



global drinks

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FOR THE GLOBAL DRINKS EXECUTIVE | DEC 2024–JAN 2025

Exclusive
Q&A with
Asbel Morales,
Maestro del
Ron Cubano
p14–15

*Havana Club: 'Every bottle
carries the soul of Cuba'*

BRANDED CONTENT



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Global Drinks Intel is your essential B2B platform for the latest insights into the global drinks industry. In our new-look February magazine, we explore the flavour trends shaking up the beverage alcohol industry, report on the state of the tequila category outside North America, and take a look at what is happening in the fast-growing alcohol-free category. Plus, we launch our new country analysis series, kicking off with a deep-dive into France's spirits market.

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COMMENT

Joe Bates

RIP diversity, equity and inclusion programmes? Farewell sustainability? The future of ESG in a Trump-led world

Everyone knows that Donald Trump's favourite word is 'tariff', but his 'war on woke' could also spell trouble for the growing ESG movement.

For many in the alcoholic beverage sector, the new year won't start properly until 20 January, the date the US Republican Party takes office. Only then will they see if the president-elect and his team make good on their much-publicised pre-election promises to slap tariffs on Mexico, Canada and China, with taxes on the EU and the UK likely to follow in short order.

Having suffered the damage inflicted by tariffs during Trump's first term in office, drinks industry executives have, unsurprisingly, reacted in dismay to the prospect of Trump 2.0, despite political commentators advising the business community to judge the outspoken president-elect by his actions, not his words.

Chris Swonger, president & CEO of the Distilled Spirits Council of the US, warned the last thing the already ailing US hospitality sector needed was a retaliatory trade war. "Tariffs on spirits products from our neighbours to the north and south are going to hurt US consumers and lead to job losses across the US hospitality industry just as these businesses continue their long recovery from the pandemic," he said.

The Trump presidency could also have a profound, yet underexplored, impact on corporate ESG initiatives both in the US and further afield. The president-elect has always been unashamedly pro-business, pro-fossil fuel and anti-regulation; more liberal causes,



Image: Shutterstock/Anne Cichos

such as concern for the environment and promoting diversity, equity and inclusion (DEI) programmes, rather less so.

In truth, the ESG movement has been an increasingly polarising issue in the US for some time — the backlash against Bud Light's 2023 promotional deal with transgender influencer Dylan Mulvaney being a prime example.

Sensing the rightward drift of public opinion and the likelihood of another term for Trump, a slew of blue-chip US corporate names such as Harley-Davidson and Ford scaled back their DEI initiatives last year. Their number included Jack Daniel's owner, Brown-Forman, where executive pay is reportedly no longer linked to DEI targets.

Other companies have been embrac-

ing so-called 'greenhushing', effectively adopting radio silence on ESG issues to avoid arousing the wrath of either pro or anti-ESG lobbies. A report published last year by data insights companies Connected Impact and Ringer Sciences discovered that 58% of US firms were underpromoting their legitimate sustainability credentials.

The fear is that this new anti-ESG sentiment could quickly spread beyond the US — the influence of the world's biggest economy should never be underestimated, especially as right-wing populist governments are now in power in many countries worldwide, from Argentina, Italy and Hungary to India and the Netherlands.

At *Global Drinks Intel*, we remain convinced, as many studies have shown, that drinks companies committed to reducing their environmental impact, improving the diversity of their workforce and supporting social causes are following a path that chimes with the mindsets of Gen Z and Millennial consumers, the two consumer demographics that everyone agrees are vital to the future of the alcoholic beverage business.

As the world nervously watches how Trump's policies unfold, the drinks industry faces a critical moment: double down on ESG and thrive in the long run, or retreat in the face of political headwinds and risk alienating the next generation of consumers.

The stakes are high, but so is the potential payoff for brands that align with the values of tomorrow. **GDI**



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MARKETING TRENDS

Chris Tyas

What a road digger from Buckinghamshire can teach us about marketing

Huel, the company which bills itself as “the future of food” and counts Idris Elba and Steven Bartlett among its investors, recently revealed that its year-on-year profits had almost trebled to GBP13.8m (US\$17.5) on the back of a 16% rise in revenues, to GBP214m.

The brand’s success makes me question whether our sector always goes about marketing new products — and even the whole NPD process — in the right way.

In my experience, a lot of NPD is driven by category growth and a healthy dose of FOMO (fear of missing out). The conversation tends to be: “The no/low-alcohol category is set to grow by X amount, therefore we need one of those.” Then everyone duly sets off to create a brand that meets what the category demands.

That’s how, in 2014, a brand whose core product might just be the driest substance known to humanity ended up in the drinks chiller cabinet. Weetabix On The Go breakfast drink was the direct result of brand managers worrying over stats showing that commuters were abandoning traditional breakfast at home, and predictions that the on-the-go category would be worth GBP300m within a couple of years.

Category ‘unconventions’

At that same time, a former road digger called Julian Hearn was sitting in his garage developing Huel. The idea was that Huel would be a nutritionally complete food that had minimal impact on the environment. But Hearn was arguably more focused on creating the kind of brand he had in mind and then aligning it to the product he was making, than vice versa.

Every category has its conventions — those codes that must be adhered to, whether it’s the shape of a bottle or the colourways that have to exist. I think we often follow the category conventions and the category codes, because we are afraid of not looking like the shelf.

Huel ignored the rules of its category. In fact, everything about it was, and still seems to be, designed so it does not



*Julian Hearn,
founder &
CMO of Huel*

look like a functional food brand. The logo and packaging are deliberately understated, and even the way their website is laid out looks more like a clothing or lifestyle retailer.

This contrarian approach extends to Huel’s advertising as well. When two of Huel’s ads were recently banned by the Advertising Standards Authority, it felt less like a misstep and more like part of the plan — a move that generated more media value than the ads themselves likely could. It’s a classic challenger brand move: take risks and do things differently.

Huel cracks aspiration

For a myriad of reasons, a lot of marketers have become caught up in the idea that all their comms must look and sound exactly like the core audience for their brand. Not only does that result in boring advertising, but it doesn’t create a sense of aspiration — the brands that appeal to the slightly better version of ourselves.

Huel doesn’t do that. Its advertising features slightly affluent-looking, slightly good-looking people, who are definitely fit and healthy, and I’m not convinced that reflects their core consumer. They’re not showing you what you are today; they’re showing you what you could be if you embraced their product. I often say, “Be a magnet, not a mirror”, and Huel’s marketing definitely does that, inviting us to dream a little.

Beyond the superfans

When Hearn was fulfilling his first Huel orders in 2015, the big news was how the future lay in D2C brands, like Dollar Shave Club and Eve Sleep, the mattress company.

Huel quickly grew to become a multi-million-pound brand purely through direct selling, with a passionate fanbase of ‘Hueligans’ helping shape the product. But the company has wisely pursued much wider distribution.

The brand’s first listing was in 500 Sainsbury’s stores in 2019 — five years later it was available in 25,650 retail outlets of all stripes. That’s where the big growth opportunities are — with casual buyers who might pick Huel as part of their lunchtime meal deal once or twice a month. Because, ultimately, that’s the power of branding: the more you see it, the more visible it is, the more you are likely to consume it.

Ultimately, the point here isn’t to outline the steps we should follow if we want to replicate Huel’s success. It’s about asking ourselves the right questions and challenging the conventions when it comes to marketing and NPD. Sometimes the answer is going to be to carry on as we usually do — but there’s a lot to be said for being brave enough to go against the grain and just see what happens. **GDI**

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

Q&A with Milestone Beverages co-founder & MD Joe Milner

The 'heart and soul' of what **Milestone Beverages** does is innovation — 'we like to produce our own brands and grow the business organically', says co-founder & MD **Joe Milner**

What can you tell us about Milestone Beverages?

The heart and soul of what Milestone does is innovation — we like to produce our own brands. We've tried to follow categories that are trending but also scalable in opportunity, and we're very aggressive in terms of price points.

Our Japanese whisky, Onikishi, is our most successful brand — so far, its results have been fantastic. Over the last two or three years, we've been selling Onikishi in 35 countries. We've put a lot of resources behind our bourbon brand, Stateless, recently and have been innovating in flavoured whisky, which is a huge trend. The portfolio also includes a scotch whisky [Taisteal], as well as an Australian wine brand [Blowfish] and an Italian wine [Atilius].

We grow the business slowly and organically. Currently, we're in around 80 markets through 70 distribution partners.

Would you describe Milestone as a

disruptor? One hundred per cent. If you're trying to do the same as the big multinationals in this industry, you can fall flat on your face pretty quickly.

In Japanese whisky, for example, there are a lot more brands now than two or three years ago. Pagodas, Fuji Mountain and Japanese calligraphy are all pretty standard across the



Stateless Bourbon (far left) and Stateless Banana Flavoured Whiskey. Flavoured whisky is 'a huge trend', says Joe Milner (above)

whole category. We've been extremely disruptive with Onikishi's packaging, and that's proven to be hugely successful. We try to do our best with a very limited marketing budget to promote our portfolio.

You've chosen to concentrate on Asia-Pacific, one of the more volatile areas of the world.

There are a lot of variables in that question — Asia's home to around 4.5bn people! We're Asian as a company and very proud of that. I'm half-Asian, was born in Hong Kong and can speak fluent Cantonese. It was natural that we started in this part of the world.

This is a region that chops and changes very quickly. Every time you go with the flow, the next thing you know, it changes. That's partly why we've moved into Europe and domestically into the US. We're trying to spread it out a bit.

What's been the single biggest learning for you from starting your own company?

If you're planning to launch a brand, it has to be better than whatever's out there. Ideally, your brand is in a category that's either very limited or doesn't even exist. If you're going to do it in a category that does exist and is very competitive, you have to do it a lot better than everybody else. There are only really two ways you can sell a brand; one is

price, the other is to spend a lot of money on marketing. Cash flow is key.

One of the biggest lessons I've learned in the last couple of years as a brand owner with brands that may not be very well-known is that it's not difficult to get a container into a retailer. What's very difficult is making sure you get your second and third orders. That requires a lot of energy, because if you don't, you'll get delisted very quickly.

You have to make sure you're working on depleting through your customers rather than just finding new ones all the time.

What's the main strategic piece of work that's front of mind for you right now?

It's going to be tackling the domestic US market in a big way. Clearly, it's a huge market — there are a lot of opportunities there, almost too many in a way. In the US, you have to figure out which opportunities you're going to go after, or you could lose a lot of money very quickly. We'll be focusing on the market not just with Onikishi but also with our other brands, due to the scale and nature of the US.

Are you enjoying yourself? The answer is yes! I go through a lot of challenges in this business, as any entrepreneur does. It's definitely not what people think it is — nowhere near. I've gone through very low periods running Milestone, but I'm grateful and I enjoy coming to work and running a team. **GDI**



Onikishi Japanese Blended Whisky has been Milestone's biggest success story so far

Rum fever: ‘Complexity and diversity’ creating global interest in category

The category has long waited for a seat at the top table — with growth forecast for premium-plus liquids as well as increased consumer interest, has rum’s time *finally* arrived? **Jaq Bayles** reports

Always the life and soul of the party, rum has made no secret of its desire to mingle with the more serious crowd rather than just be known as the ultimate mixing guest, and it looks like its invitation to the top table has finally arrived.

IWSR puts total global rum value in 2023 at US\$18.8bn, with ultra-premium-and-above products accounting for less than half a per cent of volumes and 3% of value.

Nonetheless, IWSR predicts that premium-plus volumes will climb by a CAGR of 6% between 2021 and 2026, with value increasing by a CAGR of 6.5%, so it’s little surprise that independent producers and multinationals alike have been looking to their aged rum reserves and experimenting with distillation to create expressions that can, at the very upper ends of the scale, command five-figure prices.

But many rums in the luxury sector — defined as those that sell for over US\$40 — are well within the grasp of the aficionado. From cask finishes to limited-edition vintages and rare flavour expressions, there are plenty of rums destined not for the party punch bowl, but rather for the serious sipping and cocktail occasion.

Attempts to take rum into the higher echelons of drinking culture are nothing new, so why is there such a current boom in quality diversification in portfolios? A different consumer set is the reason given by many, with younger drinkers more willing to experiment and to try different expressions of well-known brands, as well as rums from beyond their more traditional heartland of the Caribbean.

Havana Club International CEO Christian Barré is among those who have seen increased consumer interest in quality and craftsmanship. “As brands compete to inspire these drinkers and broaden their appeal among rum connoisseurs, we’re witnessing a wave of new production techniques like unique barrel-ageing and cask-finishing innovations,” he says.

Alexandre Gabriel is founder and master blender of Maison Ferrand-owned Planteray Rum, which recently released a highly limit-



Hattiers, the UK’s first B Corp-certified rum, says flexibility in regulations allows for creativity (see p13)

ed-edition 1984 Jamaican rum from Gabriel’s personal collection, with just one barrel producing 317 bottles. He believes that the luxury sector provides the “opportunity to offer consumers more than just a drink”.

He explains: “It’s about taking them on a journey, exploring beautiful flavours. People are craving this adventure, and with Planteray Rum we can provide it, because of years of research, learning and sharing. By studying ancient methods and combining them with modern knowledge, we create expressions that are true to the heritage of their terroir — each one precise, unique and unforgettable.”

Global demand drives geographic diversity

While the US remains rum’s major market, due largely to its proximity to the Caribbean, consumers with a desire to seek out quality and experiment are increasingly broadly geographically spread, especially as production of high-quality rums is increasing outside the Caribbean.

Bernard Lim, MD of Paraguay’s El Supremo, which has now added an 18yo agricole rhum to its portfolio, sees demand flourishing particularly across Europe, North America and Asian markets. “Spain, Italy, France and the US are at the forefront, with rising interest in Japan, Hong Kong and Singapore as well,” he says. “Many consumers, seeking alternatives to whisky, are drawn to rum’s complexity and diversity.”

IWSR head of status spirits insights Guy



Planteray Jamaica 1984 is limited to 317 bottles

Wolfe says: “Greater diversity of product should be positive for the category, as long as it is of high quality. The rise of New World whiskies — Australia, Taiwan, India, China, etc — their increasing reputation and ability to create buzz and attract new consumers is possibly a good parallel.

“The consideration is that each country has its own characteristics and regulations, so education is key so that consumers understand what they are drinking and what sets it apart from rums from other countries. Done properly, this can inspire a connoisseurship that will help drive the category forward.”

Lack of regulations: Marketing barrier or innovation driver?

Those regulations — or perceived lack of — are a sticking point for some when ➤



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Product spotlight: Recent rum releases

Clément Cuvée Robert Peronet

Just 1,330 bottles were released of this blend, created by Rhum Clément's former cellar master before his retirement. Audrey Bruisson, marketing & brand advocacy director for brand owner Spiribam, says the "luxurious liquid" — bottled at 44% ABV and with a SRP of around EUR1,529 (US\$1,603) — has mainly sold to "historical clients in Italy, Belgium, Switzerland and Germany, but we were also quite surprised to find buyers in Greece, Armenia, Czech Republic and Luxembourg".

Rump@blic

Disaronno International UK launched Rump@blic earlier this year in response to "increasing global demand for experimentation in the luxury space". The range offers one-off single batch expression Sicilian Legacy (43% ABV/SRP GBP38 [US\$48]), and the Origins range — African, Spanish and Indochina Rum Identity expressions (all at 41.5% ABV/SRP GBP31–GBP33). Disaronno's Peter Dries says that "by leveraging global heritage with influences from across the world, Rump@blic is distinguishing itself as a truly global brand that is future-forward".



Saint James 2003 Single Cask

This vintage from La Martiniquaise-Bardinet's Saint James — which celebrates its 260th anniversary in 2025 — is a limited edition of 1,750 bottles (42.3% ABV/SRP EUR189). Each bottle is made with rum from a single cask "selected for its ability to provide the roundness and strength required during an exceptional 18 years of ageing in a tropical environment", says Saint James Distillery oenologist & production manager Marc Sassier. The result is "a dry vintage offering an exceptional rum with a beautiful intensity, thanks to the presence of warm tannins".

Havana Club Icónica Collection

The recent unveiling of Havana Club's reimagined Icónica Collection is, according to CEO Christian Barré, "a testament" to the growing appetite for ultra-premium rums. Havana Club Máximo Extra Añejo, (40% ABV/ SRP EUR2,500 [US\$2,756]), of which a maximum of 1,000 bottles are produced annually, is a collector's item; Gran Reserva Añejo 15 Años (40% ABV SRP/EUR209) is a gifting option; and Barré says Selección de Maestros (45% ABV/SRP EUR55) is "for both collectors and those seeking a sophisticated sipping experience".



» it comes to marketing at the luxury end.

El Supremo's Lim believes: "With the rum category's limited global regulations, producers have creative freedom in ageing, finishing and blending, allowing traditional and innovative flavours to coexist. However, producers must uphold transparency and quality standards, ensuring discerning buyers can trust their choices."

Another big name in the agricole arena is Rhum Clément, which plays in two categories in the luxury field: annual limited releases under the Clément Private Cask Collection and the very limited (1,330 bottles) Cuvée Robert Peronet, created by the former cellar master before his retirement.

Audrey Bruisson, marketing & brand advocacy director of brand owner Spiribam, welcomes "more curious luxury rum drinkers".

"Once in, those consumers will continue to navigate the category, refine their personal tastes, improve their rum knowledge, and eventually be interested in our rum expressions as well," she says.

"We already saw this phenomenon in France in the aged rum category ten years ago, with the introduction of Latin and English-style rums in a market originally French-style focused [rhum agricole]. Even if it was at a more mainstream price positioning, it helped the overall category to grow and to become more attractive."

But, Bruisson says, the lack of overall regulations globally makes it harder to market luxury rum. "When navigating the luxury rum market, consumers are looking for two key assets: transparency and brand image," she explains. "At this level of price, it is crucial for consumers to understand what they are buying and why a certain origin, technique or certification makes a rum more expensive than others."

"For example, with our Dame Jeanne from Rhum J.M, a very limited-edition blend of AOC Martinique rhum agricole aged from eight to 22 years in oak barrels, we have precisely detailed the components and ratio of the blend to communicate about its scarcity to the end consumers."

"But with the lack of overall regulations known globally by every single rum drinker, sometimes only describing the liquid isn't enough. To overcome this barrier and still appeal to luxury rum consumers, brands must also work on improving their luxury brand-building."

"This mission either takes a very long time for smaller brands who can only afford to educate their audience step by step, or big budgets to strongly broadcast this message globally. That is why the category is dominated by big international brands, rather than small craft and local brands." »



Clément Private Cask Collection is aimed at 'more curious luxury rum drinkers'

Transparency is key to build consumer trust

» The founder of the UK's first B Corp-certified rum, Hattiers, Philip Everett-Lyons, agrees: "The flexibility in regulations globally allows for more creativity and innovation in rum production, giving brands room to experiment with unique blends, ageing processes and flavour profiles that distinguish them in the luxury market."

"However, this lack of standardisation can sometimes lead to consumer confusion, especially among those accustomed to highly regulated categories like whisky. To address this, brands such as Hattiers are emphasising transparency in production processes, provenance and quality standards, which is helping to build consumer trust and loyalty, despite the regulatory diversity. This is a long road to walk down and eventually I suspect there will need to be regulation to support the category."

Havana Club's Barré welcomes new entrants to the category "as it proves its dynamism and encourages innovation, which is always positive". But he also agrees there are challenges, which come "when producers don't communicate the regional variations within the category". He says: "For example, all our rums hold a Protected Designation of Origin for Cuba, which reassures drinkers they're buying a sophisticated product which has met minimum age requirements and is produced from raw materials sourced on the island."

