

global drinks

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THE ON-PREMISE ISSUE | OCTOBER 2024



CELEBRATING UNFORGETTABLE MOMENTS,
MAKE IT A LYRE'S.

A toast to excellence: Lyre's ranked the world's No.1 non-alcoholic spirits brand

A trailblazer in the world of no/low drinks, Lyre's was recently named the No.1 non-alcoholic spirits brand in the global on-premise. Now its award-winning Classico Grande Sparkling is also gaining plaudits

Non-alcoholic drinks specialist Lyre's has rapidly become one of the global leaders in the non-alcoholic category. Launched in Australia five years ago, the brand is now available in more than 60 countries.

It offers an extensive spirits range — including everything from a Pink Gin and Amaretti, to an Agave and lots more — as well as wine, with its Classico Sparkling no-alcohol offering, and canned RTD variants, such as G&T, Amalfi Spritz, Classico, Margarita and Dark 'N Spicy.

Lyre's was recently ranked as the No.1 non-alcoholic spirits brand stocked in the global on-premise — 24% of the world's top bars nominated it as the best-selling non-alc brand when polled for the *Drinks International Brands Report 2024*. Lyre's also took top spot in the survey of 100 leading bars for being the No.1 'top trending' non-alc brand.

The brand attributes much of its success to its wide portfolio which "can recreate 80% of the world's leading cocktails", enabling it to "make its mark in the vibrant world of restaurants and bars".

Jacco van Vliet, the company's SVP for Europe, says: "Lyre's has been embraced by many of the world's top 50 bars, including acclaimed venues across North America, the UK, Europe, Asia-Pacific and the Middle East. Leading venues across these markets are incorporating Lyre's into their offerings, recognising the potential to elevate the non-alcoholic cocktail experience.

"Bartenders and mixologists are leveraging the brand to craft innovative and sophisticated non-alcoholic cocktails, enhancing the drinking experience for patrons who seek elegance without alcohol."

The company moved into wine alternatives with the launch of Lyre's Classico Sparkling, a non-alcoholic prosecco-style drink, at the end of 2019.

"Celebrated for its remarkable quality and refined taste, Lyre's Classico Sparkling has quickly risen to prominence," says David Murphy, Lyre's VP product. "Crafted with meticulous attention to detail, the 75cl Classico Grande delivers a sophisticated



Elegance without alcohol: Lyre's Classico Sparkling and Italian Spritz

sparkling experience that mimics the nuances of a traditional brut, without the alcohol. It's quickly becoming one of the top-selling SKUs for the brand globally as venues seek a premium non-alc sparkling option for their patrons and guests.

"Its elegant bubbles and crisp, refreshing taste make it a perfect match for toasts and to celebrate milestones."

A perfect fit for every occasion

The rise in popularity of Lyre's reflects broader consumer trends towards more mindful drinking choices, with 64% of consumers across the top ten no/low beverage markets (Australia, Brazil, Canada, France, Germany, Japan, Spain, South Africa, the UK and the US) moderating their alcohol consumption.

The company's EU marketing lead, Benedicta Tornieri, explains: "As global awareness of health and wellness continues to grow, consumers are increasingly seeking premium non-alcoholic options that do not compromise on taste or quality. Lyre's has successfully captured this market shift by providing a product that meets the highest standards of flavour and sophistication."

Lyre's "sophisticated profile" and versatility make it an ideal choice for a diverse range of occasions, from weddings and milestone

anniversaries to corporate galas and charity functions. "Event organisers and hosts are increasingly opting for Lyre's as a premium staple to ensure all guests can partake in the celebratory spirit without compromising on style or taste," adds Tornieri.

The brand is also seeing success in the culinary world, as top restaurants increasingly recognise the value of offering high-quality non-alcoholic beverages.

Murphy says: "Lyre's Classico Sparkling is now a staple on the menus of renowned dining establishments, where it pairs beautifully with gourmet dishes and provides diners with a premium alcohol-free option. This trend highlights a growing consumer demand for inclusive dining experiences and demonstrates Classico's role in setting new standards for non-alcoholic options in fine dining."

Lyre's dedication to excellence in the non-alcoholic spirits market is evident in its success, adds Van Vliet. "Each bottle embodies the brand's commitment to craftsmanship, using the finest ingredients and traditional techniques to create a product that stands out in both taste and presentation."

It is clear that this award-winning non-alcoholic brand will continue to define the no/low category around the world. **GDI**

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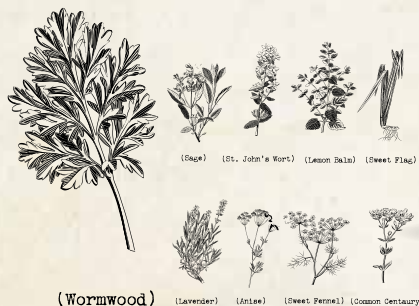
The on-premise issue

*Explore the latest innovations shaping mixology
with the bartenders behind them*

NO1 PREMIUM CROATIAN BITTER

ORIGINAL
RECIPE SINCE
1862
CRAFTED LEGEND

40
NATURAL HERBS,
FRUITS, ROOTS
AND BLOSSOMS

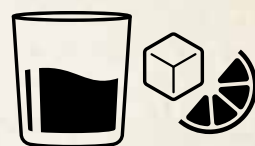


ALL NATURAL

NO ARTIFICIAL FLAVOURS,
NO ADDED AROMAS

100%
BOTANICALS
OF MEDITERRANEAN
ORIGIN. FOUR STEPS
CRAFT PROCESS

UNIQUE
& PERFECTLY
BALANCED



PERFECT SERVE
ANTIQUE
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COMMENT

Laura Willoughby

Alcohol consumption is changing. Adapt and you'll set your venue apart as a forward-thinking, inclusive destination

Alcohol consumption is changing, and this presents an opportunity for your venue to capitalise on a growing movement. As of 2023, 2.6m fewer UK adults are drinking alcohol weekly compared with 2021, according to KAM Insight's *Low & No 2024* report.

However, this decline doesn't suggest people are giving up alcohol altogether. Instead, they're moderating their consumption in more deliberate ways. Some are switching to lower-alcohol options, designating alcohol-free days or incorporating alcohol-free drinks into a night that also includes traditional alcoholic beverages. A rising trend known as 'zebra striping' sees consumers alternating between alcoholic and non-alcoholic drinks throughout the evening.

What's vital to understand is that the biggest buyers of alcohol-free drinks are often people who still drink alcohol. So the question becomes: What will your venue offer them when they choose not to drink or when they want to moderate their drinking?

To stay competitive and appeal to these customers, your venue could reflect this growing demand by enhancing its alcohol-free offerings. The choice is simple — do you want guests sipping on uninspired cola all night, feeling disconnected from the experience, or do you want them engaged and excited to explore your range of alcohol-free beer, cocktails and spirits? Offering more thoughtfully curated alcohol-free options can create a more inclusive atmosphere for everyone.

Embracing this shift could not only attract new guests to your venue, but also maximise the spending of your existing customers. Think of the potential upsell when you recommend an alcohol-free beer or a zero-alcohol gin-and-tonic instead of a standard soft drink.

There's a healthy profit margin on alcohol-free cocktails, and customers will often spend more willingly if the drink elevates their overall experience. Vagabond Wines head of drinks Freddie Cobb says a menu overhaul to include more alcohol-free options has increased group bookings at the UK chain of wine bars. It's



important to note that the key to success in offering alcohol-free drinks lies in creating equality of experience. When guests come to your venue, they expect a unique, memorable experience — something they wouldn't easily get at home.

On Virgin Atlantic, where all drinks are free, the alcohol-free drinks offering is seen as a key part of creating a brilliant and different customer experience. The carrier offers sophisticated non-alcoholic cocktails and botanical spirits with Three Spirit, as well as zero-ABV craft beer, alongside a 'feel-good' range allowing passengers to enjoy a refined drinking experience without alcohol. From this month, it will offer Lucky Saint alcohol-free lager across the entire cabin.

It is clear that alcohol is no longer the star of the show when creating memorable experiences. Whether abstaining from alcohol for lunch or choosing to have a no-alcohol night, customers still want the same level of quality, expertise and presentation that comes with alcoholic drinks. They're willing to pay the same price for a well-crafted alcohol-free option if it meets these expectations. Venues that offer an exceptional range of alcohol-free drinks have reported increased profits, stronger customer loyalty and glowing reviews.

Broadening your venue's no/low offering is also about catering to different occasions. Your alcoholic drinks menu likely caters to a range of preferences and situations, from casual to celebratory. Why not extend that

same philosophy to alcohol-free options?

If your bar stocks a full-strength lager, IPA and stout, it's easy to find alcohol-free versions of those beverages. If you pride yourself on a curated wine list, consider adding alcohol-free wine that pairs well with food. If your venue is known for its cocktails, ensure the same care and creativity goes into crafting alcohol-free versions. There is no excuse; there is a wide variety of low and no-alcohol beverages, including ready-to-drink cocktails, that can elevate your menu and entice customers.

Customers' expectations of what is on offer when you are not drinking is low, so don't assume guests know about your alcohol-free range — highlight it! Make sure your staff are knowledgeable about your offerings and empower them to recommend these drinks. Set targets for up-selling customers from basic sodas or tap water to premium alcohol-free beverages.

Make your alcohol-free offerings visible. Consider having a dedicated section on the menu for alcohol-free options. You can also use chalkboards, tent cards, posters or video screens to spotlight what you have. Ensure that your venue promotes alcohol-free drinks just as prominently as alcoholic ones. Offer non-alcoholic alternatives during specials, like happy hours, and create themed drinks menus for occasions such as lunch or weeknights, focusing on your alcohol-free selections.

Finally, don't forget about digital promotion. Make sure your website and Google listings include your alcohol-free options. This can attract local customers searching specifically for alcohol-free drinks, ensuring that your venue pops up in their search results.

By adapting to this trend, you not only meet the evolving needs of your customers, but also set your venue apart as a forward-thinking, inclusive destination. **GDI**

Laura Willoughby MBE is the founder of the world's largest mindful drinking specialist, Club Soda. Experts in alcohol and behaviour change, Club Soda also runs The Tasting Rooms, a space for the trade to try and buy no/low-alcohol drinks in Covent Garden. Find out more at joinclubsoda.com or [@joinclubsoda](https://twitter.com/joinclubsoda)

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Virtuous Vodka is a organic rye vodka, handcrafted in Sweden. Flavored thru maceration with real fruits and botanicals.



"Offers an unusual nose with distinct rye nuances. There's floral orange blossom and ripe cherries, plus some layers of candied sweets. The palate is incredibly smooth and the finish really lingers."

- THE IWSC EXPERT JUDGES -

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All the Virtuous flavours are crafted with real organic fruits and botanicals, through a flavouring method called maceration. This traditional Nordic method of flavoring means steeping the organic raw ingredients in organic rye vodka to achieve the desired taste profile and intensity. This is how we achieve a naturally authentic flavour and aroma for all our flavoured vodkas. Whether you're a bar professional or consumer first dipping your toe into the category, you can't help but see, smell and taste the Virtuous difference.



No Additives

All our products are made with organic and high quality natural ingredients only. No flavor essences. No additives. No artificial ingredients. No sugar or other sweeteners. Gluten Free and Vegan of course.



The Beginning

Virtuous Vodka was created by Swedish chef and visionary Claes Stenmark in 2012. Driven by a passion for exceptional cooking, curiosity, and an irresistible desire to create something extraordinary, he embarked on creating his own vodka. In his home lab, he experimented with organic rye, eventually perfecting his recipe. Drawing from childhood memories of foraging with his grandfather, Claes adopted the traditional Nordic method of flavoring, maceration, to infuse his vodka with authentic taste.

Virtuous Vodka was born - a brand that not only stands for quality and innovation but also celebrates Nordic flavoring traditions. Every drop of Virtuous Vodka is a tribute to nature's unparalleled ability to create genuine taste experiences.

Web: virtuousspirits.com
Facebook: facebook.com/VirtuousVodka
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MARKETING TRENDS

Chris Tyas

The drinks industry is overlooking its biggest growth driver — CMOs should be leading the boardroom conversation

Amid the deal-making and speculation that has characterised the global drinks industry in recent months sits an uncomfortable truth — the drinks industry is overlooking its biggest driver: marketing.

Major alcohol conglomerates are chasing growth at a tough time, what with the industry currently beset by challenges including high costs, lower yields of raw materials and the rise in sober-curious consumers turning from spirits to other no/low-alcohol options.

But their response — a blinkered focus on acquisitions and buying into new markets — is way off the mark.

For proof, consider the speculation around a potential Diageo sale when the spirits giant posted its first sales decline (-1.4%) since 2020 in July, driving shares down more than 9% to a four-year low. Then ponder Carlsberg's agreed bid to buy Britvic for GBP3.3bn (US\$4.23bn) to drive growth through the creation of a "UK powerhouse".

Both demonstrate that when it comes to growth, the industry is currently short on ideas. This is because purchasing market share isn't the best way to boost a brand and that's because marketing can be a much more effective strategy.

Despite this, beverage giants aren't turning to advertising to increase their market share, customer base and overall business revenues. The reason for this? I believe it is the ongoing lack of CMOs in the C-suite and at board level.

It's a story told in stats.

Nine in ten CEOs believe the role of

marketing is well-defined and when it comes to understanding modern marketing, 50% of CEOs feel comfortable with it, according to research by McKinsey.

Yet a staggering 66% of CMOs believe CEOs don't comprehend it.

This disconnect, paired with lack of marketing experience among Fortune 250 CEOs — just 10% have marketing backgrounds — demonstrates an underestimation of marketing's wider business-driving potential, the same report shows.

Worse still, only 2.6% of board members from S&P 1500 firms had executive-level marketing experience (over a six-year period), according to research published in the *US Journal of Marketing*.

Meanwhile, just 26% of CMOs regularly attend board meetings, according to a separate study by Deloitte.

While other sectors have long recognised the power of marketing to grow brands, many in the alcohol category still perceive advertising as a fluffy add-on rather than a powerful growth driver.

In commoditised industries such as energy, businesses understand the power of branding to differentiate and grow share. Earlier this year, for instance, Octopus Energy became the UK's largest energy supplier just eight years post-launch, thanks to its investment in brand-building.

In travel, Airbnb's decision to move its spend into brand-building returned the brand to profit.

Pre-pandemic, its marketing strategy was mostly performance-driven. But a switch to big brand campaigns with a focus on upscaling education boosted both direct bookings and retention, and delivered the travel accommodation company's most profitable fourth quarter (revenue +24% year on year).

AB InBev leads the way in the drinks industry, with its investment in marketing as a growth driver resulting in its beer brands becoming the most valuable in the world.

Its Corona brand, for example, is the most valuable beer brand globally follow-

ing a 40% brand value increase, according to Kantar's recent BrandZ rankings, with a valuation exceeding US\$19bn.

Other AB InBev brands in the top ten are Budweiser, the second most valuable beer brand in the world; Modelo comes in fourth; Brahma, fifth; Michelob Ultra, sixth; Bud Light, seventh; Skol, eighth; and Stella Artois, tenth.

With its focus on creative excellence to power sustainable business growth — which earned the company the title Creative Marketer of the Year at Cannes Lions in 2023 for the second consecutive year — AB InBev is an exception among drinks multinationals, however, not the norm.

So how do drinks marketers get a place at the top table?

The answer is to have the aspiration to become a CEO, according to Kimberly A Whitler, the Frank M Sands senior associate professor of business administration at the University of Virginia's Darden School of Business.

In a recent *Forbes* article, she identified several traits common to CMOs that become CEO.

These include a commitment to leveraging marketing as a P&L function (as opposed to a staff function that serves the firm's P&L function), and operating in highly competitive markets (providing a more challenging environment to learn how to engineer growth).

Also on Whitler's list is having a sustained track record over time for developing marketing talent and ensuring enterprise-wide learning and leadership.

As economic pressures increase, drinks industry CMOs urgently need to be leading the boardroom conversation. Now is the time for them to step up — and for CEOs to wake up, acknowledge the case for growth-driven marketing and act on it. **GDI**

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



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Drum roll please: The votes are in for the Global Drinks Intel ESG Awards

The winners of the Global Drinks Intel ESG Awards 2024 were announced at a beachside cocktail event during TFWA Cannes on 30 September.

GDI COO & awards organiser Kate Wake-Walker said that following last year's debut, the 2024 iteration attracted an outstanding mix of entries from single-product owners, established brand owner companies and travel retailers.

"What we've worked hard to do with the ESG Awards is provide *GDI* readers with a best-practice sharing platform," she said. "The incredible number of entries we received serves to confirm how essential a strong environmental, social and governance strategy is to the success of both companies and their brands."

The 15 GDI ESG Awards cover a broad range of initiatives ranging from diversity inclusion and responsible drinking, to green packaging, biodiversity achievement and water preservation.

Entries were judged by an eight-strong panel selected for its in-depth knowledge and experience in both the beverage alcohol industry and the ESG arena.

Global Drinks Intel digital editor Olly Wehring and journalists Joe Bates and Kevin Rozario were joined on the panel by mindful drinking specialist & Club Soda co-founder Laura Willoughby, beverage M&A advisor Alex Oldroyd and GTR veteran & emerging-markets spirits business specialist Tim Young.

Independent ESG specialist Andrew Nicholson and Nic Rattle, a PhD researcher & consultant at Oxford Brookes Business School, also lent their expertise to proceedings.

Full coverage of the awards ceremony



and judges' commentaries will be included in the November edition. Until then, here's a look at this year's winners.

Alexander Smith Grand Prix Award for ESG Beer, Cider, RTDs Producer of the Year
Winner: **SXOLLIE Cider**

Sustainable Spirits Product of the Year
Winner: **The Boatyard Distillery**
Special Commendation: **Waterford Distillery**

Sustainable Wine Product of the Year
Winner: **Champagne Telmont**
Special Commendation: **Santa Rita Estates**

Alexander Smith Grand Prix Award for ESG Spirits Producer of the Year
Winner: **Conrad Distillery**
Special Commendation: **The Boatyard Distillery**

Alexander Smith Grand Prix Award for ESG Wine Producer of the Year
Winner: **Australian Vintage**

Best Sustainability Marketing Initiative
Winner: **ADM Agency Diageo for Guinness**

Water Preservation Achievement of the Year

Winner: **Diageo**
Special Commendation: **Heaven Hill**
Special Commendation: **Raincheck Earth**

Waste Reduction Achievement of the Year
Winner: **Tequila Komos**

Green Packaging Initiative of the Year
Winner: **Bruichladdich Distillery**
Special Commendation: **Smurfit for Westrock Bag-in-Box**

Biodiversity Achievement of the Year
Winner: **Waterford Distillery**

Best Responsible Drinking/Alcohol Harm Reduction Initiative
Winner: **International Alliance for Responsible Drinking**
Special Commendation: **Diageo Hungary**

Diversity/Gender Inclusion Achievement of the Year
Winner: **Australian Vintage**
Special Commendation: **Illegal Mezcal**

Global Travel Retail Best Sustainable Product
Winner: **Diageo**

Global Travel Retail ESG Champion 2024 – Brand Owner
Winner: **Brockmans Gin**
Special Commendation: **Raincheck Earth**

Global Travel Retail ESG Champion 2024 – Operator
Winner: **Avolta**
Special Commendation: **Lagardère Travel Retail**

Full coverage in the November edition of Global Drinks Intel



global drinks intel. 2024 ESG Awards



LA HECHICERA

FINE AGED RUM FROM COLOMBIA

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DRINK RESPONSIBLY

US distillers grapple with dynamic change, both at home and abroad

Vast distillery builds, fundamental structural shifts and a changing consumer audience: American whiskey-makers are having to adapt at breakneck speed, discovers **Kristiane Sherry**

“How many barrels do you think you can get from one oak tree?” asks Landon Foster, visitor centre manager at Lux Row Distillers. We’re standing in a filling hall surrounded by new casks just about to embark on their mission as maturation vessels. It’s towards the end of a tour at the enormous Lux Row production complex just outside of Bardstown, Kentucky.

The build project was first announced by the then-family-owned business in 2016. Since then, it’s seen major expansion projects and an acquisition by leading third-party producer MGP Ingredients.

Today it fills 100,000 barrels of American whiskey a year. “No-one know?” Foster continues. The answer is a shockingly small one-and-a-half. To put the production scale in context, Lux Row alone, just one maker, requires over 150,000 oak trees a year to meet its whiskey requirements.

It’s a balmy evening in Kentucky as we spill out from the filling hall to enjoy old fashioned overlooking the tree-lined driveway that leads up to the distillery and its towering rackhouses.

What’s striking is that Lux Row, which makes brands including Ezra Brooks, Rebel and Blood Oath, is far from the only maker of this scale. Heaven Hill’s vast new production complex will eventually produce



Lux Row Distillers fills 100,000 barrels of American whiskey a year at its huge Kentucky production complex

150,000 casks of whiskey a year. Bardstown Bourbon Company also fills over 100,000. That’s before you consider the likes of long-standing giants Brown-Forman, Jim Beam and the many others.

The vast majority of it all is still drunk within the US (67%, according to IWSR data). But that’s changing — and it’s one of the factors fuelling the frantic-feeling building and expansion projects across Kentucky and beyond.

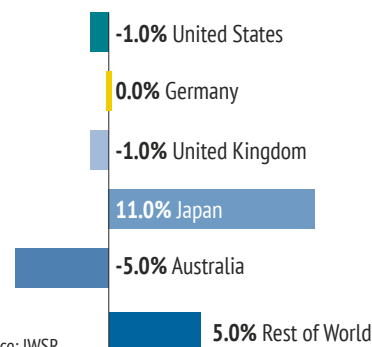
According to the Distilled Spirits Council of the US (Discus), the UK alone imported US\$86m worth of American whiskey in 2023. And it’s not just the sizeable makers contributing. Speaking at a Discus event in London in September, Christine LoCascio, Discus chief of policy, strategy and membership, noted that 38 states are now shipping internationally.

“It doesn’t just come from Kentucky and Tennessee, although a lot of it does come from there, of course,” she said. “It really shows the diversity and the availability and the interest in American whiskey.”

Interestingly, despite the momentum and enthusiasm from distillers large and small, the current landscape is a little more mixed. Volume sales in the US and UK actually slipped by 1% in 2023, according to IWSR.

