

MARKET NEWSLETTER

Spirits

OCT 2023



YOUR MARKETS IN FIGURES

Find out about the health of your markets in figures and estimated projections.

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LAUNCHES IN MORE DETAIL

Find the detail of the launches of spirits in Europe.

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THE FLAVORS OF THE MARKET

What are the top flavors per type of drinks in Europe in S1?

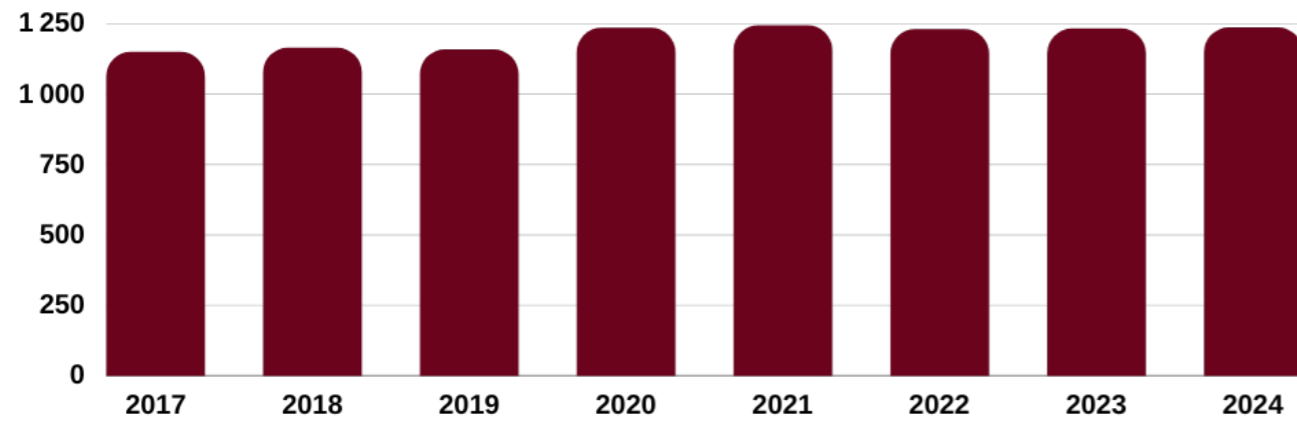
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Go

YOUR MARKETS IN FIGURES

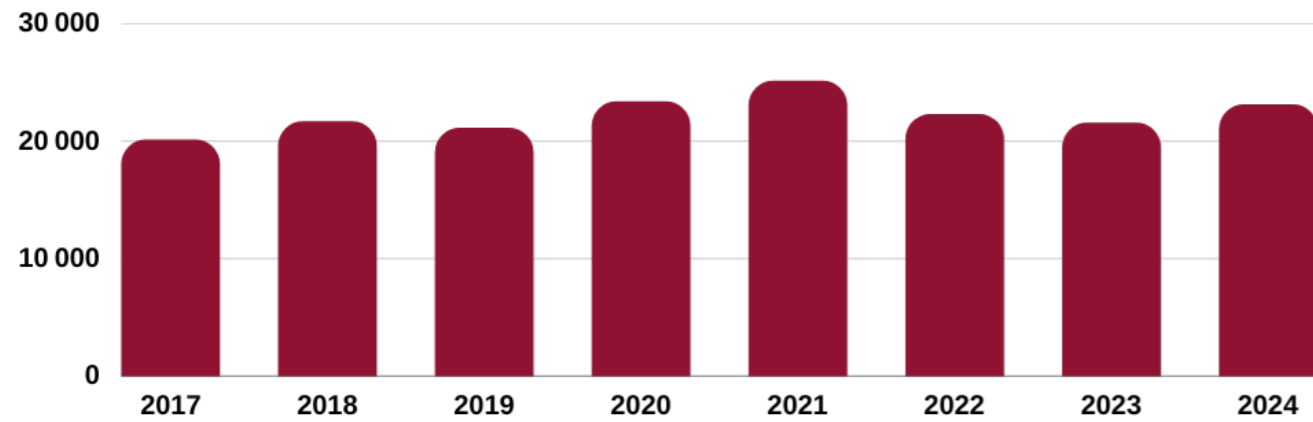
Retail markets by volume (in millions of liters)

| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---------|--------|--------|--------|--------|--------|--------|--------|--------|
| France | 298 | 293 | 283 | 290 | 293 | 288 | 287 | 286 |
| Germany | 440 | 441 | 442 | 465 | 468 | 478 | 475 | 474 |
| Europe* | 1149 | 1163 | 1156 | 1234 | 1242 | 1229 | 1231 | 1235 |
| World** | 16 359 | 16 611 | 16 691 | 15 897 | 16 282 | 16 260 | 16 252 | 16 303 |



Retail markets by volume (in millions of \$US)

| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| France | 5 777 | 6 022 | 5 851 | 6 189 | 6 653 | 5 737 | 5 496 | 5 725 |
| Germany | 5 738 | 6 119 | 5 989 | 6 499 | 7 161 | 6 518 | 6 322 | 6 677 |
| Europe* | 20 097 | 21 638 | 21 082 | 23 346 | 25 103 | 22 247 | 21 524 | 23 077 |
| World** | 205 240 | 217 623 | 217 580 | 214 221 | 233 482 | 230 119 | 228 199 | 243 274 |



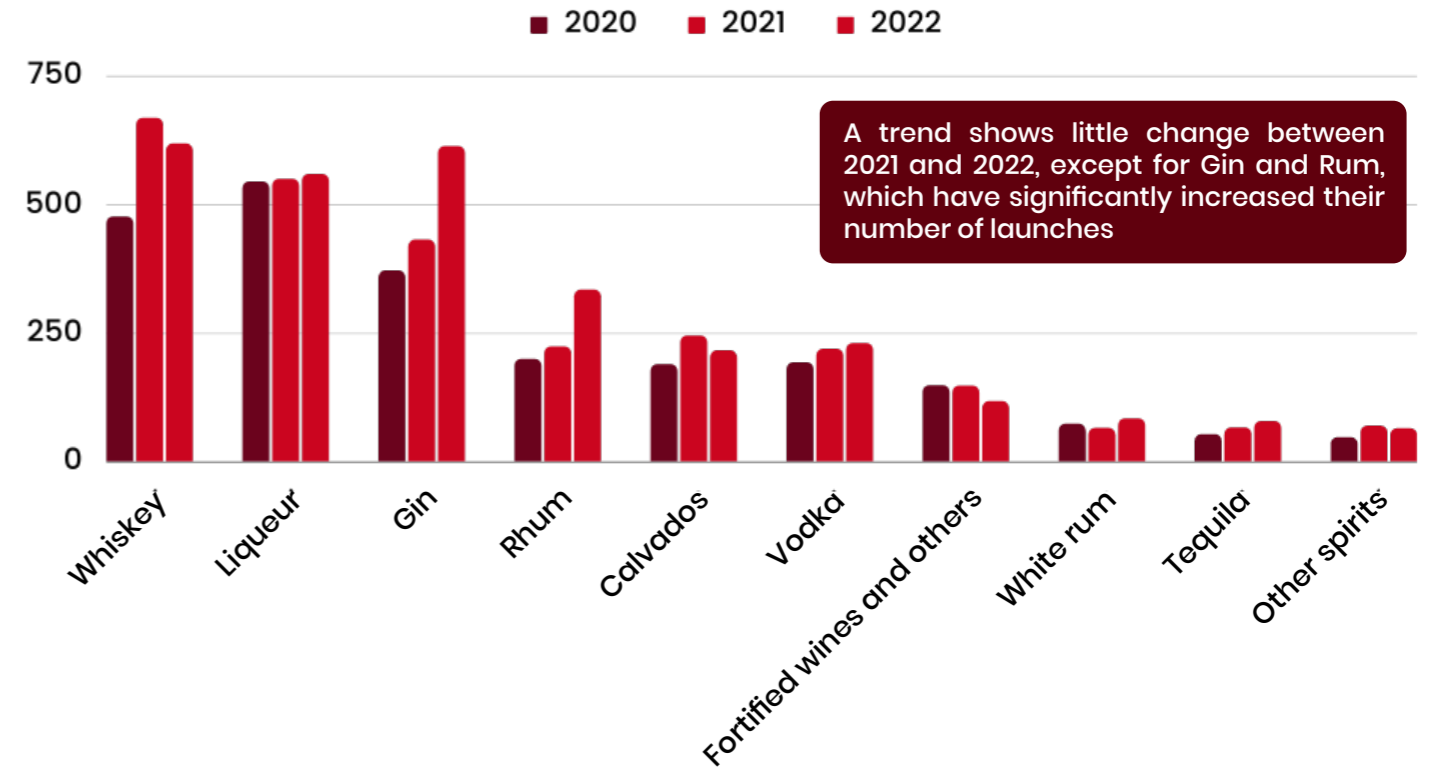
*Europe is statistically analyzed over 5 countries of reference (France, Germany, UK, Italy, Spain)

