-alcoholic beers, which now enjoy a 9% market share of overall beer sales and grew 8.4% in value in 2024. More than 800 non-alcoholic beer brands are being brewed according to Germany’s purity laws, and one in every ten litres of beer sold in Germany’s on-premise is now alcohol-free.

Also encouraging for Germany’s brewers is recent data from the on-premise research firm CGA by NIQ which shows that beer remains the country’s most popular alcoholic drink, with 42% of consumers buying it in bars and restaurants in the last month.

Pils is still the most popular beer style, with seven in ten consumers trying it and sales rising 4.4% in 2024, but alcohol-free options are the true growth option.

German wine industry in crisis

Several factors are causing headaches for German wine producers, from economic pressures, rising costs and shifting consumer habits, to the effects of climate



Munich Oktoberfest: beer has always been a cornerstone in Germany's drinks industry, but sales are falling

change, and in the case of some wineries, an oversupply of cheap wines destined for the bulk wine market.

A report published earlier this year by the Deutsches Weininstitut revealed that wine consumption in Germany dropped 4% in 2024, with domestic wines performing disproportionately worse than often cheaper imported wines, declining 5% in sales and 6% in revenue.

Yet innovation and premiumisation are offering this beleaguered industry hope. The move towards *trocken* (dry) styles now dominates, with nearly half of German wines falling into this category, reflecting both warmer growing seasons and consumer preferences. Meanwhile, more premium, terroir-driven single-vineyard wines are gaining traction as winemakers embrace a more Burgundian mindset.

Climate change is forcing winemakers to adapt: chardonnay and sauvignon blanc are increasingly planted alongside PiWi (fungus-resistant) varieties, for instance. Sustainability is now mainstream across the industry, with organic and biodynamic farming widespread. And while domestic sales have faltered in recent years, exports are climbing modestly, up 3% last year, with the US, the Netherlands and Poland proving reliable outlets.

Henkell Freixenet bucks trend

In the sparkling wine category, the outlook is brighter. Henkell Freixenet, the world’s leading sparkling wine company, is defying domestic headwinds.

“Compared to the almost stable overall German sparkling wine market, Henkell Freixenet and all its sparkling wine brands performed positively and better than the market as at year-to-date May [2025], with positive sales in terms of volume and turnover,” says Vanessa Lehmann, the company’s head of communications.

Freixenet, Mionetto and Henkell have been driving growth for the company in 2025, supported by double-digit increases for alcohol-free cocktails and sparkling wines. Prosecco also remains very popular — Mionetto became Germany’s top-selling brand last year, with a 33% market share. Crémant’s stock is rising in the country too, with Henkell Freixenet’s Gratien & Meyer growing 7% in volume in 2024.

“Non-alcoholic sparkling wines are very much in vogue,” says Lehmann, citing 7% sales growth for the nascent subcategory last year. In 2025, Henkell Freixenet unveiled both Mionetto Aperitivo 0.0 and Henkell 0.0 to capitalise on the trend.

“As a company with over 30 years of expertise in de-alcoholisation, starting with sparkling wines, we see further growth potential in the no/low-alcohol product category [in Germany],” adds Lehmann.

Henkell Freixenet, Stock Spirits, Underberg and Jägermeister may operate in different categories, but their approach to the challenges facing Germany’s alcoholic beverages shares a common thread. Each is tackling the issue head-on through NPD and marketing, embracing themes of convenience, premiumisation, moderation and consumer engagement, which should hold them — and the broader drinks market — in good stead during these testing times. **GDI**



Henkell Freixenet reported double-digit increases in sales of its alcohol-free cocktails and sparkling wines in 2024

‘Guest expectations and operational realities’ driving on-premise change

The pandemic reset expectations for both guests and operators in America’s on-premise. Bar & Restaurant’s **Maura Keller** explores how and examines what’s next

As recently as three years ago, on-premise dining trends in the US were reflective of consumers who were still considerably cautious about dining amid dozens of other customers. And while on-premise dining is picking up again, the drivers behind it look different from what they did pre-pandemic.

According to Joe Hannon, general manager, inventory & sales at back office management platform Restaurant365, today’s guests are looking for an experience. This drive for connection is pushing restaurants to double down on in-house services where they can control more of the experience and, frankly, the margins.

“Off-premise channels are still important, but with rising fees and delivery costs, many operators are refocusing their energy on what they can do in-house,” Hannon says. “What’s driving this shift is a mix of guest expectations and operational realities. People want connection, operators want consistency, and on-premise dining — when done right — delivers both.”

The pandemic reset expectations for both guests and operators, according to Restaurant365’s *Midyear State of the Restaurant Industry* report. As Hannon explains, on-premise dining today looks very different from what it did just five years ago: operators are being smarter and more intentional with labour, menu design and table turns.

“Technology also is playing a bigger role, from QR code menus to integrated POS and inventory systems that help staff move faster and managers make better decisions in real time,” he says. “At the same time, we’ve seen a clear shift in how restaurants define success. It’s no longer just about filling seats; it’s about margin protection and operational efficiency.”

Samantha Des Jardins, content marketing manager at F&B intelligence platform Datassential, adds that the company’s 2025 *Trends Report* found “the distinction between dining segments, such as quick-service



Customers are tired of paying US\$18 to \$20 a cocktail and are seeking out more reasonable prices

restaurants (QSRs), midscale and casual dining, is diminishing as restaurants compete on value, innovation and quality to cater to evolving consumer preferences”.

This trend highlights the importance of affordability and worthwhile experiences in attracting on-premise customers.

“Casual dining is adapting to merge the convenience of QSRs with the quality of traditional restaurants, fostering community-based environments that emphasise authenticity, health and contemporary dining experiences,” Des Jardin adds. “[US] consumers are increasingly indifferent to traditional service styles, with 43% stating they do not prioritise whether a restaurant is quick-service or midscale, signalling a shift toward prioritising food quality, convenience and overall experience.”

Consumers are searching for meaningful experiences

Priscilla Conyers, the franchise partner of one of the nation’s top-performing Eggs Up Grill locations in Riverview, Florida, says there’s definitely been a shift in how people approach dining out.

“Post-pandemic, folks are more selective. They’re asking themselves, ‘Is it worth it to go out when I can make something at

KEY TAKEAWAYS

- Consumers are prioritising food quality, convenience and overall experience, with 43% unconcerned about quick-service or midscale.
- People are going out more, but spending less — for example, by ordering wine by the glass and splitting main courses.
- Menus are shrinking, with more appetisers and fewer main courses.
- More restaurants are using tech, such as handheld POS devices, to improve F&B ordering and delivery.
- Tired of paying US\$18–\$20 a cocktail, consumers are seeking out cheaper prices.
- The push toward hyper-local, community-driven dining experiences is set to continue.

home?” Conyers says. “It’s not just about the food anymore; it’s about the experience. People are looking for more than a meal — they want connection, hospitality and something that feels personal. At Eggs Up Grill Riverview, we’ve seen this firsthand. Guests want to feel seen and valued, and that’s what drives them back through the door.”

Izzy Kharasch, president of restaurant »

» consultancy Hospitality Works, says while guests are going out more, they are trying to spend less. “One cocktail before dinner, not two; a glass of wine rather than a bottle of wine; and more sharing, including sharing one entrée [main course] and not having an individual one,” he says.

Kharasch is also seeing menus becoming smaller, with more appetisers and fewer entrées. As he explains, this is helping on-premise establishments keep a lower inventory, which in the long run will help them save money.

“Also, more restaurants have increased their technology, such as handheld POS, so that the servers can be much more efficient in the ordering and delivery of food and beverages,” Kharasch says.

“The current trend of cocktails continuing to increase in price will begin to turn itself around. Already, a number of restaurants in bigger cities are beginning to roll back their cocktails pricing. Customers are tired of paying US\$18 to \$20 for a cocktail and are now seeking out restaurants with more reasonable cocktail prices. The trend of trying to spend less and share more will continue for the rest of 2025.”

Top three on-premise trends

Bill Mitchell, CEO of restaurant technology solutions provider HungerRush, says the top three on-premise trends he’s seeing are: “rising guest expectations, tighter labour dynamics and the strategic use of technology to close the gap”.

First, as Mitchell explains, guests now expect a faster, more personalised experience, whether they order at a kiosk, from their phone, or at the counter. They want the system to recognise them, apply loyalty rewards automatically and accept digital coupons without friction. Paying at the table should be simple and fast.

“Second, dine-in traffic hasn’t fully recovered to pre-pandemic numbers, but expectations have risen,” Mitchell says. “Guests want their on-premise experience to feel efficient and worthwhile. This shift is driving operators to use technology to reduce staff strain, improve order accuracy and create more value during each visit.”

Third, Mitchell says rising operational costs are forcing restaurants to do more with less. The right tools help



Handheld POS systems have helped on-premise venues improve the efficiency of F&B ordering

streamline workflows, improve service and keep teams focused on what actually drives revenue.

“The biggest change in on-premise dining is the way restaurants are using technology to enhance the in-store experience,” Mitchell says. “It’s no longer about adding more tools. It’s about using the right tools to improve speed, accuracy and guest engagement.”

Guests also expect to be recognised and rewarded in real time. As Mitchell explains, they want to reorder favourites, redeem texted offers and pay without delays. In-store mobile ordering and tablets are helping teams meet those expectations by reducing wait times, preventing mistakes and simplifying loyalty sign-ups.

“This evolution is also helping teams manage tighter labour environments,” Mitchell says. “When tech does the heavy lifting behind the scenes, staff can focus on hospitality and consistency during peak hours.”

The future of on-premise dining

Eggs Up Grill’s Conyers believes the restaurant industry will see a continued push toward hyper-local, community-driven dining experiences. “People want to support businesses that support them,” she says. “Whether it’s sourcing local ingredients, giving back to nearby schools, or hosting events that celebrate our neighbourhood, diners are paying attention to those details.”

Conyers also

sees technology playing a bigger role — not replacing the personal touch, rather enhancing it and streamlining operations so her team can focus more on genuine hospitality. “It’s all about that balance between efficiency and warmth,” she says.

Looking ahead, the Restaurant365 team expects two things to define the next wave of on-premise dining: personalisation and precision. On the personalisation side, guests will continue to seek out restaurants that feel tailored to them, whether that’s through loyalty programs, curated menu options or localised experiences.

“For operators, that means using guest and sales data more strategically to inform everything from LTOs to staffing,” Hannon says. “On the precision side, it’s all about tightening the screws operationally. Every decision, from what to prep to who to schedule and when to reorder, needs to be rooted in data.

“That’s especially critical as food and labour costs remain unpredictable. Operators who rely on gut instinct alone are going to struggle. Operators who build a culture of data-driven decision-making will win.”

Mitchell believes that on-premise dining is headed toward full integration. One system that connects ordering, loyalty, feedback and payment into a single, seamless guest experience.

“We’re already seeing more restaurants adopt digital ordering within the store to reduce wait times and give guests more control,” Mitchell says. “Loyalty programs are becoming smarter by tying directly to order history, not just points. Feedback tools are improving from just collection to allowing operators to act on issues and respond immediately.

“The restaurants that will lead in the next few years are the ones treating technology as a core part of the guest experience. When tools are connected and easy to use, service improves, teams stay efficient and loyalty grows naturally.” **GDI**

Bar & Restaurant, a Questex brand, provides the US on-premise industry with the latest trends and education to drive profitability. Sign up to receive Bar & Restaurant’s Crave and Crave on the Menu newsletters, follow them on Facebook and Instagram. Find out more at barandrestaurant.com

Izzy Kharasch: Restaurant guests are spending less — ‘one cocktail before dinner, not two’ — and, rather than diners having their own main meal, they are sharing



Uncork the possibilities: engage your customers by reviving your wine list

Wine may be down, but it's nowhere near out in the US dining channel. Former wine director **Maia Gosselin** explores how to evolve your offering to reflect the changing landscape

Contrary to what you may have heard, wine is not dead. Yes, it's had its share of woes. Yes, it's true that the category has been in a slow, but steady, decline as it grapples with a seemingly never-ending list of challenges.