Germany, the largest export market for American whiskey, was flat, with Australia,

Top 5 Global US Whiskey Markets Chg Vol 2022–23



Source: IWSR

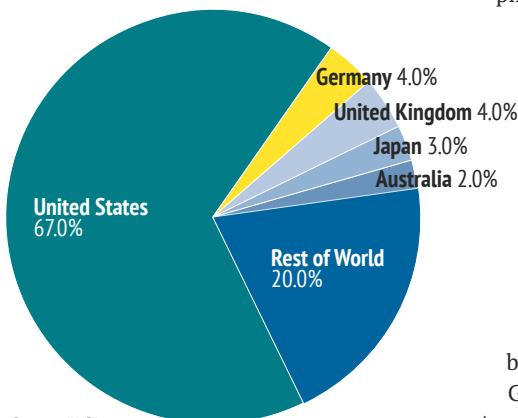
another major importer, seeing volumes slide by 5%. Two bright spots: Japan, which ranks just behind the UK on imports, saw 11% gains. The rest of the world saw a 5% uptick. The general mood in Kentucky? That it’s a small bump in the road. Expansion projects continue apace and few come bigger than the new build at Heaven Hill.

Small international gains ‘beneficial’

Summer in Kentucky brings with it oppressive heat. Giant industrial fans are essential to keep the construction workers cool as they scurry around the Old Bloomfield site.

Just a short drive from Bardstown itself, the walls aren’t even fully up yet. Step inside the shell, and concrete pipework lies ➤

Top 5 Global US Whiskey Markets Market Share (Vol) 2023



Source: IWSR



The Bardstown Bourbon Company (left) 'kind of changed the picture'. Rabbit Hole's modern, industrial, cathedral-like space in downtown Louisville opened in 2018

» uninstalled, in pieces across the unfinished concrete floors. The tanks for what will be a future yeast lab are in place. The stills are just going in. It's dusty work — but productive.

Ground was broken less than two years ago. Commissioning will get under way in just a few months. It's so large that phase one alone is budgeted to hit \$185m. Two more will follow as production ramps up.

Heaven Hill master distiller Conor O'Driscoll proudly shows us around the site. Clad in high-vis and a hard hat, he paces through the hangar-like space with an evangelical-like fervour. For him, it's the thirst for American whiskey domestically that showed a new distillery was going to be needed "by 2024 or 2025". Apparently it was an easy sell to Max Shapira, the Heaven Hill president at the time.

"We put the project into a PowerPoint and put an hour on the calendar," O'Driscoll recalls with a grin. "Twenty minutes in, he'd asked all the hard questions. He put his chair back and said, 'I guess we'll build a distillery'."

The new site will supercharge Heaven Hill's production. But who will drink it? "We have a lot of fans overseas," he continues. "Even a small increase over there is going to be very, very beneficial."

Phase One of the Heaven Hill Springs Distillery on the Old Bloomfield site will open at the end of 2024



'New' older generation of whiskey drinkers

Who exactly is forecast to get a taste for American whiskey? For Donn Lux, chairman & CEO at Lux Holdings, it isn't going to be about recruiting the younger age demographics. While they kicked off the interest in craft distilling and in many ways are already 'won', it's about looking across the age spectrum.

Those with an interest in distilling and the thirst for education and understanding is shifting. "That's translated to the older generation now," Lux says as we sit outside the distillery. "I was here all day, and most of the people were [aged] 45 to 60. That's really interesting. They're fascinated by it, because it's completely new for them."

He agrees that American whiskey growth will come from international markets. "The next great wave for the bourbon industry is international. Jim Beam and Jack Daniel's have done a great job on American whiskey worldwide, and Wild Turkey a little bit. But the rest, people around the world don't really understand bourbon and American whiskey, so our big challenge is to accomplish that over the next ten years."

For Discus's LoCascio, it's important to look at gender diversity too. "I was looking at some statistics that said anywhere between 30%–40% of whiskey consumers are women." You wouldn't necessarily know that from the comms and marketing, she adds.

Changing shapes of the market

It isn't just the shifting demographics that place American whiskey at such a fascinating crossroads. Third-party production models have shifted too. "Contract distilling was rampant in the early 2000s, 2010s," explains Dan Callaway, VP product development at The Bardstown Bourbon Company, as we tour the sleek, modern facility. It was fuelled by the "big guys" selling their excess. "We kind of changed the picture," he says.

Bardstown was the first to meaningfully offer custom distillation rather than contract production. The difference? "We produce over 60 recipes a year, so different

everything, from the yeast, the grain, temperature off, the still, fermentation time — there's 500 points of production that we tweak and adjust." This isn't shifting excess stock; it's making whiskey for partners through a collaborative model. Bardstown makes around 10m proof gallons a year, which, by Callaway's calculations, ranks the maker fifth overall in the US.

Another major change driving Kentucky whiskey tourism was the 2017 law change allowing makers to sell direct to consumers outside of the three-tier system. Whiskey tourism wasn't quite as big then, but now distilleries can serve drinks and sell bottles without going via a third-party distributor.

Bringing whiskey to the masses

A maker that perhaps best sums up the changes in the market is Rabbit Hole. Founded by Kaveh Zamanian in 2012, the company officially opened its distillery — a modern, industrial, cathedral-like space in downtown Louisville — in 2018. Zamanian's vision was to bring whiskey to the masses, creating everything from scratch in a traditional style.

"I wanted Americans to actually get educated on their own native spirit, because when we first started I was amazed how few Americans actually even recognised bourbon as an American spirit," he says as he shows off his architectural whiskey-making space.

"What's changed in the last decade-plus, and in the end, ultimately, it's about entertaining and bringing people together," Zamanian continues. "The idea with the design was transparency, entertainment and education." It's a recipe that worked. Drinks giant Pernod Ricard bought into the distillery in 2019. As of this summer, Zamanian has become chief whiskey officer at the firm's North American Distillers.

The pace of change is astonishing. And, against the backdrop of flattened sales, American whiskeymakers are convinced that the category will continue to grow. There's about to be a lot of new whiskey on the market — one way or another, the thirst needs to continue. **GDI**

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 fifth annual Elijah Craig Old Fashioned Week, from 11–20 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 for 2024. 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. This year it will hop over the pond to the UK, with on-premise venues across two continents uniting to celebrate the Old Fashioned while giving back to their local communities.

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 \$400,000 for organisations that support bar and restaurant workers facing hardship since its inception.

These employees are the backbone of the hospitality industry and Elijah Craig Old



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

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:

■ **US: Southern Smoke Foundation** provides mental health resources and emergency relief grants to service industry workers. In 2023, with the help of Elijah Craig, the foundation provided nearly 1,000 no-cost mental health counselling sessions and distributed nearly \$150,000 in emergency relief grants.

■ **Canada: Bartenders Benevolent Fund** supports bartenders in facing financial hardship or crisis. In 2023, \$25,000 donated from the Elijah Craig Old Fashioned Week was allocated to the Emergency Relief Fund and the Hospitality Workers Mental Health Fund.

■ **UK: The Drinks Trust** provides financial assistance, mental health support and skills development programmes to people working within the hospitality industry. This year, Elijah Craig is proud to partner with The Drinks Trust for the first time to give back to the vital UK hospitality community.

Bars and restaurants that are keen to take part in this year's Elijah Craig Old Fashioned Week can find out how to sign up at

Canvas for creativity Elijah Craig Old Fashioned Week 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 competitions in the US and the UK to showcase their most innovative riffs on the classic serve. Winners will receive a prize of \$15,000 in the US or £1,000 in the UK. The US winner and semi-finalist's cocktails will be published in the upcoming *Elijah Craig Cocktail Book*, while the winning UK cocktails will appear on prestigious drinks website [Diffordsguide.com](https://diffordsguide.com). Join Elijah Craig in celebrating the Old Fashioned, supporting a worthy cause, and experiencing the artistry of mixology.

[Visit OldFashionedWeek.com](https://OldFashionedWeek.com)

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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*Elijah Craig will donate \$1 for every Old Fashioned sold during Old Fashioned week (up to \$100,000) to the Southern Smoke Foundation in the USA; \$1 for every Old Fashioned sold during Old Fashioned week (up to \$25,000) to the Bartenders Benevolent Fund in Canada and £1 for every Old Fashioned sold during Old Fashioned week (up to £10,000) to The Drinks Trust in the UK, which empowers, develops and supports the drinks and hospitality workforce.

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Drink Wisely.™

Punching above its weight: Why white rum deserves a second look

Is white rum simply a bland, mass-produced base for cocktails, as many believe? **Joe Bates** dispels some misconceptions about a spirit that's too often dismissed as 'entry-level'

Too long seen as a low-quality mixer, white rum is ripe for reinvention. Many bartenders and aged rum drinkers dismiss white rum as cheap, synonymous with mass-produced brands, lacking in complexity and age and associated with omnipresent cocktails such as the mojito, cuba libre and piña colada. Many of these preconceptions are rooted in long-standing regional and historical preferences.

In the Caribbean and South America, aged rum has long been considered the 'premium' choice, often reserved for special occasions or consumed as a sign of status. By contrast, white rum has historically been considered a more fun, everyday spirit, perfect for tropical, sweet, fruity cocktails and punches — a world away from the complex dark aged rums savoured like single malt whisky or cognac.

The long charge sheet against white rum contains many holes, of course. It's inaccurate to say all white rums are unaged. Many are, but others are cask-aged for short periods to mellow their flavour. Other styles are aged for years and charcoal-filtered to remove any trace of barrel-imparted colour, much like a cristalino tequila.

An example of an aged white rum is Havana Club Original Añejo 3 Años, the entry-level expression of the Cuban rum



UK-based Hattiers Rum sources and blends aged and unaged rums from distilleries across the world

brand. Global marketing director Nathalie Parte emphasises that the ageing process of this rum sets it apart from many other light rums in the marketplace. "The minimum three years of ageing imparts the liquid with sophistication and depth rarely found in the subcategory," she says.

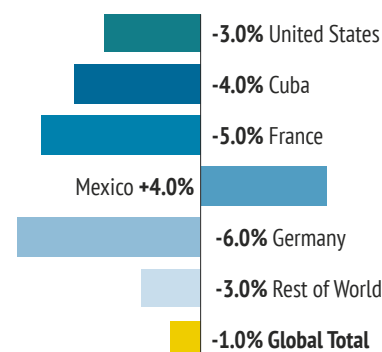
Huge opportunities

Another common criticism is that white rum is bland and lacks innovation compared with other styles. "There's a huge opportunity to do more with white rum," argues Shavinraj Gopinath, beverage manager at the Casa Sol restaurant at the Maxx Royal Bodrum Resort in Turkey. "Brands are creating white rums primarily as a house pour, entry-level products before they go into aged products, but there's so much more to do in the market with the category."

However, examples of premiumisation and innovation, especially among smaller craft producers, are not hard to find. Devon-based Hattiers Rum, the first British B Corp-certified rum, produces Eminence Blended Aged White Rum, a blend of aged and unaged rums from Australia, Jamaica, Trinidad and Barbados. It is one of the brand's key expressions and a gold medal winner at the International Wine & Spirit Competition.

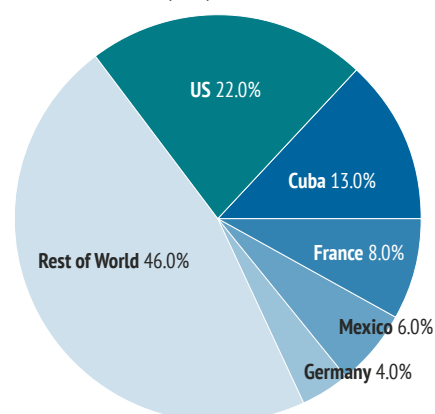
"By barrel-ageing our rum, we infuse it with layers of complexity that only time in

Top 5 Global White Rum Markets Chg Vol 2022–23



Source: IWSR

Top 5 Global White Rum Markets Market Share (Vol) 2023



Source: IWSR

wood can bring," explains founder & CEO Philip Everett-Lyons. "Through careful filtration, we can remove the colour while preserving those rich, nuanced flavours. The result is a white rum that delivers the best of both worlds — the crispness and versatility you expect from a white rum, combined with the depth and character typically found in darker spirits. This also makes it perfect for mixing, adding bags of flavour to cocktails without overpowering them."

Another producer defying typically low consumer expectations around white rum is Belize-based Copalli. The brand makes rum from organic, heirloom sugarcane and has won praise for its contribution to >>



Sustainability is at the heart of Copalli's single-estate Cacao (above), Barrel Rested and Organic White rums

» local communities and rainforest preservation. One of Copalli's more unusual offerings is Copalli Cacao Rum, an ultra-premium white rum infused with roasted organic cacao nibs grown at its distillery in the rainforest of Southern Belize.

"We grow so many interesting local fruits and crops at our farm that we're continually experimenting with how to use those ingredients in future releases of our rum," says Copalli Rum CEO David Bart. "When you talk about brand heritage, that's exactly how we maintain it. Everything ties back to our farm, our sugarcane fields, community and respect for the environment and ecosystem of our home in Southern Belize."

The company also produces Copalli Barrel Rested Rum and Organic White Rum, a more mainstream release made with organic sugarcane juice crushed within two hours of being harvested. The fact that this expression is made without added sugar enhances its taste and quality, according to Bart.

"Consumers and bartenders have increasingly discovered that well-made, top-quality white rum is not only flavourful, but also highly versatile," he claims. "In addition to traditional white rum drinks like a daiquiri or mojito, it's seemingly endless, the number of interesting and innovative cocktails that can be created using this spirit."

Meanwhile, a more recent release from the Seychellois brand Takamaka contests the widely held view that age is what commands luxury status and price points in rum. Le Clos Napa Laz (pictured right), a blend of 100% unaged sugarcane rums made using a slow double distillation process to capture the complex flavour of the cane, was launched into select European markets last month.

The addition to the brand's luxury Le Clos range is made entirely from non-hybrid cane varieties sourced from farmers local to the company's Trois Frères Distillery, and limited to 408 bottles.

Changing on-trade attitudes

In the world of mixology, attitudes to white rum are changing as ever-more discerning



Bacardí and Havana Club use music tie-ins to push white rum

Bacardí dominates the world of white rum, but this 20.6m-case-selling giant has been focusing elsewhere in recent years on persuading consumers to trade up from the classic standard Bacardí Carta Blanca to higher-priced expressions in other styles, such as Caribbean Spiced, the brand's first spiced line extension, and Reserva Ocho Sevillian Orange Cask Finish, an 8yo rum finished in orange wine casks from Seville, Spain.

But this year it switched focus back to Bacardí Carta Blanca with a marketing push aimed at music-loving Millennials and Gen Zers. In April, the brand announced that Grammy-nominated singer Camila Cabello would star in a new summer campaign celebrating the "vibrant spirit" of her new music and Bacardí's association with "fun and community". The campaign featured Cabello's new song 'I Luv It' and included a co-created signature drink, the 'I Luv It Punch', built around Bacardí Carta Blanca.

In a similar music-related vein, this year Pernod Ricard promoted Havana Club Original Añejo 3 Años at major European music and cultural festivals in five countries, including England's Glastonbury and Notting Hill Carnival, France's Garorock and Yardland, as well as Portugal's Afro Nation.

"Across the venues, our Havana Club Grounds team provided immersive experiences that not only

consumers and bartenders discover the depth and complexity the subcategory can offer.

"My perception of white rum has definitely evolved over the last few years," admits Jacoby Morciglio, bar manager at Denver's Adrift Tiki Bar. "My understanding of it when I started working with rum was more so

that white rum was a lengthener to add more proof and a slightly more neutral flavour to a drink. Some of the column still white rums can definitely function like this, but there's just so much more out there.

"My first smack in the face was Wray & Nephew's Overproof Jamaican Rum. The name 'Overproof' gave a bit of a hint as to how it would read, but nothing like the ripe fruit flavour blaster it is," he adds.

"The colour is just so unassuming and to have that much depth and complexity is wild. I definitely view white rum as a much, much larger umbrella term



Bacardí teamed up with American singer Camila Cabello for its 'Do What Moves You' campaign



Havana Club Original Añejo 3 Años' limited-edition bottle was designed with creative agency Golgotha

highlighted our 3yo rum in delicious cocktails, but also delved deep into Cuban culture," says global marketing director Nathalie Parte. "With a focus on inclusivity, sustainability and local empowerment, these activations enabled drinkers to connect with Havana Club's rich heritage."

Parte says the launch of a limited-edition bottle, featuring vintage stickers and holographic effects to capture the vibrant essence of Cuba, positively impacted the activations.

with thousands of expressions, flavours and uses."

Similarly, Ricky Ramirez, owner of The Mothership rum bar in Milwaukee, is equally enthusiastic about white rum's potential. "With more brands coming into the rum game, including new American brands, it becomes more important for people to have an understanding of how the country of origin, terroir, fermentation and the stills used in making rum are important in the final product [and to] understand that some white rums have as much character as an aged whisky," he says.

Despite these upbeat words from bartenders, the white rum subcategory is not forecast to grow as fast as other styles. According to a recent report by Persistence Market Research, the white rum market was valued at US\$4.67bn in 2023, behind light/gold rum, the largest subcategory, valued at over \$5bn. The spirit's fastest style is spiced, predicted to grow at a CAGR of 4.5% over the next nine years. **GDI**

Cocktail bitters ‘write the intro to the story and the mixologist finishes it’

The creative, collaborative cocktail bitters sector is developing rapidly, with a proliferation of producers and new flavours as bitters are more widely used. **Sandra Newman** reports

Demand for cocktail bitters has grown significantly in recent years, boosted by the cocktail boom and the growth of the no/low sector. The range of bitters, used in small quantities to flavour cocktails and other drinks, has also developed considerably, with savoury and unusual flavours more prominent, while many new companies have entered the market.

Surviving in a crowded market isn't easy, reveals Stephan Berg, joint managing director of Germany's The Bitter Truth. "New entries in the bitters category keep coming, even if most are not overly successful due to the saturation of the market and increasingly tight market conditions," he says.

"Competitiveness is growing, which leads to more 'out of the box' flavours looking for a niche." At the same time, he says, cocktail bitters are "appealing to a wider audience — also more and more to consumers — and established brands seem to have a better hold and acceptance".

One such established player is Fee Brothers, based in Rochester, New York, which celebrates its 160th anniversary this year



Fee Brothers reports success with new releases Habanero (above), Mole and Turkish Tobacco



The Bitter Truth Black Cherry Bitters launched in 2023 and is already one of the brand's best-sellers

and has tripled sales in the past four years, according to CEO/owner Jon Spacher.

Describing the cocktail bitters sector as "fun and dynamic", he explains: "While new bitters companies and products are emerging, what's exciting to me is how mixologists continue to create new experiences by pairing simple flavours." Bitters, feels Spacher, should be "the quiet, humble flavouring in the background that takes the drink over the top and knocks your socks off".

Anthony Cook, a brand management and education consultant for Canadian company Ms Better's, offers a similar view on the role of cocktail bitters: "We're a complement, we're side notes of drinks, we're little highlights that fit in, and it's a very collaborative space because it's not a very big space. We write the intro to the story and then it ends up in the bartender or mixologist's hands and they finish that story."

Changing consumer tastes

He says changing consumer tastes have helped bitters' growth. "Modern-day drinkers have moved towards a slightly more bitter palate than in the early 2000s," says Cook. As a result, he says: "Creative people are thinking, 'What can we do with bitters?' That's why bitters have grown — because people have been inspired and a little bit braver."

At US producer Bittercube, whose most popular flavours include Cherry Bark Vanilla and Orange, owner Ira Koplowitz highlights bitters' versatility. "Cocktail trends often swing like a pendulum between extravagance and simplicity," he says. "At Bittercube, we focus on creating bitters that offer complex, layered flavours, which are versatile enough to enhance cocktails across the trend spectrum."

Ms Better's co-founder Sam Unger says bitters are an inexpensive way to make cocktails special. "It's such an easy way to elevate a cocktail and to give it consistency and also to make something that people think is standard be exceptional," she says.

Unger says there's now a greater appreciation of the value of cocktails and a growing awareness of bitters' potential for improving spirits-based drinks — even in bars that don't serve many cocktails.

"Even if they [bar owners] are not doing anything beyond a rum-and-Coke or a gin-and-tonic or, at most, a Pimm's cup, they're seeing how they can have a selection of a few bitters that can really just change the game by just adding a few drops in," she observes.

With the alcohol content of a dash of bitters negligible, Cook highlights the rapid growth of the no/low-alcohol category as another driver of growth for bitters.

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» bitter notes that can mimic the alcohol,” he says. “A lot of non-alcoholic spirits do miss that bite. So you can add that in for minimal cost, minimal skill and deliver a non-alcoholic drink that actually delivers on experience the same as an alcoholic drink.”

The Vancouver-based company partners with soda and RTD producers which use Ms Better’s bitters in their products.

Rise of savoury flavours

While traditional bitters flavours remain the biggest sellers for most producers, the number of products with new taste profiles coming onto the market is growing.

“Classic flavours like aromatic and orange bitters are among the most popular as they fit into nearly any drink,” says The Bitter Truth’s Berg. “Tropical and tiki drinks are benefiting from the use of bitters as well.”

Other flavours are gaining in popularity

though, says Molly Bradbury, the founder of Bitter End, based in Santa Fe, New Mexico. “Beyond the classic aromatic and orange bitters, there seems to be a lean towards the spice rack,” she says. “Cardamom is making an appearance, as is black pepper.”

The US company’s best-selling product is Memphis Barbeque, closely followed by the Mexican Mole and Thai bitters.

Savoury flavours, which can be used for culinary purposes as well as in drinks, are also becoming more prominent due to their broad appeal, according to Berg.

“While we see growing demand for all flavours we produce, there seems to be an increasing call for savoury flavours, as they bring an unexpected twist into the cocktail mix beyond the well-known,” he says. “All our savoury flavours (Celery, Cucumber, Olive) do really well.”

Bradbury also notes how culinary usage



Bitter End’s Memphis Barbeque, Mexican Mole, Thai and Jamaican Jerk bitters

of bitters has influenced cocktails. “Cocktail trends are moving towards the kitchen for inspiration,” she says.

“Bitter End’s flavours are inspired by culinary traditions, but give bartenders a range of flavour profiles that can really accentuate other ingredients in a cocktail. Lately, our Jamaican Jerk Bitters have been having a moment. The combination of nutmeg and habanero can really shine with an overproof rum or an amaro.”

Not all new taste profiles will hit their mark, of course, but Berg says The Bitter Truth’s Black Cherry flavour already ranks as one of its best-selling flavours within a year of its introduction. He describes Black Cherry as “an aromatic bitter with a surprising fruity twist” inspired by a 19th century Baltimore bitters brand.

Collaborative effort

At Ms Better’s, where new flavours are continually developed, Cook says bitters give consumers a flavour of ingredients that may not otherwise be readily accessible. “A lot of the ingredients that are used maybe don’t travel well and are hard to get or can be quite expensive, so the idea is that we encapsulate that and make it available for everybody,” she says.

Ms Better’s currently has a range of some 20 flavours on sale, plus five bespoke bitters for individual venues.

Fee Brothers also produces bespoke bitters and Spacher highlights the importance »

Ms Better’s Batch 42 is made with ‘48 classic trade route spices and botanicals’



Cocktails and home mixology drive NPD in herbal bitters

Trends in the cocktail bitters segment are largely mirrored in the wider bitters category. Matteo Luxardo, export director at Italian producer Luxardo, reveals the key trends driving herbal bitters.