** the World is statistically analyzed for 16 countries of reference in 5 continents (list of countries on request from request to marketing@metarom.fr)

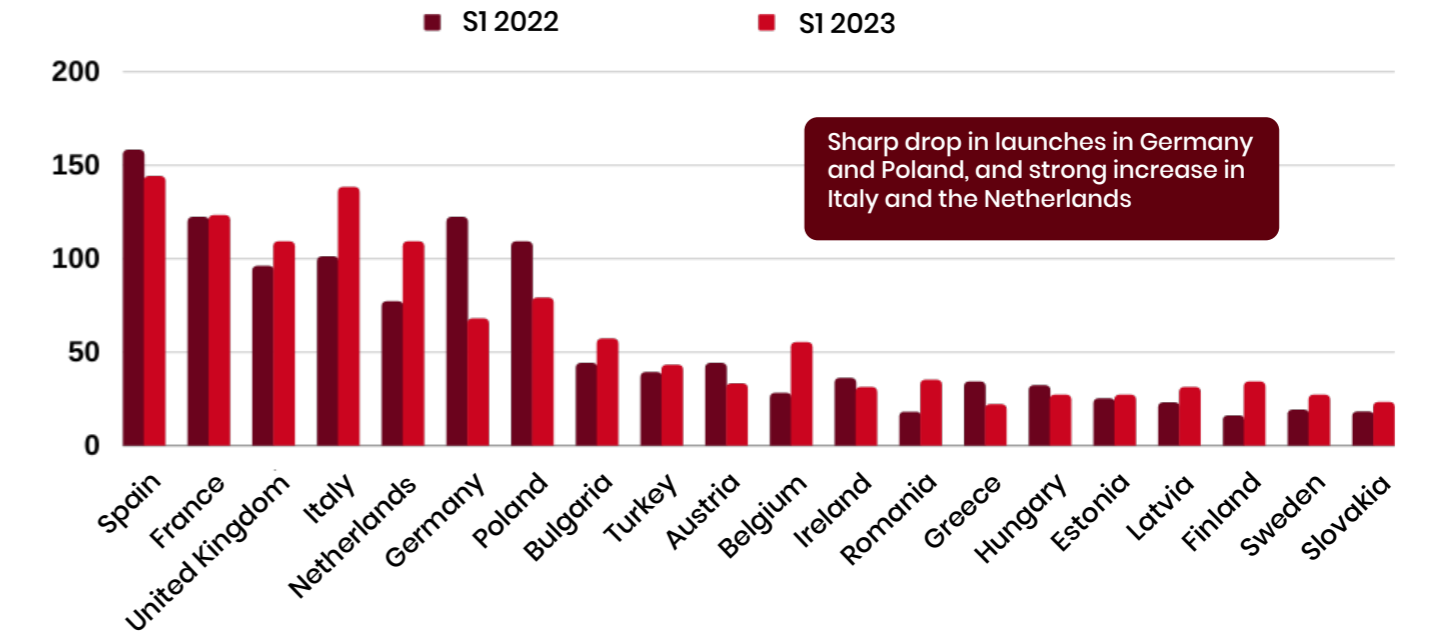
Source : Mintel Market Size 2023. Depending on the country and the year, some data are forecasts