And yes, even wine lists, long the darling of the on-premise, have not been spared as changing demographics, economic fears and a global decrease in consumption are all impacting sales in restaurants.

New Q2 SipSource data from the Wine & Spirits Wholesalers of America (WSWA) reveals the dining channel, which accounts for more than half (56%) of wine revenue and 58% of wine points of distribution (PODs) in the US on-premise, is down 7.2% and 7%, respectively.

But just because the landscape is different doesn't mean that the days of successful wine lists are over. There are plenty of innovative ways to reignite the spark, but it requires a willingness to rethink strategies as customers' tastes — and budgets — have changed. The time to evolve is now.

Down, not out

Volumes may be down, but there are definitely areas of positivity. Andrew Bender, VP of Massachusetts-based importer and distributor Ideal Wine & Spirits, notes: "The older, more seasoned wine drinker is who continues to spend the big dollars.

"That said, the 'reasonably priced' fine wine market should do well with younger consumers who do drink, as they care more than previous generations about what they are consuming and these are products of ten very much of a place, of a person, and with a real story to tell."

Frank Paredes, wine industry veteran & founder of consulting company Wine Sense (winesenseamerica.com), sees great potential in vinho from Portugal in the US dining channel. "Portuguese wine continues to outperform all other categories," he notes. "Driven by affordability, safety and direct



A wine list should focus on engagement. Is there a story to the wine or winery? Why does it stand out?

flight increases, tourism from the US to Portugal has surged, with American visitors nearly doubling in just two years and becoming the second-largest source of foreign tourists. American tourists are returning home and seeking out many of the wines they enjoyed during their vacation."

Ali Cheevers, director of sales Maine & Vermont at family-owned wine and spirits importer/distributor M.S. Walker, says: "[American] consumers still want European [wine] and feel that they need to consume it now before more tariff uncertainty makes it impossible to get. People have shied away from the value wines and are looking to the more mid-tier price point."

Engagement over information

We live in an era of Insta-everything. Younger drinkers have the world of wine at their fingertips (thank you, TikTok) and will likely fact-check whatever you tell them. More importantly, they don't want to feel burdened with too much dry or technical information.

A wine list should focus on engagement. Is there a story to the wine or the winery? What makes it a standout? Bender comments: "It seemed like every supplier and winery wanted to talk about the 'premiu-

misation' of wine for the last five years, but that's come to a grinding halt.

"Regardless of their origin, we've found that wines which are made by real people, who farm responsibly and which over-deliver for the money are those that keep consumers happy."

According to Paredes, people want authenticity: "Establishments are awash in wine at all price points that lack character, depth, vibrancy and expression that reflects the vineyards where they are produced. Wine consumers, young and old, are seeking out authentic wines that represent the vineyards they're grown in."

Less is more

Gone are the days of the 20-page wine book — restaurants have been trimming their wine lists back since the Covid-19 pandemic. Rather than just slashing to reduce inventory, beverage directors should focus on featuring what will speak to their customers' palates and interests.

Ideal Wine & Spirits' Bender says: "I've noticed a continuing trend in favour of simplification — that often means fewer overall selections and variety on wine lists, but it can also allow for a greater focus on particular regions, styles or themes." »

Glass-pour potential

» Customers clearly want more by-the-glass choices. Wine Sense's Paredes notes: "A number of the restaurants we work with have moved to offering the majority of the wines on their list by the glass (BTG). This encourages experimentation by their customers, as well as a more memorable dining experience."

Marc Provencher, chef/owner of Taverna Khione, a popular Greek restaurant in Brunswick, Maine, echoes this. "There is a slow-down here on wine sales," he says. "We sell fewer bottles than in the past. People are gravitating towards glass pours and if they do a bottle, it's most likely from the glass-pour list and between US\$40 and \$60."

M.S. Walker's Cheevers sees on-premise lists taking this a step further, noting: "Some beverage directors are creating sub-categories in their BTG wine sections to direct consumers to more unusual options, like 'skin contact', for example."

Glass half full

Going smaller with wine pours can result in bigger sales. Cheevers comments: "Beverage directors and owners are offering smaller ounce-pour options or flights to give the consumer an opportunity to explore the list more, and [we're] seeing restaurants do themes, like regional wine highlights, or offers or special pricing on certain wines on slower mid-week nights."

Taverna Khione has embraced this trend. "At Taverna Khione, we offer half-glass pours and those sell a good amount as people are curious about our all-Greek wine list, but maybe not willing to commit to a full pour," says Provencher. "People can try multiple wines without leaving here drinking too much. Kind of creating your own wine flight."

Maine's Taverna Khione offers half-glass pours to showcase its all-Greek wine list



Ten steps to sparkle up your wine offering

1. Find the story – focus on engagement rather than information overload.
2. Streamline your offer by speaking to your customers' palates and interests.
3. Showcase classic grapes from lesser-known regions.
4. Present quality, price-friendly options from less prestigious classic regions.
5. As well as wine from Europe's top exporters (France and Italy), consider



- bottles from other American tourist draws, like Portugal.
6. Build on the growth of champagne and sparkling in the US dining channel.
7. Increase your by-the-glass options.
8. Offer smaller wine pours or flights.
9. Incorporate a no/low section.
10. Bring your team along for the ride – an educated staff increases wine sales.

Classics with a twist

Another way to add interest to your wine list is to get creative with the classic regions and grapes.

Cheevers explains: "I believe the more hands-on wine lists are looking to keep things interesting – they are holding true to offering the classics, but also peppering in more interesting and 'exotic' options to try and draw out the consumers that want excitement to their dining experience."

When I was a wine director, I often showcased classic grapes from lesser-known or different regions as these presented an opportunity to offer dynamic selections for better value. Barbera from California or chardonnay from Alto Adige are both recognisable grapes from areas not known for producing them.

Regions such as Friuli, Campania and the Languedoc are all producing high-quality, price-friendly wines that are a nice alternative to the more prestigious counterparts. And in the Loire, appellations such as Touraine and Quincy offer delicious sauvignon blancs at a much more affordable price.

Embrace no/low

The rise of the no/low category is impossible to ignore. "More than ever, restaurants and even the unexpected dive bars and pubs are embracing the non-alc movement with entire sections being reserved for various non-alcoholic options," points out Cheevers.

"There are still margins to be had in mocktails, non-alcoholic beer and wine, so instead of losing that to the consumer, whose only option would have been water, they are trying to capture that drinker any way they can."

Alcohol-free wine is a limited subcategory, so consider including a section on your list dedicated to low-alcohol wine featuring options such as vinho verde,

muscadet, prosecco, riesling, brachetto, etc – and be sure to include both ABV and calorie information.

Buzz comes from within

The Covid-19 pandemic resulted not just in a decrease in wine sales, but also a dearth of knowledgeable servers. It's time to refocus on education.

As a wine director, I not only held routine seminars, but at pre-meal we would sample the evening's specials alongside two to three featured wines. Additionally, I always ran a weekly BTG special of a wine normally only available by the bottle. This gives both the customers and staff an opportunity to taste something they otherwise might not.

The importance of generating enthusiasm with your staff cannot be emphasised enough and always results in better sales.

Bubbly sales continue to sparkle

Champagne and sparkling wine are both showing modest to strong growth mid-year, with the \$9-plus subcategory up 15.1% by volume in the US on-premise in the year to June, according to SipSource.

The WSWA says that it is the first time in "many quarters" that still white wine did not finish on top in the on-premise dining channel. The reason? The strong performance of prosecco in both the on and off-premise. The Italian fizz is now the market leader in both channels.

With the holiday season approaching, build on this. Expand to premium DOCG proseccos and grower champagnes; then add on sparklers such as crémants, franciacortas, sparkling rosé anything and, my personal go-to, Bugey-Cerdon Sparkling Gamay – unique, delicious and affordable, just like your wine list should be. **GDI**

Maia Gosselin owns Sip Wine Education, a US provider of on-premise, community and corporate wine education. sipwineeducation.com

Q&A

with The Wine Group CEO John Sutton



Prior to joining the California-headquartered producer, John Sutton served in the White House as special assistant to the counselor of the president. 'I have one of the more unorthodox routes to the CEO seat,' he tells **Olly Wehring**. 'You don't see too many lawyers go from general counsel to CFO to CEO'

What's your history with The Wine Group?

I have one of the more unorthodox routes to the CEO seat. I graduated from law and business school in 2000 and became an M&A lawyer. Coincidentally, the first deal that I got assigned to was The Wine Group buying the Glen Ellen [Californian wine] brand from Diageo [in 2002], then the third was The Wine Group acquiring Concannon from the Wente family. That's how I gained exposure to the industry, but mostly from the corporate contract, M&A side of things.

In 2007, I joined the company as general counsel, then became CFO in 2015. Three years ago I became CEO. You don't see too many lawyers go from general counsel to CFO to CEO.

What's the company structure? We're management-owned. There's a group of 60 to 70 current and retired managers. It's a really unique system. I'm not aware of another structure like this in either the wine industry or beverage alcohol more generally. We answer to ourselves — we don't have shareholders or an investor group.

So no shareholder pressure or family-fuelled idiosyncrasies to contend with? We believe it's our strategic advantage, because it allows us to make decisions

much quicker. While I wouldn't describe us as a risky company, family ownership, in particular, can promote a risk-averse approach; it can paralyse you from making decisions.

Because we're the decision-makers, we can be more nimble and can often move quicker than the competition.

Speaking of making decisions, you decided to cut a deal with Constellation Brands earlier this year. The purchase consisted of six brands — the J Rog  t and Cook's sparkling wines, Meiomi, Simi, Woodbridge and Robert Mondavi Private Selection. Combined, these brands represent about 13m cases of volume worldwide.

We also acquired three production facilities with about 500 employees, along with 6,600 acres of vineyard, all in California. Something we're really excited about are the in-house production capabilities that are key to our future growth. Before the purchase, we didn't have the ability to produce sparkling products internally, or cans and Tetra. We're really excited about that.

The industry narrative comprises larger companies setting a price floor for their portfolios and selling anything below it. The Wine Group secured more than just lower-priced brands from Constellation. That's really accurate. In this environment, a lot of public

companies are under pressure from Wall Street and have to meet earnings expectations. They've made the decision for their businesses to go for luxury and as high a price point as possible.

For us, we like very high-volume power brands that we can take on and take a shot at slowing down the trends, and possibly even growing. We like playing the role of consolidator — it fits our business model really well. That's not a new thing; over the years we've acquired Almaden and Inglenook from Constellation [2008] and Beringer Founders' Estate and Main & Vine from Treasury [2021], to name a few. We've just never done anything at this scale.

We were fortunate that this acquisition represented the best of all worlds. It gave us the declining brands that we like under US\$10, like Woodbridge and Robert Mondavi Private Selection, that we're excited about trying to turn around and take them back to their roots. We're also trying to premiumise like everybody else, which for us, means trying to get up to about US\$30 [per bottle] on the shelf in big retail.

Prior to this transaction, our portfolio was heavily weighted to under \$15. Acquiring Meiomi and Simi at the \$20 price point has helped us to premiumise at the same time.