“The popularity of cocktails remains a significant driver for the demand for bitters, especially as the craft cocktail movement continues to thrive globally. Bartenders and mixologists appreciate the versatility that bitters add to drinks, enhancing complexity and depth of flavour,” says Luxardo, who sees the growth of home mixology as an important related development, as consumers seek to replicate bar-quality drinks at home.

In addition, consumer interest in the digestive benefits of bitters taps into the health and wellness trend, says Luxardo. He also describes the growing popularity of lower-ABV long drinks featuring bitters as “part of a broader movement towards ‘sessionable’ cocktails”, with bitters “adding complexity and balance without significantly increasing the alcohol content”.

Culinary use of herbal bitters is increasing, as with cocktail bitters. Luxardo says bitters’ concentrated flavours can add complexity to dishes, appealing to cooks who enjoy experimenting with different flavours.



Vibrant red Luxardo Bitter Rosso and nearly transparent Luxardo Bitter Bianco

Premiumisation is also evident, says Luxardo: “There’s a trend toward premium and craft bitters, with consumers willing to pay more for high-quality products with unique flavour profiles.”

He also reveals that increased competition is driving innovation within the bitters category. “Many new brands have entered the market, offering a wide range of bitters with unique and innovative flavour profiles. These newer brands often focus on specific niches, such as organic, local or exotic ingredients, challenging established brands to innovate and expand their offerings.”

» of collaboration for product development. “When it comes to creating new flavours, we reach out to our importers, distributors, influencers and mixologist friends and listen to what they’d like next,” he says.

“We also work with our ingredients companies to hear about worldwide trends. The confluence of all that feedback is where we aim our R&D passion.” The newest additions to Fee Brothers’ range of bitters include Habanero, Mole and Turkish Tobacco, which he says have been very successful.



With chilli peppers, cocoa, coffee and cubeb berries, Bittercube Chipotle Cacao is ‘reminiscent of a mole’

Botanicals are the main focus for Milwaukee-based Bittercube when developing new flavours, says Koplowitz. “Our research and development process involves exploring new botanicals, engaging with suppliers about unique single-origin options, and continually expanding our understanding of botanicals and extraction techniques.

“Using high-quality fresh ingredients from suppliers employing ethical and sustainable practices is also key,” he says. “Since our inception, when we handcrafted bitters in one-gallon jars, to now producing enough bitters annually for over 25m cocktails, our commitment to quality has never wavered. We source our botanicals directly from origin as often as we can, and also work with the most reputable spice purveyors globally.”

Both The Bitter Truth’s Berg and Fee Brothers’ Spacher feel product quality, being innovative and evolving to stay ahead of the curve are key to remaining successful in the increasingly competitive bitters sector.

Cook of Ms Better’s also looks to the future: “It’s almost like a personal challenge to push bitters to a level where it’s uncomfortably amazing.” And company co-founder Unger adds that the key for bitters is “making the best products that you can make which inspire people who then make the trends”. **GDI**

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Premiumisation and sustainability drive growth in mixer market

The days of generic mass-produced mixers are numbered. Premium and artisanal brands are gaining traction, offering sustainability, unique flavours and healthier ingredients. By **Joe Bates**

Mixers have always played a pivotal role in shaping a bartender's ability to craft a wide-ranging drinks menu. In some on-premise venues, however, their contribution is undervalued or even overlooked. Often served unceremoniously out of a bar gun, mixers in these establishments need simply to offer carbonation, consistency, brand recognition and value for money.

Conversely, in more upscale locations, mixers are increasingly valued highly. Bartenders are actively sourcing exotic-flavoured mixers to complement and enhance their cocktails or to make unfamiliar spirits more approachable. Some cocktail bars now even boast 'laboratories' that make their own in-house varieties.

At a macro level, the global cocktail boom and surging consumer interest in non-alcoholic drinking options are driving growth in the mixer market. A recent report by Custom Markets Insights valued the category at more than US\$8.89bn, with a forecast CAGR of 8.2% over the next decade, taking its total market value to over \$18bn by 2033.

Victims of the market maelstrom

Despite these bullish projections, mixer producers are not immune to the headwinds currently buffeting much of the drinks industry. In August this year, UK startup Lixir Drinks entered liquidation, citing the global Covid-19 lockdowns, Brexit and the cost of living crisis as factors in the mixer brand's demise.

In the same month, New Zealand-based firm East Imperial also went into liquidation, cancelling its listing on the London Stock Exchange. Founded in New Zealand and Singapore in 2012, East Imperial expanded the distribution of its super-premium mixers to Asia-Pacific, the US, Europe, the Middle East and Asia, selling more than 33m bottles in the 12 years the firm was trading.

Big players with deeper pockets are proving better able to ride out the storm.

"There have been some strong headwinds with the external environment, but



Bars want to 'create alcohol-free offerings that feel just as much a part of the premium experience', says Ounal Bailey, co-founder of London Essence, which offers its premium Freshly Infused range on tap

we continue to remain in profit," says Jayne Andrews, director of marketing at Fentimans, the privately-owned UK manufacturer of a range of botanically brewed brands that include Curiosity Cola and Connoisseurs Tonic Water.

"Our brand awareness also continues to grow steadily, and we are seeing continued success outside the UK as well. We operate in over 70 markets, in countries as far-reaching as the Netherlands, Albania and Chile — showing the popularity of both our soft drinks and mixers to a diverse audience in the premium sector," she adds, revealing that the company has entered three new international markets in the past year: Australia, Lebanon and Chile.

Colorado-based RTD hard cola brand Grisly's Cosmic Black is also faring well, despite the challenging market conditions. "Our company has had a great 2024 contrary to broader predictions from some market prognosticators," says Eric Trueheart, the co-founder of brand owner Black Yeti Beverage. "This year our product went from being in a small handful of local stores to being available throughout both Southern and Northern California.

"I think this speaks to the dual trends of people being less interested in hard seltzer and moving toward more flavourful op-

tions, while simultaneously wanting to stay with a no-added-sugar drink, especially for sessionable beverages," he adds.

No/low trend boosts mixer market

In terms of trends, no/low continues to grow globally, with IWSR predicting the category will enjoy a CAGR of 6% over the next three years. The increasing popularity of no/low cocktails is a major part of this growth curve. Half of consumers in the UK tried a mocktail or virgin cocktail in 2023, up from 35% the previous year, according to research by Fentimans and CGA by NIQ.

This dramatic growth has forced many bar owners to rethink their soft drink selection. "The trend towards lower-ABV cocktails has somewhat forced us into drastically expanding our selection of soft drinks," reveals Michele Mariotti, head of bars at Scotland's prestigious The Gleneagles Hotel.

"This means that we are moving away from standard flavours and guests are looking for more exotic and complex selections. Certain brands are really leading the charge when it comes to softs by mixing things like peach and jasmine, fig and rhubarb, and other flavours which are recognisable yet feel innovative."

Co-founder of the Britvic-owned mixer brand London Essence Ounal Bailey argues that "bars are increasingly looking to >>

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Luscombe Drinks reformulated its tonic range to reduce its sugar content by 34%

» create alcohol-free offerings that feel just as much a part of the premium experience”.

He adds: “With six in ten UK adults attempting to moderate their alcohol consumption, our diverse range caters to this appetite and the shift towards mindful moderation with our growing repertoire of non-alcoholic adult soft options, such as Aromatic Orange & Fig and White Peach & Jasmine craft sodas.”

Reducing sugar top priority

Staying in the realm of health and wellness, rising consumer concerns around sugar consumption are forcing mixer brands to rethink their attitudes to NPD.

“We understand the increasing consumer demand for lower-sugar options, and we’ve responded by carefully reformulating our tonic range, reducing the sugar content by 34%,” reveals Gary Williams, technical & NPD manager at Luscombe Drinks, a Devon-based producer of organic soft drinks, juices and mixers.

“Our focus has always been on using the finest natural ingredients, and this reformulation was no different,” he adds. “We worked meticulously to refine our flavour profiles, ensuring that even with less sugar, the distinctive taste of our tonics stayed true to the Luscombe standard. Our commitment to taste is unwavering, and we only introduced this change after rigorous testing confirmed that the exceptional flavour was preserved.”

Switch to sustainable packaging

Like their alcoholic counterparts, mixer brands are eager to demonstrate their efforts to make their business operations more sustainable.

Independent British mixer producer Franklin & Sons collaborated with international hospitality group Red Engine to switch from glass bottles to 20cl recycled aluminium cans, a move which both reduced packaging weight and transportation emissions.

Fentimans has also been focusing on reducing the environmental impact of its packaging. “One of our significant initiatives over the last year has been lightweighting our glass packaging,” reveals An-

Bartenders on mixers: Fizz, flavour and fun

Few topics arouse the passions of bartenders like that of mixers. A good mixer can enhance the flavour of a drink, while a poor one can ruin it. For some bar professionals, the requirements of a mixer are simple. “It needs to be fizzy!” insists Liam Broom, general manager at London cocktail bar Silverleaf. “It needs to still retain the fizz after being added to a flat product like gin or cocktail base.

“Too many products go flat if you just look at them wrong,” he adds. “As with any ingredient in your bar, taste, quality and consistency should always be at the forefront of your consideration process. Put good in, get good out — and the reverse is applicable as well.”

Standard out-of-the-gun mixers aren’t going anywhere, according to Mia Crusto, general manager of Roof on theWit Chicago, a downtown rooftop bar where classic mixers are preferred. “They’re fast and familiar and most people have a preference already for



Gaston Fusco: Every cocktail is ‘driven by carefully crafted mixers’ at The Churchill Bar & Terrace

draws. “This means we are not only cutting down on raw material consumption, but also lowering the overall energy required for production and transportation — helping to reduce our carbon footprint.”

Alongside health and wellness, sustainability is becoming a key differentiator in the mixer market. As consumers prioritise eco-friendly choices, mixer brands that are not seen to innovate and reduce their environmental impact are likely to fall by the wayside. **GDI**



Michele Mariotti: Experimenting with new mixers is a ‘pillar of cocktail creation’ at The Gleneagles

what they like,” she says. “It’s nice to have options, but I think those are here to stay.”

Other bars take a more adventurous attitude towards mixers. “Experimentation is essential for us,” says Gaston Fusco, bar manager at London’s The Churchill Bar & Terrace, which produces its own range of in-house tonics. “Our bar laboratory is where we push the boundaries of traditional mixology. The entire Unity by Water signature menu is a testament to this approach, with every cocktail being driven by carefully crafted mixers, some from our in-house tonic selection, demonstrating the success that comes from experimenting with new techniques and flavours.”

Scotland’s The Gleneagles Hotel also takes a bold approach to the use of mixers. “Experimenting with new mixers is a pillar of our cocktail creation,” explains Michele Mariotti, the hotel’s head of bars.

“Long drinks and highballs are becoming a staple of most menus due to the resurgence of low-ABV cocktails. We have recently been experimenting with flavoured kombuchas, which offer the perfect balance of carbonation and acidity, allowing us to create very complex spirit-mixer combinations.”



Franklin & Sons switched from glass bottles to 20cl recycled aluminium cans at the start of September

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‘The biggest thing for vermouth is the low-ABV aperitif’

With the popularity of no/low and cocktails providing the wind in its sails, the development of the vermouth category continues apace.

Sandra Newman reports

An essential ingredient in many of the world’s favourite cocktails, vermouth’s fortunes have been on the rise for some time. But is the aromatised wine set to become even more popular? Producers certainly think so, pointing to the craft and premiumisation trends which have injected both quality and excitement into the category.

There’s been a global resurgence of interest in vermouth, according to Fabio Torretta, general manager at Italy’s Compagnia Dei Caraibi, producer of Carlo Alberto Vermouth.

“The main trends include an increased focus on ingredient quality, with a preference for artisanal and organic products,” he says. “Experimentation is also a growing trend, with many producers exploring local botanicals and revisiting traditional techniques to create distinctive and contemporary vermouths.”

Quady Winery, based in California’s San Joaquin Valley, is among those using local botanicals — founder Andrew Quady says it utilises needles from Maine balsam firs for its two dry Vya American vermouths.

Using local ingredients can help smaller



Monte Carlo Vermouth Rosso is made in France with rose petals from Monaco and wine from Italy. Australian brand Regal Rogue (below) says pairing vermouth with food ‘makes sense’



brands stand out, argues Michela Palmer, owner of Canadian vermouth Esquimalt.

“Producers that incorporate local botanicals and ingredients in their products have a leg up within their immediate market, as consumers are still really interested in supporting local wherever possible,” she says. “Using small-batch local ingredients is one of the easiest ways to set your products apart from the giant brands.”

Shift away from mass production

Premiumisation is also driving NPD, says Rudy Stol, global brand director of Villa Massa-owned Giardino, which saw solid growth last year, particularly in the US, Spain, Australia and Northern Europe. “The premium vermouth category has been growing in the past five years and is expected to grow further in the years to come.”

Torretta agrees: “There is a clear trend towards the high-end segment, where consumers are increasingly interested in premium and super-premium vermouths. This shift is driven by a growing awareness and appreciation of the quality, history and craftsmanship of the product.”

France’s Maison Eugène René, based in Grasse on the Côte d’Azur, launched its Monte Carlo Vermouth Bianco in 2022 and a Rosso expression last year. Both now feature in high-end restaurants, bars and wine shops in Monaco, and will soon be available in Paris, says CEO Edouard Eme. “The trend is clearly to develop high-quality liquids for mixology and to leave behind cheap mass-production vermouth,” he adds.

Perlino marketing manager Elena Branda

also sees growing demand for premium craft vermouths. “There’s a noticeable movement in the premiumisation of vermouth, where consumers are willing to pay more for high-quality artisanal products,” she says. “This includes vermouths made with unique botanicals, natural ingredients and innovative flavour profiles.” Perlino’s portfolio includes two premium vermouths: Corsieri del Palio and Casa Martelletti.

At Spain’s Casa Mariol — which produces both a black and a white vermouth — sales manager Marta Vaquer says the trend is towards “refreshing and easy-to-drink vermouths that are not medicinal or excessively bitter and, at the same time, are of great quality and complexity and are made using an artisanal process”.

On-premise ups its offer

Campari Group has historically focused on mass-market vermouths, but recently added two premium craft vermouths to its portfolio, with the launch of 1757 Vermouth di Torino in 2019 and the acquisition of Del Professore in 2022.

The premiumisation trend is changing the selection of vermouth available in the on-premise, notes Campari Group’s director vermouth Cristina Ferro. “We have seen a ➤



Casa Mariol Vermut Negro (left) and Esquimalt

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» shift towards quality over quantity, which is driving bartenders to use brands that offer experiences over a mere product,” she says.

The craft vermouth sector continues to grow in the UK, where several producers have applied for a Protected Geographical Indication for English vermouth, says Sacred Spirits co-founder Hilary Whitney. Sacred’s London-made vermouths — English Dry, Amber and Spiced — are performing well, she reveals, and have recently secured new retail and on-premise listings.

No/low and cocktails drive growth

The continued popularity of cocktails and the growth of lower-ABV drinks also remain key drivers for vermouth. Mark Ward, founder of Australian brand Regal Rogue, says that while cocktails are still very big globally, with the negroni in particular growing in popularity, “the biggest thing for vermouth is the low-ABV aperitif”.

Demand for vermouth is building among consumers who want to drink alcohol but don’t want high-ABV drinks, says Ward, who notes that with many different flavoured mixers now available, “the idea of drinking vermouth over ice or with soda or tonic is becoming a lot more popular”. Palmer adds: “The broad trend towards no/low-ABV drinks has benefited vermouth and other aperitifs, and has encouraged more growth in the category.”

Perlino’s Branda also notes the importance of aperitif culture, “particularly in Europe”, in driving vermouth consumption, as does Campari’s Ferro, who says a fascination with Italian culture and the aperitif moment has “expanded the popularity of bitter-forward, long and light serves”. The vermouth category has “high potential” in this arena, she adds.

Role of specialist bars

Regal Rogue’s Ward says the opening of specialist vermouth and aperitif bars around the world, including in the UK and Australia, in recent years reflects the influence of European aperitif culture.

Casa Mariol’s Vaquer reveals that such specialist outlets have helped increase vermouth consumption considerably in Spain. “Vermuterías and specialist retailers have expanded their range of vermouths, giving customers more choice and increasing awareness of the product,” she says.

The owner of Catalan vermouth brand Marnuthem, Marc Cuenca Grifol, agrees that “vermuterías and bars have been key” to the category’s growth in Spain and will “continue to be so”, although he adds that the next step is “concerts and festivals”.

Vermouth is also becoming more popular in restaurants, says Grifol, who feels producers can capitalise further on this trend. “The sector has to adapt and offer less bitter vermouths or bitters to make pairing possible in restaurants,” he says. “At Marnuthem, we are already working on it and we already have options,” he says.

Regal Rogue is also already very active in this area. “We’ve always done food-pairing as it makes sense to us, as the botanicals are used in cooking,” says Ward.

Colourful versatility

Villa Massa’s Stol sees the use of a wider range of grapes and botanicals as a key trend for vermouth, while Vaquer says the rich variety of vermouth colours shows its versatility, particularly for creating cocktails.

“The number of wineries producing black or red vermouth has been steadily increasing for a few years,” she says. “Casa Mariol was a pioneer ten years ago, revamping not only the image of our black vermouth, but also its formula and concept.”

Mancino brand ambassador Elena Urbani notes a growing interest in rosé vermouth, which she mainly attributes to “the attractiveness of the colour”. While Mancino



In the pink: Mancino Sakura Vermouth (above) and Marnuthem Vermouth Rosé

does not produce a rosé vermouth, its pink Sakura Vermouth, infused with cherry blossoms from Kyoto and violets from Tuscany, is one of its most popular lines.

Marnuthem’s Grifol also highlights the visual impact of rosé vermouth, which particularly appeals to younger consumers, although he says it remains a niche segment.

Diverse audience

At Regal Rogue, whose Wild Rosé has been among the global top sellers in its four-strong range since its launch in 2015, Ward feels a wider range of product styles is helping to broaden vermouth drinkers’ demographic profile.

He reveals that consumers in their mid-20s, who are “drinking less but better, and making interesting choices around their purchasing and drinking”, are attracted by vermouth’s lower-ABV serve, while “nostalgic consumers” in the 55–80 age bracket, who grew up drinking vermouth, are returning to it, “in part attracted by modern, lighter vermouths”.

Ward feels his company is well positioned with organic and gluten-free vermouths with a low sugar content. He says: “You’re tapping into wellness and low-ABV trends with such a diverse audience and age demographic — that’s the thing I see in every single market.”

Urbani hails the rise of new vermouth brands and styles as “great for the entire category, as it means vermouth is getting more and more appreciated worldwide”. She feels the growth of Mancino’s Sakura and Kopi (coffee) lines demonstrate that “not only the traditional style of vermouth is appreciated — bartenders and consumers like to play with vermouth and new flavours and see how versatile this product can be”.

As the category develops, warns Compagnia Dei Caraibi’s Torretta, it’s vital to recognise the importance of traditional consumption and brand heritage while embracing new trends and occasions. “Respecting one’s origins while also knowing how to innovate to meet the needs of an ever-evolving market is the key to remaining relevant and competitive,” he says. **GDI**



Premium offerings (from top): Carlo Alberto, Corsieri del Palio and Del Professore

‘We must be relevant to ensure the brand survives another 177 years’

Carlsberg has gone global with a single campaign for the first time, with a worldwide activation for its flagship lager. Global brand director Lynsey Woods tells **Olly Wehring** the thought process behind the major push

How’s the brand doing? The brand’s in growth, so it’s in a good place. We’ve been thinking recently about how Carlsberg’s storytelling is going to take us through the next ten to 15 years. Brand positioning isn’t something you change very often, nor should you. To appeal to the new generation of LDA beer drinkers, we’ve sharpened our positioning. It isn’t new; when a brand’s been around for 177 years, you shouldn’t make up stories.

What problem are you trying to solve with this global campaign? Telling the story of Carlsberg has been hard, because it’s really complicated. Because of this beer, the pH scale exists. Because of this beer, insulin exists. Because of this beer, you can wash your clothes at 40°. And 30% of this beer goes to funding fundamental science across the world (through largest shareholder the Carlsberg Foundation).

The story’s too big, but it’s ultimately really good for people.

Carlsberg has always seemed to struggle between taking a modern or a provenance position in its marketing. To set up a business 177 years ago and say we’re going to always give to science no matter what, and we’re going to share everything we learn, was so ahead of its time. But we don’t need to tell our history to get you to drink our beer tonight. We just need you to feel good about the brand and about the choice you’ve made.

What matters is the authenticity. You earn the right to tell those stories, but that comes in time. For now, you won’t see anything other than this modern take — we won’t be teaching history lessons anytime soon. It’s about being modern and fresh, but with the confidence of what we’re built on.

How does the Carlsberg brand segment its consumers? In each individual market, we know who’s drinking our beer, who’s coming into our beer and who we’re losing. You can’t roll it up globally, because it only



Carlsberg applauds progress through curiosity in the global campaign created by London agency Fold7

makes sense to look at it by market. A big objective for us is to be the beer of choice for the younger LDA generation. How we’re going to talk to them, through encouraging curiosity, is going to be different. It’s quite a unique position for a beer brand.

We want the people who love Carlsberg today to keep enjoying Carlsberg, but we must be relevant to ensure the brand survives for at least another 177 years.

How much of the brand’s present growth is down to price increases? There’s a mixture of strategies — it’s difficult to give a global view, because each individual market will have its own strategy. Every brand in the world has had to put pricing up in the last year; because of commodity increases, the impact of the war in Ukraine — the cost of everything has gone up.

The brand was showing growth prior to Covid. We did OK during Covid, because we have a healthy off-trade/on-trade split globally. Today no-one’s thinking of the Carlsberg brand as a place we’re not going to go to for growth.

Which markets do you see as being the major growth drivers? Vietnam is well-publicised as a big opportunity — it’s a huge beer market. We’re definitely under-represented there. There are big markets, like the UK and Denmark, where we’re very mature and the job is to defend share. What really excites me is getting new consumers and the growth of new markets, which is always on the agenda.



Lynsey Woods: ‘What matters is the authenticity’

How do you switch mindset from defending share in an established market to attacking for growth in a developing one? It’s the best part of the job! Imagine we were trying to do the same thing in every market — that would be incredibly dull.