LAUNCHES IN MORE DETAIL

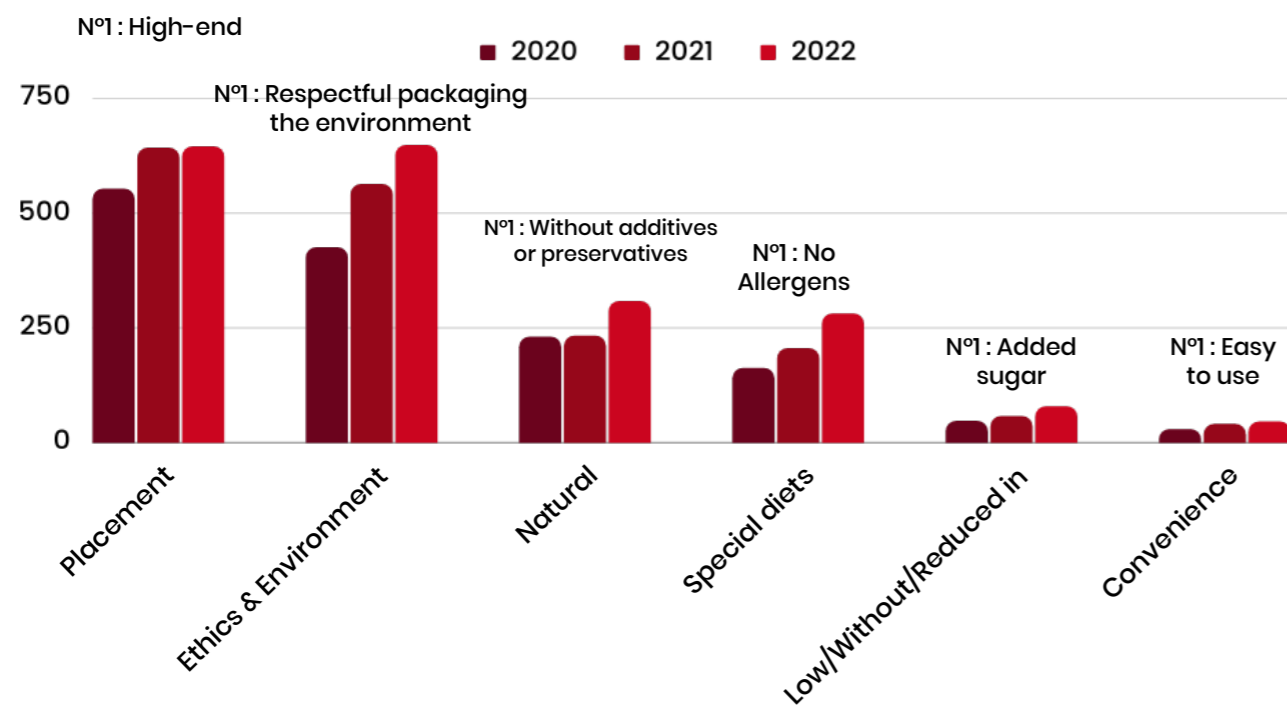
The launches of Spirits in Europe between 2020 and 2022
Dynamics by category (7 868 products launched)