Is the skill set required for a volume player in wine totally different to the skill set required for a value player? I think it comes down to the channel. Our focus is on the big national retail chains and on-premise operators, where you can get up to about \$30 on the shelf. Once you get above »

» that, for higher-end, premium liquor stores and white tablecloth restaurants, that's where a different skill set kicks in.

What role do you see The Wine Group playing in introducing younger LDA consumers to the category? We're very positive about the opportunity going forward to attract the younger consumer. Once you understand the trends that are going on and what they're looking for, then you get more optimistic about coming up with solutions to attract them.

For example, we still believe there's a consumer for wine under \$10 — we have a very large private label business that sells very well at \$8 and below. We know there's a consumer out there, but because of the premiumisation trend, the industry really hasn't innovated here in at least a decade. That needs to happen.

For the younger consumer, we need to expand the occasions for wine, which is largely thought of right now as a beverage to be had with dinner. We're confident we can create products that can attract the younger consumer in terms of occasions.

We're seeing that they aren't purists when it comes to wine. A lot of what the younger consumer is looking for could be things like fruit-flavoured or lightly sparkling wine. They're also looking for things in alternative packaging — Tetra Paks are selling really well and so are cans. So far this year we've launched eight new products all going after the younger generation and new occasions, and many of them are in alternative packaging sizes to address these areas.

We're confident that if we can innovate at under \$10, we can get more competitive in pricing. As it's got more premium, the per-ounce price of wine is not competitive with beer or spirits. If we can create products that the younger generation is looking for, in the packaging types that they're interested in, we're optimistic that over the next several years — it won't happen overnight — we'll be able to track that consumer into the wine category.

Is there any prospect of geographical expansion for The Wine Group in the future? We're probably at around 95% US. We have — I should say 'had' — a large business in Canada, until they kicked American wine off

Tetra Paks, such as The Wine Group's Fuel By Franzia RTDs, are selling well



The Wine Group recently acquired six wine brands — including Meiomi, Simi and Cook's (above) — from Constellation Brands, as well as three facilities and 6,600 acres of vineyard in California

the shelves. We were the largest bulk wine exporter from the US, with a very large business in the UK, throughout Europe and in places like Japan and China, where rather than sell branded case goods, we're very big at selling bulk wine to retailers that then bottle under their own labels.

This business has been challenged over the last few years with the worldwide glut of wine, but it's still a strategically important business for us. We tend to concentrate on bulk shipping; by avoiding shipping all that glass, it's environmentally friendly, and then the wine gets bottled locally, throughout Europe and Asia.

What are your current work-related pain points? I'd say it's the declining trends in the category. I believe they've stabilised, thankfully, albeit at a down level. I look forward to them coming back up again.

Beyond those, it's about working through the combination of pricing, inflation, cost increases and COGS, together with the worldwide glut of wine. In the past, senior managers had to deal with inflation and down cycles and rising costs and excess wine.

What's been unusual in the last few years is that we've had to deal with all of these things occurring at exactly the same time. I don't know if that's happened before. The biggest challenge is a lot of them counteract each other. If you want to take price to deal with inflation in a rising cost environment, for example, then that's only going to make your wine position worse. Add in a worldwide glut, and there's nowhere to move that wine.

Conversely, if you want to promote to start moving through that wine, it's extraordinarily dif-

'I tend to believe that while [the tariff situation] is not catastrophic to the industry, it's one more negative thing to pile on'

ficult when your margins are under pressure from the inflationary environment. How do you balance all of these challenges that are coming at you at once? It makes for a really tough environment right now.

Doesn't the tariff situation, at least, work to The Wine Group's favour? It depends on your viewpoint — we'll see how it plays out.

We're not totally unaffected; while it's not a material part of our business, we have products like Italian pinot grigios and proseccos and New Zealand sauvignon blancs that are part of our portfolio. It's not easy to just switch those to California sourcing, because they're not exact substitute products.

Some believe the tariffs will increase demand for California wines and offset any financial hit from them. I don't know yet if that's going to be the case. I tend to believe that while it's not catastrophic to the industry, it's one more negative thing to pile on. I'm not convinced that a lot of people are going to be in a position to pass along price increases to the consumer in this environment, or that there'll be a big substitute effect for California wines. It'll be interesting to see it play out.

Part of it will end up being where the tariffs settle out. Obviously, 30% is very different to 10% or 15%. So that will play a part as well. **GDI**

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



Cakebread Cellars appoints ex-Penfolds exec as next CEO

US-based Cakebread Cellars has named a former regional VP for Penfolds, David Amadia, as its CEO. Amadia will succeed Mike Jaeger, who announced his retirement earlier this year, and joins the Napa Valley-based company from Californian peer Peju Winery, where he spent the last two years as president.

Ole Smoky Distillery recruits externally for next CEO

Ole Smoky Distillery confirmed a switch of CEO with former Gallo and Constellation Brands executive Michael Novy taking the helm. Novy will move from his current position as CEO of 818 Tequila owner Calabazas Beverage Co in Chicago to Tennessee to join Ole Smoky. He takes over from Robert Hall, who is retiring after nine years in the post and “moving closer to his family in California”.

Zero wine brand Prima Pavé signs distribution deal in Italy

Non-alc wine brand Prima Pavé agreed a distribution tie-up with Gruppo Italiano Vini in the latter’s namesake domestic market. The deal, which will result in Prima Pavé’s Blanc de Blancs and Rosé Brut varietals becoming more widely available in both the on and off-premise channels nationwide, is effective immediately.

WX Brands prepares lower-ABV Bread & Butter wine for UK

US-based WX Brands has introduced a lower-alcohol version of its Bread & Butter Wine brand to the UK. The ‘Chardonnay Sliced’ SKU, which carries an SRP of GBP12 (US\$16) per 75cl bottle, has an ABV of 9% compared with the brand’s full-strength chardonnay at 13.5%. The launch is being backed by Bread & Butter’s ‘Don’t Overthink It’ marketing campaign and follows a “strong performance in the US”.

Global Brands cleared of Hooch anniversary can complaint

UK alcohol industry advertising watchdog The Portman Group has dismissed a complaint against Global Brands over the lemon mascot on a limited-edition 30th anniversary can of Hooch RTD. The self-referred case followed concerns the design was too similar to a 1995 design found to breach rules in 1996. However, the panel ruled the updated packaging did not hold “particular appeal to under-18s”.

Sliabh Liag Distillers lands Ferovinum capital boost

Irish whiskey producer Sliabh Liag Distillers secured EUR15m (US\$17.5m) in working capital support through a partnership with London-based Ferovinum. The deal marks Ferovinum’s first move into Ireland and will help accelerate the growth of the Donegal distiller.

Ferovinum, founded in 2018, provides alcohol producers with capital and supply chain support by enabling them to convert maturing inventory into an “on-demand” financial resource. Earlier this summer the platform received \$550m in backing from private capital asset manager Pollen Street Capital and an unnamed leading investment bank, positioning it to expand further into the wine and spirits sector.

For Sliabh Liag, the agreement represents more than just financing. Co-founder James Doherty said the arrangement offers

an “opportunity to drive diversification and scale”, while highlighting Ferovinum’s recognition of the distillery’s authenticity and product quality. “They’ve given us peace of mind, knowing our foundations are robust, so we can focus on building the business, telling our story and driving growth,” he added.

The EUR15m facility will be secured against Sliabh Liag’s maturing whiskey stock, providing the company with working capital to fund expansion without compromising long-term production. For Ferovinum, the deal underscores its ambition to offer an alternative to traditional lending, providing producers with flexible tools to finance growth, improve profitability and manage risk.

The partnership reflects a growing trend of innovative financing solutions in the spirits industry, designed to support independent distillers as they scale operations.

Middle West Spirits appoints former Old Elk lead as CCO

US-based Middle West Spirits appointed Luis Gonzalez as CCO following its acquisition of Old Elk Distillery in May, where Gonzalez previously served as CEO. Gonzalez will oversee commercial strategy, operations and marketing at the Ohio-headquartered business as the company’s contract distillation programme expands into international markets.

Gonzalez led Old Elk for more than seven years. Under his leadership, the Colorado-based distillery “expanded its custom mash bill programme” and introduced innovations such as its Signature High-Malt Bourbon and the Cask Finish Series.

Nyetimber scores England Rugby tie-up

Nyetimber has agreed a “long-term” partnership with England Rugby, becoming the sport’s first English sparkling wine sponsor.

The agreement covers the England men’s and women’s senior teams and includes pouring rights at the Allianz Stadium in West London, as well as at major tournaments including the Guinness Six Nations and Quilter Nations Series. Nyetimber will also present the player of the match award at every England Rugby senior home fixture.

As the “exclusive sparkling wine” partner, Nyetimber’s range will be available across hospitality and fan areas at the stadium, with the namesake brand’s Routemaster Bus featuring in the British Airways West Fan Village.

Nyetimber will be served at the stadium for the first time on 1 November, when England host Australia in the Quilter Nations



The first glasses of Nyetimber will be poured at West London’s Allianz Stadium on 1 November

Series. Fixtures against Fiji, New Zealand and Argentina follow later the same month.

The partnership extends the wine group’s presence in British sport, following its association with Team GB in 2023. In May, Nyetimber secured ‘official sparkling wine producer’ status with UK governing body British Cycling for another year.

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Entrepreneur, mixologist & cocktail innovator Frankie Snobel sold her first premix cocktail venture to Diageo. Now she's turned her attention to 'fun formats' with The Drinks Bureau. Interview by **Olly Wehring**

The Drinks Bureau launched in 2023. What's your role? I'm the founder & the chief of drinks. We make ready-to-drink cocktails that are bar-quality and in fun formats — we sell in bag-in-box and cans. We really want to celebrate the fun in the cocktail occasion.

How did you get here? Pretty much my whole adult life has been in the drinks industry. When I was 19, I started out working at bars and clubs before getting the chance to work behind a cocktail bar. I loved making drinks, so that became a big passion of mine. I travelled the world bartending and about 20 years ago ended up in the UK — I'm originally from Canada.

I knew that I always wanted to start a business; I've always been a bit of a risk-taker and the black sheep in our family.



Frankie Snobel marks the launch of The Drinks Bureau's 'on-tap' Party Box cocktails in UK supermarket chain Morrisons in May. Retailing for GBP15 (US\$20) per 1.5L bag-in-box, each box contains ten serves

It may sound 'like a taboo approach', but 'I want to scale and I want to exit'

Back in 2012, I could see there was a huge gap in the home-cocktail market — bottled premix cocktails didn't really exist. With my first business, Tipplesworth, we created luxury cocktail sets in vintage suitcases that we sold through high-end retailers, and then bottled cocktail mixers. It went really well, but I wanted something that was more scalable. Then, I realised that draught cocktails were starting to happen, but not very well because of the poor quality.

Ultimately, I wanted to exit to a big drinks conglomerate. I always wanted to sell to Diageo — our investors at the time thought I was completely bonkers and that the chances were slim. But I'm very determined and persistent! I also made some great allies in the industry and had a mentor — Emma Wykes, the former COO of Seedlip and founding partner of Pollen Projects — who opened the door to someone at Diageo to have a conversation.

With premixed on-premise cocktails, I convinced key stakeholders within Diageo

to give me a chance to create something; within a couple of months we had some prototypes that we pitched to one of their biggest customers and they wanted it. That's what led to the acquisition [in 2019].

The industry's changed so much since then. People have realised you can have a quality liquid in a bottle or in a can. That's made it fiercely competitive, but it also means there's a lot less education needed for consumers.

How do you feel the industry took to Tipplesworth, given its then-disruptor status? You need to have a lot of gumption in this industry and not have a fear of rejection. It takes a lot of courage to reach out to someone and ask for help, but people are helpful and if they can be kind, they will.