What’s the first dataset you look at in the morning? It’s value sales. We used to look at volume — I think most big brands used to be interested in how big they were. But it’s about how much money we’re delivering for shareholders. We have this extra pillar in the Carlsberg Foundation [which owns 30% of the group]. **GDI**

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Q&A

with World Spirits Alliance president & Moët Hennessy CEO Philippe Schaus

Trade association the World Spirits Alliance recently published *Spirits: Global Economic Impact Study 2024*, examining the spirits industry's place in the global economy. The organisation's president — and CEO of Moët Hennessy — Philippe Schaus tells **Olly Wehring** the report signals a 'new beginning' for the WSA



Philippe Schaus: 'Today there are more voices speaking against free trade'

Why has the World Spirits Alliance produced this report? This is a new beginning for the World Spirits Alliance. It's great that we have this study to highlight to outside players how important the spirits industry is. If we can grow the alliance and make it stronger by having more people join us, whether it's individual companies or national associations, we can better defend our industry while also creating more synergies.

We believe that spirits companies need to be more vocal in a world in which we are facing challenges, such as in trading and with regulations. As a kick-off of this new approach to being more visible and more proactive, we felt it was important to start with answering a question that we've all received quite often and not always had a good answer to: What is the importance of the spirits industry to the global economy?

In order to have objective answers, we had this study done by Oxford Economics and IWSR. The results actually surpassed what we were expecting in terms of the importance of the industry to the world.

Who do you feel is challenging the spirits industry that needs this kind of information? We

are moving out of a time when the universal paradigm for economic development has been free trade. Today there are more voices that are speaking against free trade; people who think that by reducing free trade, they are going to generate wealth for their national population. But free trade is what helps countries move out of poverty, it's created millions of jobs throughout the world, and it's made the spirits industry particularly successful.

We, as an industry, thrive on free trade and we've created an enormous amount of jobs. There are 36m jobs throughout the world that are directly or indirectly linked to our industry — that's one in every 84 people working in the world, or the working population of the UK, more or less.

Every year, we produce US\$730bn of GDP, which is \$1 in every \$140. We're also one of the biggest clients for the agricultural industry — think about agave for tequila, corn for bourbon, barley for scotch or grapes for cognac. We're often a driving force towards elevating the sustainability of agricultural practices, because we're very visible to consumers and authorities. We want to be best-in-class in what we do, so we drive a

lot of initiatives. All these things are linked to the fact that, generally speaking, we are living in a free trade environment. We hope we can make sure it stays like that.

Spirits sales seem to have plateaued somewhat this year. How short-term is this situation? Is there something underlying here that's causing concern? In the very long term, what's been driving the category is diversification — by which I mean greater choice for consumers — and premiumisation. Over the last 20 years, overall alcohol consumption has been going down. Premiumisation has been going against that, as there's been this whole movement of drinking less and drinking better.

When we look at the closer time frame of the last five years, the industry had very steady growth until 2020, when Covid came. Then what happened in this industry — more than in many others — has been this kind of 'Roaring '20s' thing from 2021 to 2023. These were fabulous years for spirits, as consumers wanted to travel again, to enjoy themselves and to experience new things — the industry benefited from that.

What we're seeing this year is a bit of a »

» normalisation more in line with what was happening prior to Covid.

How confident are you that the return to single-digit growth rates is set to continue in the longer term? None of us has a crystal ball for the future. We believe that what has helped us to grow — premiumising what we do, bringing more craftsmanship to our liquids and internationalising, while at the same time being clear advocates of responsible consumption as a societal trend — is a formula that's going to continue to be good for our industry.

At the same time we're seeing younger LDA consumers coming through who have a totally different relationship with alcohol to the generation before. If that means young people being into binge drinking much less than before, then that's a good evolution.

Time will tell. As these young people get older and become more sophisticated, will they want to discover the enjoyment — in a responsible way — of well-crafted spirits? The jury's out, but we're pretty optimistic.

The report looks at spirits' performance within total beverage alcohol. Is that the limit to the pool of opportunity for brand owners like yourself? Bear in mind that I'm speaking here in my capacity as the president of the World Spirits Alliance, not as the CEO of Moët Hennessy! Each [alcohol] category has its own strengths and its own opportunities. What unites us is that we're all based on strong, local cultures, on nature, on agriculture and on craftsmanship. We all have stories to tell.

Different categories have different strategies. For spirits, the big story is premiumisation, giving consumers more choice and pursuing an agenda where we are highly supportive of more moderate consumption practices.

Does it worry you that the current cost of living is steering consumers away from stories of provenance and more towards a product's price? Look at the consumer evolution over the last 20 years: we have had cycles when consumers became more price-conscious, as well as cycles when they became more quality-conscious. The very long trend, however, goes clearly towards quality.

How do you see spirits being able to win the sustainability argument when the industry is such a large user of energy? All the spirits companies have their own agenda on sustainability. You have what's happening on the agricultural side, like stopping the use of chemicals or using more carbon-friendly

Spirits poised to overtake wine in global volume

The spirits industry is on course to surpass its wine peers in share size of total beverage alcohol volumes, according to the World Spirits Alliance (WSA).

In its *Spirits: Global Economic Impact Study 2024*, released in July, the organisation utilised data from IWSR and research by Oxford Economics to highlight the role that the category plays as a "significant economic driver" worldwide.

One section of the report, which considers the broad trends affecting spirits, cited figures showing that in 2022, the category accounted for 9.9% of total beverage alcohol (TBA) volumes, just behind wine with 10.4% share. Beer was far out in front at just over 75%.

"[Over the last 20 years], spirits has increased its importance within TBA," the report says. "While beer, understandably, dominates volumes, spirits has grown its share markedly and now sells almost as many bottles as wine (2.67bn cases in 2022 compared with wine's 2.8bn).

"Should current trends in both categories continue, spirits volumes will soon surpass those of wine."

The WSA conceded that domestic white spirits, most notably baijiu in China, account for a sizable proportion of the category's overall volumes. That said, the report claims the segment's share of total spirits declined markedly in the decade

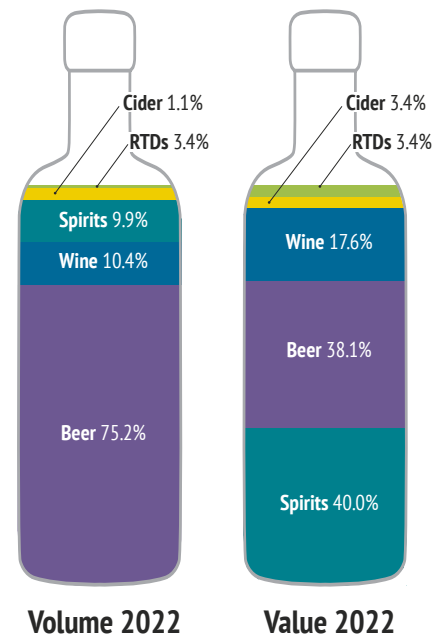
ways of harvesting. Soil is a very important method of capturing carbon. At Moët Hennessy, we have our Living Soils programme, where we focus on bringing more biodiversity into soils to make them healthier, as well as capture more carbon.

There are also moves to using lighter glass for packaging and changing from air transport to ocean transport.

On the distillation side, there are a lot of efforts towards decarbonising. There isn't a single player in the world who doesn't have a programme to reduce its carbon footprint. As a result, distilleries are becoming more energy efficient. Some are playing with electric-powered distilleries while, in Poland, for example, our Belvedere distillery has moved from using gas as its power source to recycled biomass from wood manufacturing.

As an industry, we have a commitment to decarbonise progressively, because we all know we have an overall commitment to lowering our carbon footprint.

Total Beverage Alcohol Categories



Includes national spirits. Source: World Spirits Alliance

from 2012, from 45.7% to 33.3% in 2022. International spirits, meanwhile, have grown their share from 54.3% to 66.7%.

Looking forward, the trade association said it expects all spirits categories to grow "in the medium term", with tequila & mezcal and Indian whisky both set to do particularly well. "The latter is the world's fastest-growing spirits category," the WSA said, "predicted to grow by almost 50m cases by 2027."

The full report can be read at www.worldspiritsalliance.com

How comfortable are you with the way the industry is working together on sustainability?

Of course, production methods are not the same throughout the industry, but there's an opportunity here. I've seen good examples of exchanges between industry players.

Moët Hennessy will host a Living Soils forum at the end of this year in the south of France. At the last one, we invited our competitors to join us to share what we're doing and for them to share what they're doing.

When it comes to sustainability, there's a journey there, but the industry can share more. We are all living on the same planet — whatever one of us gets as an improvement can be shared with others. The World Spirits Alliance could also play a role here to facilitate this exchange — we can all win from this. **GDI**

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German drinks market struggles as economic headwinds intensify

Despite some notable success stories, the German alcoholic beverage market faces significant challenges, reports **Joe Bates**

After a brief post-pandemic bounce, the complex and fragmented German alcoholic beverage market is struggling to shake off the effects of the country's long-standing economic malaise.

The country is forecast to record the second-worst GDP growth figures of the G20 this year at just 0.1% (Argentina is set to take the No.1 spot with a decline of 3.9%), according to global management consultancy firm Roland Berger.

Inflationary pressures, demographic challenges, an energy crisis and stifling bureaucracy lie at the heart of Germany's economic problems. This long list has done nothing to loosen the purse strings of the country's traditionally price-conscious consumers.

"Given the continuing international crises and related economic uncertainties, plus increasing prices, consumers, as well as the industry, are facing multiple challenges," admits Torsten Römsch, CEO of one of the country's biggest spirits producers, Mast-Jägermeister Deutschland GmbH.

"The situation is leading to uncertainty and reluctance to buy, in other words, a negative consumption index," he adds. "Despite these challenges, we are very proud to have largely met our expectations for the first half of the year, due to the great efforts of the entire team."

Jägermeister pushes craft credentials

Despite the challenging market conditions, Römsch said that this year, the company was focusing on highlighting the quality and exclusivity of its products. In spring, Mast-Jägermeister Deutschland launched a campaign called 'Matured for the Best Nights' to showcase the craftsmanship behind its flagship Jägermeister herbal liqueur and its maturation in oak barrels.

In September, the brand partnered with colour authority Pantone to define Jägermeister's traditional colours, 'Herbal Green' and 'Culture Orange', launching two limited-edition packs to celebrate the partnership. It also had a successful summer festival season with its 'Giganten' walk-in bottle installations across Germany. The



Germany is forecast to record the second-worst GDP growth figures of the G20 this year at just 0.1%

company will introduce premium tequila Teremana to the German market at Bar Convent Berlin (see p53), with accompanying advertising and social media efforts.

Challenging outlook as supermarket spirits sales fall

The challenging market conditions outlined by Römsch are supported by recent data released by the Federal Association of the German Spirits Industry (BSI), which revealed that sales of spirits in the dominant supermarket channel declined 4.5% last year to reach around 528m 70cl bottles. This price-sensitive 'food retail trade' sector accounts for over three-quarters of the country's spirits sales.

In contrast, business in the off-trade and specialist retail trade was more robust last year, according to BSI's data. Also positive is that the per capita consumption of spirits in Germany increased by 0.1L or 1.9% to 5.1L last year, with 69% of German households buying spirits at least once during the year. At around 710m bottles, Germany remains Europe's largest spirits market with an 8% share.

Nonetheless, the business outlook remains challenging. BSI managing director Angelika Wiesgen-Pick highlights a shortage of skilled workers, inflation, energy prices, rising raw material prices and bureaucracy as the principal challenges facing German spirits producers.



Jägermeister's Pantone limited editions

"A serious consumption forecast for 2024 can only be made if it is foreseeable how inflation and further economic developments in Germany will show themselves," adds BSI president Thomas Ernst. "Under the current conditions, the producers and importers of the [German] spirits industry appeal to politicians not to plan further state interventions in the various areas such as advertising, warnings, food law, etc, for the spirits industry, but to set reliable framework conditions."

Pernod Ricard and Campari thrive as imports fall

Spirits importers also had a generally challenging 2023, with imports into Germany falling 12.7% to 446m bottles. If the fortunes of scotch whisky producers are anything to go by, the same pattern has continued into 2024. The Scotch Whisky »

» Association revealed that scotch whisky exports to Germany, the eighth-largest market for scotch worldwide, plummeted 30.3% over the first half of the year to reach GBP63.5m (US\$83.65m). Of the top ten scotch whisky export markets, only France (-32.6%) and China (-42.4%) fared worse.

Not every company's recent experience of the German market is wholly negative, however. For instance, in its annual financial results for the year ending June 2024, Pernod Ricard reported that the French multinational had achieved a five-year organic net sales CAGR of 12% in Germany, despite the country's subdued economic performance and cost of living squeeze.

With a 9% share of the German spirits market, Pernod Ricard highlighted the performance of Absolut, now the country's

top-selling premium vodka. Lillet, Pernod Ricard's French aperitif brand, has been another star performer, boasting a CAGR of 28% over the past five years.

Similarly, Germany has also proved a growth market for Italy's Campari Group in its financial results for the first half of 2024. Germany achieved a sales increase of 13.4%, largely as a result of the continuing popularity of the company's flagship brand, Aperol. In contrast, other key Western European markets, such as the UK and France, all recorded sales declines for Campari.

Another company with a positive view of the German market is Stock Spirits Group, which last year acquired Hamburg-based Borco-Marken-Import Matthiesen GmbH & Co KG (Borco), the owner of Sierra Tequila, among other brands, for an undisclosed sum. The blockbuster transaction was part of Stock Spirits Group's wider expansion strategy to become the leading mainstream spirits company in Europe by 2027.



Hendrik Schatz: German consumers are price-sensitive, so brands must balance quality and affordability

Hendrik Schatz, marketing director of Stock Spirits Germany (formerly Borco), says the company's current market share in the highly fragmented country is 3%, a share it plans to grow quickly. "Stock Spirits Germany will play a key role in the drive to build strong European brands in the mainstream category," he reveals. "The German team has just launched the group's core brands, such as Żołądkowa Vodka and Clan Campbell Scotch Whisky.

"Both launches will be accompanied by a strong media campaign that will help to gain significant market share in these very important spirits segments," he continues. "At the same time, Stock Spirits is investing heavily in the original Borco brands, Sierra Tequila and Finsbury Gin."

Schatz explains that the German spirits market has several unique characteristics and challenges. Firstly, it is highly fragmented, he notes, with a variety of trends coexisting simultaneously. This means that spirits producers need to be flexible and adaptable to appeal to different consumer segments.

Secondly, German consumers are price-

An outsider's view: Kirker Greer Spirits

German market conditions may be challenging, but the Belfast-based firm Kirker Greer Spirits, the owner of Ukiyo Japanese Spirits, Born Irish Whiskey, Jawbox Irish Gin and Kirker Shamrock Irish Whiskey, has ambitious plans to grow its business there this year.

Chief commercial & strategy officer Ryan McFarland says the company plans to leverage its partnership with established distributor Hellwege Spirituosen to capitalise on the growing demand in Germany for innovative and high-quality spirits. He says 2024 has been dedicated to carefully building distribution for the company's Ukiyo Japanese Spirits line, a move which has already secured listings with major retailers like Edeka.

McFarland acknowledges the German market has its unique challenges. "The independent on and off-premise channels are fragmented, while conversely, much of the national grocery channel consolidates around a few big players.

"Bar and shelf space of standard categories are squeezed by well-established local brands, particularly liqueur and schnapps brands, meaning new international brands need to really capture the imagination of buyers and consumers to earn their listings," he says.

Despite these challenges, McFarland believes Kirker Greer's diverse portfolio can win over German consumers. "Born Irish and Kirker Shamrock whiskies bring unique and innovative propositions to a fast-growing category; and a brand we intend to bring to market in 2025, Grand Kadoo Flavoured Rum, offers convenience to professional and home bartenders wanting to make consistent cocktails packed full of flavour with limited fuss," he insists.

sensitive, Schatz warns, so brands must balance quality and affordability. Finally, the main cities in Germany are more geographically dispersed than in many other markets, which requires a comprehensive and localised approach to market penetration and brand visibility.

Stock Spirits Germany's strategy of focusing on growing categories such as tequila and scotch whisky is a canny one. There are pockets of growth in this key European market, the booming no/low-alcohol category being another example, but the overall outlook for the German spirits market remains uncertain and ultimately contingent on the country's ability to address its underlying economic woes. **GDI**

No/low categories gain ground

In common with many other mature drinks markets, Germany's non-alcoholic spirits sector is booming, defying the gloom of the wider alcoholic beverage market in the country. According to IWSR, non-alcoholic spirits in Germany are set to grow by 11% over the next five years.

Figures from Germany's Federal Statistical Office also reveal that the production of non-alcoholic beer, which contains less than 0.5% alcohol, has nearly doubled in the past decade. According to 2023 figures from the German Brewers' Association, German supermarket shoppers can now choose from 700 non-alcoholic beer brands available – double the number available in 2010.

The same trend is now also apparent with wine. "German consumers are increasingly asking for alcohol-free alternatives," says Dan Harwood, the key account manager UK and Ireland at Schloss Wachenheim AG, the brand owner of alcohol-free Eisberg Wine. "We have noticed that this trend has gradually become a way of life over the years for some consumers.

"Leveraging our technical expertise, we pioneered the introduction of high-quality sparkling wine to the German market, establishing ourselves as one of the country's leading producers. By commissioning a second de-alcoholisation plant this year, we can meet the high demand even better."



Five minutes with Compass Box CEO Maurice Doyle

With a storied career in spirits dating back to 1992, Maurice Doyle became CEO of UK-based Compass Box almost three years ago. **Olly Wehring** catches up with him to hear more about the 24-year-old 'whiskymaker' business

What's your history in the industry and with Compass Box? I've spent around 30 years in spirits, mostly working on small entrepreneurial brands for companies like Bacardí, William Grant & Sons and Suntory. I've been a fan of Compass Box for nearly 20 years and have been part of the team as CEO for a little over two years.

What's the company's business model? We're independent whiskymakers. We're not distillers, and we believe we're more than just blenders. We came up with the word 'whiskymaker' over 20 years ago to describe what we do. We source our whisky from pretty much anybody and we're sold in multiple countries, the US being our biggest market.

We're never going to be for everybody, but if you're an appreciator who's looking to stand out from what can be a sea of sameness and assert your individuality and creativity, that's where Compass Box comes in.

What's the ownership structure for Compass Box? We're owned by Cælum Capital, an investment house that specialises in the alcohol sector — they own the overwhelming majority of the company.

What's the scale of Compass Box? Who is your competition? By global standards, we're a very small brand. Since I've been a fan of



Maurice Doyle says Compass Box's whiskies appeal 'to consumers who are looking for something more'

Compass Box, I always felt that the brand deserved to connect with more people.

We don't have any one direct competitor. We're in a competitor set with any whisky brand that appeals to consumers who are looking for something more.

Can you talk us through the portfolio? We've just launched our new core collection, probably the most exciting news from the brand since it was created in 2000. We've been working on this project for 18 months; it's designed to address the challenges that made it more difficult to grow the brand. One of the things we heard from fans was that we had quite a difficult range to navigate — we're trying to make it simpler.

We're moving from a core range of seven to four, two of which, Orchard House and The Peat Monster, have been around a number of years. Then we've introduced Crimson Casks and Nectarosity.

For a brand our size, it's very difficult to ask for all seven expressions to be listed consistently, whereas with four we can. In a market like the US, we would typically have three or four SKUs listed in our retail partners, but they were never the same ones. Now we can have the core range merchandised in the same place, in the same way, and we can build up that consistency. We've also dialed up the Compass Box branding. It's very difficult to grow an expression, but it's much easier to grow and scale a brand.

What's the company's relationship with limited editions? Limited editions have always been part of what we do — they add a lot of excitement and news. Over the last couple of years, we've had some feedback that we were doing too many of them and maybe we'd been going for too high a price point.

Limited editions will continue to play an important part, but we're going to scale back the extent of them, while having a clearer range from a pricing point of view. They'll be less frequent and more accessibly priced.

Is Compass Box of a scale to be impacted by the wider trends in scotch? The answer is a definitive yes and no! Everybody's being very cautious at the moment.

On the consumer side, people invested in a lot more premium spirits for consumption at home during the [Covid-19] lockdowns. Now they have a healthy supply in their pantries and they're depleting that rather than buying new bottles. Meanwhile, retailers are being cautious given the high interest rates, and distributors have been shrinking their inventory levels, which they always do when times get tough. That's the part where we're definitely being affected, just like the big players.

What's different for a small, agile brand like ours, which effectively has a nothing share of the market, is that there are still plenty of opportunities. If you have the market share of Diageo, for example, it's much harder to deliver growth if the market is significantly down. In my experience, it's cyclical: the brands that do the right things consistently when times are tough will do better when the sun starts to shine again. We fully intend to be one of those brands.

What kinds of opportunities have you identified? It's about simplifying our business. At the moment, we're being slightly contrary, because we're investing more time and money in telling our story.

There are always new distribution opportunities, but we're looking to drive sales velocity with our current partners and retailers. I believe that narrow and deep is the best way for brands like ours to grow. It's always better to sell ten bottles in one outlet than one bottle in ten outlets. From there, you get natural growth and that's what we're looking to achieve. **GD**



Simplified offer: New Compass Box core collection

BAR TALK

A bartender with glasses and a dark shirt is using a handheld device to create a drink. The device is dispensing a red liquid into a glass that has a white sphere on top. The glass is shaped like a flamingo. The bartender is smiling and looking at the drink. The background is a bar with various bottles and lights.

*‘Knowledge sharing
is the best way to grow
as a bar industry’*

From a flavour bubble ‘gun’ to sub-zero freezing techniques, **Jaq Bayles** explores the latest innovations shaping mixology with the bartenders behind them

Mixologists have long been innovators when it comes to drinks construction, often borrowing from culinary techniques as shown by the likes of fat-washing and molecular mixology.

But today’s top bartenders are going beyond unconventional flavour combinations and homemade ingredients. They are designing and building the systems to deliver the outcomes they desire, and rather than keeping their methods in-house as a signature of their own brand, they are sharing »

» sharing them within the bar community, creating a sideline for their own businesses an opening up new avenues for other mixologists. For Simone Caporale, co-owner of Barcelona's Sips (No.1 on the World's 50 Best Bars list 2023), it's the latter that denotes true innovation.

"In general, people don't know the difference between innovation and creativity," he says. "Very often they are confused with each other. Innovation is things that, after being created, can open new doors.

"You can be very creative by coming up with a new combination of flavours for a cocktail and that can become an RTD or a flavour for an ice cream. That combination of flavour became an innovation, because it can open new doors. So you can be innovative without being creative."

He cites as an example of both creativity

and innovation the hexagon bar station designed by Alex Kratena and Monica Berg for London's Tayēr + Elementary and brought to life by Oslo-based design & manufacturing agency Behind Bars.

Comprised of moveable hexagons, the station transforms to meet the needs of the bartender (and venue) at different times. The Tayēr Series is now commercially available in two designs — The Double and The Single.

"You can have your own station, but if the station becomes commercialised and anyone can get access to it, that becomes an innovative result," explains Caporale.

Caporale is no stranger to the concept of innovation, having created the Flavour Blaster — a 'gun' that applies aromas and edible bubbles over cocktails and food — with UK-based hospitality expert Colin



The Double, part of the Tayēr Series of bar stations

Myers and manufacturer Robert Flunder six years ago.