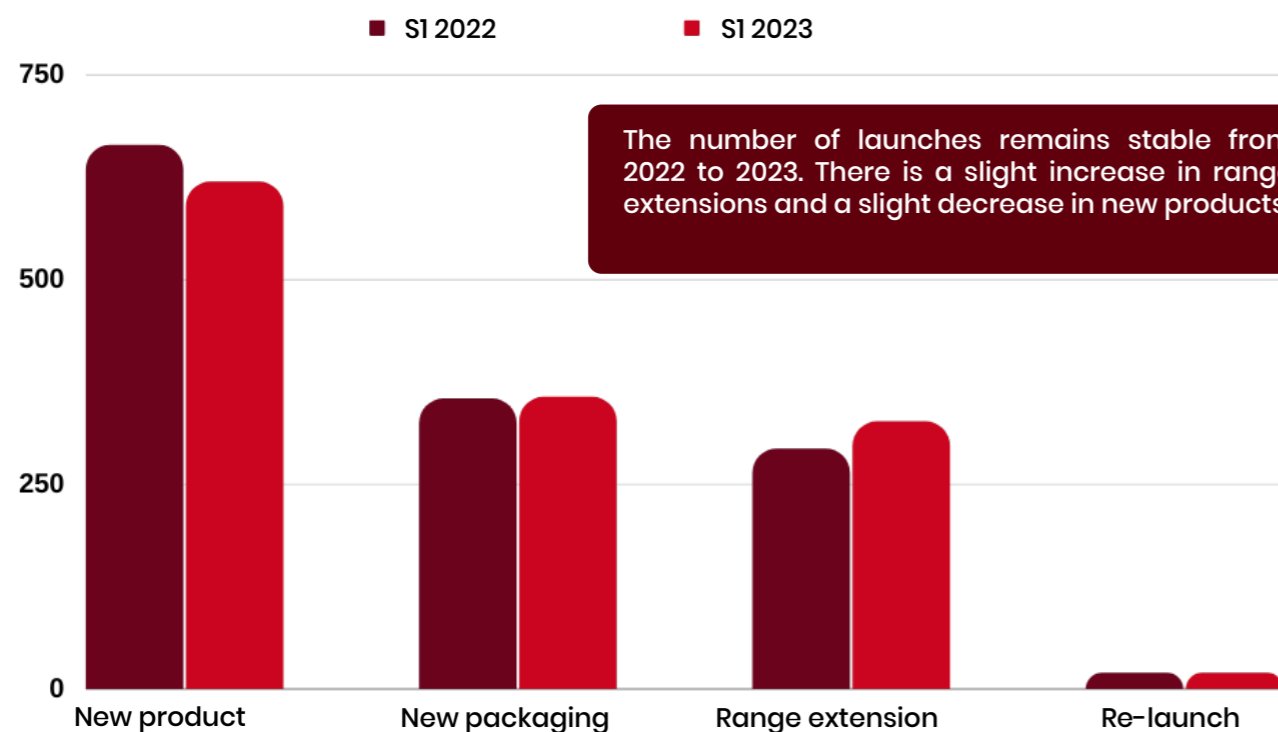
The launches of Spirits in Europe in S1 2022 vs 2023
Dynamics per country (4 465 products)



The evolution of marketing claims in Spirits launches in Europe
Dynamics by claim category (7868 products launched)



Types of launches of Spirits in S1 2022 vs 2023
(Europe - All segments - 4 991 products launched)



THE FLAVORS OF THE MARKET

Top 5 of flavors of spirits launched in Europe
(Accumulated average 2021 to 2023)

TOP 5

VODKA

1. Raspberry
2. Vanilla
3. Lemon
4. Passion fruit
5. Lime

Flavor gaining popularity in 2022: Passion fruit

RUM

1. Spicy
2. Pineapple
3. Vanilla
4. Passion fruit
5. Mango

Flavor gaining popularity in 2022: Ginger

GIN

1. Lemon
2. Raspberry
3. Strawberry
4. Rhubarb
5. Blood orange

The flavors gaining popularity in 2022: Plants/Red fruits

Had you identified them?