As to the occasions driving demand for luxury expressions, IWSR's Wolfe says: "We have certainly seen whisky drinkers experimenting with rum as they explore new categories, but they are by no means the only ones."

"At the luxury end, most product will be sipped or used in high-end cocktails rather than mixed. There is definitely a collector's market at the very upper end, with certain limited editions and products from 'ghost' distilleries much sought after. But this secondary collector's market is much less developed than that of scotch, for instance."

With so much willingness by producers to innovate and consumers to sip in the lap of luxury, rum's star is certainly in the ascendancy. **GDI**

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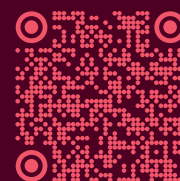
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The Iconica Collection symbolises the finest examples of Cuban excellence, blending Havana Club's storied heritage with the highest standards of global luxury

‘We’re more than just rum-makers; we’re caretakers of a rich cultural legacy’

Asbel, you've been with Havana Club for 30 years. Can you tell us how you first became involved in rum production, and what drew you to this craft?

Growing up in Cuba, rum was more than just a drink — it was part of our culture, woven into our way of life. The artistry and deep-rooted connection to our island captivated me, and I was drawn to creating something distinctly Cuban, that would carry our identity to the world.

My path began after completing my studies in the beverage industry, when I met Don José Navarro, Primer Maestro del Ron Cubano. Navarro was a visionary, shaping both Havana Club and modern Cuban rum as we know it. Under his and the other Maestros' guidance, I learned that creating rum isn't about skill or recipes, it's about intuition, patience and respect for every element of the process.

Today, I carry his influence with me as I work with my fellow Maestros del Ron Cubano at the San José distillery, to refine our craft and ensure every bottle honours our Cuban heritage.

To mark the launch of the Iconica Collection, **Asbel Morales**, Maestro del Ron Cubano, shares his journey with ‘the beautiful artform’ of rum and how **Havana Club** strives to ‘ensure every bottle carries the soul of Cuba’

Havana Club has long been celebrated for its dedication to Cuban rum-making traditions. Could you explain the significance of the Maestros del Ron Cubano and how their know-how has been recognised by UNESCO?

As Maestros, we're more than just rum-makers; we're caretakers of a rich cultural legacy passed down through generations and we're proud to be part of a collective who are responsible for upholding Cuban rum's protected designation of origin status.

Our expertise earned UNESCO recognition as World Intangible Cultural Heritage in 2022, which safeguards our traditions for future generations. This is a profound acknowledgement of our role in preserving traditions and we remain dedicated to protecting this legacy.

Rum is our national drink, an integral part of our heritage. It's not a phrase, or a slogan; it's a beautiful artform and we'll always ensure every bottle carries the soul of Cuba.

Havana Club's Core range has recently undergone a redesign. How does this restage enhance the brand's identity and reflect Havana Club's commitment to premiumisation in the evolving rum market?

The new design of our Core range was crafted to modernise and premiumise the portfolio by merging the vibrancy of Havana's streets with the spirit of our rum, inspired by Cuba's unrivalled character.

The harmonised design across the portfolio, including Havana Club Añejo 7 Años, Havana Club Original — Añejo 3 Años and Havana Club Especial, creates standout for retailers and bartenders and reflects our dedication to craftsmanship and embracing modernity. This bold collection signals to consumers that Havana Club remains true to its roots and reaffirms our premium status.

Unlike many white rums, Havana Club Original — Añejo 3 Años has been aged. »

» **What difference does this make to the final product, flavour profile and suitability as a key ingredient in mixed drinks and cocktails?**

The ageing process of Havana Club Original – Añejo 3 Años is central to its distinct character and sets it apart from other light rums. Aged for a minimum of three years in oak barrels under Cuba's tropical conditions, it develops layers of complexity and smoothness.

The resulting rum imparts delicate notes of vanilla, oak and a subtle hint of spice, while still preserving the fresh sugarcane essence reminiscent of Cuban rum. This creates a rum that shines in cocktails, like a Mojito or Daiquiri, and transforms these serves from simple refreshers to true Cuban experiences.

As a Maestro del Ron, you've played a key role in creating some of Havana Club's most iconic expressions. Could you walk us through your creative process crafting your flagship Havana Club Añejo 7 Años, and very limited releases, such as Havana Club 11-Year-Old and Single Cask expressions, in partnership with The Whisky Exchange?

Havana Club Añejo 7 Años, our flagship expression described as 'the essence of Cuban rum', is matured for a minimum of seven years in ex-Bourbon barrels and crafted using the continuous ageing method pioneered by Don Navarro in 1978.

This method harnesses Cuba's unique climate, where the 'angel's share' results in more concentrated flavours from the humid environment. Once the rum has been left to age naturally, a portion is taken out of its original barrel to be re-aged and blended in another cask for a more sophisticated profile. It is then bottled in accordance with the *gota minima* principle, dictating that any age statements must reflect the youngest drop in the bottle, meaning every bottle will always remain the spirit of the original batch.

Our collaboration with The Whisky Exchange leveraged their expertise in catering to fine spirits connoisseurs and the creative process used our knowledge and exemplary stock to craft innovative expressions, while staying true to our Cuban rum-making traditions. Guided by their briefs, we crafted Havana Club 11 Year Old, aged in American white barrels, at 50% ABV and the new Single Cask Collection, of which Barrel 98323 debuted to a record sell-out at the London Rum Show, was made from a selection of rare rum bases – aged for more than 15 years. We look forward to unveiling the second Barrel in 2025.

The Icónica Collection is regarded as the pinnacle of Havana Club's portfolio.

What sets this collection apart, and how does it reflect the best of Cuban rum-making traditions and your team's expertise?

The Icónica Collection symbolises the finest examples of Cuban excellence, with an exquisite range of extra-aged and rare rums, blending Havana Club's storied heritage with the highest standards of global luxury.

We recently presented the reimaged Icónica Collection, enhanced by an elegant, contemporary design across Havana Club Selección de Maestros, Havana Club Gran Reserva Añejo 15 Años and Havana Club Máximo Extra Añejo. This transformation is a tribute to our craftsmanship and heritage, heralding a new chapter for the collection.

with its distinguished crystal decanter, featuring a crystal stopper engraved with Havana's Giralilla in gold, but sustainability is at its core. The packaging is made from certified wood by-products, boasting an 89% reduction of plastic components, reflecting our commitment in appealing to modern consumers.

Cuban rum holds a unique position in the global spirits landscape. In your view, what makes Cuban rum, and Havana Club in particular, superior in terms of craftsmanship and flavour profile?

The distinction of Cuban rum making lies in our country's natural resources and



Asbel Morales, Maestro del Ron Cubano at Havana Club: 'The distinction of Cuban rum-making lies in our country's natural resources and time-honoured traditions'

The recently revamped Havana Club Máximo Extra Añejo is hailed as one of the most prestigious rums in the world. How does this new design, with its sustainable elements, honour the legacy of Cuban rum while appealing to modern consumers?

Havana Club Máximo Extra Añejo sits at the head of our Icónica Collection as the supreme expression of Cuban rum, blending the oldest and finest rums in our reserves, with only a maximum of 1,000 bottles released annually.

We gave this rare expression a new look last year, with the modernised design not only creating a statement of luxury,

time-honoured traditions, with consumers valuing our dedication to preserving these authentic techniques.

Cuba's sugarcane is among the finest in the world, and our tropical climate, coupled with the Cuban heat, accelerates the ageing process, creating expressions with unmatched complexity and depth. We only use the most exceptional Cuban ingredients that nature provides, meaning every bottle of Havana Club carries the designation of origin status [D.O.P Cuba], reassuring consumers they are buying a sophisticated product that meets these classifications and is produced from raw island materials. **GDI**

Cracks are showing in cream liqueurs — can rapid-fire NPD save the day?

Confident that a drop in global sales volumes was a short-term blip, cream liqueur producers are pushing ahead with innovative and premium NPD to drive growth. **Joe Bates** reports

Cream liqueurs have an unfair reputation in the popular imagination as being rather staid and old-fashioned, a seasonal, price-driven purchase wheeled out at Christmas. In truth, the category proved a hotbed of innovation in 2024, with new brands, flavours and spirit bases flooding the market.

The key question is whether this high level of NPD and investment can reset the category's commercial fortunes.

Cream liqueurs hit the buffers in 2023 with a -4% drop in global sales volumes, according to the latest figures available from IWSR. This decline halted a period of steady growth over the previous five years, a time frame which, of course, included the hugely destabilising Covid-19 pandemic.

The sector's woes were exemplified by the difficulties faced by market leader Baileys — its sales dipped 6.3% to 8.2m cases in 2023. The Irish brand's response was to maintain a rapid pace of innovation in 2024, experimenting with light aluminium bottles in European airport shops in March and trialling paper-based mini-bottles at a Spanish festival in May. New flavour extensions — Chocolate, Chocolate Mint Truffles and Cinnamon Churros — were also released.

A closer look at IWSR's figures suggests that the downturn shown in the 2023 data may be temporary. The US performance was largely responsible for the sector's woes, although economically troubled Germany, the category's third-largest market, was also a concern, posting an 11% drop in volumes. However, it



Zamora's Licor 43 range includes Crème Brûlée (above), Chocolate and vegan Horchata cream liqueurs

was a 3% dip in the US that caused cream liqueurs to wobble, as the country has a commanding 22% category share.

IWSR research director Adam Rogers seeks to downplay cream liqueurs' problems in the US, arguing that 2023 was a year in which many alcoholic beverage categories that had benefited from the Covid-19 lockdown era readjusted as the on-premise reopened. "As with each segment that posted significant growth during the pandemic, volumes are now normalising," he explains.

UK and Spanish markets defy global trend

In contrast with the US, the UK, the second-largest cream liqueur market, enjoyed a 7% jump in sales volumes in 2023. UK-based producers remain bullish, despite the country's cost of living squeeze. Scottish brand Magnum Cream Liqueur, distinctive for its single malt whisky base and stainless steel flask, opened a new GBP1m (US\$1.25m) production facility in Kirkcaldy this summer in anticipation of future growth in the UK and key export markets such as Canada, the US and South Africa.

UK distillers also continue to have success with cream liqueur line extensions despite fierce competition. Welsh distillery Aber Falls, owned by Halewood Artisanal Spirits, reportedly sold out of its 15% ABV Aber

Falls Cream Liqueur within three days of its release in August. Other UK launches this year included Warwickshire-based Shakespeare Distillery's Jester Rum Cream Liqueur, a collaboration with a local chocolatier, and a salted caramel Caribbean rum cream liqueur from Duppy Share (which blends rum from Jamaica and Barbados in the Netherlands and bottles them in the UK), released in October in time for the peak Christmas sales period.

Like the UK, Spain was another strong performer with 5% growth in 2023. "Cream liqueurs have been performing well in Spain in recent years, driven in part by flavour innovation and the desire for small, affordable indulgences," explains IWSR research director Dan Mettyear. "While the move to more traditional creams has started to cool, there is a strong movement towards tequila-based creams — principally strawberry flavoured, but now other flavours — that is providing momentum for the category."

Mettyear adds that these tequila-based cream liqueurs are mostly locally produced and popular among young LDA consumers as low-ABV shooters enjoyed on nights out. While most are budget-friendly, some premium options exist. As the trend gains momentum, Mettyear notes, it is now expanding to older consumers and after-dinner occasions.

One Spanish company innovating within the creams arena is Zamora Group, which unveiled a new crème brûlée-inspired Licor 43 liqueur line extension in September 2023. Licor 43 Crème Brûlée launched in ➤



Cinnamon Churros is one of several new flavour extensions released by market leader Baileys

» key markets including the Netherlands, Germany, Mexico and the US, with “the Netherlands the best-performing market so far”, according to Zamora Group global spirits marketing director Blanca de la Infiesta.

“We recommend serving Licor 43 Crème Brûlée chilled or over ice,” she says. “This is the best way to bring out the rich flavours of Licor 43 Original combined with crème brûlée and a final touch of salted caramel. This is how it’s most commonly enjoyed. Of course, in some markets, bartenders are creating their own cocktail recipes with Crème Brûlée and it’s used as an extra ingredient for desserts in some restaurants.”

Innovation pipeline picks up pace

Few drinks categories have seen as much innovation as cream liqueurs in recent years. Producers increasingly play with flavour, the spirit base and the ‘cream’ element to stand out on the shelf and appeal to Millennial and Gen Z consumers.

Consumer demand for nostalgic foods has popularised peanut butter-flavoured beverages and prompted several liqueur launches, including one from Heaven Hill Brands, which expanded its Carolans Irish Cream range. Launched in the US with a SRP of \$14.99 for a 75cl bottle, the Peanut Butter variant joined Carolans’ existing line extensions, Cold Brew and Salted Caramel.

Meanwhile, Halewood Artisanal Spirits capitalised on the rise of tequila-based creams with the release of Black Cherry and Blue Raspberry Tequila Cream Liqueurs. Available in 50cl, 70cl and 1L formats, Halewood recommends the liqueurs be served in shots, over ice or in a “hard shake”.

Halewood describes the new additions, which join the existing Mango and Strawberry flavours, as “perfect for creating showstopping, Instagrammable serves”.

Non-dairy cream liqueurs is another area attracting heavy NPd, fuelled by the wide-

spread prevalence of lactose intolerance and dynamic growth in veganism — Statista forecasts the value of the global vegan food market will reach \$27.8bn this year, up from \$24.5bn in 2023.

Plugging into these trends, New Jersey-based firm Misunderstood Whisky has launched a range of 14% ABV dairy-free and gluten-free bourbon cream liqueurs made with sustainably sourced, non-GMO oats. Priced at \$27.99 each, the Oatrageous Bourbon Cream, Coconut and Espresso variants are available online and in Florida, New Jersey, New York, Texas and Massachusetts.

“A lot of consumers out there want to enjoy cream-inspired products but are limited by dietary restrictions, lifestyle choices or simple taste preferences,” says company co-founder JD Recobs. “We are thrilled to be able to open doors for consumers by giving them delicious, dairy-free options that are produced transparently and made with significantly less sugar compared with what is currently available on the market.”



Coole Swan Superior Irish Cream Liqueur now holds a 1% market share in the US

Super-premium success stories

As the Christmas holiday season approaches, the major multiples in the UK and other key cream liqueur markets slash prices on brands to entice shoppers to spend more on other products. In the UK on 23 November, for example, a 1L bottle of Baileys Original Irish Cream Liqueur that was retailing for GBP22 was on offer for GBP10 in two super-market chains, Tesco and Sainsbury’s.

This annual discount reinforces the image of cream liqueurs as a price-driven discount purchase, but there are super-premium brands in the category that are thriving.

A case in point is Ireland’s Coole Swan, which CEO Mary Sadlier describes as a “new take on a flat category”, launched over 12 years ago and made with single malt Irish whiskey and Belgian white choc-



Cotswolds Cream Liqueur has seen ‘fantastic growth, thanks partly to its ‘real cult following’

olate. “Coole Swan isn’t about creating a ‘cake in a glass’; it’s about offering an authentic, unforgettable taste experience that goes beyond just sweetness,” she says. “This commitment is why we’re a multi-award-winning brand that resonates with consumers.”

Coole Swan has built strong distribution across Ireland in select independent stores, hotels and bars, while internationally, it has seen remarkable growth, particularly in the US and across Europe. Sadlier is particularly proud of the brand’s recent expansion in the US, a notoriously complex and tough market for overseas companies to make their mark in.

“Coole Swan now holds a 1% market share [in the US],” she reveals. “That might not seem like a lot, but remember, we are only in five states and we have limited budgets. We have done it by building relationships with distributors who understand our brand’s value and appeal, and our ‘But Better’ campaign resonates strongly.

Another premium-positioned brand enjoying sales growth is England’s Cotswolds Cream Liqueur. It has seen “fantastic growth”, according to Cotswolds Distillery cask sales manager Rob Patchett. “It has a real cult following,” he adds. “What started as a distillery-only product has gained great distribution success with our friends at Majestic Wines, as well as the independent off-trade. We also have listings in ten international markets.”

Patchett believes Cotswolds Cream has “real potential to attract the more discerning drinker that still has a sweet tooth”. He says: “We always say we have something for everyone. If gin isn’t your thing or whisky isn’t your thing, we always get you with our cream liqueur. We have had previous success in UK airports with the cream liqueur pre-pandemic, and we’re hopeful to be able to repeat that [this festive season].”

The successes of Cotswolds Cream and Coole Swan augur well for the wider category. The recent dip in sales is likely to be a temporary blip — IWSR forecasts a global CAGR of 3% for cream liqueurs over the next four years, with growth coming from the African markets of South Africa, Angola and Nigeria, as well as the more mature European markets of Spain and Belgium. **GD**



Oatrageous Dairy Free Oat Milk Cream and Dead Man's Fingers Blue Raspberry

‘Premiumisation, limited editions and cocktails’ drive fortified wine forward

Producers are working hard to overcome volume sales declines by recruiting younger LDA consumers without marginalising their traditional base. **Sandra Newman** reports

Changes in drinking habits have created a more challenging environment for port in recent years, according to Porto Cruz international senior brand manager Maéva Fonsino.

“The category is perceived as traditional and not very attractive,” she explains, “while consumer trends have shifted, with people often preferring younger wines or less sweet products.” Despite these trends contributing to a decline in traditional demand, Fonsino says “there are plenty of opportunities” as port explores new ways to attract a younger audience.

Symington Family Estates head of communications & vintage port Harry Symington pinpoints three key trends shaping the port category and providing potential for development as “premiumisation, limited-edition releases and cocktails”.

While these trends are also prominent in the sherry sector, port is perhaps better placed than sherry to target new consumers, thanks to the added versatility afforded by the development of white and rosé port.

Premium opportunity

Premiumisation represents a key area of opportunity for fortified wine. The Fladgate Partnership CEO Adrian Bridge notes that while sales of mass-market ‘commodity ports’ have been declining for two decades, demand for ‘quality ports’ is growing.

“There is a growing demand for high-end, aged and limited-edition port wines,” he says. “Consumers are increasingly willing to pay more for premium experiences,



Passion fruit port sour made with Fonseca Siroco Port. The brand's owner, The Fladgate Partnership, is among the many producers harnessing the rise in cocktail consumption to reach new consumers

driving producers to emphasise craftsmanship, heritage and the ageing process. Also, single vineyard bottlings offer unique, terroir-driven expressions. These wines often appeal to connoisseurs looking for rare and distinctive characteristics. Classic port houses are also investing in exclusive releases to cater to affluent consumers seeking exclusivity and quality.”

Symington also sees “a growing interest in limited-edition/release ports — both among collectors and general wine enthusiasts” in the last decade. “We have seen our premium port sales grow across our brands, particularly our aged tawny [10yo, 20yo, 30yo, 40yo and 50yo], single harvest tawny and, more recently, our vintage ports,” he says. “We are seeing the trend toward premiumisation as consumers look to drink less but better.”

The González Byass limited-edition selection includes the Tío Pepe Finos Palmas range, an annual release of four sherries representing different ages of the same wine, launched in 2011. González Byass UK senior brand manager Amanda Baxter says a broad portfolio is essential to encourage consumers to trade up. “González Byass is well positioned to offer classic brands, but our superior range also covers the category from amontillado to pedro ximénez, and our VORS range allows customers to upgrade to 30yo wines,” she says.

Made for mixing: Graham's Blend No.5

Importance of cocktails

The growing importance of cocktails and long serves provides further opportunities for trading up. Bridge feels that as innovative drinks highlight its versatility, port is becoming more approachable for younger consumers unfamiliar with the category's traditional consumption occasions.

Symington agrees. “Our objective is to introduce these new consumers to other styles of port which they may enjoy, such as aged tawnies,” he says, highlighting the Graham's Blend series of “fresh, aromatic” ports in “vibrant packaging”.