"The idea started by blowing, with the mouth, inside a smoking gun," he explains. Then we said, 'OK, if we can apply pressure to it, it can make a big difference'. So we swapped the burner of a smoking gun with a vaporiser. Then we could start to play with different aromas with no smoke or combustion anymore."

Further development followed and today around 30,000 bars worldwide use the Flavour Blaster — this, says Caporale, is what makes the tool truly innovative.

It was "an experiment, the first prototype created", he explains, only when "many bars" adopted it, did it become truly innovative. "Innovation is when you can monetise from the creativity as well."

The Flavour Blaster allows bartenders to blow huge bubbles that land on the drink and release an aroma cloud when popped, creating some real interactive theatre for consumers. It has been adopted by top-flight bartenders such as GN Chan, co-founder of New York's Double Chicken Please (No.2 on the World's 50 Best Bars list 2023), who uses it to top a 'custard bun' cocktail with the aromas of a Chinatown dim sum house.

Caporale acknowledges that creativity takes resources and money, and that means having the "time to reflect". In addition to its main bar, Drinkery House, at the front of the venue, Sips has a developmental area in Esencia. Caporale describes it as a space in the back "where we actually develop creativity to become innovation for the front part".

He says: "In the back, we serve 14 people and in the front, 200 people. If you can turn those ideas for 14 people, making them available effortlessly for 200 people, that is an innovative result." »

Aroma therapy (clockwise from below): Flavour Blaster theatrics; Simone Caporale; the bubble at Sips, a variation on a pornstar martini presented as a bowl of soap bubbles; and the krypta, which is served in a bespoke oval vessel designed so that drinkers must use their sense of smell and taste



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Panda & Sons' sub-zero freezing techniques

» Also keen to share his ideas with the wider bar community is Iain McPherson of Scotland's Panda & Sons (No.39 on the 2023 Worlds 50 Best Bars list). And he has a lot of knowledge to pass on — the Edinburgh speakeasy-style bar has garnered plaudits for its sub-zero freezing techniques.

"I'm always about knowledge sharing," says McPherson. "I think that's the best way to really grow as a community, as a bar industry. Back in the day, it was like, 'Here's my secret recipe'. We're not really like that. We're very much transparent with our research. I realised people were using our techniques, but I wasn't blind to the fact there was a financial barrier."

Some of McPherson's techniques require special freezers that not all bars can afford. This was a factor in his latest foray into freezing techniques, Sous Pression, which launched last year along with the bar's Transcend menu of sub-zero cocktails. "I really wanted to develop a technique that was not going to cost a lot of money — they could potentially use the freezers they already have," McPherson says.

The method was developed in Panda & Sons' creative space, the Brain Melting Society, while looking at alternatives to heat techniques.

"We wanted to create a freezing version of sous vide, which means 'under vacuum'," explains McPherson. "Sous vide is broken down to two main parts: the vacuum chamber, which gets rid of the air and creates the infusion process, and the water bath, which is the marrying process."

Recreating these processes became the 'goals' for the Sous Pression method of freezing.



Panda & Sons' Iain McPherson believes knowledge sharing is the best way to grow as a bar industry

McPherson was interested in how very low temperatures lead to burst water pipes because when liquid freezes, it expands. He considered how much energy is generated from water freezing and whether there was a way to harness that energy in the freezer.

His team was looking for a vessel that was strong enough not to burst when liquid expanded as it froze and came across some small stainless steel kegs.

The bar's technique allows all ingredients of a batch cocktail to be combined in a keg and undergo a freezing force up to 20 times stronger than that required to burst a household water pipe. "Sous Pression harnesses that power to extract the flavour from fresh produce into a fusion with the other ingredients," according to the bar's website.

"We launched [Sous Pression] in February last year and I was absolutely in awe and humbled and amazed by how quickly it spread," says McPherson. "We were utilising really good social media, like cocktail bartenders to explain the technique with us on their accounts. During the World's 50 Best Bars [event] last year, I think more than half of those bars had that technique being used on their menus."

Panda & Sons' other freezing techniques are: 'switching', using ultra-low freezers to freeze large quantities of water from spirits, then 'switching' the frozen part for another flavour; freeze drying, which extracts moisture, leaving "a dried product that maintains all the fresh flavour in a highly concentrated form"; and cryo concen- »



Panda & Sons, hidden inside a barber shop, was one of the first 'secret' bars in Edinburgh. Its creations include the core values (left) and red panda cocktails

» tration, which ripens fruit by freezing water and extracting it from the juice.

McPherson's team usually dedicates December to February to developing new ideas, he reveals, and is currently looking into the idea of 'freeze grilling'.

"I was thinking, if you touch something really hot, you'll get a blister; if you touch something really cold, you'll get a blister," McPherson explains. "So you're kind of freeze cooking."

He isn't yet sure where this will go — or if it will offer much difference — but says he likes to research all the possible freezing techniques he can imagine. And he has a lot of admiration for other cocktail bars that truly innovate and establish an identity.

When McPherson gives seminars, he asks bartenders: "What is your passion? What is your thing? You must have a clear identity for your bar." He says more bars seem to be taking risks. "Going off the beaten track is what I'm trying to encourage."

He is a big fan of Röda Huset in Stockholm, where co-owner Hampus Thunholm utilises his experience at the now-shuttered two-Michelin-starred restaurant Fäviken in cocktail creations celebrating Scandinavia's

high-grade native ingredients. McPherson also highly rates Line in Athens, where Vasilis Kyritsis and Nikos Bakoulis, formerly of The Clumsies, are doing interesting things with fruit wine.

Line's Why Ins

The goal of Line (No.12 on the 2023 World's 50 Best Bars list), explains Kyritsis, is to always think sustainably, which means it is constantly searching for ways to help the community grow.

"When we talk about the community, we mean not only the bartending community, but also other industries such as fruit farmers, coffee makers, artists, etc," says Kyritsis.

"We invest a lot in the macro economy, which means we buy large amounts of seasonal and organic fruits from all over Greece to make our fruit wines, called Why Ins. This helps farmers invest more and produce better products for the community, while also securing significant funds for their improvement."

Line's Why Ins are created in collaboration with the bar's R&D team — Giannis Vavadakis, Angelos Zeimpekis and "one of the most important winemakers in »



Vasilis Kyritsis: The goals at his Athens bar Line is to 'always think sustainably'



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» Greece”, Thanos Georgilas. Georgilas is responsible for the production of T-Oinos and “very selective and special wines, 80% of which go directly to Alain Ducasse restaurants”, reveals Kyritsis.

There are two categories of Why Ins: Classic, inspired by the grape wine process, and Fancy, inspired by the bartending process.

“For the Classic category, we ferment fruit, and the flavour profile and identity come directly from the fruit,” says Kyritsis. “We maintain all the correct processes, such as controlling temperature, using the right type of yeast, feeding and inoculating the yeast correctly, managing the right amount of different gases (CO₂, N₂) depending on the profile, and ensuring the proper resting period at the end.

“In the Fancy category, we follow the same process, but we create the desired profile in our tanks by adding different ingredients such as distillates, fresh fruit and aromas for a few days or hours,” he explains. “We experiment with different macerations and techniques to achieve the desired profile, similar to making a cocktail — [the process] can last one to four months.

“An example is our Fancy Fig Why In, inspired by the profile of aged champagne. We ferment dried figs — sourced from a biological [organic] farm in the Evoia region called Askada — in a controlled environment with the right amount of neutral oxygen, running a reverse pasteurisation to prevent acetic bacteria from working.

“After a few days, we add a basket of homemade pistachio brioche for a couple of days, and then remove it. In another



stage of fermentation, we add half-sliced oranges for a couple of hours and then we remove them too. We create the profile we want and add the right amount of carbonation. We rest about two months and our Fancy Fig Why In is ready.”

It’s a complex process with impressively complex results. “In my mind, making fruit wine is like making mezcal, and making grape wine is like making tequila — similar processes, but so different at the same time,” says Kyritsis.



Team effort (clockwise from top left): Pistachio brioche is added to Line’s fermentation tanks for Fancy Fig Why In; interior of the Athens bar; Line’s punch garnished with coconut cheese made from leftovers; Apple Why In

“One of the latest techniques we developed, which was simply amazing, was the controlled oxidation during the fermentation process of our plum wine, creating a profile similar to that of an amontillado sherry. We experiment extensively with different approaches in our Why Ins, so expect more complex results from us.” »

Beyond the glass: The ‘competitive socialising’ opportunity

‘Competitive socialising’ is a concept that has been gaining ground the world over for some time now, but new players are constantly joining in and cocktails often feature as part of the experience.

Red Engine is the company behind darts-based Flight Club and shuffleboard-based Electric Shuffle. It started ten years ago, now has 24 sites across the UK, the US and Australia, and is just one of a growing band of such organisations satisfying an increasing appetite for experiential bars. From axe-throwing to bingo, golf, ping-pong or F1 and stock market-themed nights, there’s an activity for everyone.

Twenty per cent of on-premise consumers in the US visit experiential bars, according to CGA by NIQ 2023 data, representing

“a huge opportunity for brands to win among those highly engaged with the on-premise — 66% of experiential bargoers visit monthly and 42% visit weekly”.

It’s a similar story in other countries.

Daniela Cardaciotto, CGA by NIQ’s Italy on-premise sales leader, says: “Venues providing entertainment and other experiences are increasingly attractive to Italian consumers who want to get full value from their out-of-home visits.

“Interest in this channel is likely to grow further, so brands and manufacturers who can identify consumers’ unique needs now can help craft effective channel strategies for growth in the future.”

With hospitality venues feeling the effects of the cost of living crisis,

competitive socialising could be a way to improve the industry’s overall fortunes.

Kate Nicholls, chief executive at UKHospitality, says: “There is no doubt that we have seen an increase in the number of bars focusing on different leisure experiences or competitive socialising as venues look to create new income streams and consumers demand new experiences from hospitality. As long as that consumer demand remains strong, it’s likely we will continue to see this type of venue cement its place in the market.

“Hospitality has always been incredibly responsive and innovative, whether that’s operators or drink suppliers, and a relatively new market like competitive socialising provides plenty of opportunities for existing and new entrants to reach new audiences.”

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Bar Pompette's Hugo Togni: There is a 'movement towards environmental responsibility'

Sustainable approach nurtures flavour experimentation

» A sustainable approach to cocktails is increasingly being adopted across the world, with many bars embracing a 'circular-making' philosophy. Much of the focus is on being anti-waste, explains Absolut global brand ambassador Ricardo Dynan.

"If [bartenders] are juicing a lime, they will also look to do something with the zest by making a tincture," he says. "At Absolut, we worked on Green Hustle, a project which took place some years ago to encourage bartenders to think in more circular ways. It included a seminar where we encouraged bartenders to try our sustainable 'hacks' — like, for instance, making lime stock from leftover limes."

Hugo Togni, co-owner of Toronto's Bar Pompette (No.29 on North America's 50 Best Bars list 2024), agrees that sustainability is currently a major focus. "Many bars are adopting zero-waste practices, prioritising eco-friendly methods and using locally sourced ingredients," he says. "This commitment to sustainability reflects a broader movement towards environmental responsibility within the food and beverage sector."

Togni says Bar Pompette takes "pride in the art of combining unexpected ingredients and cultural influences to craft truly unique cocktails". He adds: "Inspired by my experiences with Grand Marnier and 'The Grand Encounter: Behind the Bar' video series we worked on, we're continuously exploring unconventional ingredient pairings."

"Recently, we've been fascinated by the origins of classic dishes and their unexpected connections. For instance, we learned that the Hawaiian pizza, a dish often per-

Syrup and liqueur producers lead the charge in no/low

With innovation clearly rife in some areas of mixology, one sector has proved a little disappointing for some — no/low cocktails.

The category may have quite quickly become a staple in cocktail bars, but two leading syrup and liqueur makers feel it needs to pick up the pace in terms of innovation.

"In general, the bartender world has changed quite a lot in terms of using new techniques and trying to go beyond the usual way of making drinks," says Monin advocacy brand manager Mišel Posavac.

"Regarding no/low cocktails, I need to be honest and say that I was expecting much more from bartenders, especially if we talk about high-level cocktail bars. But it is moving, and it will develop more and more."

Over at fellow syrup and liqueur producer Giffard, UK, Northern Europe & Baltics brand ambassador Alex Robin is also not blown away by progress so far, but is a little more positive.

"There is more 'innovation' in low than in no at the moment," he says. "Top bars are taking the trend more and more seriously and are trying harder to propose standalone drinks to their customers, whereas high-volume/smaller venues are only starting to consider non-alcs since last year, really."

Robin anticipates a growing trend in the no/low arena in 2025 will be on the non-alcoholic vermouth side of things, adding that non-alcoholic wine "is definitely a thing now and people know



how to play with flavours, so innovation will start to focus on new areas".

But for now, he says, Giffard leads the no/low innovation charge with four alcohol-free liqueurs — Elderflower, Grapefruit, Ginger and Pineapple — produced using pasteurisation to create a long-life product with no need for refrigeration. "This kind of innovation in the category is what is needed to inspire and invigorate the industry, and keep up with customer demand for no/low-alcohol cocktails that are complex and taste as good as their alcoholic counterparts."

Monin is also on the case. Posavac says its Paragon by Monin Mystic Collection of premium cordials is made using "the most innovative acid blend and extraction methods to create flavours never before used in the beverage industry". He claims the company's Pure range (pictured above) to be a "game changer" when it comes to no/low-sugar, no/low-ABV products. "Pure is a range of five flavours with a very powerful aroma, but with no added sugar and completely natural," he says.

"To give you an example, adding 1cl of Pure Passion Mango to your margarita will give you a taste of passion fruit and mango without changing the balance of the drink; 1cl of Pure has less than 0.1g of sugar and only 2 calories, so is perfectly made for skinny cocktails."



Hugo Togni's margarita suzette was created for 'The Grand Encounter: Behind the Bar' series

ceived as exotic, was actually created just two hours away from Toronto. This insight inspired us to experiment with a pairing of tomato and pineapple, but in a way that goes beyond traditional pizza."

Thoughtful sourcing is also a key component of making cocktails sustainably, says Togni. "We're excited to integrate locally sourced tomatoes into our cocktails, working with the best varieties available in our region to ensure exceptional quality. By thoughtfully blending these local tomatoes with pineapple, we aim to create a cocktail that celebrates the unique flavours of both ingredients in a refined and innovative manner. This approach not only highlights our commitment to using the finest local produce, but also underscores our dedication to innovation." **GDI**

Beer volume and value may be down in Germany, but opportunities remain

Germany's beer category last year saw both value and volume decline. Look closely at the data though, and businesses will discover room to grow, says CGA by NIQ's **George Argyropoulos**

When people think of Germany, beer often comes to mind as a defining element of the country's identity. However, such a strong cultural association does not shield the category from negative trends.

Indeed, recent data from CGA by NIQ's On Premise Measurement (OPM) solution, newly launched in Germany, reveals that beer faced significant setbacks in 2024, with declines in both volume and value across the country. Beer volumes reached 4.95m hectoliters, marking an 11.1% decline compared with last year, while sales fell by 7% year on year.

Beer's performance was particularly poor in the south of Germany, where the decline was more pronounced. Volumes fell by just over 14% in the south-west, with sales down 10.2%, while the south-east experienced an additional 1pp (percentage point) drop. Northern states performed slightly better, but they still recorded negative results, with the north-west — the best-performing area — seeing beer sales decrease by 3.2% and volumes down 7.9%.

A matter of style

Despite the overall decline, there are bright spots within the beer category. CGA by NIQ's research reveals that certain beer subcategories have actually been performing well, offering opportunities for operators and manufacturers to capitalise on in the coming months. Pilsners, for instance, have gained nearly 2pp in volume sales, signalling growth within an already substantial segment, as it accounts for two in every five beers sold in the German on-premise market.

Even more promising are relatively smaller subcategories such as *helles* (pale lager) and *alkoholfrei* (alcohol-free), each of which has grown by 0.4pp compared with last year. This figure may seem modest, but with each style representing around a fifth of all beer sales in the country, their growth is rather significant and suggests strong potential for the coming months.

Alcohol-free beer has traditionally been



Thousands of festivalgoers crowded Munich's streets during last year's Oktoberfest opening parade

Data drop

■ German beer volumes reached 4.95m hectoliters in 2024, marking an 11.1% decline compared with 2023, while sales fell by 7% year on year.

■ Bright spots include pilsners (+2pp in volume sales), *helles* and *alkoholfrei* (both +0.4pp).

■ Poor performers include *bier mix* (volumes -15.8% in the north-east) and *weizen* (year-on-year loss of 0.7pp in volume market share).

■ Germans engage with the on-premise, with two in five LDA consumers visiting venues on a weekly basis.

■ Regular on-premise visitors tend to be younger — predominantly Gen Zers and Millennials — and are more likely to consume beer.

more popular in Germany compared with other European markets, but with the recent global rise in interest in this segment, the country's alcohol-free beer market can expect strong potential for continued growth in the future.

Meanwhile, the *bier mix* category —

which includes popular beer-based mixed drinks like the classic German radler — is experiencing a negative trend. This decline is particularly pronounced in the north-east, where volumes have dropped by a substantial 15.8%.

Weizen (wheat) beer is another style facing significant challenges in the German on-premise, with a year-on-year loss of 0.7pp in volume market share. While this decline is evident nationwide, it is most pronounced in the southern federal states, where the subcategory has seen the steepest drops.

Pricing dynamics

Analysing the pricing trends of specific beer styles can uncover deeper insights into consumer behaviour, helping to identify why on-premise users might be shifting away from certain subcategories and, in turn, offering manufacturers valuable guidance for future strategies.

Amid the ongoing cost of living crisis, one might expect that consumers would steer away from higher-priced drinks. Yet the data presents a different picture.

Pilsners, which have shown growth despite beer's overall downward trend, are among the more expensive beer options in Germany, averaging EUR9.93 (US\$10.94)

per litre. This is higher than the average price of *weizen* beers, which — as we have seen previously — have experienced a significant drop in market share nationwide.

Non-alcoholic beers are more expensive than *weizen* beers too, yet, like pilsners, they have also performed better despite their higher price tag. Additionally, pilsners have seen a higher cost increase over the past year compared with other styles, which does not appear to have adversely affected their satisfactory performance in the on-premise market.

It is worth noting, however, that *bier mix* is the second most expensive beer category in Germany, averaging EUR10.09 per litre, and it has seen a decline. This suggests that price may well influence consumer choices too, yet only to a certain degree, and other factors should be considered.

For instance, *weizen* beer is the second-cheapest option available in Germany's southern federal states, the heartland of this style. Despite its affordability, *weizen* beer has faced the steepest decline, a particularly surprising development given its historical popularity in the region. This trend could indicate that southern on-premise users — particularly younger drinkers — might be shifting away from traditional styles (like wheat beers), possibly due to their association with older generations and outdated lifestyles.

Profile of a beer drinker

With beer the leading alcoholic category consumed in the on-premise, it is crucial for operators, manufacturers and brands to gain a detailed understanding of consumer interactions and behavioural changes in this environment.

This deeper insight is essential for fully grasping shifts in how consumers engage

with the beer category when they go out.

CGA by NIQ's consumer research reveals that drinkers in the country are engaged with the on-premise environment. While the market has experienced a decline in visitation, two in five LDA consumers visit venues on a weekly basis, a figure that certainly confirms the significance of the on-premise in their lives.

Regular visitors to bars, pubs and restaurants in Germany are more likely to consume beer compared with the average user, making them a crucial target audience for businesses looking to capitalise on beer opportunities.

Those who regularly visit the German on-premise tend to be younger — predominantly Gen Zers and Millennials — and they generally benefit from higher incomes, which, crucially, translates to a higher potential monthly spend. Despite the overall decline in the beer category, price seems not to be a determining factor in German consumers' beer choices.

The younger demographic of weekly visitors significantly over-indexes across most channels, but especially in venues suited to larger groups and longer outings, such as drink-led establishments, bars and nightclubs. Despite the popularity of drink-led venues, bars and nightclubs among regular visitors, restaurants and hotels remain the most popular channels overall, accounting for more than half of the market.

For beer brands and suppliers, however, these are precisely the venues where the category's volumes have experienced the sharpest fall. Beer's market share has instead increased in smaller venues such as pub bars, fast-food outlets and small food establishments, which represent only a limited fraction of the total beer volumes sold in Germany.

The research

CGA by NIQ offers an unparalleled and comprehensive view of the on-premise market through its suite of research services.

Its On Premise Measurement (OPM) solution provides a robust and extensively validated measure of beer performance in Germany. This tool enables businesses to address key questions related to category, channel and occasion, and to optimise their sales and marketing strategies.

To explore how OPM research can enhance strategies or learn more about CGA by NIQ's other consumer insights for brands, operators and suppliers, visit www.cgastrategy.com or email George.Argyropoulos@nielseniq.com

Several factors could explain the beer category's success in these smaller or more casual venues. For one, casual environments may better suit the preferences of frequent beer drinkers, who might favour beer consumption in a relaxed setting while opting for other beverages in more formal venues.

Furthermore, while cost does not appear to be a determining factor in the specific styles of beer that people choose, financial constraints may influence the types of venues where they prefer to imbibe them.

In fact, CGA by NIQ research shows that the cost of living crisis is impacting the choices of nearly half of Germany's on-premise users. These consumers may be favouring more affordable casual venues, as they typically offer lower prices for both food and drinks.

Lucky for operators, the undeniable inflationary pressures do not seem to negatively impact the overall outlook for the sector. Insights indicate a positive trend for future on-premise visits, especially among those younger demographics which may have higher spend levels when they go out. One in five are still willing to trade up during special outings, and half are likely to simply pay more for higher-quality drinks.

Beer has yet to fully capitalise on this opportunity. The category remains the most consumed alcoholic beverage in the German on-premise market, but its appeal among Gen Z is relatively limited.

This is promising news for beer brands, manufacturers and operators, as it unveils a promising path to enhancing engagement with this demographic and driving higher-value purchases. **GDI**

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The beer category's strong cultural association with Germany does not shield it from negative trends

From unique shooters to miniature cocktails, shots are finally growing up

The rise of moderation and premiumisation should have sounded a death knell for the shot serve, but bartenders are coming up with innovative creations to keep the party going. **Amy Hopkins** reports

For many Millennials, shooting back tiny glasses of strongly flavoured, high-ABV booze was a formative part of their introduction to alcohol. Sambuca, Jägermeister, Aftershock, Sourz — these were some of the most popular drinks that stickied bar tops across the Western world during the noughties. Neat alcohol such as tequila and vodka were also common shot choices, staining the image of both categories for years to come.