At the beginning of Tipplesworth, I met Emma, who at the time was the MD of a drinks distributor, who invited me to an event where I met someone from Harvey Nichols, which led to my first retailer listing. Because of her, I try to pay it forward

now. When people reach out to me for advice, I owe it to them to give them some of my time and expertise.

It's just as hard the second time around; the difference is that I have much thicker skin this time.

In between Tipplesworth and The Drinks Bureau, you spent a couple of years with Diageo. When you have your own business and you can react and innovate so quickly, to go from that to then working in a big corporate machine, where things must pass through so many stakeholders, it's tough for somebody who doesn't have that corporate background.

Why have you decided to launch another new brand? I sometimes feel like there might be some sort of adrenaline addiction to being an entrepreneur, because when I sold Tipplesworth, I promised myself I wasn't going to start another business. And now, here I am. »

» I caught up on my sleep first, but I also had a horrible health scare and was diagnosed with breast cancer, which put a lot of things into perspective. Life is really short; you better love every moment and have a bloody good time doing it. So I decided to start another cocktail business — it's what I know and love. This time around, I have a business partner involved on the manufacturing side, which is really helpful; the supply chain and production side of things is where a lot of the stress lies.

There were a lot of brands on the market [when we launched] that took themselves really seriously. There was a big gap for a fun, playful brand that's bright and colourful and says it like it is. I also wanted something mid-premium and mid-strength — easy to drink but still punchy enough to taste like a real cocktail. The other thing is our packs — nobody was doing nice cocktails in 1.5L bag-in-box. Factor in the cost of glass and recycling charges coming into play, not to mention carbon footprint, and bag-in-box just makes sense.

How did you identify the market gap you're trying to fill? At the moment, everyone seems to be fighting for the premium space. From there, you drop down to the alcopop space — there's nothing in the middle.

We were looking at statistics on where all the big sales come from in premix. The volumes are more from the alcopop ones, but the quality isn't. We thought we could create something that's high-quality, at a higher ABV to an alcopop; for those alcopop drinkers who want to trade up to something that tastes a lot better, tastes boozier and has a more generous serve, but doesn't cost GBP4 (US\$5.40), as is the case with the premium ones. That's why we're



Frankie Snobel: With the cost and environmental impact of glass, 'bag-in-box just makes sense'

about to shift our can range in grocery into a larger serve size and to 8% ABV in October.

How big is The Drinks Bureau? We're actually a team of three now — we're very much doing everything on a shoestring budget. We haven't really done any marketing, but within the next month or two, we're going to be turning over seven figures. We're considering external investment, because we need to bulk up our team.

It just goes to show that you can do it with a small budget and you don't have to give up all your equity from the get-go.

What was your funding journey with Tipplesworth? I'd been speaking to a few 'angels' and they were giving me the runaround. I really wanted to take control of raising investment, so I went on to [startup crowdfunding platform] Crowdcube — I ended up

'I sometimes feel like there might be some sort of adrenaline addiction to being an entrepreneur'

raising what I wanted in less than a week. Bear in mind I had no business experience prior to starting the company!

We also, obviously, received investment through Distill Ventures, but that was further down the line.

This time around, we're weighing up the options for the best route for us. I'm having conversations with some 'angels', crowdfunding's another option and there's a venture capital firm that's put an offer on the table. We don't need a huge amount of money to get to where we want to, and we've proved that you don't need a lot of money to grow the business.

Do you have the same exit strategy with The Drinks Bureau? I want to scale and I want to exit, yes. That might sound like a taboo approach, but I want to go fast and go hard, then catch up on sleep again, knowing that I created something that's in the market and gives joy to a lot of people who want great cocktails.

How else does this time around differ from the last? The journey's always exhausting and you make so many sacrifices, with family, friends, your finances and your health.



The Drinks Bureau launched the 'world's first' Dubai Chocolate Style Espresso Martini in a can in July

You put so much into it that it becomes your identity and your everything. Although it's exciting to be involved with something that you can be so passionate about, it also means you're not fulfilled in a lot of other areas in your life.

I have a lot of self-awareness now — I step back when I feel I deserve to enjoy my weekend, or need to see my mum and relax. Sometimes I feel myself falling back into the same me from before, but I'm trying to be a bit more balanced this time around.

What other learnings from Tipplesworth have you taken into The Drinks Bureau? I now know how to say no. With the first business, I wanted to say yes to every opportunity that came my way. Now I'm so focused on growth for the business that if it isn't going to lead me to where I want to be in the next three to four years, then I say no.

I have international distributors wanting our products, for example, but I'm turning them down to focus on the UK right now.

Would Tipplesworth have been as successful if you'd had the approach that you have with your second business? Who knows? Everything is so fast-moving in a startup. I did quite a lot of pivots with Tipplesworth — first kits, then mixers, then draught cocktails — all of which I took to get to the end goal of exiting the business. This time around, I'm trying to make what I have work.

There's also a lot less ego involved. With the first business, I was so worried about what people thought of the product and how they saw me as a founder. This time around, I just want to sell a shedload of cocktails! I want to have a brand that has a lot of fun in the industry.

What advice would you give to a younger you? Enjoy the ride. There are so many ups and downs, you have to stop and appreciate everything you've accomplished. **GDI**

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

‘Identify gaps’: how to approach the on-trade channel on a budget

Spirits startups can’t outspend global giants in bars and restaurants — but, as Overproof’s Ed Dobbles explains, smart research and bartender relationships can deliver outsized on-premise impact. Interview by **Henry Mathieu**

Do your homework first

Overproof, a US sales execution and business intelligence platform, helps alcohol brands use AI and data to target the right accounts, optimise field operations and connect depletion data to performance. Chief analytics officer Ed Dobbles believes the on-premise remains the most powerful channel for challenger brands to build traction — if they approach it smartly.

On-premise success begins long before the first pitch. For Dobbles, account-level research is non-negotiable. “Start by doing your research,” he advises. “Before visiting an account, take time to review their cocktail menu online and log the details in a spreadsheet. Focus on the brands they feature, the types of cocktails they offer and whether they support local craft brands.”

This preparatory work allows founders to target outlets where they’re more likely to win. “If they already work with smaller producers, that’s a strong indication you could be a good fit,” Dobbles explains.

It’s just as important to know where to avoid. “Avoid competing in areas dominated by the big players,” he advises. “For example, if Diageo or Suntory Global Spirits products are already widespread on the menu, move on. Instead, focus on identifying gaps.” Challenger brands don’t typically



Ed Dobbles: ‘Bartenders are your frontline’



Image: iStock.com/makebusinessimages

If bar staff ‘believe in your product, they’ll recommend it. If they don’t, it won’t move’

have the firepower to displace global incumbents. Success lies in finding openings where their pitch is distinctive.

Use trends to tailor the pitch

Generic product pitches rarely get brands onto cocktail menus. Dobbles believes tailoring to market-specific trends is what cuts through. “Leverage menu data to spot cocktail trends in each market,” he says. “If the espresso martini is trending in NYC, craft a unique twist on it using your spirit and pitch that version.”

This kind of insight doesn’t just get products into venues — it gets them onto menus, where they can make a real impact. “Getting your product on the menu, especially in a branded cocktail, is key,” Dobbles says. “It can drive five to ten times the volume compared with just selling the spirit by the bottle.”

Platforms like Overproof are built to give brands this visibility, connecting proprietary menu intelligence with depletion data to show what’s moving in real time. But startups without advanced tools can track trends manually. The crucial point is that pitches should be data-led and aligned to what bartenders and consumers want right now.

Nurture your accounts

Placement is only half the battle. As Dobbles notes: “Once you land a placement, your work doesn’t stop there. Focus on sell-through by consistently visiting the venue, building relationships with the bar team and offering staff training.”

For startups without deep budgets, that means being creative with how they support accounts. Training sessions, small tastings and pairing activations can build advocacy without draining resources. “If your budget allows, consider simple gestures like bringing in food — it creates goodwill and keeps the team engaged,” he suggests.

The people pouring drinks are also the people selling the brand story. “Bartenders are your frontline. If they believe in your product, they’ll recommend it. If they don’t, it won’t move.” In this way, staff engagement is often more valuable than consumer-facing marketing.

Respect venues’ time and culture

The final lesson is one of discipline. Overwhelmed staff don’t respond well to pushy founders. Dobbles advises: “Respect buyers’ time. Avoid pitching during peak hours when the bar team is busy. Visit during slower periods when they can engage more freely.”

These small points of etiquette make the difference between being remembered as a partner and dismissed as a nuisance, he adds. Building a culture of respect also means tailoring activations to the occasion. A thoughtful, relevant idea — such as a cocktail paired with a seasonal menu — will resonate more than a flashy but ill-suited campaign.

Ultimately, trust is what keeps a brand on the menu once it gets there. “These small, thoughtful gestures will go a long way in building trust and long-term relationships,” says Dobbles. And in a crowded drinks landscape, that trust can be the differentiator that keeps a challenger brand in the glass — and off the shelf. **GDI**



Five lessons from a drinkpreneur

Duppy Share Rum CEO Jack Orr-Ewing

'The most important audience isn't the end consumer, but the buyers,' according to Jack Orr-Ewing, who joined the UK's best-selling independent rum brand in 2016. Interview by **Henry Mathieu**

In the on-premise, contracts win, cocktails sell

"The on-trade isn't about looking pretty — it's about being in the right cocktails and the speed rail," says The Duppy Share Rum CEO Jack Orr-Ewing. That means focusing less on bottle aesthetics and more on where and how your liquid is served.

"Most of the volume comes from being named in cocktails — mojitos, rum punches — and sitting in the speed rail where the bartender reaches first," he says.

Early on, the London-based Caribbean rum brand secured many listings informally. "You get a WhatsApp from someone saying, 'Yeah, we'll take you'," recalls Orr-Ewing. "But without contracts, you're one competitor away from losing it."

The turning point came when the B Corp-certified company partnered with UK-based distributor Proof Drinks. "We dropped high-volume, zero-margin accounts and replaced them with healthier, contracted business," says Orr-Ewing. "We lost some dross, but gained stability. Now we're ahead of where we were."

Community is a competitive edge

Orr-Ewing co-founded The Kindred Collective to connect indie drinks brands. What began as a 500-member WhatsApp group has evolved into a paid network offering supplier contacts, quarterly CGA insights reports and collaborative marketing opportunities.

"It's brilliant for sharing stands at shows, finding suppliers or tackling red tape," says Orr-Ewing. "For solo founders, having that hive mind is invaluable." Members use the platform to swap everything from bottling contacts to advice on complex packaging regulations. "We've always had each other to bounce ideas off," explains Orr-Ewing. "A lot of founders don't — Kindred fills that gap."

Collaboration isn't just about advice. Brands often pool resources to cut costs, share distribution opportunities or co-host activations. "If you're about to do a show,



The Duppy Share Rum founder George Frost (left) and CEO Jack Orr-Ewing

finding another brand to split the stand with can halve your expenses," enthuses Orr-Ewing. "It's just smart business."

Sell to the trade, not the shopper

Orr-Ewing says: "One of the hardest things to realise as a young company is that you're not actually a B2C brand — you're a B2B brand."

When The Duppy Share launched, it looked at what big players like Bacardí and Captain Morgan were doing — billboard ads, flashy consumer campaigns — and tried to emulate them. "We used to trick ourselves into behaving like that," Orr-Ewing admits.

The reality is that the most important audience isn't the end consumer, but the buyers who decide what's on the shelf or cocktail list. "Our mantra became, 'Act like a big brand'. Do things that catch the eye of the people who make the decisions — the Waitroses, the Tescos, the Fullers."