Made for mixing, the range launched in 2019 with Blend No.5 white port, followed in 2021 by Blend No.12 ruby port. “These wines have allowed us to attract audiences that we otherwise would not have reached, and sales have continued to grow positively since we launched them,” Symington adds.

Baxter notes that, as well as introducing consumers to a style of wine they may not previously have considered, long drinks appeal to those seeking lower-alcohol alternatives. “Cocktails are an excellent way to introduce a complex wine category in an approachable way, appealing to both a younger generation of consumer and those working behind the bar, the gatekeepers to our future consumers,” she explains.

“The sherry category offers a broad range of flavour profiles to play with in mixed drinks — from dry vermouth »



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Cruz Tonic! (above) and Croft Twist RTDs

» alternatives to sweet sherries that bring a flourish to an espresso martini or manhattan — as well as authentic histories to engage customers.”

The boom in cocktails and long serves has given white port a boost. “White port is often served as an aperitif, and more and more in cocktails,” says Porto Cruz’s Fonsino. “Its unique aromatic profile and ability to pair with a wide variety of dishes have allowed it to find a place on shelves among consumers looking for something new. There is also a growing demand for dry or semi-dry white ports, which provide a fresher, less sweet alternative to classic red ports.”

Symington has also seen “encouraging growth” in sales of white port. “The growth in tourism to Portugal has had a very positive impact on port in general, but white port specifically, as tourists are introduced to the refreshing white port-and-tonic cocktail on their holiday and look to replicate the experience back home,” he says. “We expect to see this growth continue.”

However, reports Symington, tawny port has seen the strongest growth over the last few years. “Sitting in between the lighter white port and the richer ruby port, tawny port pairs beautifully with a range of desserts, which is one of the reasons it continues to be so popular,” he says.

In the pink

Rosé port is also performing well, says Fonsino. “Introduced a few years ago, pink port has experienced a real boom, especially among younger consumers,” she says. “Its popularity is rising due to its freshness and fruity aromas.”

At Fladgate, whose Croft Pink was launched in 2008, Bridge says: “Rosé port has steadily grown in popularity, particularly among younger, trend-conscious consumers looking for something new within the category. Its appeal has been fuelled by its versatility, fresh taste and the rise in consumer interest in rosé wines and cocktails.”

While still a smaller segment than traditional port styles, Bridge expects demand for rosé port to continue growing as consumer tastes evolve.

RTDs broaden appeal

RTDs are another way fortified wine is diversifying and broadening its appeal, in both the port and sherry categories. Fonsino describes the emergence of RTDs as a “relatively recent but growing trend”, with producers targeting younger consumers who often value convenience. Cruz Tonic! RTD, which is sold in 20cl bottles and has a low (5.5%) ABV, launched in 2023.

Fladgate’s Taylor’s Chip Dry & Tonic, introduced in 2021, has been “very well received globally”, says Bridge. “We are also seeing a strong move towards the premiumisation of the RTD category, through higher-quality and higher-priced products,” he adds.

González Byass has also launched a pre-mix — Croft Twist Fino Spritz RTD. Baxter describes it as “the perfect option to meet new consumer trends: the ‘healthy’ phenomenon, the emergence of the spritz category, more daytime consumption and the search for low-alcohol alternatives”.

Launched in the UK in 2018, the 5.5%-ABV drink is now available in Spain (the RTD’s key market since its launch there in 2022), Germany, Sweden, Switzerland, Belgium, Argentina and China.

RTDs help drive a growing presence for port at festivals, while tastings and culinary events build exposure, says Fonsino. “These events allow producers to showcase their products to a wider audience and strengthen their brand image,” she says. “They also help educate consumers about the history and diversity of port.”

Symington feels education is fundamental for promotion. “We find that the more people learn about port and its different styles, the more they recognise its ability to fit different moments or pair with different dishes,” he says. The company’s School of Port educational platform, launched in 2020, has produced “tangible benefits”, he adds.

Social media and digital content also play a key role in developing demand, particularly among younger consumers, with Bridge highlighting the importance of interactive content, such as live tastings, virtual events, and influencer partnerships.

No one gets left behind

As fortified wine broadens its appeal, maintaining a relationship with more traditional consumers is key, says Symington. This goal has been encapsulated by a new look for Cockburn’s featuring contemporary illustrations by artist Song Kang that

Top 15 Port Markets by Volume 2023

’000s of Nine-Litre Cases

	1. France 1,693.12	▼ -15.5% vs 2022
	2. Portugal 1,383.81	▼ -1.9% vs 2022
	3. Netherlands 795.86	▼ -0.3% vs 2022
	4. UK 755.39	▲ 8.6% vs 2022
	5. Belgium 690.11	▼ -15.2% vs 2022
	6. Germany 380.27	▲ 3.3% vs 2022
	7. US 355.02	▼ -13.3% vs 2022
	8. Denmark 181.84	▼ -7.9% vs 2022
	9. Canada 115.56	▼ -10.0% vs 2022
	10. Spain 106.11	▼ -6.0% vs 2022
	11. Poland 80.67	▲ 6.0% vs 2022
	12. Italy 68.94	▲ 1.7% vs 2022
	13. Brazil 63.25	▼ -8.3% vs 2022
	14. Russia 60.65	▼ -16.5% vs 2022
	15. South Korea 33.69	▼ -21.3% vs 2022
	Rest of World 441.29	▼ -8.1% vs 2022
	Global Total 7,205.59	▼ -7.0% vs 2022

Source: GDI calculations based on IVDP data



depict vignettes from the brand’s 200-year history. Launched in September, the lighter-weight bottles also introduced a modern reimagining of the brand’s heritage logo (Cockburn’s 10yo Tawny Port, pictured left).

Bridge agrees that traditional consumers should not be left behind as the industry evolves. Producers, she says, should “seek to balance tradition with innovation, cater to a broader and younger consumer base, and emphasise sustainability and quality in response to changing consumer demands.” **GDI**

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Bitter truths: Resilience and growth in a challenging market

Trading conditions have impacted the bitters category in recent months, but the sector continues to show considerable resilience and growth potential, writes **Joe Bates**

Herbal bitter liqueurs haven't proven immune to the headwinds currently buffeting the wider alcoholic beverage sector. Yet this diverse and dynamic category is arguably in better shape than many others.

Driven by the spread of cocktail culture and aperitivo-style spritz serves, as well as strong growth in markets such as Argentina and West Africa, the sector continues to buzz with new entrants and product innovation.

Currency devaluation hits Nigeria

The leading market remains Africa's most populous country, Nigeria, where bitters are an integral part of local culture and are even believed to have medicinal and aphrodisiac properties.

This market enjoyed a healthy CAGR of 6% between 2018 and 2023, according to IWSR, and Diageo-owned Orijin Bitters, produced in Nigeria, was the category's fourth-largest brand by volume globally in 2023, with sales of 2.2m cases.

However, Nigeria faced an array of problems in 2024, from high inflation and a currency devaluation to the removal of fuel subsidies and continuing political instability.

"Bitters in Nigeria tend to be low-priced local products," admits IWSR senior market analyst Charlie Winter. "There is a small premium imported segment, which was



growing, but is expected to fall back due to the devaluation of the naira [currency]."

Stephan Berg, founder of German cocktail bitters brand The Bitter Truth, takes a more upbeat view of Nigeria and the wider West African region — IWSR ranks Ghana as the category's third-largest market.

"We pride ourselves that we've had a presence in West Africa for years," he says. "At first, [it was] through some more one-off contacts, but we have now found a partner that covers the area as a whole. We have big expectations for the region, albeit that, of course, each of the countries in the region will require its own approach."

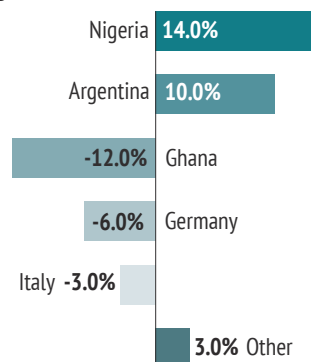
Argentina: Temporary downturn

Ranked second in size by IWSR, economically troubled Argentina saw a 10% jump in bitters volumes in 2023.

The South American country boasts a strong cocktail culture, with more than 62% of the population claiming to have some degree of Italian ancestry. Consequently, the classic Italian amaro Fernet-Branca-and-Coke is a popular bar call, especially among younger LDA consumers.

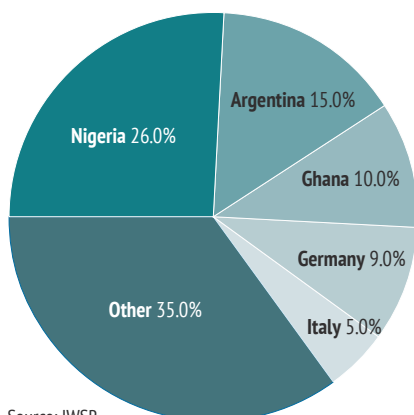
"Bitters play a significant role in Argentina and transcend all socio-economic statuses," maintains IWSR senior research analyst Luciano Anavi. "However, 2024 is the first year since the pandemic that we are starting to see signs of the category suffering due to the local economic crisis. We expect this to reverse once the economic situation improves."

Top 5 Bitters Markets Chg Vol 2022–23



Source: IWSR

Top 5 Bitters Markets Market Share (Vol) 2023



Source: IWSR

Aperol reports flat Q3 sales

The challenging trading climate for herbal bitters is also reflected in the latest sales results of Campari Group, the owner of Aperol, the herbal bitter category's hugely successful market leader. In the third quarter of 2024, sales growth for Aperol was flat at 0%, with the brand growing at only 3% over the first nine months of the year.

The multinational partly blamed the poor summer and autumn weather in key markets such as Italy for the Q3 slowdown. Yet there was also strong growth in other territories, including the US, Canada, Australia, Greece and global travel retail.

The ubiquitous Aperol spritz is now the most popular cocktail in London and 22 US states, according to Campari, while the Aperol brand itself is the most ordered spirit in both Germany and Italy. >>



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Jägermeister Culture Orange design pack

Jägermeister 'cautiously optimistic' about 2024 results

» Jägermeister, the category's second-largest brand, has admitted market conditions in its home market of Germany, with its economic stagnation and energy crisis caused by the Ukraine war, have been far from ideal of late.

Nonetheless, the brand managed to achieve global sales of 9.2m cases in 2023, helping Mast-Jägermeister achieve its second-best commercial performance to date.

The UK and other Western markets helped Jägermeister offset a flat performance in Germany and a slowdown in the US; the travel retail channel and a recovering post-pandemic China were also bright spots. Mast-Jägermeister has yet to release figures for 2024, but CEO Michael Volke is "cautiously optimistic" the company will achieve a "stable, high result" despite "the fragility of the consumer climate in many markets".

The family-run company, a single brand model since its inception in 1878, has set its sights on becoming a portfolio company in recent years, acquiring stakes in Gin Sul (2018) and US tequila brand Teremana (2022).

It continues to innovate with its core brand, working with the Pantone Color Institute to redefine the herbal liqueur's signature colours and releasing its first monochrome bottle design as part of limited-edition design packs. Just 560 design packs in each colour — Herbal Green and Culture Orange — containing the minimalist bottles were released in September.

Schwartzhog seeks to build overseas presence

With deep roots tracing back to medieval monasteries, Germany's herbal liqueur heritage is steeped in tradition. Despite its age, the category continues to chime with the country's consumers and was worth EUR556.35m in 2023, according to Statista.

Schwartzhog, meaning 'black wild boar',

'Record-breaking' year for The Bitter Truth

Despite challenging market conditions, German cocktail bitters producer The Bitter Truth enjoyed a successful 2024, according to company founder Stephan Berg. He says the company managed to expand its reach, introduce innovative products and solidify its position as a leading player in the cocktail bitters arena.

"It has been a record-breaking year for us," said Berg. "We are incredibly grateful to our customers and partners for their unwavering support, especially in a year that has been challenging for many in the spirits industry."

The Bitter Truth expanded its global footprint by entering new markets and forging strategic partnerships with distributors, reveals Berg. The company's "commitment to quality, innovation and education" has resonated with bartenders and consumers alike, leading to increased demand for its products.

"Bartenders are constantly seeking new and exciting flavours," says Berg. "We've



Bestseller: The Bitter Truth Black Cherry

seen our newest flavour, Black Cherry, soar in popularity, and our savoury flavours are also performing exceptionally well."

Looking ahead to 2025, The Bitter Truth is poised for continued growth and innovation. The company is already working on several exciting new projects, including a unique new bitter flavour that Berg maintains will "shake up" the cocktail scene.



Plans are afoot to grow Schwartzhog's distribution

is one of the country's best-known *kräuter* (herbal) liqueurs. Created by the Hardenberg family in the 1700s and today owned by Hardenberg-Wilthen, the liqueur's secret recipe includes wormwood, ginger, bitter oranges, buckbean and *sauwurz* (hog root).

The 36.7%-ABV herbal liqueur can be drunk straight as a shot, over ice or mixed with cola, energy drinks or ginger beer. Hardenberg-Wilthen has developed a wide range of easy-to-make cocktails using the brand, including the hogs fizz (Schwartzhog, honey and prosecco), the hogarita (Schwartzhog and tequila with a sweet-and-sour mix), and the ginger hog (Schwartzhog and ginger beer).

Hardenberg-Wilthen business development director Carl Graf von Hardenberg says Schwartzhog is distributed widely across Germany and has been performing well. The company now has plans to expand the brand's overseas distribution footprint, which currently covers markets including the US, Argentina, Chile, Paraguay, Azerbaijan, Turkey and Nigeria.

"It's a mix of markets and depends on [distribution] partners," he explains. "Of course, there are markets where bitters are more popular than others. Markets with a strong shot culture are interesting, and we can compete with tequila or whisky as an alternative shot."

Fernet Stock withstands Czech Republic tax hike

Fernet Stock, created in what was then Czechoslovakia in 1927 by Stock Trieste, is another herbal bitter with a proud heritage and a strong modern following. Now part of the fast-growing Stock Spirits Group, Fernet Stock boasted 28% value and 38% volume market shares in Czechia in the first ten months of 2024, according to Tomáš Hejkal, Stock Spirits marketing director for Czechia & Slovakia.

Hejkal admits that Stock Spirits had to raise the prices of both Fernet Stock Original (pictured left) and popular line extension »



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Angostura Bitters enters third century with no/low focus

Angostura Bitters, that beloved paper-wrapped staple of the bartending of the world, valued for its complex flavour profile and versatility in elevating all manner of cocktails, has released a limited-edition bitters to celebrate the brand's bicentenary in style.

The Angostura Anniversary Limited Edition, made with Angostura-aged rum and packaged inside a collector's edition box, is limited to just 120,000 bottles globally.

"The addition of aged rum adds complexity to the blend by introducing woody notes and balancing the herbaceous character imparted by the new botanicals," says Angostura Bitters marketing manager Vitra Deonarine.

"Originating from the only remaining distillery in Trinidad and Tobago, with its exceptional rum-making quality and tradition, the new commemorative bitters is the ultimate expression of the provenance of Trinidad."

The commemorative release was made available in limited quantities to select US national and regional liquor



chains, as well as online at ReserveBar and The Bourbon Concierge in October. The company has also published a celebratory book, *Classic Cocktails and Fancy Drinks with Angostura Bitters*, which celebrates the brand's key role in the growth of cocktail culture and showcases serves featuring it as an essential ingredient.

Commercially, Angostura Bitters continues to go from strength to strength. In the company's financial year ending 30 September 2024, sales rose 4%, with growth driven by increased sales of bitters in Australia (+28%), Latin America (+18%) and North America (+1%).

Deonarine says that this year the company will react to the growth of no/low-alcohol beverages globally. "2025 will see Angostura roll out a new campaign focused on education and trial of Angostura to inspire consumers and the trade with how Angostura can elevate no/low-alcohol offerings in both the on-trade and at home," she reveals.

» Fernet Stock Citrus after the Czech government raised the alcohol excise tax by 10% in January 2025. "However, sales of the Fernet brand remain strong, as many customers are drawn to the more affordably priced options, such as Fernet Stock Standard and Fernet Stock Standard Citrus," he insists.

"We launched TV commercials during

the peak holiday periods, Christmas and Easter, supported by point-of-sale and in-store [on-trade and off-trade] promotions to strengthen brand connections," Hejkal adds. "We also engaged in key events like the Prague Bar Show and Majáles — one of Czechia's largest student music festivals — showcasing our commitment to the com-

munity and building brand presence in exciting, relevant spaces."

The most famous cocktail using Fernet Stock is the simple *bavorák* a Fernet-and- tonic, but Hejkal says the brand is mostly enjoyed on its own neat. "We also successfully used the base of Fernet Stock to produce Fernet Stock Bitters in two »

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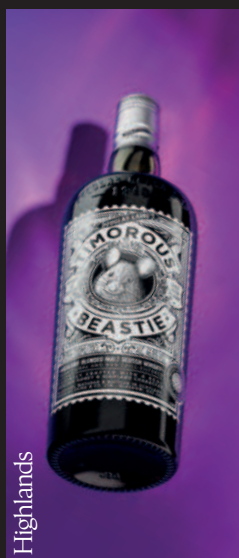
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» two variants: Dark and Pale,” he says. “Thanks to its high quality and intensity, it quickly gained recognition within the bar community, and today you can find it in many bars across Czechia and Slovakia.”

Moving with the times: Caffo enters RTS; Lejay enters bitters

Bitter liqueur producers may pride themselves on their long histories and rich heritages, but they also increasingly demonstrate their ability to move with the times.

A good example is Calabrian spirits producer Gruppo Caffo 1915, whose flagship product is Vecchio Amaro del Capo, a herbal liqueur based on an ancient Calabrian recipe made with regional herbs, flowers, fruits and roots.

In September, Caffo launched two canned ready-to-serve (RTS) cocktails: Capo Arrabbiato Spritz (Vecchio Amaro del Capo Red Hot Edition, white wine and soda, pictured right) and Capo Tonic (Vecchio Amaro del Capo, Calabrian lime and lemon juice and tonic).

“We have chosen to expand our offer in the RTS market, because it is one of the most promising cate-

gories in the alcoholic sector,” said CEO Nuccio Caffo, announcing the launch. “A market currently growing strongly finds us prepared for the challenge.”

The new lines were initially test-launched in the southern Italian market, pending a wider national rollout. “The first findings are positive beyond all expectations and push us to continue quickly,” Caffo revealed.

Similarly, French liqueur producer Maison Lejay Lagoute, best known for Lejay Lagoute Original Crème de Cassis de Dijon, has shown it too can enter a fast-growing category — it launched a bitter cassis in April. It was the first new liqueur from the La Martiniquaise-Bardinet-owned brand in a decade.

Lejay Bitter Cassis uses the distillery’s signature blend of Noir de Bourgogne and Black Down blackberries and buds, macerated in eaux-de-vie. The bitter flavour is achieved by adding citrus fruits and orange peel to the original recipe.

According to a company spokesperson, Lejay Bitter Cassis has three objectives: to meet demand from bartenders for less sugary, more complex and bitter liquids; to offer a product that will appeal to bartend-



Lejay Bitter Cassis aims to meet demand for less sweet, more complex and bitter liquids

ers making classic bitter-tasting cocktails such as the negroni, americano and boulevardier; and to appeal to consumers wanting delicious, easy-to-make recipes at home, such as highballs made with soda water.