As the ‘drinking less but better’ trend continues to build, what’s become of shots? Knocking back baijiu, soju and shōchū is customary in parts of Asia, but this is not a particularly popular mode of consumption among younger tastemakers. Elsewhere, the consensus seems to be that the traditional shots of the noughties are still relevant to some extent, but are much less frequently ordered during nights out.

While mainstream venues — particularly high-volume bars that attract students, hen/stag parties and office Christmas parties — still make a good profit from shots, premixed cocktails have opened a lucrative



Shot serves have evolved into mini cocktails — like this creation at London’s Archive & Myth — as consumers search for more unique and premium experiences with an eye on their alcohol intake

new revenue channel. And the sophistication of contemporary bar culture means that, overall, fewer establishments are willing to serve shots in any shape or form.

Shift towards premium serves

When they do play a crucial part in a bar’s offering, the shots of today are often an altogether more interesting and premium proposition. Menu developers believe the format continues to play an important role in nightlife — after all, shots satiate patrons’ desire for celebration and camaraderie — but contemporary innovations use new ingredients, flavour combinations and presentation styles to add excitement and sophistication to this oft-judged occasion.

For example, at Kiki Lounge, based on the UK’s Isle of Man, ordering shots gives patrons a memorable experience that tacitly pokes fun at the seriousness of the contemporary bar scene. “The shot occasion has certainly evolved over recent years,” co-owner Jamie Lewis explains. “While the usual suspects like tequila, sambuca and Jägermeister are still popular, there is a noticeable shift towards more unique and premium shot experiences.

“At Kiki Lounge, we have observed a trend towards more experiential offerings that enhance the celebratory aspect of shots. For example, we offer a spectacular tray service for special occasions. The tray is loaded with the shot of choice, decorated

with crushed ice and embedded with flashing lights, making it a visual feast. The tray is brought to the table by team members wearing disco hats or other extra-fancy headwear, wielding a bubble gun and sparklers, while an appropriate celebratory song is blasted from the speakers.”

The bar’s ‘house shooters’ are imbued with a sense of nostalgia, channeling guilty pleasure flavours that many patrons cannot resist — but would perhaps have hardened agricole rum fans running for the hills. They include hubba bubba buckfast, popcorn rum and birthday cake vodka, served with whipped cream, sprinkles and a sparkler.

While picklebacks (a shot of Irish or American whiskey followed by a shot of pickle juice) and boilermakers (a glass of beer accompanied by a shot of whisky) were once deemed trade secrets, enjoyed by off-the-clock bartenders, Kiki Lounge has incorporated accessible versions of these serves into its menu.

“[We] always strive to turn traditional expectations on their head. Rather than offering Jägermeister or sambuca, we provide creative alternatives that bring a fresh twist to classic shot occasions,” continues Lewis. “Our unique offerings are designed to fill the gap typically occupied by traditional shots. We believe that relying on those standard shots can be a missed opportunity.” »



Kiki Lounge’s house shooters arrive with a sense of nostalgia and guilty pleasure flavours

From shot to tiny cocktail

» For other bars, riffing off the shot concept can, perhaps counter-intuitively, allow them to capitalise on the modern temperance movement. At London's Archive & Myth bar, for instance, customers can order cocktails in two different sizes: 'minor' or 'major'.

According to bar consultant Jack Sotti, who launched Archive & Myth earlier this year, these miniature cocktails give drinkers the chance to sample a full-flavoured cocktail that isn't a low-ABV spritz. They also offer financial flexibility and allow people to try more drinks without getting too intoxicated, he says.

Likewise, Mirror Bar in Bratislava serves 'cocktail shots'. "They are a huge thing for us, because we use them as a part of our hospitality rituals for our guests within different occasions and stages of the evening," explains the bar's ambassador Stanislav Harcinik. "We have dedicated this part of our menu to 'sharing', as that is essentially what hospitality is in our eyes. The serves are either inspired by the Japanese tea ceremony, the Barranquilla Carnival or nature."

The award-winning Atlas Bar in Singapore also touts the benefits of miniature craft cocktails. "[In] cocktail bars, there's been a notable decline in traditional shot consumption," says beverage director Yana Keller. "With the emphasis on responsible drinking, bars are now offering alternatives that reduce the likelihood of over-intoxication. Instead of serving straight spirits, we create petite cocktails that offer a more refined drinking experience."

"These 'cocktail shots' are becoming a menu staple, allowing guests to enjoy a sophisticated drink in a smaller portion, often shared with the bartender. This approach promotes responsible drinking while still meeting the occasional demand for traditional shots."

Charlie Kim, bar manager at Singapore's MO Bar, observes that guests are increasingly favouring flavoured or aromatised



London's Archive & Myth offers cocktails in two different sizes: 'minor' or 'major'

wine to consume as a celebratory shot. "[There] is always a time and place for shots and I do not think it will ever fade away into history. However, given the fact that the majority of consumers are becoming more health-conscious, they opt for lower-ABV 'shots'."

Culinary influences now prolific

Another element of the modern shot evolution is how the occasion is increasingly capitalising on gastronomy. It's been many years since the famous bloody mary-inspired prairie oyster shot was conceived at London's 69 Colebrook Row, but culinary influences are now prolific among shot innovators, particularly in Asia.

Examples include a shot of local Thai spirit ya dong served with pickled raw mango and a pandan water chaser; a pickleback consisting of a shot of soju followed by fermented white radish; and a shot of sweet potato shōchū chased by an Oreo cookie and a dollop of kimchi.

Then there are what's known as the 'bartenders handshakes' — in other words, drinks ordered by people, both industry and non-industry members, 'in the know'. Boilermakers and picklebacks were once thought of in this way — now Fernet-Branca has a colossal bartender fanbase. These drinks are often served by one bartender to another as a sign of camaraderie or gifted to patrons as a gesture of hospitality.

They — and shots more generally — can symbolise celebration and conviviality, as opposed to mere drunken debauchery. Like



cocktails, they can be tweaked and personalised to fit a bar's style and the trends of the day.

As Mirror Bar's Harcinik says: "[There] are no limits to creativity in any way. With shots, it's what shots means for you and for what you want them to represent at your bar. Today, it's not only about shooting vodkas or tequilas, but for some bartenders it has also become a custom where they say 'Cheers' with a shot of herbal liqueur."

"You can use shots to build up a drinking experience, like with picklebacks, for example. Jelly shots have also become a huge thing. To be as creative as possible you can go deeper within molecular gastronomy and create spherical shots with pouches of whatever flavour you like."

Far from being a dying breed, the reincarnation opportunities for shots appear almost endless. **GDI**

'Cocktail shots', inspired by the Japanese tea ceremony, the Barranquilla Carnival or nature, are served as part of 'hospitality rituals' at Mirror Bar in Bratislava





Forbina (left) brings a touch of drama with cocktails named after productions like *Swan Lake* and *Don Giovanni*. Liquid Office co-owner David Andrie

An interesting paradox characterises the on-premise in Prague: although there are fewer rather than more customers and they don't drink as much as they used to, new establishments — often ones with very ambitious concepts — are on the rise. Including those serving exclusively cocktails.

The scene

The Czech Republic is generally perceived as a beer country, which is justified. The Czechs are the record holders in terms of beer consumption (128L per person in 2023) and given the size of the country, has an impressive number of breweries — around 550, with 48 falling into the industrial category.

Pilsner Urquell dominates a significant part of the market, and lager remains the standard choice for Czech drinkers, but the popularity of top-fermented beer, such as ale and stout, has grown significantly since the millennium, with small breweries in particular contributing to its rise.

There are more than 50 mini or restaurant breweries in Prague alone, and almost every large brewery has a branded or contract pub or restaurant there. The Czech capital, with a population of nearly 1.2m people on 496sqkm, is generally renowned for its high concentration of on-premise venues.

In recent years, however, operators have had to face the fact that fewer people are drinking their beer. And the difference is particularly noticeable — 15 years ago, 51% of the beer produced for the domestic market was consumed in pubs and restaurants; by 2023, this had fallen to 30%.

A long-interrupted tradition

Having beer written into its DNA doesn't mean that cocktail culture isn't also thriving in this small Central European country. In Prague, its initial heyday was between 1900 and 1939, when 60 bars were operational.

A reminder of this cocktail era is The American Bar in the basement of one of

CityScapes

PRAGUE

The Czech Republic earns its reputation as a beer country by consuming the most per person in the world, but cocktail culture is thriving in the capital — just as well, as beer consumption in the on-premise is falling rapidly. By **Bára Urbanová**

Prague's most important Art Nouveau monuments — the Municipal House. It has been part of the building since its very beginning, 1912, and although much of the original decor has been replaced by replicas over time, it has retained its period appearance.

The period from February 1948, when the communist regime came to power, until the so-called Velvet Revolution in November 1989, was not very favourable to cocktail culture as it fell into the category of 'bourgeois entertainment'.

It was not until 1995 that the Czech Republic's first bar exclusively serving cocktails opened in Prague — Bugsy's Bar — and began writing the city's modern bar history in the true sense of the word. Among the other pioneering cocktail bars that followed, Hemingway Bar (2009) and Black Angel's Bar (2010) have received international acclaim.

Changes in the bar scene

These bar legends have to some extent predetermined where Prague's nightlife will continue to evolve. One of its main centres is in the Old Town around Dlouhá Avenue and its connecting streets, while the other is on the border between the Old and New Town near National Avenue.

Two of the most talked-about new businesses are connected to this part of Prague. The first is the Alma gastronomic complex, comprising a restaurant, café, bar and club,

which opened last year. The bar team's philosophy is simplicity, sustainability and seasonality. Alma is the first bar in Prague to incorporate foraging and has plans to build its own garden and greenhouse.

The second venue to create a buzz is the cocktail bar Forbina, which welcomed its first guests at the end of August. The National Theatre is opposite the bar and the historic location is reflected in everything from its name (Forbina means 'forestage'), and theatrical Art Deco-inspired decor to its drinks menu, with cocktails named for famous productions like *Swan Lake* and *Don Giovanni*.

Another recent opening of note in this neighbourhood is The Monkey Bar, part of the upscale Falkensteiner Hotel, a lively venue with a year-round bar garden and a fine-tuned cocktail line-up.

The Lesser Town is also starting to come alive with bars, and there are some interesting venues in Vinohrady district. A sister to Hemingway Bar, Liquid Office, opened in the Karlín district in 2022, while Vršovice is known for its concentration of interesting venues, including the neighbourhood-oriented Café Bar Pilotů, as is Holešovice district, home to Bar Cobra and Garage22, Prague's only craft distillery.

Lots of businesses, few people

Among Prague's new establishments, there are often bars with unclear concepts and »

» futures, or businesses that rely more on effect than quality. The oversaturation of the market, coupled with the reverberations of the pandemic, has resulted in a shortage of labour. At the same time, bartenders no longer feel as much loyalty to their employers and don't hesitate to throw themselves into new projects.

Liquid Office co-owner David Andrle says: "When I started, there weren't that many cocktail bars and it was all the more difficult to get a job in one of them and then keep it. Today you say goodbye to a colleague and he has another job within five minutes. At the same time, today's young people have completely different priorities. They prefer more free time and less work, but at the same time they expect high financial compensation. Fortunately, there are still enthusiasts who want to work hard and get ahead in this industry."

Dominant categories and players

As elsewhere in the world, Czech LDA consumers have been drinking less and thinking more about what they order in recent years. In addition to changing consumer habits, this has been driven by high inflation and a 10% increase in excise duty on spirits.

Spirits sales in the Czech Republic fell by 51.3% year on year in H1 2024, according to the Union of Producers and Importers, which last month called on the government to cancel further increases planned for 2025 and 2026.

The premium and upmarket segments of the market remain stable, as wealthier consumers have retained more spending power, reflected in year-on-year growth in champagne (+9.2% sales growth 2022–23, Comité Champagne) and single malt scotch (+23.1% volume change 2023 vs '22, IWSR). Rum (+7.6%) remains the best-selling spirit, with gin & genever (+5.5%) still popular.



R. Jelínek's GoldCock Blended Czech Whisky

and distillate production. The intersection of these skills is giving rise to a unique new quality — Czech whisky."

The strongest player on the Czech spirits market is Stock Plzeň-Božkov, part of Stock Spirits Group, which has built up a very strong distribution portfolio in addition to its own liqueurs and spirits. It has found partners in Diageo, Beam Suntory and, since April this year, Rémy Martin, whose brands have been distributed in the Czech Republic by Mast-Jägermeister CZ.

Among the purely Czech distribution companies, the leader is Ultra Premium



Old meets new (from left): Art Nouveau style at The American Bar; foraging pioneer Alma bar; and The Monkey Bar at the Falkensteiner Hotel

Of the current trends in the Prague bar scene, Andrle highlights localism, seasonality and sustainability.

Classics remain the mainstay of Prague's cocktail scene. Benedikt Houda, director of bar at the Falkensteiner, has noticed conservatism among guests of all nationalities. "Even in the context of rising prices, people don't like to experiment," he says. "At the same time, they have a hard time imagining a drink based on a list of ingredients, so the ideal is always to match it with a cocktail classic."

One area garnering increasing interest, Houda adds, is non-alcoholic cocktails, which make up a quarter of the 16-item cocktail menu at The Monkey Bar. It's a similar story at Alma. Bar manager Pavel Sochor explains: "We recently added three new non-alcoholic drinks in response to growing demand. It's the same with lower-alcohol drinks, seven of the nine cocktails on our current menu fall into the low-ABV category."

Agave spirits are also growing in leaps and bounds, but they remain a rather marginal category overall. Attention is therefore turning more towards whisky, which is growing across all market segments and is expected to continue to grow in the future.

In this context, it is interesting to mention the boom in Czech whisky, led by the relaunched GoldCock brand produced by R. Jelínek, mainly known for fruit spirits.

Miroslav Motyčka, the company's sales & marketing director, says: "Sometime around 2020 to 2022, Czech whisky started to make a stronger presence, first in the whisky community and later in the gastronomy sector. There are three serious distilleries producing local whisky, and a number of smaller distilleries starting production. It is still only a fraction of the market, but the trend is growing steadily and looks set to take hold.

"After all," he adds, "it combines two distinctive Czech traditions, beer production

Brands, which continuously adapts to changes on the global scene — in 2022 it was deprived of Diplomático Rum when it was acquired by Brown-Forman, and it lost Don Papa when Diageo bought the brand last year (it is now distributed by Stock in the Czech Republic). Its current brands include Campari, Nikka and Planteray.

A new player is Polish Maspex. Although it has been on the Czech market for over 25 years, it has so far focused exclusively on the non-alcoholic segment. The move to alcoholic beverages came in 2021, when Maspex Group bought the largest alcohol distributor in Poland, CEDC, which is, among other things, the producer of Żubrówka Vodka.

This year it bought Czech herbal liqueur Becherovka, formerly owned by Pernod Ricard and once a bartender's 'love' brand. Maspex has made no secret that it intends to expand its alcohol portfolio further, so the local distribution environment looks set to be at least slightly shaken up. **GDI**

On-premise consumers are ‘ready to dive into the world of anise spirits’

Anise spirits are capturing the imaginations of bartenders, but their use in cocktails must be carefully considered, reports **Joe Bates**

Liquorice, fennel and anise flavours are expanding out of their traditional Mediterranean heartlands into markets which once found them challenging. Bartenders are increasingly enthusiastic about using anise-based spirits such as pastis, absinthe, ouzo and sambuca in their drinks menus, which are proving a hit with the increasingly adventurous palates of Millennial and Gen Z consumers.

Liquorice and anise spirits share the common chemical compound anethole — it’s what gives them their distinctively sweet, aromatic taste, which some people love, and others find too strong and medicinal. It remains a divisive flavour profile for some. In a survey of 2,000 US consumers conducted last year by market research firm The Harris Poll, for instance, liquorice came second only to anchovies as the country’s most hated food.

Despite this traditional resistance, bartenders sense the consumer mood is shifting.

“We are on the tipping point of a lovely resurgence for absinthe, in particular,” says Darian Everding, a bartender at London Underground, a British-themed pub in Ames, Iowa. “Americans are ready to dive into the world of anise spirits and absinthe is the alluring siren drawing them in. Absinthe has a mysterious history dripping with intrigue and laden with misinformation.

“In the last year of introducing a culti-



Absinthe’s ‘edgy backstory’ offers a ‘compelling hook’ to draw on-premise drinkers to the anise category

vated selection of craft absinthes to my back bar and menus, guests have been really eager to not only experience the flavours of absinthe but also to learn about it,” she adds. “Absinthe’s edgy backstory is a compelling hook, and hopefully, once they come to the point of exploring the world of absinthe, these guests are introduced to the true history of the spirit.”

A question of balance

To accustom untutored palates to the joys of anise spirits, many bartenders counsel a cautious approach to their use. “When incorporating anise spirits like absinthe or pastis into classic cocktails, balance is key,” says Mario Perez, the CEO of the House of Wine, Beer and Spirits, a bou-

tique drinks distributor based in West Palm Beach, Florida.

“I typically start with a smaller amount — perhaps just a rinse or a splash — allowing the spirit’s distinct flavour to enhance rather than dominate the cocktail. Complementing the anise with citrus or herbal elements can create a more harmonious blend.”

Similarly, Kevin Rigault, bar manager at Bar Les Ambassadeurs in the Hôtel de Crillon, Paris, argues that less is more. “We approach anise spirits with restraint, typically using them in small proportions — just a dash or two. This allows their unique flavour to enhance the cocktail without overwhelming the other ingredients, maintaining a balanced drink.”



Absinthe: Quality trumps history

Of all anise-flavoured spirits, absinthe has the most historical and cultural baggage for brand owners and mixologists to unpack. Consumers’ views on absinthe often tend to be shaped by the many myths and misperceptions that persist over its 19th-century heyday in France and Switzerland when its alleged hallucinogenic properties made absinthe a popular drink among leading artists and intellectuals.

“It can be a bit funny to hear people’s perspectives on absinthe, but it makes for an easy segue into talking about its rather contentious history and its misplaced association with violence and rising crime because of its high ABV,” says Chris Tunstall, co-founder of California-based barware supplier and bartender training provider A Bar Above. “A touch of education helps to tamp down these perceptions and fosters curiosity instead.”

Spirits expert Ted Breaux (pictured left), the creator of Lucid (right) and Jade absinthes, acknowledges that absinthe’s colourful history is great at creating »



» initial customer interest, but the liquid inside the bottle has to deliver. “I recommend only artisanally distilled absinthe and anise spirits, which excludes anything blended with star anise oil and greatly pares down the recommendation list.”

Absinthe reigns supreme among anise spirits in classic cocktail culture, with around 100 cocktails containing absinthe famously appearing in Harry Craddock’s original 1930 publication, *The Savoy Cocktail Book*. Yet this history-laden spirit can also be served more simply to a younger LDA crowd.

Student serves and expanding markets

La Fée Absinthe, a French brand founded in the late 1990s and instrumental in overturning the absinthe ban in many markets, is having success targeting UK students.



La Fée is promoting an absinthe twist on a mojito

La Fée and its distributor Amber Beverages are actively targeting this LDA sector with a focus on three serves: a simple shot, a mix with an energy drink and an absinthe twist on a mojito. Marketing activations include a bright green branded Routemaster bus with a luxury lounge bar, and this month La Fée will launch a range of branded clothing via its website www.lafee.com.

Founder & brand owner George Rowley says the company is adapting its strategy to more cost-conscious on-premise customers. “Our response to these [challenges] is to try and enable our clients premium access at an affordable price with La Fée Parisienne Absinthe Supérieure 20cl.

“This product easily retails sub-EUR20 (US\$22), makes eight drinks or loads of cocktail additions and is ideal for the front of bar with its unique cocktail book label. NV, being our entry base, offers better affordability, and often alongside the Parisienne, it ranks in the top three on Amazon

Pastis ‘works on anything from boozy dry drinks to long highballs’

Pastis holds a much-cherished place in the heart of the French people. It’s a quintessential symbol of the country’s culture and has been enjoyed at social gatherings for generations, especially in the Mediterranean port of Marseille, where it is virtually synonymous with the city’s famously laidback outdoor lifestyle. Yet its old-fashioned image has led to pastis losing ground in recent years, with the market shrinking from 66m litres in 2016 to 55m in 2021, according to the French Federation of Spirits (FFS) trade body.

Nevertheless, a new generation of mixologists, both at home in France and overseas, have no intentions of giving up on pastis and instead are putting the classic spirit at the heart of their cocktail lists. At the CopperBay cocktail bar in Hôtel Lancaster Paris, anise spirits such as pastis are revered for their cultural importance and versatility in mixed drinks. The bar even produces its own brand, Pastis Mauresco.

“Anise works on anything from boozy dry drinks to long highballs,” insists co-founder Aurelié Panhelleux. “It brings that fresh herbal sensation that brings complexity and depth to the drinks. CopperBay’s flagship pastis cocktail is



Complex flavour: Pastis Henri Bardouin

[in the UK] and in the top five to ten globally.”

Europe and North America have been the traditional focus regions for absinthe producers, but La Maison Fontaine, a multi-award-winning French blanche absinthe produced in the traditional absinthe-producing town of Pontarlier, has had success growing its export footprint in Asia.

“Our primary export markets span across Asia, where we have established a strong



CopperBay’s flagship pastis cocktail, the Mauresco (left)



the mauresco, a blend of the bar’s own pastis combined with gin,

orgeat flavoured with cedrat, dill and lemon juice. “It’s a sour drink with a nice note of fresh anise,” explains Panhelleux.

Pastis Henri Bardouin, produced by Distilleries et Domaines de Provence (also the producer of Absente 55 Absinthe), is one of France’s best-selling premium pastis brands. Export department manager Jean-Pierre Trouillet is excited about the imagination that bartenders are using to use pastis in their creations, but the company’s serving recommendation for pastis remains traditional.

“Our recommendation for pastis remains traditional: six to eight portions of water to one portion of pastis,” he says. “Bubbles don’t match with the anise flavour, this is why we do not recommend making a spritz with our pastis, but it is possible to make your own recipe by adding a drop of rose liqueur to a glass of pastis to bring a discrete flowery note to the complex flavour of Henri Bardouin Pastis.”

presence in Hong Kong, China, Taiwan, Singapore, Indonesia and Thailand,” outlines company co-founder Sven Olsen.

“These markets have been particularly vibrant, fuelled by the burgeoning premium cocktail culture that continues to evolve in these regions,” he adds. “The sophistication and creativity of the cocktail scene have created a natural affinity for absinthe, a spirit steeped in history and mystique.” »

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'Diverse' sambuca suits both shot and cocktail serves

» Sambuca remains the most schizophrenic of spirits categories. This very sweet anise-flavoured liqueur is traditionally sipped neat in its native Italy, where it is still enjoyed as a traditional digestive by older consumers or mixed with strong Italian espresso coffee in the form of a classic 'caffè corretto'.