That thinking informed trade-friendly activations like The Duppy Share's Guinness World Record for the world's largest rum punch. "It wasn't a GBP100,000 TV campaign, but it cut through in a way that got us noticed — and paid for itself through partnerships."

Nail distribution before marketing

"At heart, we're a distribution business," says Orr-Ewing. "Get thousands of points of sale first. Then turn the marketing tap."

For years, The Duppy Share handled its own logistics and selling. The problem? "You lose as many accounts as you win," says Orr-Ewing. "The cost of additional sales staff, delivery and customer manage-

ment wipes out the savings." Handing the UK over to Proof Drinks was a tough call, but one he says they should have made sooner. "A good distributor brings relationships you can't replicate. Buyers at national accounts want to talk to people with a track record, not a startup's sales rep."

Orr-Ewing also cautions against startups putting all their chips on the UK. "It's a terrible place to build a profitable indie brand," he says. "I'd have put more money and time into France and Germany — that's where people build sustainable businesses."

Chase momentum, not margin

Prestige listings are great, but Orr-Ewing is clear-eyed about what fuels growth. "Nice packaging, sharp price point, great liquid — that's what wins at scale."

Even low-margin, high-volume accounts serve a purpose. "Volume builds momentum," he says. "Momentum gets you funding and funding gets you to the next stage."

Orr-Ewing points to The Duppy Share's listing at UK budget pub chain Wetherspoons. Margins were razor-thin, but it gave the brand reach. "If Hendrick's is there, why shouldn't we be?" he asks. "No one's scanning the back-bar thinking, 'I saw them in Wetherspoons, so I won't buy them in Waitrose.'"

"Collaboration is the way forward," according to Orr-Ewing — the brand's partnerships with Moth Drinks and Old Jamaica "halved costs and boosted distribution".

His final tip? "Do things that make the right people notice you, and make sure your brand is in the right place when they do." **GDI**

Heinemann introduces liquor firsts at sea with *The Macallan*, Hennessy and Patrón

Heinemann Americas has stepped up its liquor offer on board Royal Caribbean's *Star of the Seas* cruise ship with "first-at-sea" backwalls for major brand partners.

The shipboard retail specialist, a wholly-

owned subsidiary of Hamburg-based global travel retailer Gebr Heinemann, has unveiled a new cruise retail concept onboard *Star of the Seas*. A highlight is the "highly curated collection of prestige and rare spirits" in its Port Merchant liquor store, "crafted to surprise and captivate connoisseurs with selections found nowhere else at sea".

The Macallan, Hennessy and Patrón brands now all have personalised backwalls, while Johnnie Walker gets a dedicated gondola. There are also products unique to the ship, including a limited-edition Louis XIII monogrammed box hand-decorated exclusively for *Star of the Seas*, with only 30 pieces available globally.

Among the rarest offerings is a bottle of Loch Lomond 50yo, one of just 100 available in the world, retailing for US\$34,999. The onboard liquor offer also debuts exclusive barrel programmes, such as Angel's Envy and the rare O.F.C. Bourbon 1985.



Backwalls for *The Macallan*, Hennessy and Patrón, while Johnnie Walker has a gondola

Heinemann Americas CEO Nicolas Hoeborn said: "With *Star of the Seas*, we continue our mission to elevate cruise retail through storytelling, exclusivity and unforgettable experiences."

At 365 metres in length, with capacity for 5,610 guests and 2,850 crew, *Star of the Seas* is one of the world's largest cruise ships.

Heinemann's retail partnership with Royal Caribbean began in 2019 and now spans six vessels, including *Icon of the Seas* and *Utopia of the Seas*.

Passoã expands UK retail presence

Passion fruit liqueur Passoã has expanded its UK portfolio with a duo of RTDs: Passion Fruit Martini and Pink Lemonade Spritz. Following a successful launch in Europe on the back of the pornstar martini trend, the RTDs are available in the UK with an SRP of GBP2.30 per 25cl can. Passoã global brand director Kaarina Jannin said: "With our RTD range, we're making it easier than ever to enjoy delicious passion fruit cocktails."



Taiwan's Everrich Duty Free lands first-ever Aberlour boutique

Pernod Ricard Global Travel Retail and Aberlour Whisky have opened the first-ever boutique for the Speyside single malt in one of Asia's busiest hubs: Taiwan's Taoyuan International Airport — a gateway which processed almost 45m passengers in 2024.

Designed in partnership with Pernod Ricard GTR's long-standing partner Everrich Duty Free, the 32.5sqm boutique is in the Departures YP concourse of Terminal 1.

As well as showcasing the heritage and crafting of Aberlour, the consumer experience includes Taiwanese elements. For example, travellers are welcomed into the store by a wish tree where they can post requests for good luck and prosperity. They can then taste a dram from the Aberlour range, paired with sweet pineapple cake, a local delicacy.

Everrich Duty Free president Kevin Chiang said the Aberlour boutique was a way for the retailer to create "a true cultural gateway" combining both Scottish and Taiwanese traditions.

The world-first Aberlour store follows a



Pernod Ricard GTR and Aberlour say they have a pipeline of innovations which will appear on sale in the Aberlour Boutique over the coming months

brand refresh, the launch of a GTRX trio and a global 'Everything Considered' campaign, all of which have taken place this year.

The boutique is decked out in the brand's new visual identity: red representing Aberlour's distillery oak doors, beige for Scottish barley fields and gold which symbolises Aberlour's amber liquid.

Aberlour is now rolling out a 2025 travel retail-exclusive range: Aberlour 13yo Dou-

ble Cask Matured, Aberlour 16yo Double Charred Selection and Aberlour Suthainn Double Sherry Cask Solera. The sought-after Small Batch 15yo and 17yo are also available in a limited edition of 300 bottles.

Pernod Ricard GTR said it aims to drive excitement for rare malts in Taiwan — the third-largest market for single malt whisky after the US and France — as well as "accelerate Aberlour's presence in Asia".

Raising the bar: how LWC keeps on delivering for the UK on-premise

As the UK's largest independent drinks wholesaler, LWC blends scale, local knowledge and sustainability to navigate a challenging on-premise market and keep the pints and profits flowing. **Joe Bates** reports

The scale of LWC's operations takes the breath away. As the UK's largest independent drinks wholesaler with over 1,700 employees, the Manchester-based firm supplies around 8,000 different product lines to more than 15,500 on-premise customers across the country. The ever-changing assortment includes 1,200 draught beers, 500 bottled beers, 200 ciders, 2,800 spirits, 1,500 wines, 1,300 soft drinks and 140 RTDs.

LWC has 170 drivers on the road supplying drinks to pubs, bars and restaurants seven days a week. At the same time, its 80-strong WSET-qualified team of account managers are sitting down with customers trying to boost sales despite challenging on-trade market headwinds by supplying cask ale, wine and cocktail training, marketing materials such as wine menus and drinks lists, as well as banners, posters and POS materials.

Service over size: the LWC difference

Yet for managing director Ebrahim Mukadam, who established LWC over 40 years ago in 1979 as a small startup with business partner Robin Gray, what sets the company apart is a commitment to service, not its size.

"Service has always been central to how we operate, not just in the sense of delivering on time, but in genuinely understanding and responding to what customers need," he says. "Our decentralised model allows each depot to operate with local knowledge and flexibility, while still drawing on the scale and systems of a national network."

"What sets us apart is the consistency with which we deliver that model," he adds. "Every one of our depots is invested in its own local relationships, whether that's daily support for a local pub or working



LWC has 170 drivers on the road seven days a week, and its managing director Ebrahim Mukadam (left) says 'service has always been central' to operations

with a major group across multiple sites. We back this up with significant re-investment in systems, people and infrastructure, so we can keep pace with what our customers expect from us."

LWC also stands out from other drinks wholesalers in having skin in the on-premise game, with its Dorbiere Pub Group division, a 40-outlet Manchester-based pub group with community pubs, country inns and student bars across England's North-West, North-East and the Midlands. Operating an on-premise chain allows LWC to view the business from its customers' point of view and to test out new products.

In the company's last financial year ending 30 September 2024, LWC's parent company, Licensed Wholesale Co Ltd, reported turnover of GBP804.8m (US\$1.1bn), up from GBP627.5m the previous year. This strong performance was buoyed by the acquisitions of the wholesaling division of Glamorgan Brewing, a wholesaler operating in Glamorgan and the South Wales area, and Hills Prospect, a drinks distributor based in South East England.

Navigating on-trade headwinds

Yet the company's pre-tax profits for this trading period fell from GBP41.1m to

GBP23.4m, reflecting the challenging state of the UK hospitality sector. A barrage of challenges has dampened demand and squeezed the industry's profits, from ongoing economic pressures due to the cost of living crisis, rising energy costs and a consumer trend towards moderation, to increased employer National Insurance (social security) costs, new recycling taxes and substantial ABV-pegged increases in alcohol duties.

"The UK on-trade has shown impressive resilience, but the reality is that inflation, rising operating costs and duty increases have put sustained pressure on margins," admits Mukadam. "Operators are being squeezed from all sides, and while footfall is in some instances returning, spend per head is under constant scrutiny."

"At LWC, we're acutely aware of those challenges and are focused on offering practical support where it matters most," he continues. "Our localised account management model means our teams are embedded in the realities of each customer's business. Whether it's suggesting margin-friendly swaps, creating menu pairings or helping streamline stockholding, we're always looking for ways to ease pressure and drive value."

Regulatory changes are also heaping further pressures on the business. The UK's new Extended Producer Responsibility (EPR) rules, which require producers and »

» suppliers to take greater responsibility for packaging waste, have had ripple effects through LWC's supply chain since their full introduction at the start of the year.

Mukadam says LWC had been preparing for EPR since 2023 and the legislation has prompted "a greater expectation across the trade for genuine progress on sustainability, not just compliance". That expectation has, in turn, accelerated LWC's own ESG strategy, which aims to embed environmental considerations into product development and internal processes.

Sustainability and the rise of English wine

It also informs the company's portfolio choices. Its recent partnership with MDCV UK, one of the country's largest English wine producers and the owner of the Silverhand Estate and Harlot brands, reflects both consumer demand for provenance and the desire to support sustainable producers. Silverhand Estate is the UK's first carbon-negative vineyard and its alignment with LWC's values was a deciding factor.

"English wine has become a powerful category in its own right, and our partnership with MDCV UK reflects that momentum," says Mukadam. "But it's not just about patriotism. There's genuine consumer interest in provenance, sustainability and premiumisation, and English wines are delivering across all three.

"This partnership gives our customers access to English wines with quality, scale and story," he adds. "It's a natural next step in our wine strategy and aligns perfectly with our broader ESG ambitions and commitment to supporting sustainable producers."

ment to supporting sustainable producers."

In a mature, cost-conscious market where wine is widely perceived as being in decline and struggling to recruit younger LDA consumers, the category is a key focus for LWC. The company has reportedly almost doubled the number of its regional wine development managers to 30, and in the past three years, wine has grown from 13% to 16% of LWC's sales mix.

LWC has successfully championed accessible formats, story-driven branding and sustainable credentials as key to reaching new audiences. "We're seeing real engagement from younger LDA consumers when wine is positioned accessibly — whether that's through compelling by-the-glass offers, canned formats, or wines that tell a story," observes Mukadam. "Sustainability credentials also really resonate with this audience, as well as low-intervention wines and lower-ABV ranges."

The key, he argues, is to "meet them where they are" and avoid jargon. "That might mean offering fresher styles, natural cues, or simply building wine into more relaxed, occasion-based serves," says Mukadam. "Our approach is to curate a wine offer that's still grounded in quality, but without the intimidation factor."

