

## White Spirits and RTDs - UK - March 2012

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"The new types of RTD have revived a flagging market and could potentially lead the overall RTD market back to the £1 billion mark. Its main obstacles at the moment are that people are put off by the lack of freshness inherent in this product and that – for older people in particular – its alcohol strength is predetermined."

- Jonny Forsyth, Senior Drinks Analyst

### In this report we answer the key questions:

- How can the market maintain value growth against declining volume sales?
- What are the main obstacles to and opportunities for the new RTD market's growth?
- How can gin finally turn its potential into sales?
- Are dark spirits becoming the new white spirits?

This report focuses mainly on the opportunities to grow the new ready-to-drink (RTD) sector (ie Gordon's G&T) as well as delivering value from the mature vodka and gin sectors. The main point of difference between these products is that vodka is seen as a party drink, gin as a relaxant for more mellow in-home experiences and the new style of RTDs for outdoor, social meal occasions such as picnics and barbecues.

The report shows that vodka is best positioned for premiumisation and that flavoured versions are keeping 18-24-year-olds interested in the category. Gin is still struggling to shake off negative taste and negative experience (ie hangover/low mood) connotations among young consumers, while the new RTDs need to do a better job of telling consumers what they are for.

Both on- and off-licence sales are used to calculate the UK market size. Value sales throughout this report are at retail selling prices (RSP). Market sizes at constant 2011 prices are devised using Mintel's drink deflator. Crown copyright material is reproduced with the permission of the Controller of HMSO and the Queen's Printer for Scotland.

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