La Martiniquaise-Bardinet plans to roll out Lejay Bitters Cassis to key export markets, such as the US, Canada, the UK, Japan and France. [GDI](#)

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‘We have a growth agenda to make Stock a leading mainstream spirits player in Europe’

Stock Spirits group chief marketing officer **Nicolas Mazuranic** says the group’s agility allows it to ‘act as entrepreneurs’ in the way it responds to consumer trends with innovative NPD, advertising strategies and M&A

How have you got to where you are today with Stock Spirits? I’ve spent my whole career — over 22 years — working in marketing. I spent 14 years with L’Oreal, and from there I moved to Bacardí for seven years in Europe. I’ve been Stock’s CMO for around two years after the company was acquired by CVC [Capital Partners in late 2021]. We’ve been on a transformational journey since the acquisition, going from an established Eastern European spirits producer to becoming one of the leaders in mainstream spirits in Europe.

How have you found the change from working for a multinational brand owner to one that’s well-established in a smaller geographical area? Stock is much smaller compared with the big global spirits players, but it’s still a sizable business that’s been around for 140 years with very strong local brands. What excited me about joining was the potential of these brands — to shine a light on them with advertising and innovation.

One example is Clan Campbell — within a year of buying the scotch brand [from Pernod Ricard], we invested heavily in a marketing campaign in its largest market, France, and have launched it in seven of our markets while bringing innovation to it. The quick way we can take these local jewels and launch them in other markets is really exciting.

The difference with bigger corporate organisations is the speed of decision-making. We can try things very quickly in Stock — we made four pretty major acquisitions in 2023. We act as entrepreneurs and the group’s functions are here to support markets and help them to accelerate various processes.

This feels like a new chapter for Stock, with your recruitment from Bacardí and CEO Jean-Christophe’s from Pernod Ricard in 2022.

The acquisition by CVC led to a focus on developing a growth agenda, to make Stock one of the leading mainstream spirits players in Europe. It also became about looking at the existing brands that hadn’t really been taken care of and were under-invested in.



Nicolas Mazuranic joined Stock Spirits Group in January 2023 to lead and oversee marketing

With the support of CVC, we now have the ability to invest behind the brands and build new distilleries in Scotland [a single malt distillery at a cost of EUR30m (US\$32m)] and Mexico in the coming years. We’ve also just opened a new [EUR50m] distillery in Lublin in Poland, which is one of the most modern in Europe. There’s a lot of support for this very dynamic growth agenda. When you look at where we were two or three years ago in terms of turnover and profit, you can see we’re definitely on the right track today.

What did you see in Clan Campbell that Pernod Ricard no longer did? Pernod Ricard has different scotch whiskies and different priorities. The brand has a high quality, a mainstream price position and a smooth, easy-to-drink taste, but had no ability to

grow beyond its existing borders. We immediately saw its potential in Europe — a credible scotch proposition with a sense of place. Its sessionability aligns very much with the types of whisky that consumers are drinking in Poland and Czechia, where the category isn’t as developed as elsewhere in the world.

We also saw the potential to extend the brand into flavoured whisky, which in markets like Czechia is more important than core whisky. This is where our focus on Europe helps us — to really dig down into what consumers want, then custom-make our innovation for these markets. Joining Clan Campbell Honey soon will be a lime flavour for Poland, for example. The big groups can’t necessarily afford to have the same narrow focus on innovation, as they focus on the bigger markets for their global brands. >>

» **Does the addition of Clan Campbell indicate that Stock's vodka-leaning portfolio has reached peak maturity?**

I wouldn't say that. In the same way that we're launching Clan Campbell in Poland, Czechia and Italy, we're also launching Żołądkowa – the No.2 vodka in Poland – in Germany and France. Has vodka reached maturity in our core markets? Clear vodka in Poland, for example, potentially has – mainstream vodka is decreasing in the country, but premium is growing. The market for vodka in Poland is maturing and evolving.

One example of how much room there still is in premium vodka is the Biały Bocian brand [inherited when Stock Spirits acquired Polmos Bielsko-Biała in Poland last year]. Bocian has been one of the fastest-growing vodka brands in the past five years, with very strong brand equity even though nothing had been invested in media – Poland is a dark market. The brand is so close to Polish tradition and has grown very quickly.

Has Stock Spirits bought enough or do inorganic growth opportunities still appeal?

Today, we're quite happy with what we have. In M&A, we've benefited from major companies pushing their premium agendas, while the current economic downturn is golden for us. We've arrived at the right moment with high-quality products at a mainstream/mainstream-plus price positioning.

We've made some significant brand purchases that we still need to digest. We want to have a focused approach. We'll always look at what could happen, but we're not looking at major acquisitions in the near future.

We can also innovate. In Croatia, for example, bitter herbal liqueurs is a strong category that we weren't playing in. We looked at potential acquisitions, then decided to make our own and launched Pelinova in June. We'll be taking a similar approach to the aperitivo occasion with a 14.8% ABV Limoncè variant next year. [Limoncè original is bottled at 25% ABV.]



Bitter herbal liqueur Pelinova hit stores in June



Founded in 1884, Stock Spirits Group has 80-plus brands in its portfolio and exports to over 50 markets

Your tequila brand, Sierra, looks to be in the sweet spot of a booming category at a mainstream price.

We're very well-positioned with Sierra. In volume, it's the No.1 tequila in Europe, and it's already present in many markets internationally. We've done a lot of work to modernise the brand and we've brought in some innovation with a lower-ABV [18%], passion fruit-and-mango-infused chilli tequila, Sierra Tropical. We'll also be looking at innovation in Sierra's 100% agave portfolio.

How challenging is the current landscape for you from a marketing perspective?

We were starting from a very small base in Stock, compared with my previous roles, where a big part of net sales went into marketing spend, although the level of investment was being reduced. Here, it's the exact opposite: I'm injecting money into the brands.

We need to be careful how we spend on marketing. The media landscape is changing and consumers are more demanding – they're looking for different types of content and authenticity and value from brands.

The latest campaign in Germany for Żołądkowa is our reaction to consumers wanting things like authenticity, the stories behind the brands and a company's engagement with ESG. It's not about being the biggest spender anymore; it's about how you spend it to reach consumers. That's a positive challenge in the long run.

How well-placed is Stock to capitalise on the developing consumer trends?

We're really well-equipped. We started deploying RTDs a few years ago in Czechia and Slovakia, where we almost started the trend and we're the No.1 producer. We've got a full portfolio of RTDs on all of our key brands and have just launched Clan Campbell Scotch Whisky & Cola and Clan Campbell Scotch Whisky & Ginger Ale in Czechia and other markets. Sierra Cocktail RTDs – a three-strong range of margaritas with lime, strawberry and mango variants – will follow soon.

In Poland, half of the vodka market is flavoured, with ABVs ranging from 32% to 18%.



European potential: Clan Campbell is 'a credible scotch proposition with a sense of place'

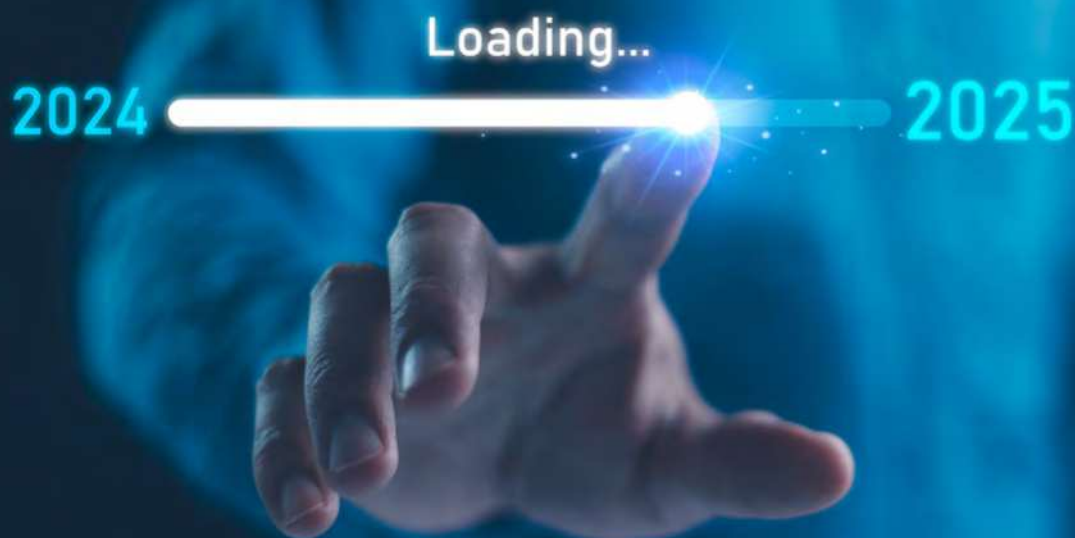
We already lower the alcohol in a lot of our flavoured vodkas. So we're definitely addressing the lower-ABV and flavour trends. We're also working on launching our first non-alcoholic gin from Finsbury. It's very important for us to look at both low and no alcohol.

We're putting a lot of effort into understanding short-term trends and what could become more long-term trends and how we could address them. We have a Europe-focused study that should be ready by the end of January.

Has the priority level for sustainability moved within Stock in recent years? ESG is one of the most important pillars in our strategy. Our aim is to reduce our Scope 1 and 2 GHG emissions by 42% by 2027. We're putting a lot of investment into this area; the distillery in Poland has a number of eco-friendly solutions.

On responsible drinking, we're about to publish our new marketing communications policy – we didn't have a group policy before. We're becoming an important player in the industry, so we need to act as such.

We're starting to see some results from our ESG efforts – we just made it to gold from silver with [sustainability rating agency] EcoVadis. We want to get to platinum by 2027. We have high ESG ambitions. It's important to CVC and to us as a credible spirits player, so it's definitely something we'll keep focusing on. **GDI**



Looking back, looking forward: Trends shaping beverage alcohol

What would Janus, the two-faced Roman god of transition the month of January was named after, make of the changeover from 2024 to '25? Most likely he'd throw his hands up in despair!

The past year has been marked by worsening conflicts in Ukraine and the Middle East, extreme weather events, rising inflation, tax hikes, increased regulation, soaring costs and tariff rises, and looks set to make way for more of the same in 2025.

Many may rather forget the trends dominating the drinks industry in 2024. But what of the year ahead? With Trump set to move back into the White House and no sign of a recovery in China, bright spots are few and far between. **Joe Bates** reports

Throw into the mix the volatility and chaos a protectionist Donald Trump-led US may bring, and there seems little light on the horizon for the alcoholic beverage sector.

The industry faced challenges on many fronts in 2024. The poor performance of the US, the world's most important premium spirits market, was a recurrent black spot in the financial results of many key industry players. Consumer confidence in the US is at rock bottom, affected by rising inflation, high interest rates and political polarisation.

Total beverage alcohol in the US fell 2.8% in the first seven months of 2024, according to IWSR, with every category except RTDs shrinking. Even tequila, the star performer stateside for so many years, fell victim to the downturn (-1%); wine was particularly badly impacted (-4%).

Despite evidence of increased downtrading in multiple markets as consumers watched the pennies and focused more on their health, drinks companies remained wedded to the idea that the premiumisation trend will pick up once the global eco-

nomic picture brightens. How else to explain the decision by several players to this year offload mass-market brands to concentrate on more premium lines?

The most eye-catching examples of this M&A activity were arguably The Edrington Group's sale of The Famous Grouse to William Grant & Sons in September this year, and Pernod Ricard's decision to offload its international wine brands, including Jacob's Creek and Campo Viejo, to Australian Wine HoldCo Ltd in July.

Bright spots for the beleaguered global beverage business included the sustained growth of no/low alcohol (the only category to grow in H1 2024 in 15 key markets tracked by IWSR) and RTDs (premiumisation also continued apace), and the robust volume and value growth seen in India.

As a dismal 2024 comes to an end, the prospects for 2025 aren't too encouraging. Yet the performance of emerging markets led by India, the multiple benefits of advancing AI technology, and the continued growth of the no/low and RTD sectors could offset some of this gloom and doom. »



Edrington exited blended scotch when it sold The Famous Grouse (above) and Naked Malt

Wine industry's annus horribilis

The past year was undoubtedly an *annus horribilis* for the global winemaking industry. Erratic weather patterns — characterised by periods of extreme heat and drought, followed by torrential rains — wrought havoc on vineyards worldwide.

The International Organisation of Vine and Wine (OIV), the wine industry's leading international trade body, forecast that global wine production in 2024 could fall to below 250m hectolitres, one of its lowest levels in 60 years. The OIV blames droughts, early frosts and flooding as key factors for this likely disappointing result.

Fluctuations in growing conditions are, of course, a fact of life of winemakers. Yet, as the OIV has pointed out, over the past century, global wine production has fluctuated between 250m and 300m hectolitres. To fall below the 250m-hectolitre threshold, as happened 2023 and looks likely in 2024, is, in the words of the OIV, a "potential turning point for the industry".

As if the vagaries of the weather weren't



Image: Stock.com/Quintanilla

Droughts, early frosts and flooding are being blamed for the huge drop in global wine production

en't enough to contend with, winemakers have also had to endure numerous other headwinds this year, from inflationary pressures and supply chain challenges to trade tensions and regulatory hurdles. Arguably, more troubling is the dismissive attitude of many Millennial and Gen Z consumers towards wine.

In March, the *San Francisco Chronicle* ran a story detailing how US sommelier & social media influencer Warner Boin had asked her 127,000 followers on Tik-

Tok why they weren't drinking wine. She received nearly 35,000 comments, many of them labelling wine as "toxic", "poison" and even as the "2024 cigarette". Others cited the high cost of wine and more tempting alternatives, such as cocktails, mocktails and cannabis, as reasons for giving wine a wide berth.

It seems that wine's well-documented 'Millennial problem' runs deeper than many in the wine industry previously thought. »



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Celebrity drinks brand gold rush

» The news in November that British actor, DJ & entrepreneur Idris Elba had partnered with Maison Ferrand to launch his own cognac brand, Porte Noire, capped off yet another busy year of celebrity drinks launches.

Whether it was country music icon & actor Dolly Parton's tie-up with Accolade Wines for the Dolly Wines range, hip-hop stars Snoop Dogg and Dr Dre's Gin & Juice RTD or pop diva Beyoncé and Moët Hennessy's rye whisky SirDavis, 2024 was a peak year for collaborations.

From the celebrity's perspective, the attractions are numerous, from revenue generation and diversification to increased fan engagement and boosted brand marketing power. It can be lucrative too — IWSR figures show celebrity whisky grew 8% in volume last year versus 2% for the overall whisky category. Celebrity tequilas performed even better, rising 16%, compared with only 3% for the category as a whole.

There are pitfalls, however. Negative publicity or controversies associated with the celebrity can impact the brand's reputation. Consumers are quick to spot if the celebrity has little or no involvement in the brand and the ecosystem that supports it.

"Celebrity brands are a bit like having



Dolly Parton poses with Dolly Rosé; Beyoncé and Moët Hennessy's American rye whisky SirDavis (below)



Image: Julian Daddouk

amazing PR. They get noticed very quickly which is great, but they have to offer something that people want to buy and, most importantly, buy again," says Paul Mathew, the founder of UK-based non-alcoholic spirit Everleaf. "Ideally, they also need a link to the celebrity in question.

"We were approached by a celebrity, but I couldn't see the connection to Everleaf, our passion for flavour or our love of wonderful plants, so it didn't go any further," he reveals. "There has to be something linking personality to product."

Much-hyped Chinese rebound set to remain elusive

Rewind the clock to before the Covid-19 pandemic and many international brands looked to China, the then-most populous nation (it's now India), with its aspirational, burgeoning middle class to turbocharge their profits.

The country's post-pandemic economic recovery has been sluggish, however, due to its struggling real estate sector, weak consumer spending and a slowdown in investment. The real estate crisis, with its ripple effects on related industries, has significantly impacted economic growth and consumer spending.

The headwinds affecting the Chinese market have been all too apparent in the results of drinks multinationals. Pernod Ricard recorded a substantial

26% slump in sales in China in Q3 2024, while Rémy Cointreau reported an 8% decline in sales in Asia-Pacific in H1 of the company's 2024–25 fiscal year, a drop it partly attributed to tougher market conditions in China.

The worsening global geopolitical situation has only heaped coal onto the fire. As anticipated, China slapped tariffs on grape-based spirits imported from the

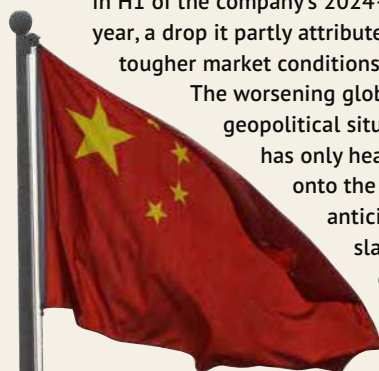
European Union in October, arguing ostensibly that imported brandy was being dumped into China, threatening "substantial damage" to the country's

domestic brandy industry. In reality, the move from Beijing was widely seen as a retaliatory tit-for-tat measure after Brussels announced extra levies on Chinese-made electric vehicles.

Importers of EU brandy must now put down security deposits ranging from 34.8% to 39% of the value of the import, according to China's Ministry of Commerce.

Looking ahead to 2025, Beijing is trying to revive its flagging economy, announcing in November a huge support package of RMB10tn (US\$1.4tn) to assist debt-ridden local governments. Yet US President-Elect Donald Trump's promise to impose tariffs of up to 60% on Chinese goods could well derail these efforts.

Tellingly, IWSR predicts total beverage alcohol volumes in China will remain flat over the next four years. »



AI moves into the mainstream



The Johnnie Walker Black Label Andy Gellenberg AI release allows consumers to personalise their bottle with a silhouette of an individual to reflect the 'many faces' of the modern whisky consumer

» In October, Diageo launched a collection of 5,000 Johnnie Walker bottles featuring designs inspired by 50 original artworks by German graphic artist Andy Gellenberg and created with the help of generative artificial intelligence (AI).

The project was the latest example of the technology's growing influence on the drinks business, whether it be using AI-powered tools to enhance customer experience, optimise supply chain efficiencies, improve quality control, or, as in the case of Diageo, create bespoke marketing campaigns and even develop new products.

"AI will transform the drinks industry, mainly through enhanced customer engagement," opines Tanya Sklar, export director at Wine & Spirit International, owner of Hapsburg Absinthe and Villa Lobos Tequila. She believes the big drinks players will use AI-driven analytics to develop innovative products based

on consumer data, enabling them to stay ahead of trends, refine marketing strategies and boost brand reach.

"It's a no-brainer, really," she adds. "We all need to get on the bandwagon and utilise AI to stay competitive, drive innovation and meet evolving consumer expectations in an increasingly tech-driven market."

Unsurprisingly, not everyone is so bullish about AI's potential.

Lasse Öznek, master distiller at Copenhagen Distillery, which produces Copenhagen Whisky, New Nordic Aquavit and Nordic Dry Gin, argues AI's potential has limitations.

"While we use AI to enhance our brand and refine our reach, the heart of what we do is rooted in a tradition that can't be matched by algorithms," he insists. "Our spirits are born from a balance of art, craft and science, guided by intuition that no machine can replicate."

Agave spirits slowdown

Agave spirits, previously a seemingly unstoppable force in the spirits world enjoying premiumisation and a growing worldwide presence, finally succumbed to the old law of Newtonian physics: 'What goes up, must come down'. According to Banxico, Mexico's central bank, exports of tequila, mezcal and other distilled spirits fell 10.9% over the first half of the year to reach US\$2.1bn.

Over the past six years, exports of tequila to markets such as the US, the UK and Italy have soared, with last year's total reaching \$4.4bn – more than double the pre-pandemic 2019 total of \$1.9bn. Yet exports to the economically troubled US, the linchpin export market for agave, dropped over 5% in the first half of 2024, and there was a far steeper, more worrying, drop of 65.5% in the EU over the same period.