Beer and the next growth wave

While English wine might be one strategic pillar, beer remains another major arena for LWC's growth. This summer's launch of Brinkhoff's No.1 — a German lager with strong regional heritage and links to football club Borussia Dortmund — into the UK on-premise is a prime example. Available exclusively through LWC's Signature Brands portfolio, the launch is backed with POS kits and event activation ideas tailored to world beer-driven footfall.

LWC beer & cider category manager Lee Williams describes Brinkhoff's as "a beer with real heritage and cultural resonance — not just in Germany, but here in the UK too". The decision to offer it in three formats — 5% ABV lager, 2% radler and 0%

Tech and people key to logistics know-how

Behind the scenes, technology underpins LWC's ability to deliver. The company's warehouse management system has improved pick accuracy, stock visibility and responsiveness, while real-time ordering systems allow the firm's depots to offer same-day delivery on orders placed before midday in many English regions.

LWC's logistics infrastructure also continues to expand. In July 2023, the company opened a new 116,000 sq ft depot in Buckinghamshire to serve London and the South-East, creating 60 jobs in the process. It was the 17th depot operated by the company.

Yet managing director Ebrahim Mukadam is quick to point out that the human factor matters just as much. With over 170 trained drivers, the delivery experience includes rotating stock, collecting empties, and often acting as an extra set of eyes and ears for account managers. "Agility isn't just about logistics," he argues. "It's also about decision-making. Because our model pushes authority closer to the customer, we're able to move faster and in a more tailored way than a centrally run business might."

alcohol-free — was designed to give operators flexibility to serve multiple consumer segments from one brand family.

In the short term, Mukadam expects steady growth for LWC in mid-market and sustainable wines, sparkling formats and products that help operators drive margin without alienating value-conscious consumers. He's cautiously optimistic that the recent EU-UK trade reset may ease the import of European wines and spirits, but insists that portfolio development and UK partnerships will remain a priority regardless.

Longer term, he sees the company's role as extending beyond supplying products to actively shaping how those products are sold, served and understood. "The relationship between our account managers and customers is the most important thing we offer," he says. "When we can support their knowledge, it helps drive better outcomes for their teams and their business."

From the outside, LWC's growth story might look like the result of scale and logistics muscle. But the internal narrative is different: one of listening closely to customer needs, responding with tailored solutions during challenging times, and continually adapting to market changes. **GDI**



LWC revealed its partnership with English vineyard Silverhand Estate in May, and launched Brinkhoff's No.1 in the UK on-premise in August

Generation game: how to win over Gen Z in Europe's on-premise

With shrinking space for brands and reduced footfall, Gen Z drinkers represent the biggest opportunity for the European on-premise. CGA by NIQ's **George Argyropoulos** reports

The current challenging economic environment is increasingly tightening consumers' disposable income and, despite its resilience, the European on-premise sector is feeling the strain. Shifting habits and attitudes towards drinks consumption add another layer of complexity, making this traditionally crucial channel for brand-building even more competitive.

In these challenging times, when space for brands is being squeezed (both on the bar and on the shelf), legal drinking age Gen Z consumers — those born between 1997 and 2012 — are a key demographic to engage for success in the industry.

This largest generation ever (2bn strong, around 25% of the world's population and 17% in the EU) have had their out-of-home consumption negatively impacted by the pandemic, but they remain the wealthiest demographic and are expected to see the highest spending growth in the coming years too.

Of course, successfully engaging with them is easier said than done. CGA by NIQ's recent Nielsen Insider survey found that nearly six in ten drinks industry leaders are unsure how to meet this generation's needs.

Societal and historical changes have shaped this generation to be markedly different from those that came before, making their behaviour — and its evolution — harder to predict. But careful analysis of on-premise-specific insights can certainly help shed light on Gen Z's characteristics, attitudes and needs.

The social factor

The on-premise is a vital space for brands to connect with Gen Z drinkers, as this generation often experiences beverage brands for the first time while enjoying food or drinks out of home. Research from CGA by NIQ's global On Premise User Survey confirms how central pubs, bars, restaurants and cafés are to Gen Z's lives: nearly three-quarters (72%) visit weekly — 16 percentage points (pp) higher than the average



Almost three-quarters of LDA Gen Z consumers visit the on-premise each week and 38% order cocktails

consumer — with numbers even higher in countries like Italy (80%). Encouragingly, Gen Z's confidence in going out is growing: 38% say they plan to visit the on-premise more over the next three months, double the 19% who expect to go less often.

To capitalise on this behaviour, however, brands must first understand the defining trait of this generation: they are the first truly digital native cohort. Technology boomed globally around 2010–11, so most Gen Zers' first mobile phone was often a smartphone. This has resulted in them spending a large part of their lives online.

Social media profiles have effectively become their personal brands, their online appearance as important as their real-life presence. In fact, more than half of Gen Zers (52%) say how they come across on social platforms is very important to them, a factor brand owners must keep in mind when marketing to younger LDA consumers.

CGA by NIQ data show that social media strongly influences spending decisions, with three in five (60%) scrolling through friends' feeds for ideas on where to eat or drink. To capitalise on this tendency and to get their brands in front of Gen Z, companies should identify the venues generating the most social media buzz and where these drinkers end up going for drinks, then focus their distribution accordingly. Brands can also go a

step further by influencing consumer choice at the decision-making stage, ensuring their products are already on young people's radar before they even step out.

But how can this be done in practice? Data provides some insight to inform strategies. Nearly half of Gen Z agree or strongly agree that documenting what they eat and drink on social media is very important, often in a visual format, whether photos or, increasingly, short videos.

Furthermore, nearly half (46%) of Gen Z say they often choose drinks based on how they'll look online, rising to 64% in Germany and 62% in the Netherlands. This means that if brands and operators manage to ensure that what's served looks appealing on social media, this will likely be shared by visitors and, in turn, noticed by their peers.

Essentially, this approach acts as an organic marketing tool for both the venue and the brand. CGA's *Global Bartender Report* reinforces the importance of a drinks' aesthetics, with bar staff ranking social media appeal as the single most important global cocktail trend.

Cocktails on the up

In the key markets CGA by NIQ surveyed, beer remains the leading on-premise choice for Gen Z and 39% drink it. Yet it's notably less popular among them compared to the »

» average consumer (-12pp). Cocktails, on the other hand, are almost as popular with Gen Z (38%) and stand out as their real differentiator, over-indexing by an impressive 11pp versus any other demographic.

And that's not all: cocktails have overtaken beer as Gen Z's top choice in several European markets, including Germany, Italy and the Netherlands. In France, Gen Z chooses cocktails over beer by a margin of 19pp, while in Britain the gap is an extraordinary 26pp.

Perhaps, this isn't entirely surprising, given the importance Gen Z places on aesthetics in out-of-home drinking culture. Cocktails are endlessly customisable — from colours and garnishes to glassware and serving styles — all of which enhance their visual appeal and, in turn, the drinker's social currency on Instagram, TikTok and beyond.

The rise of mixed drinks is also a reflection of Gen Z's appetite for new tastes and brands. More than half have tried a new drink in the past month — 10pp higher than the average consumer — with figures climbing to nearly 60% in markets like France and Poland.

Blending striking visual appeal with a sense of novelty is undoubtedly a winning formula — so long as there's no compromise on quality. When asked about their preferences within a set budget, 57% of Gen Zers would buy one or two high-quality drinks rather than a higher number of lower-quality options. The prioritisation of quality over quantity opens up the potential for premiumisation as an efficient tool to target this demographic.

The sober generation. Or is it?

Moderation has been a major global trend across age groups, and Gen Z is no exception. Nearly a third (31%) of Gen Zers say they are drinking less alcohol than before, while only 15% report drinking more, a net difference of 16pp. While this may seem concerning, it actually helps dispel the 'sober generation' myth, as that 16pp difference is lower than that of the average consumer. In fact, Gen Zers are twice as likely to be drinking more compared to the average European consumer.

What's more, the share of Gen Z consumers drinking less is a potentially highly profitable cohort too, as it can still be engaged through no/low-alcohol options. After all, they're drinking less alcohol, not drinking less overall. In fact, the no/low category ranks fifth in popularity for this generation, just behind beer, cocktails, spirits and wine, and over-indexes by 5pp compared to other demographics. With Gen Z, moderation is an opportunity for brands, not a threat.

Late-night drinkers

Another area where Gen Z clearly stands apart from other on-premise users in Europe is the timing of their drinking-out occasions. Overall, Covid-19 has been a major disruptor for the channel, sparking a shift towards earlier dayparts. Gen Zers are very much in step with this trend when it comes to food-led occasions: three in ten (30%) say they are going out to eat earlier than they were a year ago.

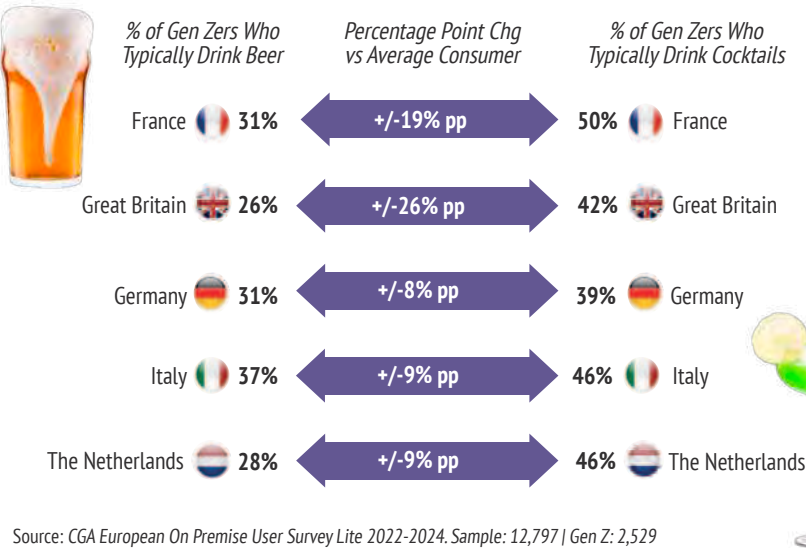
However, when it comes to drink-led oc-

casions, Gen Zers do not follow the same shift. On average, they go out to drink at similar times as before the pandemic, with occasions peaking between 11pm and midnight. This creates a clear polarisation: late-night occasions remain critical for engaging Gen Z, while earlier daypart occasions highlight the need to focus on food-pairing opportunities for brands — both alcoholic and non-alcoholic.

The Gen Z cohort may be complex to fully understand, but when the data is properly analysed and interpreted, the potential for brands is undeniable. Gen Z is the demographic going out most frequently, with many planning to increase their visits to the on-premise. They will make up a significant share of visits in the coming years, so it's essential that brands and operators keep them front of mind and shape their offering around their evolving needs. **GDI**

DATA DROP

European On-Premise Gen Z Beer vs Cocktail Consumption



Source: CGA European On Premise User Survey Lite 2022-2024. Sample: 12,797 | Gen Z: 2,529

Key takeaways

- Almost three-quarters (72%) of Gen Z consumers visit the on-premise weekly.
- In the European on-premise, Italy sees the most weekly Gen Z visits (+82%), followed by France (+71%), Poland (+70%), Germany (+64%) and the Netherlands (+49%).
- Late-night remains a key opportunity for Gen Z, with drink-led footfall peaking between 11pm and midnight.
- 47% of Gen Z agree/strongly agree that documenting what they eat/drink on social media is very important to them.
- 46% of Gen Z agree/strongly agree that they often base their drink choice on what will look good on social media.

Clan Campbell maintains momentum as it builds toward 2m cases

As it celebrates its second year as part of **Stock Spirits Group**, the scotch whisky brand has its sights set firmly on further expansion

It's been non-stop growth for Clan Campbell since it joined Stock Spirits Group just two years ago, with a raft of investment and NPD helping the blended scotch brand quickly gain momentum in existing and new markets.

