

A YEAR OF INNOVATION IN RTD, WINE & SPIRITS, 2023

As gin launches soar in Europe, innovation in the alcoholic ready-to-drink (RTD) sector is flourishing in Asia and attracting big brand investment in the US.



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Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches
- Innovation opportunities in RTD, wine and spirits

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Europe: spirits ride the wave of the home nesting boom

- Consumers are increasingly entertaining at home
- The gin category sees significant growth in share of launch activity in Europe, especially in Italy and Poland
 - Graph 1: spirits launches, by share of spirits subcategory, 2018-22
- Gin brands talk up ingredients and flavours

Europe: RTD, wine and spirit brands are making strides in sustainable production

- Consumers are concerned about the environmental impact of RTD, wine and spirit production
- RTD, wine and spirit brands are moving beyond eco packaging to highlight their sustainable credentials
 - Graph 2: RTD, wine and spirit launches, by share of select ethical and environmental claims, 2018-22
- Carbon emissions, food waste and packaging are in the spotlight

The Middle East & Africa (MEA)

- Spirits see an uptick in launch activity

ASIA PACIFIC (APAC)

Asia: RTDs are expanding in Asia

- RTDs are gaining in popularity outside of Japan
- RTDs are emerging outside of Japan
 - Graph 3: share of RTD launches, 2018-22
- RTD brands tempt consumers with unique and regional flavours and local ingredients
- Brand renovation/innovation: Satsuma Tsukasa celebrates the subtle differences between sweet potato varieties

Asia: flavour innovation can drive interest in spirits

- Consumers are after flavourful alcoholic drinks
- Fruit and vegetable flavours continue to grow in share of spirit launches in Asia
 - Graph 4: spirit launches, by share of flavour component group, 2018-22
- Local and exotic fruit and vegetable flavours can add to the appeal of spirits

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Australia & New Zealand

- Alcohol brands celebrate convenience and local and sustainable production
- Wineries look to appeal to consumers seeking low- and no-alcohol launches

THE AMERICAS

North America: distinctive packaging helps consumer to show off their liquor cabinet

- Consumers want attractive alcohol packaging
- Brands adopt a minimal and impactful design aesthetic
- Unique products need a unique look

North America: familiar brands are sought out for RTDs

- Consumers are willing to pay a premium for recognisable RTD brands
- Alcohol and fruit flavours dominate RTD launches
 - Graph 5: RTD launches, by share of top 10 flavour component subgroups, 2022
- Iced tea, spirits and beer brands enter the RTD category

Latin America

- Wine producers are switching to cans to offer consumers a more convenient and portable format
 - Graph 6: wine, fortified wine and other wine launches, by pack type, 2018-22
- Argentinian wineries lead the charge in canned wine
- Cans are also increasingly popular in the RTD category

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