On a much-needed brighter note, tequila exports to Asia-Pacific soared by 49%, giving agave spirits producers a welcome silver lining to what could turn out to have been a tough year.



Trump plans tariffs on Canada, Mexico and China in response to 'crime and drugs' entering the US

All eyes on Trump and tariff threats

US President-Elect Donald Trump's love of tariffs is hardly a secret, and the prospect of a potential blanket 10% tariff on all imports into the US once the Republican Party takes office in January is a chilling prospect for alcoholic beverage executives on both sides of the Atlantic.

Imports from Canada, Mexico and China look set to be the hardest hit – Trump has pledged a 25% tariff on all imports from Canada and Mexico, and an additional 10% charge on goods from China on top of existing tariffs.

The Distilled Spirits Council of the US, whose members include all the major global producers, plans to argue that spirits should be exempt from the tariffs given so many liquors can only be produced in legally defined countries or regions. But industry insiders are not optimistic.

"Trump, as we know, is going to implement policies to drive isolationism and further the objective to drive US self-reliance," says Dawn Davies, master of wine & head buyer at UK-based online drinks retailer The Whisky Exchange. "This means tariffs will come back into play, which has a huge implication for the drinks industry both in and outside America."

"If taxes rise on tequila, this could change the whole trajectory of the agave growth, as America is a huge market," she adds. "Cognac has already been hit by declining sales in the US, and Asia will be further hit. The response to the American tariffs, which may mean the reinstatement of the bourbon tax, can only hurt sales of bourbon and American whiskey on a global scale."

In the UK, drinks producers are bracing themselves. "We're yet to see what the actual percentage will be, but we're anticipating a significant impact in import/export costs," says Sophie Brisbane-Rhodes, the global chief marketing officer of no/low spirits brand CleanCo.

"This will hit the smaller players the hardest. With a Labour government in parliament in the UK, it feels less likely that a trade deal will materialise between the UK and the US, and it'll be interesting to see if food standards continue to be a contentious issue between the two countries." »

From roast broccoli to hot dogs: Savoury cocktails have a moment

» Ask ten mixologists for their views on which cocktails people will be drinking over the next year, and you'll likely get ten different answers. But one clear trend that is emerging from the noise is the increasing popularity of savoury cocktails.

Umami-rich ingredients like miso, tahini and mushrooms that add depth to cocktails speak of a growing fondness for culinary-inspired mixology that is also gaining momentum due to Millennial and Gen Z consumers' preference for less sugary drinks.

Singapore's Cat Bite Club, winner of the Campari One To Watch Award at The World's 50 Best Bars 2024, heroes ingredi-

ents such as roasted broccoli, celery bitters and shiitake mushroom-infused sherry. Meanwhile, the baseball inspired drinks list at Tokyo Confidential, a high-energy cocktail bar in the city's Azabujuban district fronted by British editor-turned-mixologist Holly Graham, now offers the glizztini — 'a hot dog in cocktail form', made with Roku gin, shochu, tomato pickle, Lillet Blanc, onion brine and MSG.

UK mixologist Ryan Chetiyawardana, the founder of Mr Lyan Studio, also predicts a growing role for fermented ingredients. "People are getting more confident with fermented products, and availability of interesting takes on these products — everything from *garums* [fish sauce] and vinegars, to kombucha and *gochujang* [a savoury, sweet and spicy paste] — people are underpinning everything from classics to new inventions with these deeper flavours."

The blurring line between food and drink was one of the key trends unearthed in Bacardí's latest *Cocktail Trends Report*, which pointed to mixologists experimenting with kitchen staples like milk, oil and brine to create a new wave of gastro-inspired drinking experiences. According to



Mixologist Ryan Chetiyawardana, AKA Mr Lyan

the report's survey of bartenders, some 70% of respondents said they drew inspiration from the culinary world when creating cocktails.

"Cocktails are partly moving towards the eating occasion, because that's where consumers are telling us they want to spend their money," says Bacardí global advocacy director Jacob Briars. "But there's also a growing familiarity with really interesting and esoteric food flavourings, which are making their way into drinks."



Glizztini: Tokyo Confidential's 'hot dog in a cocktail'

No/low: Welcome to 'zebra-stripping'

The final figures may not be in yet, but IWSR is confident they will show that no/low alcohol was the only market segment to increase in 2024, driven by growth in India, the US, the UK and China.

Almost a quarter of UK drinkers are now 'zebra-stripping' (alternating between alcoholic and non-alc drinks) or 'bookending' (starting and ending with non-alc options) when visiting the on-premise, reveals Everleaf non-alc spirits brand founder Paul Mathew.

"We're making non-alc versions [of cocktails] as delicious as possible to keep people out enjoying the hospitality of bars for longer with no regrets," he says.

This flexitarian zebra-stripping trend is also apparent within food, with consumers happily switching between meat and vegetarian dishes, points out Sophie Brisbane-Rhodes, global chief marketing officer of no/low spirits brand CleanCo.

"Once, it was either vegans or meat-lovers," she says. "It was so divisive; it was all one extreme or the other. Now, we see this huge wave of flexitarianism. It's the same for alcohol. There's a happy medium and world where both co-exist, and most importantly, the consumer is in control and can adjust the balance as they see fit."

RTDs to grow and mature

RTDs are fast losing their new-kid-on-the-block status and are becoming increasingly viewed as an affordable alternative to wine, spirits and beer. IWSR predicts that ten leading markets will see RTDs post CAGR volume gains over the next four years, with Brazil (+6%), Australia (+3.5%), Germany (+3.5%), the US (+3%) and Canada (+3%) leading the way.

The key growth market for RTDs continues to be the US, where hard tea, flavoured alcoholic beverages (FABs) and cocktails are forecast to be the fastest-growing subcategories. As the category matures, the pace of innovation is slowing, and consumers are becoming less experimental. In 2021, there were more than 3,300 RTD product launches, according to IWSR data; in the first half of 2024, there were fewer than 1,000.

Where new RTD products are dropping, the focus is increasingly on health-conscious options, especially low-sugar and functional ingredients.

For Daniel Jones, head of product marketing at Scotland's BrewDog Distilling Co, which owns Wonderland RTD cocktails, the convenience of premium RTDs for fast-paced on-premise venues is a major factor in their likely growth in 2025.

"There will be areas of growth within the on-premise, as premium bar-quality RTDs offer a solution to bars not equipped to churn out a high volume of cocktails," he says. "Wonderland will thrive in these spaces for a number of reasons: it makes serving great cocktails easy and time efficient, reduces wastage and waiting times, delivers consistency every time, and they're ready in an instant." **GDI**



Q&A with Heaven Hill Brands director, environment & sustainability Rachel Nally

Heaven Hill Brands prioritises making decisions that are both financially sound and environmentally responsible, says **Rachel Nally**, the company's director, environment & sustainability

What are your main areas of responsibility?

Heaven Hill has a 2030 Environmental Sustainability Strategy, which encompasses water efficiency, reductions in carbon emissions and waste, and conservation. I lead the implementation of that strategy and manage our environmental compliance around the world.

Do you experience push back against any expensive environmental measures that a business would be uncomfortable with?

We prioritise making decisions that are both financially sound and environmentally responsible. If a sustainability project doesn't demonstrate clear financial benefits, it can face more initial scrutiny. However, at Heaven Hill, two important things are understood. First, resilience against a changing climate is crucial for our long-term success. Second, there are often benefits to sustainability projects that go beyond a simple return on investment calculation, like employee morale and community resilience.

Can you share an example of a measure that has had a surprisingly high level of impact? One is our logger education programme, which we started back in 2019 with one of our main barrel suppliers, Independent Stave Co. The programme pays for loggers to attend education classes in their state-run forestry programmes. The loggers are the first line of defence for making sure we have a good barrel supply and that white oak forests across the nation are sustainable for the long term.



Rachel Nally: At Heaven Hill 'there's no effort to spin something just for marketing purposes'

The programme has led to over 400 loggers being educated on both sustainable logging practices and safety practices. Making sure those folks — who are often from family-run businesses — are coming home at the end of the day has been fantastic and is extremely meaningful.

What's been the most challenging project that you've overseen? The creation of the wastewater pre-treatment plant at our new Heaven Hill Springs Distillery, which is coming online later this year. The system will allow us to reduce loading on the city's infrastructure and capture energy to be used on the facility's property. It's a great sustainability initiative and a significant investment of around US\$5m, but it's a totally new technology to Heaven Hill. It has been a challenge trying to ensure we ask all the necessary questions to ensure

we are making the most responsible decisions and ensuring sustainability at all stages. We're very excited about it.

How do you counter the external voices that often accuse companies of greenwashing?

There's a lot of concern around greenwashing right now, but in the distilled spirits industry, I see a very concerted effort to make sure these projects are genuine and that they're making a demonstrable impact. Authenticity is one of Heaven Hill's core values.

We put our money where our mouth is to ensure that the focus areas in our sustainability strategy are supported by real dollars and that we're undertaking projects that we're proud of and are authentic and genuine. There's no effort to spin something just for marketing purposes.

We want to make sure we can prove that we're doing what we said we'd do, either through a certification or third-party audits. You have to be able to demonstrate the impact. The EPA Energy Star certification is one of the robust ways that we ensure we're not greenwashing. This is a third-party certification through a governmental agency, where we had to send them data on our actual energy use and process. When they stamp us as being an Energy Star-certified distillery, it means we're more efficient than 75% of the distilleries in our industry.

Which new technology or technique are you excited about at the moment? One of the technologies that's come a long way since I started in the industry is the ability to meter equipment to get instantaneous data, and then use AI to understand that data.

Several years ago, for instance, one of Heaven Hill's distilleries installed a smart water metering system that's able to meter individual pieces of equipment. We then used AI to figure out the base case for the quantity of water that should be going through each process. That data was used to set triggers for instant notifications if something is abnormal. This is becoming available for electrical equipment as well, where the system can learn immediately what is right and what should prompt a notification.

Data is really powerful if you have a way to synthesise it. These AI learning systems are helping us identify the opportunity areas faster. **GDI**



Volunteers in action at the new Heaven Hill Springs Distillery in Bardstown, Kentucky, where sustainability projects include planting 600 trees and 30 acres of native grasses and wildflowers

Q&A

with Rémy Cointreau global travel retail CEO Fida Bou Chabke

Rémy Cointreau may not be the biggest brand owner in travel retail, but it aims to be the 'most exciting', according to Fida Bou Chabke. The GTR CEO tells **Olly Wehring** that the company aims to add 'value through services and experiences' instead of leaning on price promotions

What's the split of Rémy Cointreau's GTR sales by region? It's pretty balanced across Asia-Pacific, EMEA and the Americas. In EMEA, we have strong brands such as St-Rémy [Brandy], Metaxa, Cointreau and our whiskies, while in Asia-Pacific, we also have our cognacs. The Americas is a bit smaller, because the airport business isn't very big in the US, although it's present across the rest of the region. Also, a lot of the world's cruise ship business is in the Americas.

The geographical mix for our GTR business differs from the group's domestic footprint.

What's the split by brand? This isn't information that we publish. I can give you some examples, though. According to IWSR data, St-Rémy has 20% market share of grape brandy in travel retail, Metaxa has 18% [of grape brandy], while Rémy Martin is a top three cognac brand.

Bruichladdich is one of our smaller brands, but it's been experiencing fantastic growth, while Cointreau is in the top five in liqueurs and The Botanist is one of the top brands in super-premium gin. So our brands are well positioned in travel retail and sometimes have bigger market shares than in domestic markets.

It's almost as if Rémy Cointreau has a portfolio that's been designed for GTR. I'm glad to hear this! We put a lot of effort into every brand in terms of activations and innovation, from Louis XIII [Cognac] at the luxury end to more affordable brands like St-Rémy, Metaxa and Mount Gay [Rum]. We really want to be a leader of exceptional experiences as well. This is a journey we've just started on.

GTR is a strategic channel for Rémy Cointreau and always has been. We were the first spirits company to set up a GTR-specific team



Fida Bou Chabke joined Rémy Cointreau in 2017, taking on the CEO role in global travel retail in June 2023

and we've strengthened the team this year with the appointment of two new MDs to lead the regions.

Of course, we've been benefiting from premiumisation trends — while our volumes aren't back to the same levels as 2019, we're growing by both value and volume and we've exceeded the 2019 level of price/mix. »

'It's not just about A&P; it is about making a smart investment that is consumer-centric rather than just splashing the cash'

» **How is the consumer environment in the channel at the moment?** It depends on the places and on the products. Overall, our current growth isn't as strong as it was last year, but there's still growth. It's not just the wider economic challenges that are affecting GTR, but also the fact that Chinese travellers aren't yet back to the levels that we were expecting — this applies beyond the Asia-Pacific region.

We've also heard from some airports that there's maybe a lower conversion rate and per-passenger spending, but that's just cyclical. When you're global and you have a diversified portfolio, you have a hedge.

We can't ignore that it's a bit more difficult at the moment, but rather than jump to price promotions, we're trying to add value through services and experiences. Promotion can only get you so far in this kind of environment.

Are there any category performances in the sales channel that you're looking at with envy? Tequila's been very active recently from a very small base, and that's something we don't have in our portfolio.

Our single malt position with Bruichladdich is enviable, though. We brought back a peated range in travel retail, and launched a non-peated range as a channel exclusive. Last year, we had a sherry cask finish and a 21yo expression that sold out halfway through our current fiscal year (to March 2025). Next year, we'll be introducing a 16yo organic expression that we're very excited about. We're really keen to expand the visibility of Bruichladdich.

What pressure do you feel to keep delivering strong results in GTR while the wider group is having a tough time? I'd call it an opportunity rather than pressure. The situation offers more options to us with a lot of attention coming from each and every brand, which we're very happy about. That helps our team to work on the experiences and activations on the ground. So it's more of an opportunity for us.

What's happening to the A&P spend for your division while the group hasn't been in growth? Investing where things are growing is the smart choice. If you look at the market in general, travel retail was booming so much in the last few years that a lot of money poured into the channel. At the same time, the cost of operating for everyone has been increasing.

I hope that we'll see expansion occur in a more reasonable way — if we want to build and invest for the future, now is the time.

I'd really like us to build something that's



A limited-edition decanter and a virtual reality experience showcasing Rémy Martin's history and provenance took centre stage when it marked its tricentennial with a pop-up at Paris Charles de Gaulle Airport in August

different and meaningful, and worth the investment. Take the example of our pop-up for Rémy Martin's 300th anniversary at Paris Charles de Gaulle Airport earlier this year. We took the time to bring as much as we could to the consumer, and we were really happy with the results.

It's not just about our A&P; it is about making the smart investment that at the end of the day is consumer-centric rather than just splashing the cash.

You mentioned rising costs from operators. Is that your main pain point? It's part of the equation, for sure. We hear from some of them that they're being more hit in other categories, so they're turning to liquor to find growth opportunities. There are also things that weren't charged for before that are now, such as activation spaces and visibility.

There's also a trend to do things in a more standardised way; when an airport is renovated, for example, you sometimes lose that customisation for your brands that you had, especially in Europe. It goes back to what I was saying earlier, that I hope we can all start to invest in a more meaningful way.

What are you seeing in rum in GTR, given the high-profile acquisitions over the last couple of years? A lot of rum's volumes in the channel have been at the lower-priced entry level. Some retailers have identified premium rum, which is the right approach. You need an assortment that's tailored to your travellers — there's no point in putting rum in front of travellers who aren't there yet.

Are you comfortable with the Mount Gay proposition? Whenever more players enter, that usually grows the category, which is always good news. High-end rum is one example; another is American single malt,

where we have Westland. It's hard to build a category on your own!

Rémy Cointreau picked up two ESG awards from Global Drinks Intel in October [Bruichladdich was the Green Packaging Initiative winner, while Telmont was awarded Sustainable Wine Product of the Year]. Our sustainability journey started a while ago with the removal of gift boxes for Rémy Martin VSOP. This year, there's been a lot of work on lighter bottles, even for Telmont Champagne, which is particularly challenging because you have to make sure they can hold the pressure.

Elsewhere, Bruichladdich got its B Corp certification with a really high score last year, and they've worked really hard to make a lighter, more sustainable bottle. Every brand's working on something.

It takes courage and effort to explain all that to the consumer, but I truly believe this is an area where we can be a leader. We might not be the biggest brand owner, but we want to be the most exciting by bringing both the experience part, as well as the sustainability part. It's important to the group and we take it very seriously.

It must be scary to move away from the premium cues, such as a heavy bottle, that GTR consumers are so familiar with. Yes and, honestly, the brands and my team work hard to bring something else in return. Telmont has a customisation offer for its bottles, for example, which is done in a very sustainable way, while actively communicating why the brand does not use gift boxes.

Everything that we do, we try to do something that's even more beautiful and compelling, but sustainable at the same time. **GDI**

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Brewers innovate to meet demand for 'eco-friendly, minimalist packaging'

Think beer packaging is relatively straightforward? Think again. Breweries, both large and small, are stepping up efforts to hit ESG goals, reports **Stephen Beaumont**

At first glance, the packaging of beer would appear to be a fairly straightforward affair. Throughout most of the world, if your ale or lager does not come in a keg or cask, it arrives in a can or bottle, usually contained within some sort of plastic or cardboard carrier. Shapes and sizes can and do vary, but the basics remain pretty much the same.

Turns out, looks can be deceiving. Very deceiving.

Consumer demand for "eco-friendly, minimalist packaging has led to changes in sourcing over the past year", according to 73% of respondents to a recent survey of 300 US-based business leaders and managers with responsibilities for packaging and labelling.

While not focused specifically on the brewing industry, the study by print, packaging & marketing specialist RR Donnelley (RRD), found that packaging and labels are key to meeting both sustainability goals and consumer expectations, with 81% of respondents saying packaging operations have played a role in their company's move toward sustainability goals.

"Sustainability in packaging and labels is more than just the materials we use; it's about rethinking the whole supply chain to cut waste, improve recyclability and support a circular economy," says RRD environmental, health, safety & sustainability director Dennis Aler. "Forward-looking organisations are putting these practices into place now to stay in step with long-term environmental goals and rising market expectations."

This very much extends to breweries, both large and small, and its impact might well change the very nature of beer packaging in the near future.

"We introduced zero pack-



The plant-based lining of Carlsberg's Fibre Bottle is made from natural raw materials, can be recycled with plastic, and will degrade into nature if it ends up outside national recycling systems

aging waste as a new focus area of our environmental, social and governance (ESG) programme in 2022, setting 2030 targets that include 100% recyclable, reusable or renewable packaging, 50% recycled content in bottles and cans, as well as a 90% collection and recycling rate for bottles and cans," says Simon Boas Hoffmeyer, head of sustainability at Danish brewer Carlsberg. "To achieve these targets, innovation in partnership with our suppliers will be key."

Most famously, Carlsberg began tests aimed at developing a paper beer bottle in 2015, starting down a road that has not been without its bumps along the way, reveals Boas Hoffmeyer.

"Following testing and consumer sampling of our bio-based and fully recyclable Gen 2.0 Fibre Bottle in 2022, we are now working on developments towards Gen 3.0 [to which end] we are testing various barrier solutions, which remains the biggest challenge," he says, "We are among others testing PEF [polyethylene furanoate], a



RRD's Dennis Aler: It's about rethinking the whole supply chain



Carlsberg's Simon Boas Hoffmeyer: Barriers are the biggest challenge



Cardboard six-pack carriers help Anderson Valley Brewing Company stand out on retail shelves

plant-based material which has just started production at our partner Avantium's new flagship plant in the Netherlands."