The acquisition was part of a larger strategy for the group's expansion in Western Europe and has already yielded results, says Stock Spirits CMO Anne Martin.

"Clan Campbell has helped us expand beyond our traditional focus on white spirits and enter the scotch whisky category, which continues to grow globally," she says. "Now a key brand in Stock Spirits' portfolio, it has been launched in all our markets, except our newest – the UK – and continues to grow internationally through third-party distribution agreements."

France remains Clan Campbell's legacy market – indeed, it is the third-largest scotch whisky brand in the market overall, according to IWSR 2024 data. Since the change in distribution in March 2024, the brand has increased its value market share in France to 11.8% and volume to 10.8% (Nielsen Retail MAT 10.08.2025) and it ranks as the third-largest 12yo blended scotch by value and the fourth-largest by volume. In the on-trade, it remains the No.1 scotch whisky brand in France, with almost 35% volume share (Nielsen On-Trade MAT March 2025).

Martin attributes the growth to "broader listings, stronger in-store visibility, stronger promotional campaigns and increased media exposure thanks to greater investment and focus on brand communications".

Stock recently launched Clan Campbell into the "key markets" of Poland, Czechia and Slovakia. "Consumer response has been very positive across both the core expression, Clan Campbell the Noble, and recent flavour innovations," Martin says. "In Poland, that includes Clan Campbell Lime and Honey variants; in Czechia and Slovakia, Clan Campbell Honey and Clan & Cola and Clan & Ginger Ale RTDs."

The releases were underpinned by significant marketing investment, including high-impact PR around launch events –



notably featuring global brand ambassador Torquhil Campbell, the Duke of Argyll and chief of Clan Campbell – as well as strong in-store visibility and consumer activations. The Czech and Slovakian roll-outs were also supported by Clan Campbell's first global advertising campaign, 'Authenticity makes the Clan Campbell'.

Other focus markets for Clan Campbell include Germany, Italy and French border regions, such as Spain and Luxembourg. Meanwhile, the Netherlands, Belgium, Spain's domestic market, West Africa and the Middle East have been identified for future expansion.

Looking to the future

Stock Spirits' "top priority", explains Martin, is to recruit the next generation of whisky drinkers by offering more accessible products whether that's through taste profile, ABV or price point. "Our current flavoured range is meeting that demand and has performed well since launch," she says. "We also have additional flavours in the pipeline."

With younger LDA consumers moving away from large alcohol formats towards smaller options, Stock Spirits has also introduced a 50cl format for Clan Campbell The Noble and 9cl formats for the Honey and Lime variants in Poland.

"Our innovation pipeline is shaped by



Clan Campbell aims to recruit the next generation of whisky drinkers with flavour innovations and new formats

both global and local consumer trends, and we're able to move quickly, thanks to our agile and talented R&D team, whether it's launching exclusives, developing limited editions or fast-tracking new product formats," says Martin.

There are plans, too, underway for a GBP25m malt whisky distillery at Inveraray Castle, which will produce a single malt that will become an integral component of the Clan Campbell blend. The goal, according to Martin, is to bring "Clan Campbell close to the 2m nine-litre-case mark in the coming years".

She adds: "While blended scotch saw a slight decline between 2023 and 2024 (-1.4%), the outlook remains positive, with IWSR forecasting around 1% annual volume growth between 2025 and 2027. Strong responses from both trade partners and consumers reinforce our belief that we can continue expanding the brand internationally and unlock new drinking occasions through our pipeline of innovations.

"Despite the headwinds facing the spirits industry over the past year, we remain optimistic about the future of Clan Campbell. As an iconic whisky brand in France – the world's largest market for blended scotch – it continues to demonstrate strong potential: both in rejuvenating its position at home and expanding into new markets." **GDI**

BCB 2025: three days of inspiration for the bar and beverage industry

As bar owners, bartenders, distributors and manufacturers from more than 90 countries pack their bags for Bar Convent Berlin, we preview what's on offer at this year's trade fair

From 6–8 October, the international bar community will converge at the Exhibition Centre Berlin for Bar Convent Berlin (BCB) 2025, organised by RX Germany. This year's 19th edition introduces “fresh formats, deeper learning opportunities and targeted networking”, reaffirming BCB's position as one of the world's leading trade shows for the bar and beverage industry.

Education takes centre stage with a programme shaped under the direction of BCB director of education Priyanka Blah, working closely with the BCB Education Board — Eleni Nikoloulia, Damien Guichard and Maria Gorbatschova. Content will span strategic discussions, interactive workshops, brand-led sessions and national showcases, with wine receiving dedicated focus through daily sessions covering wine-based cocktails, low-ABV pairings, smart pricing and profitable wine lists.

“This year's programme reflects a thoughtful and well-rounded approach to the challenges and opportunities within the global bar community,” says Blah. “I'm most excited about the diversity of voices and ideas — it's what makes BCB such a powerful platform for discovery and connection.”



Priyanka Blah: 'I'm most excited about the diversity of voices and ideas — it's what makes BCB such a powerful platform



BCB brings together bar owners, bartenders, distributors and manufacturers from almost 90 countries

A standout highlight will be the reimagined BCB Embassy, blending education, tastings and guest experience around daily themes: Low & No (Day 1), Classics (Day 2) and Next Generation (Day 3). Botanical by Alfonse will host the Embassy Bar, creating bespoke drinks inspired by each theme.

“They represent exactly the core message of the concept: giving a platform not only to the brands to have their products showcased in a real bar setting, but also to the bar to express their creativity over the three days of the show,” says Guichard.

“Visitors will get to enjoy drinks served by world-class bartenders from a little town that would not usually be on their radar.”

Debuting this year will be ‘Working Wednesday’, a new initiative dedicated to the next generation of hospitality professionals in partnership with the German Barkeeper Union.

“With Working Wednesday, we're creating a space where the next generation of hospitality professionals can discover the full potential of this incredible industry,” says BCB director Petra Lassahn. “It's about inspiration, opportunity and meaningful connection — both for young talents and the businesses ready to shape the future with them.” (See p68 for more details.)

Meanwhile, the BCB Matchmaking platform makes a return, enabling exhibitors and attendees to pre-arrange meetings with distributors, buyers and innovators — ensuring business is as central as discovery.

With curated learning, global expertise and a collaborative community spirit, BCB 2025 promises to be a space where ideas, trends and connections set the tone for the next era of hospitality.

Over the next few pages is a selection of some of the most enticing stands to visit over the three days. >>

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» Arette Tequila

Stand 17A06

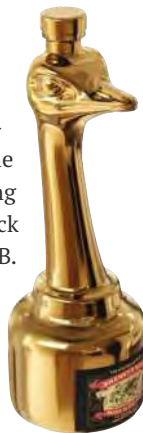
Arette Tequila marks a milestone year with the 125th Anniversary of El Llano Distillery, Mexico's third-oldest and the oldest still family-owned, founded by the Orendains in 1900. To celebrate, Arette will unveil Aniversario 125 at BCB Berlin — a blanco tequila rested seven years in glass, aged in El Llano's original cooking oven unused for over four decades. Crafted from estate-grown Blue Weber agave and distilled using traditional methods, Arette remains proudly additive-free. Now led by the fifth generation, the brand "carries forward

its legacy of heritage, authenticity and quality". Visitors to the Arette stand will be able to taste this rare release.

Biggar & Leith

Stand 11.2C49

Biggar & Leith will showcase Shanky's Whip — The Golden Ostrich, a striking limited edition of its black Irish whiskey liqueur, at BCB. Presented in a ceramic ostrich-head bottle finished in metallic gold, each numbered piece contains the brand's signature blend of Irish whiskey, spirits, caramel and vanilla, delivering "rich notes of toffee and spice". While not destined for travel retail, the launch underscores Shanky's rapid international growth, now present in over 70 markets. BCB visitors can also discover the brand's convenient 10cl cans, which the brand says "extends its playful personality to new drinking occasions".



De Kuyper Royal Distillers

Stand 18D37

De Kuyper returns to BCB Berlin with a focus on premium premixed cocktails, including a new line of 0.0% alcohol variants that expand choice for mindful consumers. Alongside these, the brand will highlight its extensive cocktail liqueur portfolio, designed to inspire both professional bartenders and cocktail enthusiasts. Show attendees can expect fresh flavour ideas and practical serve suggestions that bring creativity to every glass. "We look forward to reconnecting with bartenders and industry friends while sharing new cocktail inspirations," says De Kuyper global marketing director Godelief van Erve. »



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Cucumber Celery Olive



Havana Club

Stands 20A07 & 20A11

» Havana Club will showcase the full breadth of its Cuban rum portfolio at Bar Convent Berlin with two stands: the prestige Icónica Collection at 20A07 and the core range at 20A11 within Pernod Ricard's 'Sip' initiative. Highlights include Havana Club 3 Años, the RTD range and the Icónica Collection, culminating in the first tasting opportunity for the limited-edition Tributo 2025. Global brand ambassadors Alfredo Guerra and Liam Holyoak-Rackal, alongside *maestro del ron cubano* Asbel Morales, will engage with the bartending community and underline Havana Club's commitment to industry partnerships.

La Martiniquaise-Bardinet Stand 20B09

La Martiniquaise-Bardinet will celebrate two milestone anniversaries at Bar Convent Berlin 2025, presenting Saint James rums from Martinique, marking 260 years, and Marie Brizard liqueurs, marking 270 years. Both heritage brands will be showcased at BCB through an exclusive cocktail menu created by a team of bar-



SHOW PREVIEW BCB BERLIN

tenders, highlighting their versatility and enduring appeal. Visitors to BCB are invited to "discover the portfolio and join the celebrations at its stand, where tradition meets contemporary cocktail culture".



Luxardo

Stand 18C07

Luxardo will spotlight five lines gaining strong traction: Limoncello, Aperitivo, Espresso, Del Santo and its new Cocktail »

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» Bitters. Luxardo Limoncello, says the company, is “bright, zesty” and ideal for spritzes, sours or as a chilled digestivo, while Aperitivo “brings citrus vibrancy with herbal depth”, making it ideal for both a classic spritz or refreshing pink grapefruit serve. Luxardo Espresso Liqueur “delivers rich coffee intensity” for cocktails like the espresso martini, while Del Santo Herbal Liqueur offers “layered botanicals and a balanced bittersweet profile”. Finally, Luxardo says its aromatic-infused cocktail bitters range provides “precise, bartender-focused tools to refine and elevate both classic and modern serves”.

Maison Ferrand Stand 18A07

Maison Ferrand brings three decades of French spirits expertise to BCB, led by master blender Alexandre Gabriel. Founded in 1989, the company is home to Ferrand Cognac, Citadelle Gin and Planteray Rum (formerly Plantation), alongside acclaimed liqueurs rooted in 19th-century recipes. BCB visitors can explore a portfolio that spans the Caribbean, Charente and beyond, with projects as bold as ‘Barge 166’, a floating cellar on the River Seine. On stand 18A07, the team will showcase flagship brands and new releases, offering an opportunity to meet Gabriel and “discover a house renowned for creativity, heritage and global reach”.



Monkey 47 Stand 20A11

Monkey 47, the ultra-premium dry gin from Germany’s Black Forest, is “celebrated worldwide for its complexity and distinctive character”. Crafted from 47 “carefully selected botanicals”, the Pernod Ricard brand is a firm favourite in leading cocktail bars. At BCB, Monkey 47 will once again present its annual Distiller’s Cut — a rare, limited-edition release that adds a unique twist to the original recipe. Show attendees

can sample this collector’s item alongside chef-inspired edible cocktails to “experience the creativity and precision that make Monkey 47 a standout in the gin category”. For its 15th edition, Monkey 47 will also present a dry gin refined with precious Fleur de Sel — hand-harvested sea salt crystals from the Camargue à Under.