Fruit-based launches



Company : Beersmiths
Brand: Brygga Bränneri
August 2023 – Sweden

Limited edition vodka, distilled with watermelon



Company : Square Box
Brand : Le comptoir des arrangés
August 2023 – France

Rum from Paraguay flavored with banana, apple and Ceylon cinnamon



Company : The Whitley Neill Distillery
Brand: Whitley Neill
April 2023 – UK

Sweet, juicy guava and banana create a delicious, refreshing gin

Plant-based flavor launches and/or spices



Company : The Absolut Company
Brand: Absolut Nights
July 2023 - Sweden

Smoked “top-of-the-range” vodka, flavored with chili and pineapple



Company : MBC di Tranfo Flora
Brand: Calabria Magna
July 2023 - Italy

Wild-fennel based liqueur, with no additives



Company : Lottendlund Estate
Brand: Helsing Distillery
August 2023 - Sweden

Handcrafted Swedish gin distilled with cucumber

Asian trends



Company : Asahi Breweries
Brand: Asahi Zeitaku Shibori
August 2023 - Japan

Carbonated soft drink in liqueur form with milk, banana flavor



Company : Asahi Breweries
Brand: Asahi The Lemon Craft
March 2023 - Japan

Lemon-flavored carbonated alcoholic soft drink with a ripe profile



Company : Suntory Spirits
Brand: Suntory Chu-Hi-196°C Strong Zero
July 2023 - Japan

Yuzu-flavored carbonated alcoholic soft drink, no added sugar

The Gins



Company : Leblon – BMF
Brand: Bombay Bramble
September 2023 - France

Blackberry & raspberry flavored gin



Company : The Whitley Neill Distillery, UK
Brand : Whitley Neill
September 2023 -Switzerland

Rhubarb & Ginger flavored gin

The Whiskies



Company : Shanky & Shireman, Ireland
Brand: Shanky & Shireman's Shanky's Whip
April 2023 - Ireland

Cream & caramel flavored whiskey



Company : Ballard and Clonminch, Ireland
Brand: Grant's
July 2023 - France

Orange flavored whiskey

The trends of Spirits

An exploration of flavors and culture

Since COVID-19, consumers have been looking for taste experiences and quality products. This has led to the emergence of several trends in the spirits industry.

Mixology is booming across Europe. Numerous cocktail bars have sprung up, offering unique creations with exceptional spirits. Combined with fruity notes, they are very popular thanks to their fresh, natural flavor profile.

Gin is a spirit that has conquered Europe. It has become a staple in bars and delicatessens. Consumers are turning to flavored gins and limited editions to satisfy their need for innovation. Plants, flowers and herbs are now among the must-have ingredients that spirits enthusiasts want associated with their favorite beverage.



Company : The Secret Garden Distillery, UK
Brand: The Secret Garden
September 2023 -Switzerland