In markets such as the UK, however, sambuca is also consumed as a cheap session shot by younger LDA consumers, often too poor to afford higher-priced beverages on a night out. You would be hard-pressed to find two more wildly different consumption occasions – and producers all have their own take on how to reconcile this long-standing marketing challenge.

For Antica Sambuca (pictured right), one of the category's top-selling premium brands, shots remain a key focus, with the brand's flavoured variants proving very popular in the on-premise. "Many consumers want to be able to experiment with different flavour combinations," says Nicola Dal Toso, CEO of parent company Rossi d'Asiago.

"The range we offer gives consumers the opportunity to do so. Sweet and spicy, fruity and fragrant, sharp and refreshing: it's a

diverse offer that lets consumers experiment and find their best match. Staying relevant to the current consumer while remaining true to ourselves is the guideline."

Cocktails can play a modest role too, Dal Toso adds. "Rossi d'Asiago's favoured simple long serve is the A-star, a simple mix of Antica Sambuca Classic and

tonic water garnished with a lemon wheel and a single star anise. "A-star is a simple and modern cocktail that balances the sweetness of the sambuca and the bitterness of the tonic water well," says Dal Toso.

In contrast, Matteo Luxardo, export director at Italian spirits producer Luxardo SpA, the producer of Luxardo Sambuca dei Cesari plus raspberry and liquorice variants

(pictured right), is a strong believer in cocktails being a driver of substantial incremental sales. "Internationally, the range has seen growth, especially in markets where consumers are increasingly exploring premium liqueurs and spirits,"



Rossi d'Asiago's A-star sambuca serve

he reveals. "The versatility of sambuca in cocktails and culinary uses has helped it maintain and even expand its appeal across different demographics."

Luxardo says Luxardo Sambuca dei Cesari has recently made "significant strides" in encouraging both bartenders and home cocktail enthusiasts to incorporate sambuca into long drinks and cocktails. Twists on classic cocktails such as the sambuca-and-tonic, the sambuca mule and the sambuca sour have proved very popular, he reveals.



From a Greek twist on the bloody mary to a Plomari splash: Cocktails are key for ouzo to reach younger LDA drinkers

Like its neighbouring European anise counterparts, ouzo holds a special place in the hearts of Greeks, embodying their rich cultural heritage and communal

spirit. The classic serving ritual of diluting ouzo with water to reveal its milky-white hue is still a common sight on display at countless village tavernas up and down the country, but the challenge for the category to stay relevant for younger generations is a real one.

For Mario Perez of the House of Wine, Beer and Spirits, ouzo has "significant potential" for resurgence in the States. "Its versatility in cocktails and refreshing profile make it appealing. Emerging trends include a growing interest in Mediterranean flavours and authenticity in spirits, which could further elevate ouzo's status," he argues.

For Ouzo of Plomari Isidoros Arvanitis, one of the leading inter-

national ouzo brands, the on-trade remains crucially important, according to company consultant Konstantinos Trivizas. "We keep the traditional way of serving the ouzo, and we also try to introduce and promote signature cocktail recipes like the 'bloody Plomari,'" he reveals, referring to a Greek twist on the classic bloody mary.

Two other easy-to-make cocktails recommended by the Lesbos-based ouzo producer include the Plomari-and-cherry, a mix of ouzo Plomari, half a lime and two teaspoons of sour cherry jam, garnished with a cinnamon stick and grated ginger, and the Plomari splash (left), in which ouzo Plomari is added to lavender syrup and basil leaves.



The on-trade remains 'crucial' for Ouzo of Plomari





Agave by Montiel Stand 17A53

Denmark-based Agave by Montiel, a female-owned company, represents six agave brands which are committed to work with respect for their heritage, the environment and traditional production methods. Real Minero, Mezcalosfera, Cuish, Agua del Sol, Mezcal Del Amigo and Zinacantan (its founders are pictured above) all only produce small batches of their spirits, and Montiel is committed to providing tools to business owners and managers in hospitality so they can responsibly offer the highest-quality spirits to consumers in Europe.



Altamura Distilleries Stand 17C28

Altamura in Italy is home to the only bread in the world protected by a PDO, and Altamura Distilleries is keen for visitors to taste its vodka made from the very same wheat. Founded specifically to express the flavours and terroir of the wheat, which traces its history back 2,000 years, Altamura Distilleries finds this hard durum wheat brings a different taste and mouthfeel to that of the typical soft wheat used in the production of most spirits. The resulting umami notes, says Altamura, also gives it standout among other super-premium vodkas.

Altos Planos Collective Stand 11.2C48

Altos Plano Collective will have the full Mijenta Tequila range of Blanco, Reposado, Cristalino and Añejo Gran Reserva (above right) available to taste.



Europe's biggest bar trade show is back

Europe's biggest bar trade show is back at Messe Berlin, Germany, from 14–16 October. Bar Convent Berlin will once again welcome bar owners, bartenders, distributors and manufacturers from almost 90 countries, with visitor numbers expected, as usual, to be in excess of 12,000. As well as exhibitor stands there will be a full programme of seminars, educational talks, guest shifts with innovative cocktail bars and immersive experiences. This year BCB is joined by the OurWhisky Foundation as education partner hosting the Whisk(e)y Embassy dedicated space. With so much going on it might be tough to get around everything, so here's a roundup of what's on offer from some of the 500-plus exhibitors



Mijenta is an additive-free, sustainable tequila brand from the Highlands of Jalisco. The company is focused on celebrating the traditions of Mexican culture and the best of the land and its people — its name comes from 'mi gente', meaning 'my people'. The fully carbon-neutral brand was the first tequila to gain B Corp certification in 2022.

Au Vodka Stand 17A46

Inspired by gold, as its name suggests, Au Vodka — which is filtered through gold and packaged in a gold bottle — is a success story born from the collaboration of two school friends. Established in 2015 with the core plain vodka, it has now expanded into a flavoured range, which BCB visitors can sample while chatting about stocking queries and brand collaborations.

BBC Distillers Stand 18C35

The BBC Distillers team is welcoming visitors to its first 100% dedicated space, where a complete immersive experience is promised. They will present the range of Etsu gins (below), including Etsu The Original, winner of a gold medal at the IWSC Gin Awards 2024, as well Etsu Double Yuzu, Etsu Pacific Ocean Water



and Etsu Double Orange. The gins are being showcased through a cocktail menu created by Etsu's brand ambassadors. Not only that, but there will be a big reveal of an until-now secret new Etsu reference.

Beluga Vodka Stand 20C34

Noblewood Group, a Montenegro- »



» headquartered super-premium spirits maker and distributor, is showcasing its Beluga Vodka portfolio — comprising five expressions: Noble, Celebration, Transatlantic Racing, Allure and Gold Line — and its low-ABV spirits drink Beluga Adriatic Botanicals. Beluga Gold Line (above), Noblewood's flagship, is an ultra-premium vodka with a special opening ritual featuring a wax-sealed cork and hammer that comes with the bottle. At BCB, the group will launch the latest edition of the Beluga Signature Bartender Program, encompassing an educational component and cocktail competition. The global champion will receive a one-week internship at one of the World's 50 Best Bars of their choice, the title of Beluga Signature Bartender Program Ambassador and will represent the brand at a industry events around the world.



The Bitter Truth Stand 17C22

Stephan Berg and Alexander Hauck's love of bitters led them to founding The Bitter Truth in Germany in 2006 to make it easier to access these sometimes hard-to-find cocktail ingredients. Now the brand's widely awarded bitters flavours are complemented by a range of liqueurs and flavoured spirits. Berg and Hauck also created Tiki Lovers Rum, which will be showcased alongside the bitters. You can meet them both and taste their wares on The Bitter Truth stand.

Borco

Stand 18C15, 18C12, PEG07

Bought by Stock Spirits Group last year, Hamburg-based Borco now trades as Stock Spirits GmbH & Co. The company was



founded in 1948 by the Matthiesen family and markets its portfolio of international premium spirits globally. Its award-winning Sierra Tequila brand (above), which underwent a bottle and label relaunch in 2023, is consumed in more than 90 countries. Sierra also released a Tropical Chilli flavour, featuring passion fruit and mango, last year. Other notable products in the portfolio include Sierra Antiguo, Finsbury Gin and Helbing Kümmel.



Caffo Stand 20C28

Probably best known for its herb-based liqueur, Vecchio Amaro del Capo, Distilleria F.lli Caffo is an Italian family business founded in 1915 by master distiller Giuseppe Caffo, who began distilling pomace in Sicily. Production was initially based mainly on spirits, alcohol and derivatives from wine production, but Caffo gradually began producing liqueurs from ancient recipes and these are the products for which it is now renowned. Vecchio Amaro del Capo (above) contains 29 herbs, roots, plants and flowers which are distilled while still fresh.



Doghouse Distillery Stand 11.112A35

If you know what it feels like to be "in the doghouse", you're already on the same page as the owners of London's biggest independent grain distillery, founded in 2016. Husband and wife

team Braden and Katherine Saunders previously ran a pub in Australia, and Braden became interested in production on a trip to the US. They say: "Doghouse' to us reflects an underlying vibe of good times, passion and innovation, with a hint of rebellion. If you enjoy a drink or two, then it's likely you have spent some of your life 'in the doghouse', and if you come on a night out with us, it's highly likely you will end up there." Featured on their stand will be Baller Vodka (bottom left), Baller 'Chilli Bacon' Vodka, Doppelgänger Aperitivo, Debt Collector Moonshine and Renegade Gin.

Domaines et Distilleries de Provence Stand 11.2C43

With absinthes, gins, Rinquinquin peach liqueur (right) and pastis Henri Bardouin among its product line-up, Domaines et Distilleries de Provence is heir to the tradition of the travelling apothecary. It was founded in 1898 at Forcalquier in the Haute Provence and is the product of a fascinating history that saw these traders settle in many towns and become pharmacists, distillers or both, later producing liqueurs and aperitifs. Distilleries et Domaines de Provence has preserved these skills and today its specialities are sold in over 78 countries worldwide.



Dos Deus Vermouth — Mezcal Maguey Spirits Stand 17A40

There's an interesting pairing to be found here, where craft mezcal meets Spanish vermouth. Spain's Dos Deus and Mexico's Del Maguey say they are joined by friendship and the same vision as producers of premium spirits. Between them they are highlighting craft mezcal range Burrito Fiestero and the smoked Dos Deus Vermouth (right), both of which are the products of tradition and innovation.



Estal

Stand 18A01

In a world where sustainability is such an important aspect of many drinks companies' ethos, fully recyclable glass, such as that crafted by Estal, is an »



"Aged for 12 years in hand selected oak casks and with notes of dried and tropical fruits, spice, cloves, ginger and a subtle hint of sea salt, Cutty Sark 12 year old Blended Scotch Whisky pays tribute to the ship's many anchor points and its long, proud maritime history."

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» important consideration. The company's innovation in custom and standard glass bottles for the spirits industry also extends to "trendy textures" and the latest closure solutions. Representing Wild Glass (above), Wildly Crafted, DobleAlto, Track-Ring and Corkcoal, Estal has a "commitment to innovation and aims to present brands with a world of possibilities that faithfully reflect the style, values and emotions that resonate with the end consumer".

Fratelli Branca Distillerie Stand 17C05

With a broad portfolio of well-known brands, Fratelli Branca's is a stand to discover secret ingredients for perfect

classic cocktails or taste traditional Italian products neat. Among the line-up are Fernet-Branca (below), Brancamenta, Antica Formula, Carpano Vermouth, Carpano Botanic Bitter, Punt e Mes, Caffè Borghetti and Borghetti Sambuca. The Branca family has been running the company for five generations, with Bernardino Branca currently at the helm.



Fraternity Spirits Stand 18D21

With 26 years of experience creating, representing, distributing and developing premium brands, Fraternity Spirits prides itself on specialising in developing



premium artisanal products and rewarding "quality, effort, talent and authenticity". The company says it "aims to enrich lives with exceptional taste experiences, fostering a global community of enthusiasts who appreciate innovation, sustainability and the rich heritage of spirit-making". Among the products on show will be Tequila Corralejo (above), Ron Prohibido and Nobushi Japanese whisky.

Funkin Cocktails Stand 17C30

Funkin Cocktails is celebrating its 25th anniversary with speed-round pornstar martinis, treasure hunts and tasters. It's promising multiple prizes, so there will be fun to be had with a company that has grown over the years to supply more than 20 countries globally to create »



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» unique flavours. Funkin is a multi-award-winning brand that covers purees, syrups, mixers and nitro-infused RTD cans.

Hardenberg Distillery Stand 18B13

BCB visitors can immerse themselves in the “world of Hardenberg Distillery”, where they can sample the German producer’s core portfolio, including its latest additions — Hardenberg Dry Gin (right) and Easip Fruits, a non-alcoholic Italian Spritz which joins Easip’s London Dry and American Malt expressions. Connoisseurs who stop by the stand will also be able to sample Hardenberg Dreikorn, presented in cooperation with the DBU (Deutsche Barkeeper-Union) in an exceptional serve for BCB. Described as a “handcrafted original” made from three types of grain — wheat, rye and barley — which give the liquid “fascinating flavours and a pleasant depth”.



Guala Closures Stand 17A37

With seven research centres, 33 production plants across five continents and a sales network spanning 100 countries, Guala Closures is a proven global leader in the production of tailored closures, as well as caps for spirits, wine, edible oil and water. Founded in 1954, the company has a long-established expertise in premium design and luxury bottle closures.

Guatemalan Spirits Stand 20B35

Journey into the Mayan world, explore colonial heritage and get a feel for the contemporary and colourful Guatemala of today at

BAR TALK BCB PREVIEW

this stand, which promises to share the history connecting Botran Rum (right), Miracielo Artisanal Rum, Altabrumba Rum and Xibal Gin with their homeland. Guatemalan Spirits are present in more than 120 countries worldwide and this is a chance to experience, first-hand, the taste of one of Central America’s most intriguing countries.



Halewood Artisanal Spirits Stand 17B51

Family-run UK-based Halewood Artisanal Spirits’ experts will guide visitors through its comprehensive portfolio of gin, rum and whisky, with news and launches from the company’s range. Among the brands Halewood represents are such prestigious names as Whitley Neill Gin (left), Dead Man’s Fingers Rum and The Pogues Irish Whiskey. »



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Havana Club Stand 20B05

» The Cuban rum brand has so much going on, it's hard to know where to begin. Its immersive pop-up, Bodega Havana Club, promises to transport visitors to the vibrant streets of Havana, and immerse them in Cuban culture through mixing and sipping experiences. The pop-up will be split into two. A classic Cuban bodega will display the core range, its innovations and a selection of RTDs, including the flagship Havana Club Añejo 7 Años and the golden Havana Club Añejo Especial alongside the brand new, Germany-exclusive Havana Club Mango Lime. The Archivo promises a



“sophisticated sipping” experience and a showcase of new designs for the Icónica Collection, while Maestro del Ron Cubano Asbel Morales will present his Havana Club Icónica Selección de Maestros and the aged Havana Club Icónica Gran Reserva 15 Años. Also available will be Havana Club Icónica Maximo Extra Añejo, alongside Havana Club Tributo 2023 — an exclusive limited-edition rum created by Cuba's leading rum masters.



Heaven Hill Distillery Stand 18B17

Things are just as busy at the Heaven Hill booth, a must for whiskey enthusiasts — the company is the world's largest family-owned bourbon maker and the only heritage distiller to produce every major style of American whiskey. The brand will showcase its award-winning bourbon and rye expressions and serve cocktails

inspired by Elijah Craig Old Fashioned Week. The week takes place alongside BCB from 11–20 October and “invites discerning imbibers to raise a glass to a new era of the classic cocktail, while raising money for the hospitality community”. Heaven Hill heritage brands to look out for include Evan Williams, Elijah Craig (below left), Rittenhouse and Larceny. On Tuesday 15 October, the distillery will host a takeover with London bar Little Mercies at Fabelei Cocktailbar, Kyffhäuserstr. 21 (Corner), 10781, Berlin, from 8pm–1am, to present cocktails and food inspired by Elijah Craig Old Fashioned Week.

Henkell Freixenet Stand 18C29

Henkell Freixenet may be best known as the global market leader in sparkling wine, but proves here that its diverse range of spirits is equally impressive, with a spotlight on Barceló dark rum and leading Spanish liqueur Licor 43, which is inviting visitors to experience ‘The Art of Carajillo’ (below) at the stand. It will also showcase its extensive wine portfolio which includes Freixenet, Mionetto, Henkell, I Heart Wines and Champagne Alfred Gratien.



Japan Pavilion Stand 17C47

This is where to find the innovative producers putting Japanese wine and spirits on the map. Presented by the National Tax Agency of Japan, this showcase of Japanese culture puts forward 20 producers of distinctive homegrown spirits, from sake and shōchū to awamori, rum and whisky. There will also be a Japanese bar mixing up these products in expertly crafted cocktails, as well as masterclasses on 14 & 15 October at 5.45pm presented by Kai Fryder.



La Hechicera Stand 20B16

La Hechicera is an award-winning premium rum with a backbone that sums up some of Colombia's most recognisable scents and tastes — toffee and orange peel on the nose, and tobacco and roasted coffee on the palate. The company was launched in 2012 by Miguel and Laura, members of the Riascos family that has been producing rum for three generations, and their friend Martamaria Carrillo; Pernod Ricard acquired a majority stake in 2019. The brand's core expression, La Hechicera Reserva Familiar, is a blend of rums aged in ex-bourbon white oak barrels, while its experimental range includes a quirky, banana-infused bottling (above) and a rum finished in muscat wine casks.

La Martiniquaise-Bardinet Stand 20B09

La Martiniquaise-Bardinet will showcase some of its key brands in Berlin, including Saint James Agricole Rhum (below), Marie Brizard liqueurs, Italian brand Mixer and Cutty Sark Whisky. Operating since 1934, La Martiniquaise acquired fellow French



company Bardinet in 1993, forming La Martiniquaise-Bardinet. It expanded further in 2019, when it became the majority shareholder of fellow French company Marie Brizard Wine & Spirits. The independent, family-run group's native France remains the biggest market for its diverse portfolio — which includes pioneer in cask maturation Glen Moray and Porto Cruz, one of the most famous names in port wine — but the group's reach is global. Visitors are urged to “come and discover our cocktails and terroirs”. »



Luxardo Stand 18C07

» For more than 200 years Luxardo has been producing and exporting spirits from its home in Torreglia, Italy, and it is still entirely controlled by the same founding family. Following in the footsteps of Girolamo Luxardo, who founded his distillery in Zara in 1821, the seventh generation of the family is now exporting its specialities around the world. Luxardo moved to Torreglia in 1947 as a consequence of World War II, and prides itself on being a place where “centuries-old traditions meet cutting edge production methods”.



McHenry Distillery Stand 18A47

The southernmost family-run distillery in the world, McHenry has made the long trip from Tasmania to showcase the spirits made using the family’s own spring water. The distillery sits on the Tasman Peninsula side of Mount Arthur, where it uses native botanicals that are not found anywhere else to create its gins, also taking advantage of the cool, moist maritime environment as the spirit matures in wooden barrels. McHenry’s range of gin and whisky (including its single malt, above) will be on show.

Mont Blanc Vodka Stand 11.2C17

Vodka Mont Blanc is a brand inspired by the geographical origin of the highest peak in the European Alps. Mont Blanc is the mountain from which the vodka gets not only its name, but its water for distillation. »

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» In addition to the classic vodka (above), the Mont Blanc range features botanical vodkas — Grapefruit & Rose and Cucumber & Mint. Try a normandy fresh cocktail: mix Mont Blanc Vodka (30ml) with apple cider (60ml), lemon juice (20ml), sugar syrup (15ml) and shake with ice. Pour into chilled glasses, sprinkle with sugar and lime zest. Garnish with grapefruit and sage slices.



Namayan Spirits Company Stand 18A57

For a taste of the 1920s Manila dancehall era, head over to the Namayan Spirits Co stand, where its Santa Ana Gin (above) pays homage to the Santa Ana Cabaret. A striking Art Deco bottle with a jungle scene heralds the botanicals from its Philippine home — calamansi, ylang ylang, dalandan and alpina. If it's a nostalgic journey through history and culture in a bottle you're after, Santa Ana is your goal.

Polarity Distillery Stand 11.2B50

Urban modern spirits brand Polarity has a bottle that's well worth a look. Its interactive levitating magnetic stopper spins to suggest a cocktail to make with the black gin (below). Polarity only launched this year and calls its Blacklight



Gin “rebellion in a bottle”. It's described as “a potent mix of opposing energies designed to tease and please”. On the black side there's green walnut and saffron, while on the light comes honey and lemon. Got to be worth a shot.

Radico Khaitan Stand 20A52

One of the oldest and largest manufacturers of Indian Made Foreign Liquor (IMFL), Radico Khaitan is inviting people to try its Jaisalmer Gin and



Rampur Whisky (above) to “experience the taste of India”. Established in 1943 as Rampur Distillery, the company's extensive manufacturing facilities across India include five distilleries at two locations. These provide capacity to distill more than 13m litres a month, making Radico Khaitan one of the largest alcohol distillers in Asia. As such, it employs more than 3,000 people and has a portfolio of seven brands.

Stoelzle Glass Group Stand 18B26

Meet the sales team and learn about Stoelzle's standard bottle collection, bespoke glass bottle services, spirits closures, decoration services, and more. Stoelzle Spirits is among the world's leading manufacturers of prestige bottles



for premium spirits and liquors, with a design team offering expertise in both standard glass and bespoke needs.

Tapi Stand 11.2C15

Closure specialist Tapi believes that a



bottle closure is more than just a stopper — it's an opportunity to make every bottle different and memorable. The international group designs, produces and distributes high-end technological closures and recently introduced its customisable T-Wood range, “a collection of premium stoppers designed with wooden heads to bring an unmatched level of elegance and sophistication to spirits”.

Virtuous Spirits Stand 18B37

At the Try Swedish Bar, you will find innovative Swedish beverage producers of the highest quality, among them Virtuous Vodka. This organic, gluten-free and vegan spirit is handcrafted, unfiltered and has no additives, and the standard is deemed high enough that it scored 99 out of 100 points at the IWSC 2023, also winning the Vodka Trophy and Spirits Gold Outstanding. Virtuous is also part of A Sip of Sweden, a session on Monday 14 October from 4pm–6pm where four producers are inviting visitors to be “inspired by the flavours, stories and innovation that define Sweden's liquor industry”.



West Cork Irish Whiskey Stand 11.1C38

Check out Ireland's oldest, largest independent distillery West Cork Irish Whiskey, for a team of “disruptors driven by passion and innovation”. Based in Skibbereen, West Cork Distillers was founded in 2003 by friends John O'Connell, Denis McCarthy and Ger McCarthy. They are dedicated to sustainable employment, source the best ingredients locally where possible, and rely on many local service providers to help them uphold West Cork's history of artisan food and beverage production. [GDI](#)

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VIEW FROM THE ON-PREMISE

Charlie Mitchell

Omotenashi. Four bars and a quest for the perfect hospitality experience

The on-premise provides an experiential connection between brands and consumers, but, unlike in other channels, a middleman occupies a buffer zone linking the two and can often make the difference when it comes to brilliant experiences.