Mont Blanc Vodka Stand 17A34

At this year’s BCB, Mont Blanc Vodka will showcase its ultra-premium range “inspired by the purity and elegance of Europe’s highest peak”. Distilled with “pristine water from Angeac-Champagne and fine Picardy wheat”, the vodka delivers “a smooth, rounded texture with delicate mineral notes, setting it apart in the category”. The bottle design reflects alpine glaciers, reinforcing its link to nature and clarity. Alongside the core expression, visitors can explore the Botanical line featuring Grapefruit & Rose and Cucumber & Mint, created for versatile cocktail serves. Together, the collection captures French refinement with a contemporary edge for discerning spirits enthusiasts.



Navy Island Rum Stand 20A32

Navy Island Rum will use the German on-premise show to debut Caña Mística, a new brand created to meet shifting consumer expectations in the rum category. Positioned at an accessible price point, Caña Mística “balances approachability with authentic Caribbean character”, aiming to connect with a new generation of rum drinkers. Also on show will be the Navy Island PX Sherry Cask Finish, the latest release in the Cask Finish series, which combines Navy Island Jamaican rum with the depth and sweetness of Pedro Ximénez sherry casks.



Noblewood Group Stand 20C34

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

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D'YAVOL





» Ramsbury Distillery Stand 18B12

Ramsbury Distillery will highlight the German finalists of its global Martini Masters competition at Bar Convent Berlin 2025. Guests can sample signature serves from the 'Disco Edition' finale, each offering a playful twist on the classic martini while showcasing the skill and creativity of Germany's top bartenders. "Visitors can expect more than just a martini," says Mikul Kalyan, global brand ambassador, "they'll experience Ramsbury's commitment to outstanding taste, fresh ideas and sustainability — all brought together with a vibrant, disco-inspired energy."

SHOW PREVIEW BCB BERLIN

Spiribam Stand 18A08

At BCB this year, Spiribam introduces Shak.r, a ready-to-drink concept that lets you shake the cocktail directly in the can before serving. The range features four bar-quality classics — Espresso Martini, Pornstar Martini, Strawberry Daiquiri and Margarita — crafted with premium spirits and carefully selected ingredients. Designed for hospitality professionals,



high-traffic venues, caterers and consumers at home, Shak.r offers "consistency, speed and convenience without sacrificing taste". Each 12.5cl can (14% ABV) is available in 12-packs, combining efficiency and flavour in a sleek, portable format.



Spirit France

Stands 20B20 & 11.2B05

Spirit France will spotlight its calvados expertise at Bar Convent Berlin this »



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»October, showcasing three leading houses: Père Magloire, Boulard and Lecompte. At the IDAC stand (20B20), visitors can explore a broad portfolio, from Père Magloire's Islay Cask Finish to Boulard XO and the limited 200 Years Edition, alongside Lecompte's 12yo and 18yo aged expressions. At the Schlumberger stand (11.2B05), Boulard will feature in a dedicated corner, with the team hosting a 30-minute masterclass to mark the brand's bicentenary and "offering a unique journey into two centuries of calvados tradition and its evolving place in global spirits".

Tapi Group Stand 11.2C15

Tapi Group will highlight its diverse closure collections at this year's Berlin show, positioning closures as an integral part of the drinking experience. The Craft World range offers "warm, tactile designs" in wood and aluminium, while Style World introduces "bold looks with advanced

polymers and shimmering textures". Status World focuses on "sculptural elegance", Gourmet "delivers precision pouring and Planet addresses lower-impact



solutions. Alongside, Les Bouchages Delage will present Explore, Extra and Exquis — three ranges spanning lighter-footprint options to bespoke luxury and transparent designs. Visitors are invited to experience the materials and finishes first-hand at the stand.

The Bitter Truth Stand 17C22

The Bitter Truth will return to the show, recreating a classic soda fountain-style bar for this year's showcase. A highlight will be the new Hazy Hops Bitters, designed to elevate non-alcoholic serves with a distinctive and unexpected flavour profile. Visitors will also have the chance to sample the brand's full bitters portfolio »



Family owned distillery since 1700



» throughout the event. Founders Alexander Hauck and Stephan Berg will be on hand at the stand, welcoming guests for tastings, conversations and a light-hearted dive into the world of cocktail culture and flavour exploration.

Tovaritch!

Stand 18B04

At BCB 2025, Tovaritch! will debut a 50cl bottle format designed for convenience, portability and reduced waste. Visitors will also get an early look at the brand's 3L eco-pouches, a forward-thinking packaging solution that aligns with growing demand for sustainable choices. Both launches reflect Tovaritch!'s commitment to combining practicality with responsibility, offering the same multi-award-winning vodka in formats that suit modern lifestyles while reducing environmental impact.



Vagabund Brauerei

Stand 11.2C41

Vagabund Brauerei has been part of Berlin's modern beer movement for nearly 15 years, founded by three Americans determined to bring contemporary international styles to the city. What began as a crowdfunded project is now a well-established brewery with a diverse range that reflects both local flair and global trends. At BCB, Vagabund will present classics such as Pils and India Pale Ale, alongside innovations like Flâneur Cider and the alcohol-free Nomad Hopwater. Visit stand 11.2C41 to explore a line-up that captures the refreshing, independent spirit of Berlin's craft beer scene.



Discover who else is exhibiting at www.barconvent.com



A key element of Working Wednesday is its emphasis on the next generation

How to make the most of 'Working Wednesday' at Bar Convent Berlin

Bar Convent Berlin has long been a meeting point for the global bar and spirits industry, combining discovery, education and business. This year, the third day of the show — 8 October — takes on a sharper focus with the launch of 'Working Wednesday', designed to highlight networking, career opportunities and the industry's future direction.

Traditionally quieter than the opening two days, Wednesday is ideally suited for meaningful conversations and targeted business. The calmer atmosphere allows exhibitors and visitors to step back from the hustle, creating space for in-depth discussions, strategic meetings and new partnerships. To make the most of this, BCB encourages exhibitors to schedule key appointments on Wednesday, using the dedicated matchmaking platform to connect with buyers, distributors and potential collaborators.

A key element of Working Wednesday is its emphasis on the next generation. In partnership with the German Bartender Union, BCB invites graduates and trainees to attend, providing them with a platform to engage directly with employers. Exhibitors can tap into this talent pool by showcasing career opportunities,

involving HR teams and presenting themselves as attractive employers — a timely step given the industry's on-going skills shortage.

For young professionals, the initiative offers more than insight into bartending. The day highlights the diverse career paths across the wider drinks sector, from product innovation and brand-building to marketing and business development. This future-facing agenda is reflected in the BCB Embassy's Next Generation theme, with Botanical by Alfonse curating bespoke drinks and a stage programme dedicated to business and innovation.

"We are so incredibly lucky to have Botanical by Alfonse backing the Embassy Bar this year," says BCB ambassador Damien Guichard. "They represent exactly the core message of the concept: giving a platform not only to the brands to have their products showcased in a real bar setting, but also to the bar to express their creativity over the three days of the show."

Whether you are a brand, bar professional or newcomer, Working Wednesday is about building connections that count. By taking part, you not only strengthen your own network, you help shape the industry's future. **GO!**

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NEW YORK INTERNATIONAL SPIRITS COMPETITION, TEXAS AMERICAN SINGLE MALT DISTILLERY OF THE YEAR, BALCONES DISTILLING, 2025. NEW YORK INTERNATIONAL SPIRITS COMPETITION, TEXAS 1, DOUBLE GOLD, 2025. NEW YORK INTERNATIONAL SPIRITS COMPETITION, LINEAGE, DOUBLE GOLD, 2024.



VIEW FROM THE ON-PREMISE

Charlie Mitchell

Times are tough for the drinks industry, but hospitality is entering a golden age — let's empower those who deliver it

By most measures, the on-premise is having a tough time. Bars are closing, margins are threadbare and global drinks companies are posting, at best, sluggish figures. But there is one area, albeit unquantifiable, that bucks this trend, the art of — and the need for — hospitality.

Yes, both the execution of, and the demand for, hospitality experiences across the globe has arguably never been as high.

Walk into any bar in any city in any country and chances are that you will be served a good drink and you will be served by a good bartender. You'll have a good range of options of products to choose from and, if you so wish, your server will transform said products into a delicious concoction that you could only dream of making yourself.

If you want to chat, the barkeep will oblige, and if you don't, that's fine too. You will likely be well looked after, and you will likely have a good time. It's the basics of hospitality, but it's those basics that get us hooked and it's those basics that have never been more ubiquitous. We don't know how good we've got it.

Demand, too, is growing. Amid a back-drop of financial pressures easing for the masses, a revival of in-person connections and a renewed desire to disconnect from the outside world or the world on our devices, hospitality is perfectly placed to ride a wave into what may be an epoch of greatness.

Indeed, CGA by NIQ's latest global research highlights a clear correlation between consumers' financial positivity and their intention to increase visitation to the on-premise sector.

The biggest factor in that intention to revisit isn't the quality of food or drinks, it is the quality of experience. Yes, it is the fundamentals of hospitality that both stimulate demand and go on to fulfil that demand. Therefore, if, as a sector, we are to execute the fundamentals with



It seems like a no-brainer: invest in bartender and hospitality training and reap the rewards

consistent excellence, a virtuous cycle will form to deliver the golden age of hospitality.

Nevertheless, no matter how well the macro trends align to fuel demand, it takes a skilled workforce to deliver, and it is the hospitality professionals — the stars of this particular show — who are critical to its success and who, in my opinion, remain overlooked and under-invested in, given the vital role that they play.

An investment in hospitality staff is more than just an investment in the individual, it is an investment that pays off in a myriad of manners, unlocking a five-way win.

Firstly, of course, the individual benefits. The bartender, waiter, maître d' or sommelier gains valuable knowledge and skills that help them fulfil their role more proficiently. This in turn means that the venue itself wins, gaining a more proficient and effective workforce who are more engaged with their role and, by extension, less likely to take up offers of employment elsewhere. Win No.2.

The third win comes to the suppliers (usually drinks brands) who invest to provide exceptional training and are rewarded with staff serving their products

perfectly, recommending their brands and, ultimately, delivering a return on investment in the form of sales.

The guests themselves are on the receiving end of the fourth win, enjoying their perfectly served drinks and expertly serviced hospitality, which unlocks the fifth and final win, that of the on-premise channel itself. The sector benefits from a workforce of better-skilled employees, who want to build careers in the sector, alongside a more engaged consumer base.

It seems like a no-brainer then. Invest in bartender and wider hospitality training and reap the rewards. However, the data suggests that this is not occurring as efficiently, or as widely as possible.

CGA by NIQ's recent report with industry community Celebrate Her and hospitality training platform Allara Global found that just 29% of professionals feel that they receive adequate training for all necessary aspects of their roles. In other words, we are failing 71% of the workforce that we task with delivering the drinks, experiences and memories that keep people coming back.

The five-way win is being turned into a five-way own goal, the virtuous cycle is cycling in reverse and, rather than a golden age, we are living through a period of mass closures and poor sales performance.

It is the frontline who will turn that performance around, yet we are failing them. We need to understand their requirements better and we need to offer solutions.

If we do that, we will empower a high-potential workforce to deliver great hospitality experiences over-and-above their already high standards. Hospitality professionals are hospitality's greatest asset — let's unleash it. **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

MEET US AT BCB STAND 20A07



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