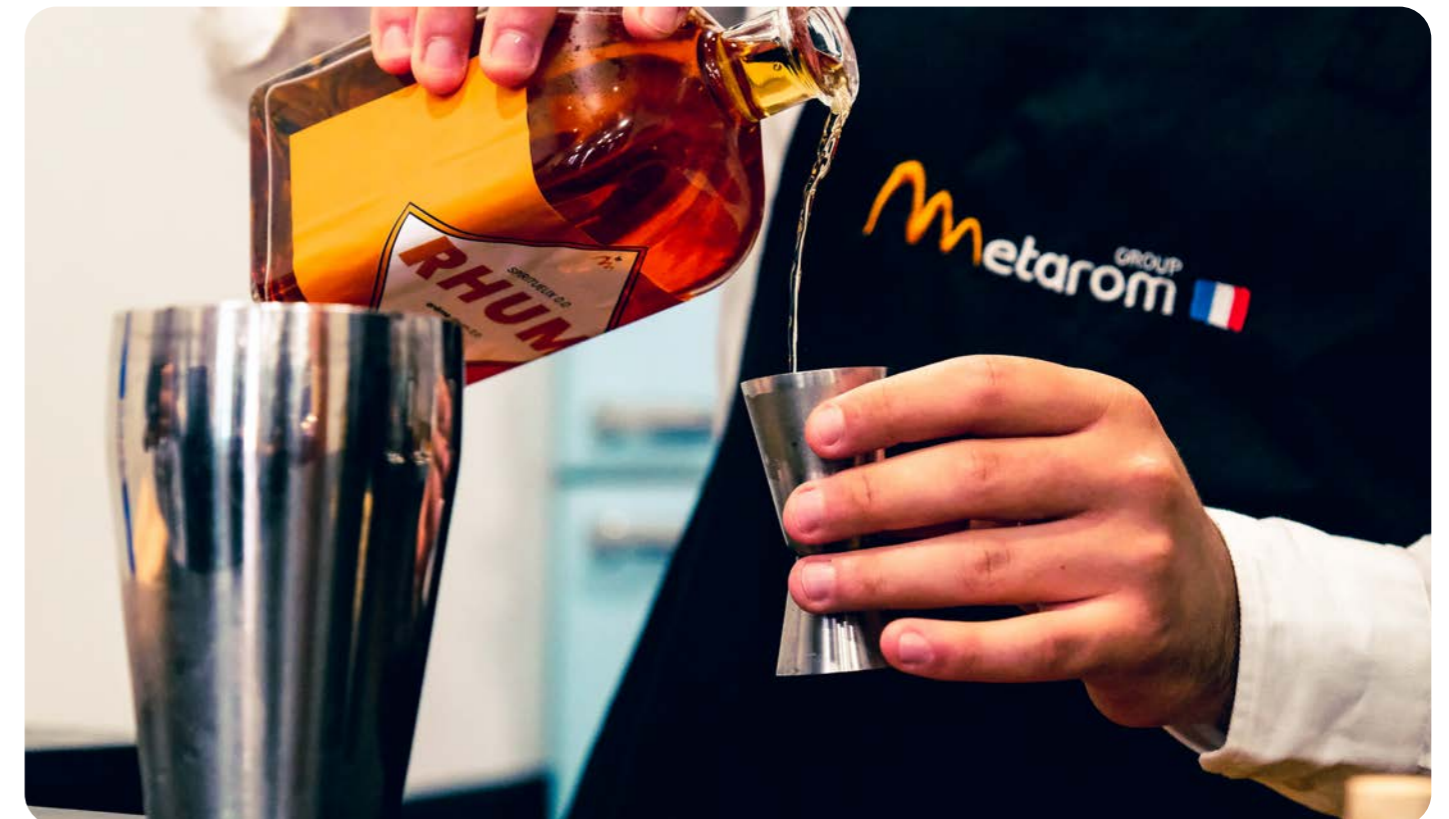
Honey & Violet flavored gin



Company : Penny Markt, Germany
Brand: Best Moments
April 2023 - Germany

Lavender & Rose flavored gin

Today, Europe uses an infinite range of possibilities to satisfy the palates of spirits consumers.



Our premium flavoring solutions



Lemon and lavender gin

A blend that will transport you to the Provence region with the atmosphere of being on vacation. Lemon gives gin fresh, tangy notes. Lavender adds a touch of originality to the application.

Peach and watermelon gin

Thanks to this blend, these flavorsome notes combine to create a fragrant, summery blend with fruity, juicy notes.



Pear and elderflower vodka

The combination of pear and elderflower combines the sweetness of fruit with the subtlety of floral flavors, giving rise to fragrant drinks.

Tangerine and ginger vodka

Tangerine and ginger add a dimension of bright, spicy and refreshing flavors and aromas. They are often used to add character to preparations.



Pecan and caramel whiskey

The combination of pecan and caramel is a harmony of flavors that evokes deliciousness and comfort.

Orange and cocoa whiskey

The marriage of orange and cocoa offers a combination of sweet, tart and earthy flavors, creating a complex taste experience.



The references

| Flavors | Reference |
|-------------------|-----------|
| Lemon (NXF) | PE 17 232 |
| Lavender (NXF) | PE 12 326 |
| Peach (NXF) | PE 16 955 |
| Watermelon (NXF) | PE 16 836 |
| Pear (NXF) | PE 16 857 |
| Elderflower (NXF) | PE 17 145 |

| Flavors | Reference |
|---------------------|-----------|
| Tangerine (extract) | LM 5323 |
| Ginger (extract) | LM 4394 |
| Pecan nut (NF) | PE 17184 |
| Caramel (NXF) | PE 17 550 |
| Orange (extract) | PE 7106 |
| Cocoa (extract) | LM 5091 |



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