Better six-pack carriers

Somewhat less dramatic but still an important move forward in terms of sustainable packaging has been the change in beer can carriers by Northern California's mid-sized Anderson Valley Brewing Company.

"Several years ago, we bought a carton- ing machine for a few hundred thousand dollars," says Anderson Valley president & CEO Kevin McGee. "The cartoner does all the work and allows us to print on squares and rectangles, so we can really make our brands stand out."

In addition to getting rid of plastic »

» six-pack carriers and adding graphic impact to the brewery's brands, McGee says that another positive aspect of the cardboard carriers is their appeal to vendors.

"[Retailers] love the boxes because they are easy to merchandise, easy to see from a distance and easy to read," he says. "Additionally, on the shelf you can stack two six-packs of our cans in the same space that would hold one six-pack of bottles."

While noted by McGee as a bonus feature, vendor appeal and efficiency figure highly in RRD's survey of packaging managers, with "consumer or end-user appeal" and "efficiencies in storage and distribution" cited as major factors driving changes to packaging by almost half of respondents.

"Building functional design and safety features into packaging remains essential to ensuring product integrity and a great user experience," says Lisa Pruett, RRD president packaging, labels & supply chain segment. "Meeting this demand requires a balance between three competing priorities: protection, convenience and brand appeal. Brands that strike this balance have an opportunity to deliver a product experience customers can trust, boosting loyalty and reducing damage concerns."

Cautionary tale

The long-term viability of packaging is also an important issue, since no company wants to incur the cost of revamping its packaging every year or two. And in this regard, a pandemic-spawned experiment by Toronto's



Anderson Valley's Kevin McGee: Retailers love the shelf standout of boxes



RRD's Lisa Pruett: Safety features and functional design are essential

Henderson Brewing Company provides a cautionary tale.

"When our home delivery took off during Covid-19, we introduced our beer crate in an effort to mimic the crates used in many parts of Europe," explains Henderson co-founder & managing partner Adin Wener. "Each one held 32 cans of beer and the idea was that we would be like a milkman of old — people would leave out an empty crate and we'd replace it with a full one."

The scheme was initially a rousing success, reports Wener, but it wasn't long before it ran into difficulties.

"People started hoarding the crates, so we had to keep buying new stock, which at CAD8 [US\$5.67] to CAD12 per branded crate became quite expensive," he says. "Further, customers would often return a bunch of crates all at once, so we'd have to pay out all these deposits at once."

Post-pandemic, demand for home delivery started to decline and people began buying six or 12 beers at a time rather than getting a full crate, says Wener. Eventually volume dropped off and the brewery discontinued the programme.

As a possible replacement, Henderson tested one of the several brands of cardboard can carriers that have entered the market, but found them hard to apply in the brewery and unpopular with consumers.

It's an experience echoed by others in the industry, including Paul Segura, brewmaster at San Diego's Karl Strauss Brewing Company.

"It has been a couple of years since we explored them, but to my recollection, we decided against using the cardboard carriers because moisture compromised their integrity," he says, "Also, they need to be manually applied, as opposed to the PakTech carriers we use now."

While he acknowledges that the PakTechs are plastic rather than biodegradable cardboard, Segura adds that the brewery is doing what it can to be more sustainability focused. "We strive to be more environmentally friendly, so we encourage people to recycle the carriers; that's all we can do for now," he says, before adding somewhat optimistically, "Perhaps there will be better options in the future and we can re-evaluate."

Improving containers

Of course, by some measure it is the physical container holding the beer that is the greatest part of its packaging, and in the majority of the beer-drinking world today, that container is a can rather than a bottle. Its constitution is very much on the mind of Carlsberg's Boas Hoffmeyer.

"We're working with a wide range of suppliers to meet our goal of a minimum of 50% recycled content in bottles and cans by 2030, and it's important that we do so with those that share our values and commitment," he says. It's an area in which the company is already having significant success.

"Our cans are getting lighter and so is their environmental impact," says Boas Hoffmeyer, noting that the company's "best-performing suppliers in Europe" have already exceeded recycled content rates of 60% for cans and 75% for glass bottles.

"In the coming years, we will increase our focus on growing recycling rates and recycled content also in our Eastern European and Asian markets, where the rates are significantly lower than in Western Europe," he adds.

One thing that is very clear when it comes to beer packaging is that, whether it's lighter containers, greater use of recycled material or more sustainable carriers, the environmental impact of their packaging is very much a concern for many in the brewing sector — and therefore it is also front-of-mind for the major suppliers of that packaging.

While that might not produce a viable paper bottle in the very near future, it's a fairly safe bet that it will continue to change the look and possibly even the shape and size of the bottles, cans and packages lining beer retailers' shelves for some time to come. **GDI**



Karl Strauss Brewing Company chose plastic PakTechs (above) over biodegradable cardboard due to functional issues. Henderson Brewing Company's discontinued beer crates (right)

ENVIRONMENTAL

Bacardí, Carlsberg, The Coca-Cola Co, Diageo, Heineken, Molson Coors and Pernod Ricard all signed up to a new initiative to accelerate the adoption of renewable energy within global supply chains. The REfresh Alliance will connect participants with renewables providers, help suppliers to accelerate their adoption of renewable energy, and provide cost-effective and targeted solutions across the sector.

Asahi partnered with the United Nations' World Intellectual Property Organization's WIPO Green online database and network, which fosters and enhances the innovation and spread of green technology. The Japan-headquartered group will expand the use of its technologies and innovations through the collaboration as part of its plan to achieve net zero by 2040. Asahi has also opened applications to join its Sustainability Growth Platform, inviting startups and scale-ups around the world to partner on the creation of new environmental solutions in seven key areas.

Carlsberg started to brew its first beer made with regeneratively grown raw materials in **Denmark**, as part of the company's 'Together Towards Zero and Beyond' sustainability strategy. Through agreements to purchase domestic malt barley grown according to regenerative principles, Carlsberg will produce limited quantities of a special-edition beer for release in 2025, while gradually transitioning to producing Carlsberg Pilsner with 100% regeneratively grown raw materials. By 2040, all of the group's global production will use 100% regenerative raw materials.

Bacardí supported the tenth edition of the **Puerto Rico Bat Festival** (below), in collaboration with the Puerto Rico Bat Conservation Program. The company also installed an acoustic monitoring system at its Casa Bacardí headquarters to identify the bat species that inhabit the area, and has



Glenmorangie's Deep Project is restoring an extinct oyster reef in the Dornoch Firth in Scotland

Around the world in ESG activations...

Not-for-profit organisation the International Alliance for Responsible Drinking rounds up the latest ESG efforts from its brand-owner members



adapted surrounding spaces to encourage the growth of the native bat population.

In **the US**, **Brown-Forman** partnered with the Environmental Protection Agency's (EPA) Energy Star programme, underscoring its commitment to environmental stewardship and sustainability. The brand owner has pledged to continuously enhance the energy efficiency of its businesses, reduce its carbon footprint and further its commitment to climate action.

In **South Korea**, **Lotte Chilsung** joined the World Wildlife Fund in a roundtable to discuss environmental issues caused by plastic, after joining the organisation's Plastic ACTION in September. Lotte Chilsung has set a voluntary target of reducing its plastic usage by 20% by 2030.

Moët Hennessy's Glenmorangie has celebrated ten years of its Dornoch Environmental Enhancement (Deep) Project in **Scotland** by restoring its 100,000th oyster to Dornoch Firth, near the brand's distillery. The initiative is restoring an extinct oyster reef to the firth and Glenmorangie plans to place millions more in the years to come.

SOCIAL

Bacardí, Brown-Forman, Diageo, Moët Hennessy and Pernod Ricard were among the first members of the **Philippines Standards Coalition**, a new partnership between alcohol brand owners and e-commerce platforms. The coalition has been established to curb harmful drinking by setting new

voluntary standards for responsible marketing and sales practices to prevent the marketing and sale of alcohol to underage youth and other vulnerable groups.

Anheuser-Busch InBev's South African Breweries (SAB) division launched a drink-driving prevention programme in **South Africa** with a focus on younger drivers. The 'Drive Sharp' campaign operates on several levels, from using social media to showcasing short documentaries featuring drink-driving victims and their families, alongside SAB's ongoing partnerships with law enforcement agencies and funding for police Alcohol Evidence Centres.

AB InBev's OB Beer unit in **South Korea**, meanwhile, debuted a raft of responsible drinking campaigns, including annual anti-drink-driving activities with the Korea Road Traffic Authority and a new 'Your Majesty November' underage-drinking prevention campaign. The subsidiary also participated in the group's Global Beer Responsible Day last month with several activations to promote its alcohol-free beer portfolio as a responsible drinking option.

In **Uganda**, **Diageo's** Uganda Breweries Ltd has been promoting moderate drinking at major events including the recent Nyege Nyege Festival and Bell Obafest. UBL set up responsible drinking zones at the festivals as part of the group's ten-year 'Spirit of Progress' action plan, engaging attendees with trivia sessions, karaoke challenges and other interactive events to reinforce the importance of moderation. »

» **Molson Coors Beverage Co's** Bergenbier has kicked off a responsible drinking campaign in **Romania** to encourage consumers to adopt a balanced and conscious lifestyle. The #TraiesteResponsabil project began with a podcast discussion with writer & psychologist Petronela Rotar. Bergenbier is backing its promotion of moderation and healthy choices through social media platforms.

Pernod Ricard has relaunched its 'Drink More Water' responsible drinking platform in **Nigeria** following its debut in the market in 2021. The campaign uses bold messaging and complimentary water at events to raise awareness of the issue of binge drinking among young people.

In **Japan**, **Suntory** unveiled its 'Drink Smile' responsible drinking initiative. The brand owner will hold seminars nationwide between 2025 and 2030, aiming to reach 200,000 people to communicate the importance of responsible drinking culture in society. Suntory will also strengthen its global responsible drinking activities during the same period, with the aim of delivering a moderation message to 1bn consumers worldwide over the next six years.

GOVERNANCE

Carlsberg launched the 21st edition of its scholarship programme in **China** for students from underprivileged backgrounds, which has so far supported 1,886 students to pursue higher education. The brewer has expanded the number of scholarships available and offers students a chance to participate in its work-study programme.

For the third consecutive year, **Kirin** was recognised with Gold Certification by the Pride Index in **Japan**. The Pride Index is the country's first evaluation scheme to support the promotion and establishment of LG-BTQ+ diversity management in companies. Kirin met the criteria for all five of the index's evaluation indices, through its continued work to promote basic knowledge and correct understanding of LGBTQ+ issues.

Finally, in **France**, **Pernod Ricard** continued to invest in a worker safety programme at its vineyards, launched in 2019 towards achieving zero absences caused by workplace accidents by 2025. Through regular safety meetings with staff and investment in safety equipment, the company's Martell vineyard in Cognac has reported only a single accident-related absence since 2019. **GDI**

New standard in online responsible marketing

The 13 brand owner members of the International Alliance for Responsible Drinking have set a new standard for compliance with digital marketing guidelines, says the trade organisation.

The NGO members exceeded an internal target of 95% for 2024 to embed five Digital Guiding Principles for their brands' online presence. The rate of compliance from the companies for 2024 was 98.2%, up from 67% in 2018. The five measures comprise:

- An age-affirmation mechanism to check users are over legal purchase age (LPA).
- A forward advice notice that content should not be forwarded to anyone under LPA.
- A responsible drinking message.
- A transparency message to clarify that the digital page is the official brand page.
- A user-generated-content policy stating that any user posts condoning irresponsible consumption will be removed.

The principles were introduced after the UN called for "concrete steps" be taken to stop the marketing of beverage alcohol to underage drinkers in 2028. IARD says it is committed to supporting the UN strategy to tackle harmful use of alcohol, which has seen alcohol-linked deaths fall 20% globally (2010–19).

Sustainable elegance: *100% recycled tin for 80% carbon footprint reduction*

The Premium Tin collection of wine capsules offers an exclusive, customised design in 100% pure tin, seamless. With high quality finishing options, it is 100% recyclable and uses water-based inks. In addition we work with Social Responsibility audited suppliers, guaranteeing a controlled and sustainable process.

TIN LITE

ramondin





Five minutes with De Kuyper Royal Distillers CEO Leo Evers

Alcohol companies have a 'responsibility to offer a non-alcoholic solution', according to new De Kuyper CEO Leo Evers. The former Lucas Bols, Heineken and Carlsberg exec tells **Olly Wehring** of the Dutch liqueur producer's plans to 'own and democratise' the cocktail

What have you identified that needs changing since joining De Kuyper in May? It's up to me to write the next chapter in the 330-year-old book of the De Kuyper family. They didn't hire me to keep the status quo and I probably wouldn't have accepted the role if they'd asked me to keep business as usual.

I've felt very much at home in the last five months here at De Kuyper. The family's extremely excited about the development of the cocktail category and fully endorse the vision of owning and democratising the cocktail. They want to accelerate that vision in terms of different brands — we launched a number of premix cocktails eight months ago and they're doing extremely well. They're also keen to expand the company in certain regions and countries, which is also a reason why I stepped in. I see a lot of opportunities for De Kuyper.

The spirits industry has been under pressure this year, especially the big boys. But the future for cocktails is definitely positive and we have the right to play there. We're bang on in terms of the company's vision.

How have you found the switch from working in a volume-focused category to one more focused on value? I actually started my career in spirits, with Lucas Bols in 1990, before switching to beer in 1995 [with



Leo Evers: De Kuyper is 'looking seriously at Asia', as cocktails are growing rapidly there

Heineken]. A lot of the big spirits companies only focus on super and ultra-premium — we're aiming more at the mainstream-plus and affordable-premium segments, which I find very interesting. It's a really nice positioning for our brands [and] makes cocktails more accessible for a larger group of consumers. I consider that extremely positive.

Is your price position the definition of democratising the cocktail? It's also about making cocktails more accessible — that's where our premix and batch cocktails play an important part. They're not only an easy way to make a cocktail at home; they're also suitable for more mainstream-plus bars, restaurants, hotels and events to be able to have cocktails on their drinks menus.

I hope to widen that further by introducing no/low-alcohol cocktails — that will really be one of my focus areas in the coming years. I truly believe in having a wide range of 0% cocktails available next to alcoholic cocktails. The market is there, but it's also the right thing to do. It's the responsibility of a company to offer a non-alcoholic solution. That can be a win-win.

What was your view of De Kuyper's acquisition two years ago of Archers from Diageo, when the company already had Peachtree peach liqueur in its portfolio? It made total sense — it was a very good acquisition. We operate in fruit-flavoured liqueurs and now

we own the peach liqueur category worldwide. The purchase also gave us immediate entrance to the UK, which is a very important liqueur market.

In the first quarter of next year, we will introduce a new packaging design for Archers in the UK and will expand the brand outside its home market. We have a strategy that we call 'Follow the Brits'! Where the British people go, we want to be present with Archers — it's a very well-known brand in the UK.

There are plenty of opportunities for companies the size of De Kuyper to grow inorganically. We're looking at both organic and inorganic. With our current portfolio, we have still have many opportunities to grow.

At the same time, we're looking seriously at opportunities that might occur in the market. You see the big spirits companies are divesting the tails of their brand portfolios, and we are looking at it. Under my leadership, we won't acquire brands that aren't in line with the vision of owning and democratising the cocktail. Where there's a fit, the family and I will look at it.

Which markets are you eyeing for expansion? We're present in 104 countries, so we're already there. In the years to come, we'll focus on the regions, countries and cities where we have a right to play. Nothing is excluded.

We're looking seriously at Asia — Peachtree is very successful in Japan and Korea, for instance. Cocktails are growing rapidly in Asia at the moment and we want to be part of that.

Does it work in De Kuyper's favour that today's consumers are looking to spend a bit less? Yes, I think it can — 2024 has been a tough year for the whole industry and we're no exception, even though we're in a category that's doing quite well. I'm not unsatisfied with our results so far.

When you look at the on-trade, alcohol is getting more expensive. We want to offer consumers the opportunity to enjoy a nice cocktail, but at an affordable price. So I do think that recent economic developments work in favour of our price level. **GDI**

The full version of this interview is available to Global Drinks Intel subscribers. To join them, visit www.drinks-intel.com/subscribe

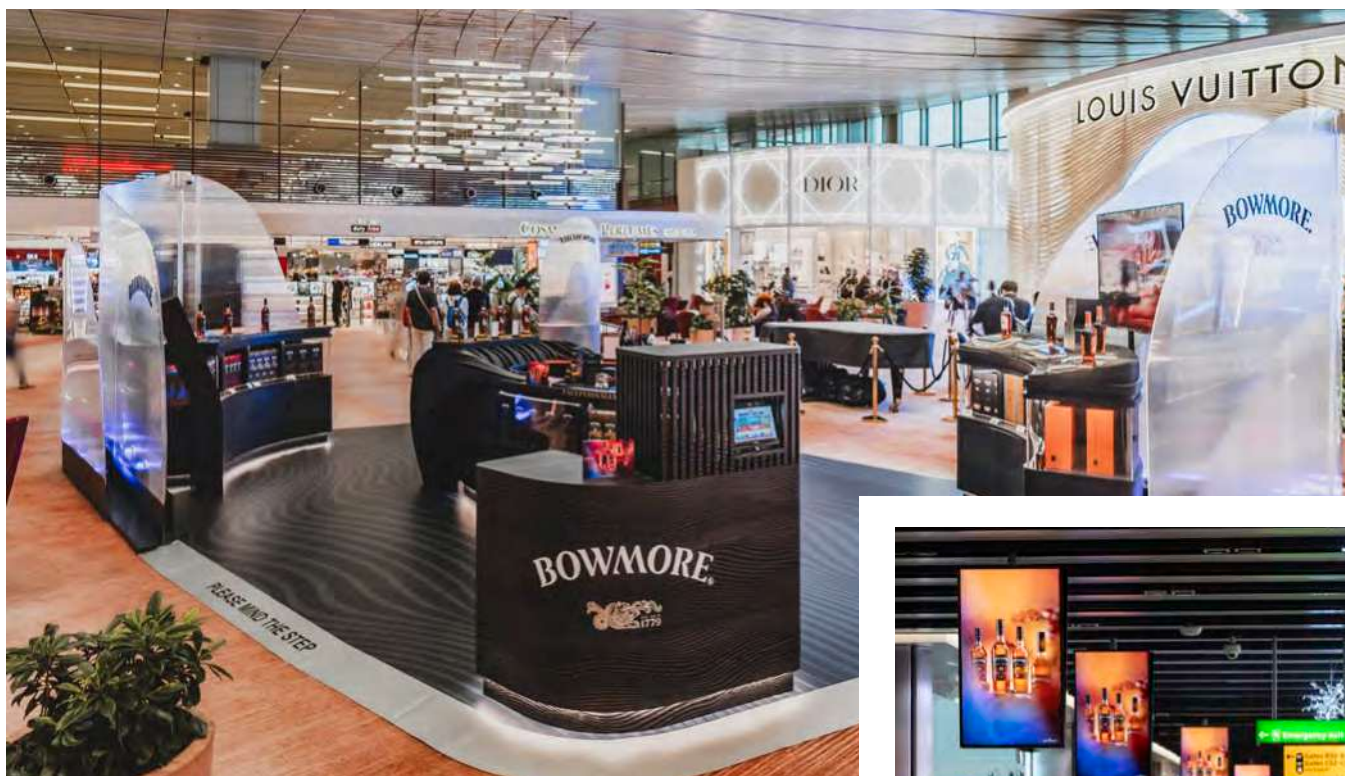


Premix and batch cocktails have a key role in De Kuyper's plans to make cocktails more accessible

RETAIL REVIEW

INSIDE

ARE EUROPEAN TRAVEL RETAILERS MISSING THE MARK ON WHISKY'S POTENTIAL?