"I genuinely love it. I do it purely for the passion of it. I don't need the money whatsoever. However, the crowds, the environment, diversity of people you meet, that's what it is about. I love it and there is no other job you experience it." The words of Luis, the bartender that I got chatting to on a recent visit to Belfast, where I stumbled across a jazz bar and settled in for a negroni.

Over an hour or so, I observed Luis, effortlessly tending to the guests, methodically giving recommendations, telling stories in a strange Spanish/Northern Irish drawl and providing nearly as much entertainment as the fiddler and tambourine man on stage. He, along with his two colleagues behind the bar, kept the whole operation afloat, the link between parched punters and their thirst-quenching elixir, the experience makers and the purveyors of good times.

I am sure this is familiar to many of you. Our on-premise experiences are shaped

as much by the service we are provided as it is by the drinks. Great hospitality has the power to transform drinks brands into a fundamental pillar of fond memories with which long-lasting relationships are formed.

It reminded me of a word that I recently learned while researching the on-premise landscape of Japan. More than a word, it sums up excellent hospitality culture and what hospitality venues should aspire to. '*Omotenashi*' is said to be impossible to fully explain in words, but in essence means wholeheartedly looking after guests.

An intrinsic part of the Japanese on-premise, it centres around delivering more than just good food and drink, instead elevating that delivery to encompass the whole guest experience.

The culture of *omotenashi* is one which Japanese hospitality staff are intensely proud of, and with reason; a culture that delights guests and fulfils servers should be celebrated, as it comes with no lack of effort. Leaving guests with smiles on their faces is difficult, especially in an age where social media-fuelled expectations are higher than ever and we are in a never-ending search for perfection.

It was with this in mind, and as a dedicated student of the on-premise, that I set out on a quest to identify the fundamental elements of a perfect hospitality experience, in which drinks brands can build relationships between their brands and prospective consumers.

Yes, I took on the unenviable task of sitting down at three more bars to observe how experiences are curated and delivered — all in the name of research, of course. Alongside the jazz bar in Belfast came a London East End boozier, a Mancunian speakeasy and a jam-packed Bavarian *bierkeller*, a shelter from the blistering summer heat of Munich.

It would be difficult to find four equally different-looking venues, but as

soon as I set foot in each, I knew that I was in for a treat.

Walking into the cockney pub on a Sunday afternoon was like an embrace with a long-lost friend, the warm murmur of conversation drowning out the low hum of football commentary from the TV in the corner.

In the speakeasy cocktail bar, I was perfectly greeted by our host, a sense of confidence immediately letting me know that I was in very capable hands.

But it was experiencing the relief of the cool, subterranean *bierkeller* when I most knew that I had made a good choice. As I entered, what hit me wasn't necessarily the aroma of pork knuckle and sauerkraut, or the vast displays of steins (and they were vast), but the pure contentment of the guests.

I'm not talking about those cheesy, easy-to-please punters either, the type who are content with big grins delivered by bogus, Instagrammable versions of 'German' hospitality (not that there is anything wrong with that — it just ain't for me); these were serious hospitality buffs — and they were happy.

Why? Well it, like each of the other venues that delivered on the on-premise experience, was authentic. It was friendly without being cocky. These guys wanted me to have a good time; they wanted me to have the best drinks they had to offer, but they didn't want to push anything on me.

If I wanted to hear a story, they had plenty, but if I wanted to be left alone, then that was fine too. It's difficult to describe, but it was the staff that made it. Maybe it was *omotenashi*. **GDI**

Charlie Mitchell is research & insight director at CGA by NIQ. His Global Drinks Intel columns provide perspective from the on-premise, based on the most up-to-date and definitive data available. For details, contact charlie.mitchell@cgastrategy.com



Illustration: iStock.com/Olga Kurbatova

Take stock: Our roundup of the latest spirits launches



The Macallan Time : Space Collection

Stored inside an oak sculpture, the Time : Space unit comprises two chambers — one contains the oldest whisky to date from the Edrington brand, the other holds the first from its current distillery.

■ Scotch whisky, single malts, Speyside. Two expressions: an 84yo (43.6% ABV) matured in a first-fill American oak butt and a second-fill European oak butt that both held sherry previously, and a 5yo single malt (54.9% ABV) that is the first from the brand's current distillery.

■ “Available to purchase through invitation.”
■ Limited to 200 units, price “available on application”.

Fettercairn 18yo, 2024 Bottling

The third annual release of Whyte & Mackay's Fettercairn 18yo iteration.

■ Scotch whisky, single malt, Highlands, 18yo. Matured in first-fill and refill ex-bourbon barrels made of American white oak; finished for an unspecified period in new Scottish oak casks sourced through the brand's Scottish Oak Programme; 46.8% ABV.

■ Available through off-premise operators in Asia, Canada, France, Poland, Switzerland and the UK.

■ In the UK, SRP of GBP212 (US\$278) per 70cl bottle.



Santa Teresa 1796 Arabica Coffee Cask Finish

The barrels used for this expression's three-month finish held a cold-brewed rum for six months.

■ Rum, Venezuela. Contains Santa Teresa 1796 Rum that has been finished for three months in American oak barrels, which have held a 4yo rum that has been cold brewed through ground arabica coffee beans, for six months; 46% ABV.

■ Released in the US, available online for domestic delivery.

■ SRP of US\$59.99 per 75cl bottle.

Jack Daniel's & Coca-Cola Cherry RTD

Brown-Forman's co-branded Jack & Coke premix has a cherry-flavoured sibling for a limited time.

■ RTD, American whiskey-base mixed with Coca-Cola Cherry, 7% ABV.

■ Released in the US for a limited — albeit unspecified — period.

■ SRP of US\$3.50 per 35.5cl can, also in four packs for \$12.99.



Sipsmith Origin 1639

The limited-edition expression from Suntory Global Spirits is based on a recipe from 1639 that “proves that gin originated in England, not Holland [the Netherlands] as widely believed”.

■ Gin, the UK. Infused with raspberries and strawberries, then “rested” in oak barrels; 42% ABV.

■ Rolling out in the UK and Germany's off-premise, as well as online. UK outlets include Harvey Nichols, John Lewis, Majestic and Waitrose.

■ SRP of GBP38 (US\$50) per 70cl bottle. Available for a limited — albeit unspecified — time.



Royal Salute 21yo Harris Reed Edition

This blend of Pernod Ricard's Royal Salute has been pulled together in collaboration with half-American, half-British designer Harris Reed.

■ Scotch whisky, blended, including ex-sherry-cask-matured liquid from the group's Braeval Distillery in Speyside and the “rare inclusion of a grain whisky”; 21yo.

■ Released in mid-September for the start of London Fashion Week.

■ SRP of US\$248 per bottle.



Catch up on the latest new product launches at www.drinks-intel.com

Avolta's The Liquor Libraries to debut at New York JFK Airport T6



An artist's rendering of the retail space at New York John F. Kennedy Airport's new US\$4.2bn Terminal 6

Avolta, the world's biggest airport retailer, has won a substantial contract, via companies Hudson and Dufray, to open multiple retail stores at New York John F. Kennedy Airport's new US\$4.2bn Terminal 6, the first phase of which will open in 2025.

Leading the duty-free offer will be a new concept called The Liquor Libraries, one of four spaces that will occupy the 1,700sqm store that takes inspiration from New York City's Union Square. In total, Avolta will run retail that also includes travel convenience and speciality stores across more than 2,600sqm in a revamped 111,500sqm state-of-the-art terminal.

The Liquor Libraries will pay homage to NYC's famous libraries. The space will offer a broad selection of wine and spirits, ranging from whisky brands such as Glenfiddich and Manhattan's Great Jones Distilling Co. Passengers will also be able to learn about — and taste — fine and rare spirits within a speakeasy environment reminiscent of the Prohibition era. The idea is claimed to be the first of its kind in a US airport.

Commenting on the pioneering initiative, Sammy Patel, vice president of commercial at Vantage Group — part of the JFK Millenni-

um Partners consortium that is building and will manage T6 — said: "We challenged prospective bidders to think outside the box and be creative about how T6 will redefine the duty-free standard in North America."

The other three areas in the Dufray store will be The Green Market, selling artisanal goods; The Pavilion, dedicated to international beauty and skincare; and Theater of Dreams, a destination for fragrances inspired by Union Square's Daryl Roth Theatre.

The duty-free store will be run as a joint venture between JFK T6 Duty-Free Concessionaires and five Airport Concessions Disadvantaged Business Enterprise partners: Kellee Communications Group, Tsion Café, Samantha Alexis Consulting, Neir's Tavern and Baked Cravings.

Having saved historic Neir's Tavern 15 years ago, CEO Loycent Gordon said: "The success of this partnership will add another layer of resilience to Neir's Tavern as we journey toward 200 years in 2029."

"This is an exciting full-circle moment for me, having migrated to Queens through JFK as a ten-year-old Jamaican immigrant, to now being part of the world-renowned team selected to invest in the build-out of T6."



Tito's continues to bolster its TR presence

Tito's expands travel retail presence in Eastern Europe

Tito's Handmade Vodka has pushed eastwards in European travel retail, led by expansion at Istanbul Airport with Unifree Duty Free, plus three other airports in Turkey (Ankara, Bodrum and Izmir), Skopje in North Macedonia, Tbilisi in Georgia and Almaty in Kazakhstan with retailer ATU Duty Free.

John McDonnell, international managing director at Tito's Handmade Vodka, commented: "These seven new listings — with more on the way — at Unifree Duty Free and ATU Duty Free help introduce Tito's to new consumers in these important markets."

In addition to the new listings, the American craft vodka brand is present in travel retail locations in major airports, cruise and ferry lines, land border stores and almost 150 global domestic markets.

Unifree provides duty-free services at 33 stores across more than 56,000sqm of sales space at Istanbul Airport, a global hub for Turkish Airlines. The company was founded in 1975 and became the Turkish partner of Gebr. Heinemann in 1999.

Lotte and Dassai support rural communities

Premium sake Dassai has launched on Lotte Duty Free's online platform with the promise of a US\$6 donation per bottle sold. The money raised will support domestic rural development starting in January next year.

Shilla adds Dewar's pop-up during Korea's Chuseok holiday season

Shilla Duty Free is hosting a pop-up store at Seoul Incheon Airport's Terminal 2 for the launch of new premium scotch blended whisky Dewar's Double Double Stone Toasted. Selected products from the Baccardi-owned brand, including the latest release, are available at a 20%–40% discount.

Running until 6 November, the event will allow outbound travellers during the busy

Chuseok (harvest festival) holiday season to experience the 21yo product.

The 'stone toast' technique involves toasting whisky casks without exposing them to direct flames. This allows the liquid to develop intense and complex flavours while retaining a smooth finish.

At the pop-up store, customers can try a discovery pack offering variations of Stone

Toasted. Tastings of other Dewar's whiskies — including Aberfeldy 12yo, Aultmore 12yo, Royal Brackla 12yo and Double Double 20yo — and special rewards based on purchase amounts are also available.

Purchases over US\$300 qualify for a black trolley or two Aultmore glasses, while spending over \$200 gets shoppers 12 Dewar's glasses or an Aultmore travel bag.

Uncovering price variation in GTR

Arguments about the validity and relevance of price savings in duty free and travel retail persist. Is it still worth buying in this channel?

Kevin Rozario does some digging

The duty-free business was built on price savings. Yet value in liquor can be hard to determine — and come by. Airport retailers are more likely to push exclusivity or limited editions, where products cost more and consumers will find it hard to scrutinise pricing.

Yet direct price comparisons between different locations and different travel retailers can easily be made. Travel retail analyst Pi Insight has been working on this aspect of the business through its ShelfTrak arm which it claims is “the industry’s only source of global SKU-level data”.

Pi Insight said this information has “fast become a must-have tool” for category development teams at brand owners. The detailed pricing from ShelfTrak comes from about 50 airports and more than 70 stores. It provides brands with a “unique way to measure, track and improve their in-store performance”, claimed the analyst.

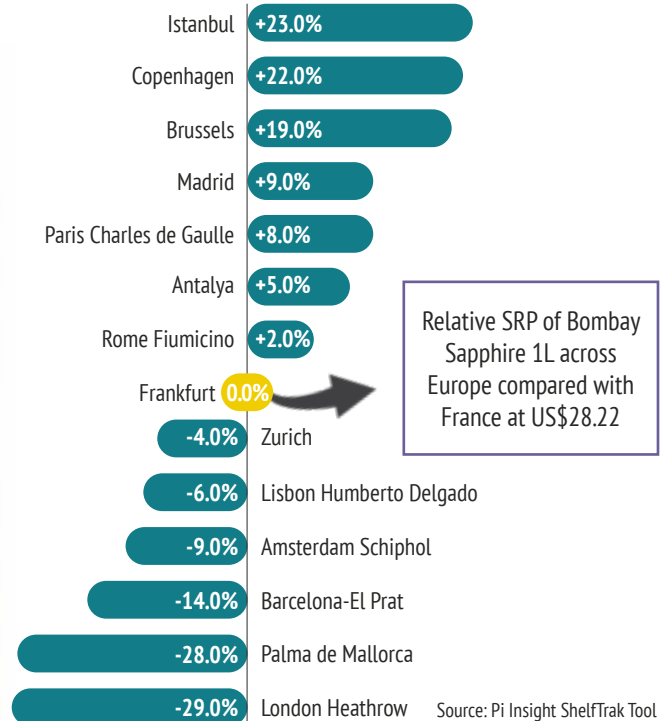
Pi Insight has just unveiled the Bombay Sapphire Index. The idea is simple — a price comparison of the popular 40% ABV 1L bottle has been made across key airports in Europe to show the variations.

The results may be somewhat surprising (see chart). Taking Frankfurt Airport as a base (0%), Pi Insight found large differences at other locations when it conducted its survey in April/May. The biggest hike was 23% at Istanbul, followed closely by Copenhagen (+22%). The best prices across the 14 airports reviewed were at London Heathrow, where the Bacardí-owned gin was sold at a 29% discount to Frankfurt, and Spain’s Palma de Mallorca Airport (-28%).

A spot-check by *Global Drinks Intel* on 10 September found some variations to the Pi Insight prices. At Germany’s biggest hub, where Gebr Heinemann is the core duty-free operator, the click-and-collect price on the Frankfurt Airport shopping website was EUR31.99 (US\$35.32) versus Pi Insight’s \$28.22. Given the time lag, this could be due to several factors including special/promotional pricing, supplier price hikes in country markets and currency flux.

Pi Insight commercial director Garry Stasiulevicius said: “The Bombay Sapphire Index shows the huge discrepancy in duty-free pricing; 20%–30% either side of an average.

ShelfTrak Bombay Sapphire Index European Travel Retail



That is not so unusual when you consider concession fees, operating costs and taxes.”

Crucially, London Heathrow remained the best value location by a huge margin. On 10 September, World Duty Free (an Avolta company) was offering the standard 1L Bombay Sapphire product for GBP15.99 (US\$20.94) — a saving of \$15 on the Frankfurt price.

Commenting on the large pricing differentials, a Bacardí GTR spokesperson said: “While Bacardí typically advises a recommended selling price for our brands based on several factors, including local market dynamics, the final decision is always at the sole discretion of retailers.”

Easy win for Avolta

At Istanbul Airport — where Heinemann is a key player with local partners in Turkey — GDI was unable to verify prices, but at Copenhagen Airport, another Heinemann stronghold, a 1L bottle of Bombay Sapphire was DKK199 Danish Krone (US\$29.47) online — almost \$9 more than at Heathrow.

In Switzerland — a country known for being pricey — Zurich Airport, an Avolta location, a 1L bottle was 4% below the Frankfurt price using the Pi Insight index. On 10 September, we found the same Bombay Sapphire bottle online on 9 September for CHF22.80 (US\$26.88), substantially below Frankfurt.

Although *GDI*’s search was neither exhaustive nor statistically rigorous, it indicates how spirits prices in travel retail can change within a few months. Avolta did not comment on the variations thrown up by the Pi Insight data, but Heinemann said: “The price varies across airports as Bombay Sapphire is a global bestseller which is regularly available in promotional offers.” The big question is: does any of it matter?

According to travel retail analyst m1nd-set, the importance of pricing dropped steeply from 30% to 13% between 2019 and 2024, with special promotions and value-for-money also decreasing in importance. Experiences have, instead, become more valued by passengers.

Nevertheless, on standard spirits, travelling consumers will not spend more than they have to. “Shoppers will be focused on where they are travelling to and from, and what they can buy at those locations,” said Stasiulevicius. “They will probably benchmark to their local markets regardless of where they are in the world. The reality is they may find — in some cases — that the product in travel retail is more expensive than in the local market.”

With a 1L Bombay Sapphire EUR22.34 on Amazon.de and GBP24.00 on the retailer’s UK site, travellers can easily assess which offers the best value — their nearest airport or online retailer — and will act accordingly. **GDI**

Tequila’s global growth is remarkable, but it is yet to crack travel retail

In the third of a new series analysing the changing dynamics of travel retail, Pi Insight’s **Garry Stasiulevicius** draws on data from the company’s ShelfTrak tool to explore how the tequila category differs across key global airports

Tequila has seen significant growth in global markets, driven by premiumisation, celebrity endorsements and a rising demand for authentic craft spirits. The spirit’s popularity has soared, particularly in the US, establishing it as one of the most exciting trends in the alcoholic beverage industry. Despite this surge, one question remains: Has tequila managed to break through in travel retail?

Data suggests that while tequila is thriving in traditional retail, its presence in travel retail — especially outside the Americas — remains limited. So what is preventing tequila from gaining the same momentum in duty-free environments as it enjoys in domestic markets?

Category space share: Still lagging

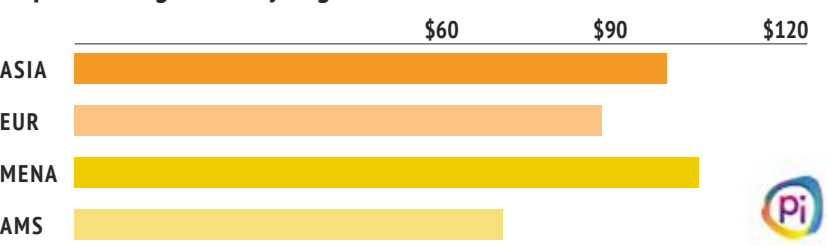
Pi Insight’s ShelfTrak data, which tracks SKU-level execution across global travel retail stores, shows a clear difference between tequila’s success in domestic markets and its travel retail footprint. When compared to vodka, tequila’s share of category space remains modest (see chart above).

Tequila (6%) holds its own in the Americas, but is still just behind vodka (7%). However, in regions like Europe, MENA (Middle East & Africa) and Asia, its presence is far smaller. In MENA, vodka holds a dominant 9% share of category space, compared with tequila’s 3%. Similarly in Asia, vodka (4%) commands almost three times more shelf space than tequila (1.4%).

Despite tequila’s domestic success, its breakthrough in travel retail has been slow. Several factors contribute to this:

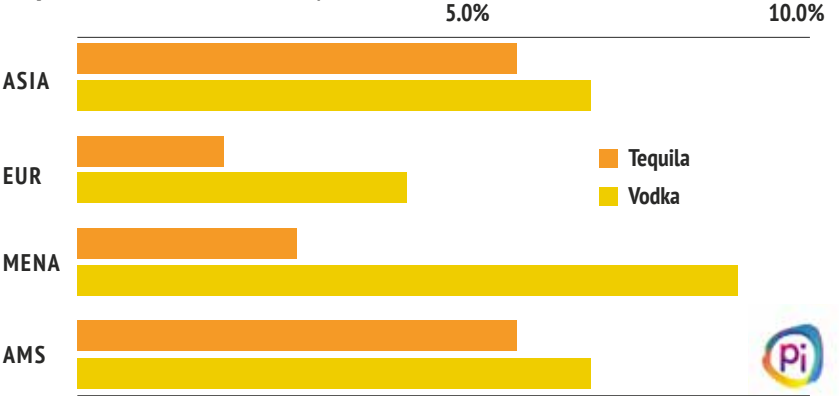
- **Regional preferences and legacy spirits:**

Tequila Average Price by Region US\$



Source: ShelfTrak Q2 2024

Tequila vs Vodka Share of Space



Source: ShelfTrak Q2 2024

Vodka, whisky and cognac have long dominated travel retail, particularly in Europe, MENA and Asia. Vodka’s broad appeal and established consumer base make it hard for tequila to compete. Whisky and cognac have strong historical ties to these regions, leaving limited space for newer entrants.

- **Lack of consumer education outside the Americas:** Many consumers are unfamiliar with tequila. While it is a staple in the US and Mexico, in Europe and Asia, tequila is still often associated with shots and parties, rather than premium, sophisticated sipping. Brands have not yet fully educated these markets about the versatility and quality of tequila, particularly its high-end offerings.

- **Space constraints in travel retail:** The channel is highly competitive with limited shelf space. With vodka and whisky already commanding large portions of the category, tequila has struggled to secure more significant visibility. Without strong brand investment or a rise in consumer demand, tequila remains sidelined in many regions.

Which brands lead tequila in TR?

Despite the challenges, a handful of brands are pushing tequila forward in travel retail.

According to ShelfTrak data, the leading brands by share of space include:

- **Americas:** Jose Cuervo, Patrón, Don Julio and 1800, alongside other localised brands, dominate the tequila category.
- **Europe:** Don Julio, Patrón, Jose Cuervo and 1800 are the primary players, though tequila’s overall presence remains low.
- **MENA:** Patrón and Don Julio lead, but tequila’s share is still overshadowed by vodka.
- **Asia:** Patrón holds the most significant share, but other brands have minimal space, and tequila’s overall presence remains small.

What’s next for tequila in TR?

For tequila to truly break through in travel retail, several actions are needed:

- **Consumer education:** Brands must invest in educating consumers in regions where tequila is still viewed as a party spirit. Emphasising its craftsmanship, heritage and premium qualities will be key to expanding its appeal.
- **Increased brand investment:** Leading brands like Patrón and Don Julio need to push for more shelf space and visibility. Collaborations with retailers on exclusive offerings could help raise tequila’s profile.
- **Shifting preferences:** As more consumers seek out premium, authentic products, tequila has a chance to capitalise on this trend. Brands that position tequila as a sophisticated, high-quality spirit will likely gain more traction in travel retail. [GO](#)

Garry Stasiulevicius is commercial director at leading GTR expert Pi Insight, a technology-led business that transforms data into actionable insight. The company’s ShelfTrak tool captures data on store-level execution across the leading 50 airports and 70-plus stores. www.pi-insight.com



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