The eye-catching pop-up at Changi (above) and digital ads at Heathrow

Suntory revs up Bowmore at Heathrow and Changi airports

Suntory Global Spirits has launched its new Bowmore Appellations Collection travel retail-exclusive whisky range with two high-profile airport activations at Singapore Changi and London Heathrow.

The Appellations Collection came about from an innovative collaboration with some of the world's finest wine-producing regions. The result is four distinct whiskies finished variously in casks from Burgundy, Bordeaux and the Douro Valley, that showcase the interplay between Bowmore's Islay roots and the European terroirs.

The release is part of a broader strategy to reflect the evolving story of Bowmore, which is approaching its 250th anniversary, and to elevate the brand's single malt whisky offerings.

The expressions are a 14yo finished in Bordeaux barriques; a 16yo matured in a combination of European oak sherry and American oak ex-bourbon barrels, with

a finish in Douro ruby port casks; a 19yo finished in pinot noir casks from Burgundy; and a 22yo matured in American oak ex-bourbon casks and finished in sauternes casks for a sweeter, fruitier character.

The four single malts will be showcased at Singapore Airport until 11 December by Lotte and the gateway's operator, Changi Airport Group. The location was the first to launch Bowmore Appellations in Asia.

The Changi pop-up is highly visual, with black as the dominant colour to reflect the collection's striking packaging. An educational area highlights the provenance and terroir of each expression enables passengers to discover the different profiles, supported by tasting notes and sampling.

Lotte Singapore MD Jeff Jeong Soongyu said the Appellations Collection brought "depth and heritage" to the whisky experience at Changi. The activation also features displays highlighting rare and



vintage expressions, including the limited-edition Bowmore Timeless 33yo.

The European GTR debut took place at London Heathrow, with a one-month exclusive partnership with Avolta across the airport's terminals where it was 'Whisky of the Month' in World Duty Free stores. The highest-profile space was a 'takeover' in T2. Tastings were also conducted, including at the new Bowmore boutique in T5.

In January, the collection will feature within T5's Whisky Wall, supported by tastings, brand ambassadors and a multi-platform digital campaign, with Gatwick and Manchester airports to follow.

Avolta global head of liquor David de Miguel commented: "We have an extensive programme of activations and tasting sessions planned to really elevate the in-store experience and help customers to discover these exceptional whiskies."

Kevin Rozario

Take stock: Our roundup of the latest spirits launches



Proximo Spirits' Bushmills 26yo Crystal Malt

Bushmills' Prestige Collection, home to 25yo, 30yo and 31yo single malts, has been bolstered by this iteration, produced using crystal malt barley.

■ Irish whiskey, single malt, 26yo. Made with barley that has its sugars crystallised during the malting process and matured in first-fill bourbon barrels; 46% ABV.

■ On sale online for UK and Ireland delivery and in global travel retail. "Key global markets" to follow in early 2025.

■ SRP of GBP850 (US\$1,075) per 70cl bottle.

Pernod Ricard's Chivas Regal Extra Smoky Cask Selection

A fifth bottling for Chivas Regal's Extra line extension that will sit alongside iterations finished in ex-Irish whiskey, tequila, rum and oloroso sherry casks.

■ Scotch whiskey, blended. The liquid was "selectively finished" in casks that previously held peated whisky; 40% ABV.

■ Debuted in Turkey, available worldwide from December.

■ SRP not available.



La Martiniquaise-Bardinet's Label 5 Original Citrus

The first flavoured extension from La Martiniquaise's

Label 5 features the brand's Classic Black Blended Scotch as its base.

■ Spirit drink. Blended scotch whisky base augmented with bergamot, lemon, lime and orange flavours; 35% ABV.

■ Available since November in all of Label 5's current markets.

■ SRP not available.



Augusto Sherry Cask Reposado

The cap for the reposado debut from new entrant Augusto can be "disassembled" to become a cigar holder. The iteration will be joined by a joven sibling next year.

■ Tequila, reposado. Matured for an unspecified period in ex-oloroso and ex-pedro ximénez sherry casks; 40.8% ABV.

■ Debuting in Hong Kong and the US – starting with California – in December.

■ In the US, SRP of US\$210 per 75cl bottle, positioned as an ultra-premium expression.



Foley Family Wine & Spirits' Minden Mill

According to Foley Family Wines & Spirits, 85% of the raw material for the Minden Mill range of three whiskeys come from the same Nevada estate as the namesake brand's distillery, which was acquired last year.

■ American whiskeys, "single estate", Nevada. The brand's debut features a straight rye whiskey, a straight bourbon and an American single malt; all three have been bottled at 47% ABV.

■ On sale since December in the US, online for domestic delivery and in Arizona, California, Colorado, Illinois and Nevada.

■ SRPs of US\$44.99 for the rye and the bourbon, \$59.99 for the single malt.



The GlenAllachie 11yo Pedro Ximénez, Oloroso & Virgin Oak Cask Finish, Year of the Snake

Marking the Lunar New Year, the latest limited-edition iteration of The GlenAllachie will target Asian markets.

■ Scotch whisky, single malt, Speyside. Matured for 11 years in ex-pedro ximénez and oloroso sherry casks, plus first-fill oak casks; 48% ABV.

■ On sale now in specialist off-premise operators in China, Hong Kong, Malaysia, Singapore, South Korea, Taiwan and Vietnam. Also available online for worldwide delivery from January.

■ SRP of GBP77 (US\$97) per 70cl bottle. Limited to 9,000 units.



Casey Jones Distillery Founder's 10th Anniversary Blend

To mark Casey Jones Distillery's tenth anniversary, a one-off limited-edition blend has gone on sale this month.

■ American whiskey. A blend of Kentucky straight bourbon and 'barrel cut' that has been produced using 50% corn and 50% cane; 51.6% ABV.

■ On sale exclusively from the company's distillery in Hopkinsville, Kentucky from December.

■ SRP of US\$99.99 per 75cl bottle. Limited to 200 units initially, with further batches going on sale in the coming weeks.



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



BOULARD CALVADOS

A new stunning design
**FOR 200 YEARS OF
EXCELLENCE**



At the dawn of its 200th anniversary, Calvados Boulard breaks with convention and unveils its new packaging - a bold reinterpretation of its heritage and a tribute to its history heralding a daring future. The world's finest Calvados, acquires a new stunning look, combining authenticity and modernity.

A design matching a unique character

The new packaging style reinvents the codes of elegance and tradition with powerful visual impact. Each detail has been carefully revisited such as the prominence of the gold and the white branded square, the emblem of Boulard since the 70s. The matt black neck is reminiscent of the ancient iconic frosted Boulard bottles and creates a striking contrast with the gold liquid. Further streamlining the bottle's allure, the packaging enhances each expression with a refined palette of colors, reflecting its unique character.

"We are proud to introduce this captivating new packaging, to mark the brand's 200th anniversary. This thoughtful redesign is a testament to our commitment to see Boulard Calvados thrive for another 200 years." said Serge Der Sahaguan, CEO of Spirit France Diffusion.

www.calvados-boulard.com

Shilla brings largest liquor store to Korea's Incheon T2



The Shilla Duty Free Liquor & Tobacco store in the west wing of T2 has more than 200 brands

Shilla Duty Free, one of South Korea's biggest travel retailers, has unveiled a new liquor and tobacco store at Incheon International Airport T2 covering almost 440sqm and showcasing over 200 brands. The retailer also opened a major cosmetics and perfume unit in the same terminal.

The liquor store has arrived a year after Shilla commenced operations at the Seoul gateway, and puts a strong focus on high-value products and aged whiskies. A series of exclusively available products include Dom Pérignon Vintage Champagne, a Fettercairn 200th Anniversary Set, The Balvenie's 11yo Hungarian Cask and 50yo, and

The Dalmore Constellation 1971. Sought-after whisky brands such as Ballantine's and Royal Salute are also available.

To celebrate the opening, the store has been offering up to 30% discounts on popular lines, as well as complimentary gifts such as whisky glasses, travel trunks and backpacks depending on purchase values.

A 'lucky draw' lottery is also being used to target departing passengers using T2, with prizes ranging from discount coupons and 'rewards' that "can be used like cash", the retailer said. The draw will run until the end of the year, but "may conclude early if supplies are exhausted", noted Shilla.

Liquor category 'still lagging', finds Kearney

The two largest global travel retail categories — wine & spirits and cosmetics & perfume — "are lagging behind and struggling to recover growth", according to a report from management consultancy Kearney, commissioned by the Tax Free World Association.

The wine & spirits category has continued down the road of a long-running premiumisation trend backed by the ability of leading brands to offer limited editions to capture traveller interest, according to the *Travel Retail's Next Chapter* report. This has been supported by what Kearney calls "bold in-store activations".

However, the consultancy says that performance using these strategies "can be uneven" depending on the product range and brand, and not helped by a deceleration of premiumisation. Moreover, like tobacco, liquor is increasingly subject to potential

regulatory constraints and reduced purchases by demanding Gen Z travellers.

To overcome the latter issue, Laurent Boidevezi, president of Asia-Pacific global travel retail & private sales at Moët Hennessey, said in the report: "Our mission is moving from selling products to selling experiences. We are advancing in creating personalised products and experiences, leveraging technology through the travel journey."

Categories that have recovered their pre-crisis levels, according to Kearney, include tobacco and confectionery, but they still face the respective hurdles of regulation and rising cocoa prices.

The categories with the most positive outlook were identified as fashion, accessories and hard luxury, like watches and jewellery, all of which seem able to capture the imaginations of younger travellers.



Ryanair offers 'incredible reach' for brands

Ryanair 'overwhelmed' by response to beer tender

Low-cost carrier Ryanair has been inundated with beer brands looking to be listed on the airline, which serves about 200m passengers each year across its extensive European network.

Ryanair head of retail Aiofe Greene said: "With an overwhelmingly large response, we are going to bring the many brands already in the process forward to the next stage. We will not accept further submissions at this point."

Ryanair offers brand visibility which rival airlines find hard to match, especially given its laser focus on driving ancillary revenue. Greene added: "Ryanair isn't about paying sky-high prices for overpriced brands. Our passengers crave a beer with character, not just a famous name. We believe a true beer partner should match our values: great quality, low cost and high impact. In return, the successful brand will gain prime in-flight real estate, access to a huge customer base and incredible reach across our entire European network."

Over 100 brands are in the process, she added, but it is too early for a shortlist. "Our lucky new partner will be on board from 1 April 2025."

Avolta HK acquisition likely to boost drinks business

Global travel retailer Avolta's Asia revenue is set to pass the US\$1bn mark — when its purchase of duty-free border retailer Free Duty from NWS clears regulatory hurdles. Alcohol, as a share of Avolta's sales in the Asia-Pacific region, will also increase.

Free Duty operates high-throughput railway duty-free stores at the major MTR stations of Lok Ma Chau, Lo Wu and Hung Hom. The shops are heavily focused on spirits and serve travellers between Hong Kong and mainland China. MTR's cross-border services processed more than 70m passengers in 2023, well above Hong Kong International Airport's 40m last year.

Are European travel retailers missing the mark on whisky's potential?

Whisky remains a standout category in European travel retail. Pi Insight's **Garry Stasiulevicius** explores whether retailers are doing enough to expand the category and engage the emerging Gen Z demographic

The current landscape

Travel retail across Europe reveals significant variation in whisky's category share. Overall, whisky accounts for 35% of alcohol space on average in European travel retail, but some retailers are clearly outpacing the norm.

■ **Heinemann Europe** achieves an average 30.4% share, with strong performances at Frankfurt (FRA) T1 (38.8%) and T2 (41.1%).

■ **Avolta Europe**, which operates in major UK airports, excels with an average 38.4%, reaching an impressive 61% share of alcohol space at Heathrow T4.

■ **Lagardère Europe** averages 36.8%, driven by its presence at Paris Charles de Gaulle (CDG) T2e (37.1%) and Rome Fiumicino T3 (37.4%).

These differences highlight how retailers are prioritising whisky differently and how they are showcasing various subcategories to appeal to their shoppers.

Breaking down the subcategories

■ **Single malts** are the backbone of the category, accounting for 41.9% of total whisky share on average across Europe. Heinemann leads the way with 42.4%, while Avolta's airports achieve 40.7%, driven by Heathrow T3, where single malts command a 60.1% share.

While the focus on single malts aligns with their premium positioning, this heavy emphasis may limit the category's appeal to younger Gen Z travellers, who seek diversity and innovation over heritage and tradition.

■ **Blended whisky** accounts for an average 31.3% share, providing a reliable and stable contribution to the category. Heinemann (29.2%) and Avolta (35.2%) show consistent

Alcohol Category Whisky Share of Total Space



■ Share of total alcohol linear space

Source: ShelfTrak August 2024

cy in promoting this accessible subcategory. However, Lagardère lags slightly behind at 29.6%, suggesting an opportunity to grow this segment.

Blends often appeal to entry-level whisky drinkers. Positioning blends as a gateway to the broader category could better capture younger, price-sensitive shoppers.

■ Representing just 12.1%, **American whiskey** is potentially under-represented compared to its rising global popularity. Airports such as Stansted (21.1%) demonstrate demand that isn't being tapped in other locations.

■ Despite its global prestige, **Japanese whiskey** has an average share of just 5%, with stronger performances at CDG T2e (8.2%) and FRA T2 (5.5%). Retailers are yet to fully exploit the allure of Japanese whisky for younger, experience-driven shoppers.

■ Averaging 7.7%, **Irish whiskey** shows growth potential, particularly in airports such as Manchester (13.9%) and Oslo (13.7%), where it outpaces other locations.

■ One of the most striking insights is the negligible category share of 'other whisky' — just 2.6%. This includes whiskies from emerging markets such as India, Taiwan and Sweden. Only Lagardère Europe has shown meaningful progress, with CDG T1 and T2e achieving 8.5% and 9.2%, respectively.

Given Gen Z's preference for discovery and unique experiences, these non-traditional whiskies are an untapped growth opportunity. Retailers could elevate these products through themed displays, tastings and storytelling to capture this segment.

Gen Z: A catalyst for change

As the next generation of travellers, Gen Z is reshaping the retail landscape. Travel retailers that adapt to their preferences can unlock new growth opportunities while ensuring long-term relevance for the whisky category. Gen Zers are:

■ **Experience-oriented.** Gen Z seeks engaging, memorable in-store experiences, from interactive displays to tastings.

■ **Curious about novelty.** Unlike older generations that are loyal to heritage brands, Gen Z embraces variety and enjoys exploring new and unique products.

■ **Digitally connected.** Leveraging digital tools, such as QR codes or AR experiences, to tell the story behind the whisky can resonate deeply with this audience.

What more can retailers do?

1. Expand 'other whisky' offerings: Non-traditional whiskies should be positioned as an exciting discovery option, supported by tasting events and storytelling.

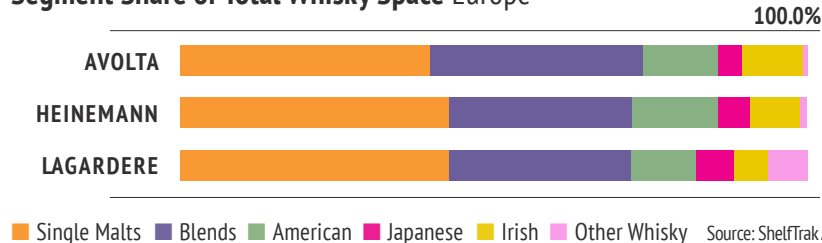
2. Engage Gen Z: Use experiential marketing, such as masterclasses or digital content, to attract and retain younger shoppers.

3. Balance subcategories: Reduce the over-reliance on single malts by investing in under-represented categories like American and Japanese whiskies.

Travel retailers have a unique opportunity to elevate whisky from a traditional category to a dynamic offering that meets the evolving consumer preferences by diversifying their focus, embracing innovation and investing in emerging subcategories. The data is clear — those who adapt now will secure their competitive edge. [GDI](https://www.pi-insight.com)

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

Segment Share of Total Whisky Space Europe



■ Single Malts ■ Blends ■ American ■ Japanese ■ Irish ■ Other Whisky Source: ShelfTrak August 2024

Will Fever-Tree be a tonic for Manchester Airport?



The soaring success of premium tonic water Fever-Tree took the company to a public listing in 2014. A decade later it is set to open a high-end bar in Manchester Airport's T2 extension as part of a wider push into international markets.

Called the Fever-Tree Bar, the concept won a tender that was designed to add some fizz and excitement to the new commercial environment. The airport, owned by Manchester Airports Group (MAG), wanted the equivalent of a champagne bar without being overtly decadent and calling it one.

Fever-Tree fitted the bill. Its high-end mixers, the brainchild of founders Charles Rolls and Tim Warrillow, retain high status among both the drinks industry and consumers, although some say the brand has become more mainstream since it was listed.

For Manchester Airport — which processed 28.1m passengers last year and is among Europe's 20 busiest gateways — the Fever-Tree Bar and its cocktail menu will fit its broad passenger profile, from stag and hen groups to an upwardly mobile set.

Fever-Tree will fill a "particular niche", according to the airport's head of media Michael Murphy-Pyle. "We have higher-end bars in all three of our terminals, but this one will be in the main body of the departure lounge and be kitted out in an eye-catching way," he says. "Today, people see their time in the airport as part of their holiday and they value the idea of enjoying really good cocktails before their flight."

While there is already a Fever-Tree Bar in Scotland's Edinburgh Airport featuring the brand's distinct tree-like canopy, the new venue will be on a larger scale when it opens in H2 2025. MAG retail director Richard Jackson describes it as a "statement cocktail bar".

On a mission to 'premiumise airport drinking globally', high-end tonic producer Fever-Tree has revealed plans for its second airport bar — one of several new F&B venues designed to elevate the offering at Manchester Airport. **Kevin Rozario** reports

The unit is part of a Fever-Tree strategy "to premiumise airport drinking and dining experiences globally", according to the company's retail operations director Craig Maitland. However, the company did not comment on which other airports, either in the UK or internationally, might see the concept.

Long term, Fever-Tree's strategy is to build the brand globally "across premium drinking occasions", which makes airports a good fit. Last year, the company's US business overtook the UK by revenue, so good growth there versus declines in the UK may make American airports a target.

Growing the drinks offer

Maitland refers to the Manchester offer as a "cocktail and champagne bar" and says the location will allow travellers "the opportunity to start their journeys by enjoying expertly crafted drinks and quality food menus". The bar is one of several new F&B venues designed to put Manchester Airport on the drinking and dining travel map.

The expansion of this style of drinks venue is not by accident — their popularity with travellers can be seen in the rise of another branded bar from Italy's Bottega. Its prosciutto bars, first launched in 2014, have spread to more than ten airport locations, mainly in Europe but also in the Middle East.

Duty free has been losing out to F&B in recent years. The trend continues as departure terminals prioritise drinking and dining as a more easily identifiable 'experi-

ential' component of their commercial offer, whereas retail remains heavily transactional. What's more, travel retailers are finding it hard to develop the right content to make retail stores inviting enough to drive conversion.

Global airports association ACI World is also pushing the passenger experience. Its Airport Service Quality (ASQ) programme, which benchmarks globally, has become more important and is being reflected in a more F&B venues.

In Manchester's case, this will be evident next year through a broader range of F&B locations. As well as the Fever-Tree Bar, the airport will see its first JD Wetherspoon pub with nods to the city's footballing heritage, and an expansion of the existing Amber Alehouse by Salford brewery Seven Brothers. These are in addition to a brewpub by Joseph Holt and the 144-seat Evergreen Bar & Brasserie opened in May and operated by SSP.

Airport F&B specialist Airport Retail Enterprises will also run The Great Northern Market, a cornucopia of world street food options that will change regularly in line with food trends and customer demand.

"People can enjoy a 'market hall' experience with a range of individual street-style pop-ups around a central eating area," says Jackson. The concept of passenger groups drinking and dining together while choosing from multiple menus is also likely to make for a more memorable experience. **GDI**

Wine Paris to welcome record number of exhibitors in 2025

Returning for its sixth year, the international wine and spirits event is set to welcome 50,000 visitors to the City of Light from 10–12 February 2025 at Paris Expo Porte de Versailles

Wine Paris, previously Wine Paris & Vinexpo Paris, is set to receive more than 4,600 exhibitors from 50 different countries in 2025, continuing its meteoric growth since the first edition opened in 2019.

In 2024, 4,000 exhibitors from 48 producer countries attended the symposium in the heart of Paris, marking a 53% increase in international participation.

The sixth edition promises to once again break records, with 50,000 visitors from 140 countries expected to descend on the City of Light in February. For the first time, more than 1,000 buyers are expected to attend Wine Paris, emphasising the growing importance of the event as a global nexus for the alcoholic beverage industry.

In the face of declining sales (2024 saw a 3.9% drop in overall wine volumes), climate challenges and shifting consumer trends, Vinexpo CEO Rodolphe Lameyse says more than ever before, the 2025 exhibition has a crucial role to play.

“In times of great uncertainty, economic crisis and loss of meaning, isolationism is not an option,” he says. “By combining strengths and fostering innovation, engagement among all industry stakeholders and links between the economic and political arenas, we can leverage solutions.”

The global industry rallies around Wine Paris 2025

Spread over three halls, 50 wine producer countries will be represented at Wine Paris 2025, with several countries significantly increasing their floor space, including Germany (+65%), Austria (+35%), China (+60%), Spain (+40%), Portugal (+61%) and Romania (+75%). Italy has doubled its exhibition area and will host 30 regional pavilions, taking up an entire hall.

There will also be several new international pavilions: South Africa, Argentina, Armenia, Chile, Hungary, North Macedonia, Uruguay and, most notably, Australia, resulting in a four-fold increase in the exhibition space in 2025. Naturally, French



France's biggest pop-up cocktail bar, The Infinite Bar, spans 40m in length and hosted 20 bars in 2024

attendance is the event's backbone, and it is due to see a 7% increase in the country's producer numbers, with all of its marketing boards attending.

Be Spirits, the place to be for all spirits from around the world

An event within the event, Be Spirits will showcase the global spirits, beer and cider industries, with a focus on no/low drinks and the future of mixology.

Be Spirits will welcome distributors, bartenders and experts from across the globe, along with over 218 producers — 38% of them newcomers and another 30% hailing from 27 countries — at its core.

Forty-seven types of spirits will be on display, including armagnac, baijiu, brandy, calvados, cognac, gin, malt, mezcal, pastis, rum, sake, soju, tequila, umeshu, vermouth and vodka.

Ten whisky producers will attend under the French Whisky Federation banner, and cognac (40 companies) and armagnac (19 companies) producers will be out in large numbers.

The no/low category will have an increased focus in 2025, with the drinks range expanding (+50%) to mirror new consumption patterns, while the floor space taken up by beer and cider will increase.

Other Be Spirits highlights include The



A range of 47 types of spirits will be on display

Craft Pavilion, which will spotlight up-and-coming spirits producers, and Speakeasy, where bar and spirits experts will lead talks, panel discussions and masterclasses.

Last but not least, brands and mixologists will shake things up at The Infinite Bar, France's biggest pop-up cocktail bar. Spanning 40m in length, the bar played host to 20 renowned cocktail bars in 2024, including three special guest bars from London, Barcelona and Madrid. »

Visit wineparis.com to find out more about the exhibition. Already registered? Turn the page for a preview of the stands to visit at Be Spirits

Seven stands to pause at during Be Spirits 2025

Image: Raphaël Reynier



BBC Spirits

» Importer, distributor and producer BBC Spirits is established in more than 50 markets and has amassed a portfolio of 150-plus products covering every major category of spirits, with special expertise in Japanese releases. “As the leading Japanese spirits company in Europe,” says BBC, “we maintain our difference through a wide range of innovative and premium brands such as Etsu Gin, whiskies from the Kurayoshi Distillery or spirits coming straight from the tropical island of Okinawa, Kiyomi White Rum and Eiko Vodka.” BBC will also showcase partner brands including non-alcoholic spirits brand Lyre’s, Fercullen Whiskey and Dead Man’s Fingers Rum.



Beveland

Family-owned Spanish company Beveland specialises in producing premium spirits including rum, whisky, vodka, gin, tequila and speciality liqueurs. Standout brands include Jodhpur Gin and Relicario Rum. Inspired by India, Jodhpur Original contains 13 botanicals native to the country. The range includes Baori (floral), Spicy (spiced), Mandore (citrus) and a limited-edition aged gin, Reserve. Relicario, meanwhile, is a blend of fine Dominican rums complemented by innovative line extensions, including Peated Finish aged in peated malt whisky barrels from Speyside in Scotland, and a unique Vermouth Finish in Italian Mancino Vecchio Vermouth barrels from Asti, Piemonte.

Black Tears/Pardela Spirits

Black Tears Dry Spiced Rum — a unique blend of Cuban rum, coffee, cocoa and *aji dulce* (Cuban sweet chilli pepper), with just 9g of sugar per litre — will be showcased by its French distributor Pardela Spirits. Owner Island Rum Brands says Black Tears is now the fastest-growing super-premium spiced rum brand in the UK, after achieving a 150% increase in volume and 109% in value in the country’s multiple grocery channels over the past 12 months (Nielsen data). Its most significant UK listing is with Waitrose, which increased distribution from 108 to 200 stores in August. Commercial director Helena Zakmane says “such a significant positive performance trend” is proof that consumers “appreciate the product and are making repeat purchases — one of the most important trackers of brand success”.



Spirit France

French group Spirit France specialises in the production and marketing of “exceptional spirits” from French AOCs. Its portfolio includes Père Magloire, Boulard and Lecompte calvados, Janneau and Le Marque armagnacs, Pomme Doublée apple aperitif and Le Verger French regional liqueur. Present in over 80 countries, Spirit France claims to be “the world leader in the production of calvados and armagnac from unique terroirs, combining tradition, excellence and innovation. Today, half the bottles of calvados sold abroad come from our cellars, and Janneau is the most exported armagnac brand in the world”.



La Martiniquaise-Bardinet

Several “iconic brands” from La Martiniquaise-Bardinet’s extensive portfolio will be showcased at Wine Paris, including Cutty Sark and Glen Moray whiskies, Saint James Rhum, Generous Gin French Gin, Cognac Gautier and liqueurs from the “emblematic” Burgundy house Lejay Lagoute. The independent, family-run group says it will also have a presence at The Infinite Bar in partnership with some of the best bars in Paris. Operating since 1934, La Martiniquaise acquired fellow French company Bardinet in 1993, forming La Martiniquaise-Bardinet. In 2019, it became the majority shareholder of Marie Brizard Wine & Spirits.

Les Bienheureux

France’s Les Bienheureux says its firm focus on innovation and quality has enabled the young company — it launched in 2015 — to establish its Bellevoye Blended Malt as “the No.1 French whisky in sales by value and gain an enviable number of medals for its El Pasador de Oro Rum brand, distilled in Guatemala”. Registering an annual growth rate of 85% over the past five years, Les Bienheureux aims to keep up the momentum by investing 10% of its sales into R&D. It has also purchased its own brewery and distillery in Cognac, Bercloux.



Spiribam

Spiribam produces and distributes “renowned rum brands” from Martinique, St Lucia and Mauritius, as well as Cartron, a super-premium crème liqueur range from Burgundy. Its rum portfolio includes Rhum Clément, Rhum J.M, Chairman’s Reserve, Bounty Rum, Admiral Rodney, Arcane and Beach House Spiced. The group recently invested in a state-of-the-art RTD factory in the UK and will take advantage of Wine Paris to present its new RTD brand SHAK.R. Dedicated to the on-trade market, “SHAK.R aims to deliver bar-quality cocktails into venues where bartender skills are not available”. **GDI**

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UK & Ireland focus: 'Tis the season to plan for a very merry on-premise

The lead-up to New Year is the most lucrative period in the hospitality calendar. CGA by NIQ's **Rachel Weller** examines the data of Christmases past to suggest how venues and suppliers can ensure this one's a cracker

The weeks leading up to Christmas and the New Year are crucial for both on-premise venues and their partnering suppliers and brands, often accounting for some of the highest revenues of the year.

With the long-anticipated festive period finally here, data from last year's festive season in the UK and Ireland can help businesses tweak their offerings to maximise the potential of this key period.

The data presented here is drawn from a combination of CGA by NIQ's consumer and sales research tools, including Business Tracker, BrandTrack, EPOS, OPMS and the latest *Christmas Report*. Leveraging such an extensive range of insights offers an in-depth exploration of how consumers engage with the on-premise during this critical time, examining Christmas behaviour to uncover patterns in habits, spending, preferences and purchase drivers.

Data from over 60,000 outlets during the last festive season, for instance, show that pubs were the main drivers of topline sales growth in the UK and Ireland. Managed operators overall saw an 8.8% increase in sales compared with the previous year, but wet-led pubs outpaced this with nearly 10% growth, while food-led pubs followed at 9.3%. In contrast, restaurants and bars underperformed, growing by 8.3% and just 5.6%, respectively, as ongoing financial pressures continued to weigh on food-led and late-night venues.

In December 2023, consumers were less affected by rail strikes compared with the previous year, which led to notable year-on-year sales growth in mid-December, particularly in the weeks from just before 'Mad Friday' (the last working day before Christmas Eve) to the end of the year. This figure serves as a clear reminder that businesses must remain mindful of external factors that can significantly impact trade, and wherever possible, they should try to anticipate and mitigate such challenges.

During this period, weekends are consistently — and perhaps expectedly — the



Peers are influential when it comes to beverage choice, with 22% of drinkers following their friends' lead

Data drop

- **73%** of consumers visiting a licensed venue in the UK and Ireland during the 2023 festive period, down 5 percentage points from 2022.
- **97%** of all consumers in the UK and Ireland report being impacted by the cost of living crisis.
- **22%** of on-premise users in the UK and Ireland opted for cheaper drink options during the 2023 festive period.
- **16 December** — the Saturday before 'Mad Friday' — was the most profitable day in the British and Irish on-premise in 2023.

most popular times for consumers to visit bars, pubs and restaurants. Last year, Saturday 16 December was the most profitable day. This is likely because Mad Friday fell on 22 December, just before Christmas Eve and Christmas Day, prompting many workplaces and social events to move earlier to avoid clashing with family commitments and travel plans. This year, Mad Friday falls slightly earlier (20 December), yet still close enough to Christmas that businesses should once again expect high activity the preceding weekend (13–15 December).

Fewer, younger, wealthier

Consumer visits saw a slight decline in the UK and Ireland last year, with 73% of consumers visiting a licensed venue during the 2023 festive period, down 5 percentage points (pp) from 2022. Yet, more consumers ventured out during the week leading up to Christmas. Again, this uptick is likely due to Mad Friday falling late in the season, just before Christmas.

But who exactly *did* go out during the festive period? CGA by NIQ research reveals that those who visited the on-premise were generally younger and had higher average incomes. This may explain why, despite a slight drop in overall footfall, these consumers maintained their 2022 levels of spending when dining or drinking out.

Meanwhile, most of those who did not go out were people who typically avoid the festive season rush and are unlikely to change this habit. That being said, for many, the decision not to go out wasn't purely personal: financial constraints also played a significant role. For 27%, it was simply too expensive, while more than one in five consumers had less disposable income or chose to prioritise their spending elsewhere. Remarkably, a dramatic 19% said they were concerned about their financial situation and stayed home to save money — displaying promotions or >>

» ensuring good value in a venue's offering could help attract more footfall this year, especially from those feeling the pinch.

Businesses should recognise that while finances contributed to people staying home, the cost of living crisis affects those who do choose to visit the on-premise — 97% of all consumers report being impacted in some way by it. This means that even those who choose to go out may be more budget-conscious and influenced by financial considerations, so enhancing the customer experience to address these concerns and offering value is more crucial than ever.

While businesses should certainly consider these financial concerns, CGA by NIQ research provides some reassurance: for many consumers, the desire to experience hospitality during the festive period outweighs their financial worries. Visiting the on-premise for special occasions ranks as the third priority for spending during the festive season, even amid cost of living pressures.

Moreover, one in five consumers affirmatively prioritise regular visits to pubs, bars and restaurants beyond just special occasions, indicating a sustained interest in dining and drinking out despite monetary challenges.

Imbibing choices

Another critical aspect that brands, suppliers and operators need to examine closely when developing their festive strategy is the specific drinks consumers prefer and expect to find when visiting a venue. Understanding these preferences can help businesses tailor their offerings to meet customer demands and enhance the overall experience.

Christmas is often anecdotally associated with rich and indulgent drinks, so it may come as a surprise that, in fact, soft drinks are the drink of choice during the festive season. Last year, their consumption

The research

CGA by NIQ provides an unparalleled and comprehensive perspective on the on-premise industry through its suite of research services. These range from its On Premise Measurement (OPM) tool, the only fully projected and extensively validated metric for measuring beverage alcohol performance in the sector, to its annual *Christmas Report*. The on-premise consumer expert can also deliver many more exclusive insights into consumer habits and preferences in the UK and Ireland's bars, pubs and restaurants.

To learn more about CGA by NIQ's capabilities across the on-premise market, visit www.cgastrategy.com or email rachel.weller@nielseniq.com

increased by 3pp in UK and Ireland on-premise venues, with 30% of people opting for them. Lager ranked as the second most popular drink at 25%, though it experienced a notable decline of 3pp compared to the previous year.

In contrast, consumption of cocktails and white wine, the third and fourth most popular categories respectively, remained stable, indicating that these options should also be a priority for businesses this festive season.

Meanwhile, red wine, vodka and flavoured gin all saw a decline in popularity compared with the previous year — and may well continue to do so, as CGA by NIQ data indicates that consumers are increasingly avoiding expensive cocktails, wine and spirits due to the cost of living crisis.

In contrast, the consumption of soft drinks and no/low-alcohol options is on the rise, as they present more affordable choices; businesses might be able to capitalise on the festive season by focusing

on these cost-effective beverage options.

Indeed, money pressures are still being felt by many consumers, with more than two in three people now closely monitoring their spending. This has led to divergent consumer behaviours, with 22% opting for cheaper drink options. CGA by NIQ's *Christmas Report 2023* reveals that consumers have varying motivations for adopting such an approach. For some, this strategy enables them to go out more frequently while staying within their budget, while others prefer to save money in order to afford more drinks during their outings.

However, most consumers (39%) are controlling their spending by simply ordering fewer drinks. This means operators must ensure that each of these drinking experiences is exceptional across all aspects to drive sales and encourage repeat visits.

For some consumers, the drinks they order may include special 'treats', as 45% of on-premise users crave these indulgences during the festive season. Businesses should pay close attention to how such treat choices influence consumer behaviour, as they present significant revenue potential.

The role of bar staff is essential in this regard, with one in four customers trusting their recommendations. Furthermore, 22% of drinkers are heavily swayed by what their friends are imbibing, which underscores the strong influence of peer recommendations on drink selections.

While some factors influencing consumer choices may be beyond businesses' control, there are other elements that can be managed to positively impact consumer behaviour. Nearly one in five consumers choose their drinks based on meal-and-drink deals, for example, while 17% are influenced by the visibility of drinks displayed behind the bar, and 16% are swayed by pairing suggestions found on the menu.

This indicates that operators and brands can collaborate to capture market share and maximise sales with high-margin products by implementing effective activations and promotions and ensuring these products are prominently showcased to consumers.

With the festive period offering the chance to generate a significant portion of annual revenue, pairing such effective collaboration data-driven strategies with is key to maximising on-premise sales and compensating for slower times throughout the year. **GDI**

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Forty-five per cent of visitors crave 'treats' when they visit the on-premise in the run-up to New Year





VIEW FROM THE ON-PREMISE

Charlie Mitchell

In difficult circumstances, clarity is critical to unlock on-premise success

It's tough out there. After nearly a decade of steady growth in the on-premise sector, many beverage alcohol suppliers are struggling to find even the smallest crumb of comfort. Once-plump profits are thinning, while blossoming shoots of optimism are withering on the vine.

Bars, pubs and restaurants are closing in record numbers amid a cost of living crisis which is landing a combination of blows to already struggling venue operators; increased costs are squeezing margins; and a lack of disposable income is leaving consumers with tough decisions on how and where to prioritise spend.

What's more, shifts in socialising and (welcome) easing of stigmas around moderation are spawning new drinking habits which have given rise to the 'sober-curious' generation of youngsters visiting the sector and choosing non-alcoholic options.

On top of all that, we are braced for a Trump US administration backed by a baying electorate with promises of minimum 10% tariffs on all imports into the largest on-premise market in the world.

In the past month alone, we have seen huge brewers miss Q3 volume estimates and some of the largest spirits companies in the world call out underperformance in key markets.

For many in the sector, this is uncharted territory. Not since the financial crisis of 2008 have such existential questions been asked about the consumer appetite to eat and drink out and, by extension, the health of the sector. Indeed, many who have built successful careers in predominantly good times are now facing up to volatile market conditions and previously unencountered challenges, resulting in, at best, nervousness and, at worst, panic.

Yet this is precisely the time when calmness and clarity are most vital. Just as in the financial crisis of 2008, there will be winners and, by extension, losers

— and it will be those who have kept cool heads and invested in strategy that will come out on top.

Because, despite the negative headlines and behind the ominous exterior, reasons for optimism remain. Speaking with those closest to the sector, the picture is far from gloomy; four in five venue operators tell us that they are optimistic about their business prospects for the next 12 months, while nearly three in four hospitality professionals state that hospitality is a sector that provides good long-term career prospects.



Image: Shutterstock/Pict River

Globally, as inflationary pressures ease, consumer confidence is on the rise and visits to the sector are actually stable. While there remain more closures than openings, an influx of innovative operators are ensuring a level of excitement and interest in the sector, which keep punters coming back.

There is a subset of enthusiastic consumers for whom eating and drinking out is a vital aspect of their lives and who think little of paying that little extra to ensure quality of drink and quality of experience.

However, that subset is decreasing in number and the opportunities are undoubtedly sparser than previously. It is at this exact point that we, as marketers, strategists and brand owners need to work both harder and smarter.

No longer will mass campaigns and re-

gional approaches be effective. Nor will we see growth through generic activations. A tailored and targeted approach, built through clarity and understanding of your target audience, is the only way to succeed.

If the US presidential election taught us anything, it taught us that you are not your consumer and that you ignore your audience at your peril. By failing to properly listen to and address the needs of their traditional working-class, lower-income base, the Democrats alienated a key audience to devastating effect.

In a world where increasing polarisation, alongside distinct, differing and discordant viewpoints are shaping people's attitudes towards pretty much everything, it has never been more important to understand and engage with your core consumer — those high-frequency users and those superfans who, more often than not, determine the success of your brand.

Building a targeted strategy that resonates with this tribe of fans (including hospitality staff), based on where, when and how they drink out, alongside their views, interests and hobbies will stimulate wider interest, picking up momentum and drive growth in otherwise near-possible conditions.

Similarly, not all venue types, occasions and even countries will be fertile ground. Picking specific battlegrounds in which conditions are favourable and being relentless in a quest to understand, target and win.

Yes, it is tough, but only a laser focus, with clarity and calmness, will still see success in the on-premise sector in 2025. **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 more details, contact charlie.mitchell@cgastrategy.com

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