

Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Irish consumers are most likely to drink vodka and gin at a pub or bar or whilst they are on holiday. Moreover, as visiting a pub or bar is one of the most popular activities Irish consumers take part in when taking a trip, and with the number of domestic and overseas visitors to the island of Ireland increasing, this provides significant growth opportunities for vodka and gin brands in the on-trade."

- James Wilson, Research Analyst

This report looks at the following areas:

- Spirit prices rising in the UK/NI
- . Health trend sees consumers drinking less overall, but gin category grows
- Public Health (Alcohol) Bill nears implementation in RoI
- Personal finances improve in RoI, NI consumers remain financially insecure

Although sales of vodka and gin are expected to grow between 2017 and 2018, the majority of Irish consumers have not drunk white spirits in the last six months. Of the consumers who have drunk white spirits, vodka remains the white spirit of choice among Irish consumers despite the resurgence of gin in recent years. Irish consumers note that they are most likely to drink vodka, along with gin and white rum, with a mixer. Unflavoured white spirits are preferred to flavoured variants, indicating that these products hold the greatest potential for brands in attracting consumers to the category.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL:EMEA
+44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Issues covered in this Report

Executive Summary

The market

Figure 1: Estimated total value of vodka and gin sales, NI and RoI, 2013-18

Forecast

Figure 2: Indexed estimated total value of vodka and gin sales, NI and RoI, 2013-23

Market factors

Spirit prices rising in the UK/NI

Health trend sees consumers drinking less overall, but gin category grows

Public Health (Alcohol) Bill nears implementation in RoI

Personal finances improve in RoI, NI consumers remain financially insecure

Companies, brands and innovations

The consumer

Most consumers have not drunk white spirits, unflavoured products hold potential for the category

Figure 3: Types of white spirits drunk in the last six months, by method of consumption, NI and RoI, October 2017

Pubs, parties and holidays the key drinking occasions for white spirits

Figure 4: Usage occasions for white spirits, NI and RoI, October 2017

White spirits seen as ideal gift by Irish consumers

Figure 5: Agreement with statements relating to white spirits, NI and RoI, October 2017

What we think

The Market - What You Need to Know

Irish vodka and gin market continues to grow

Gin driving the UK/NI and RoI spirits category

RoI drinks industry to be challenged by Public Health (Alcohol) Bill

Improved personal finances could see RoI consumers trade up to premium and craft vodka and gin

Market Size and Forecast

Vodka and gin sales to grow in 2018

Figure 6: Estimated total value of vodka and gin sales, IoI, NI and RoI, 2013-23

Growth in vodka and gin sales to continue through to 2023

Figure 7: Indexed estimated total value of vodka and gin sales, NI and RoI, 2013-23

Growth in off-trade vodka and gin sales to continue

Figure 8: Estimated value of off-trade vodka and gin sales, IoI, NI and RoI, 2013-23

On-trade vodka and gin sales set for growth in 2018

Figure 9: Estimated value of on-trade vodka and gin sales, IoI, NI and RoI, 2013-23

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Market Segmentation

Vodka sales to grow in 2018 despite resurgence of gin

Figure 10: Estimated value of vodka sales, IoI, NI and RoI, 2013-23

Gin sales expected to continue growing

Figure 11: Estimated value of gin sales, IoI, NI and RoI, 2013-23

Market Drivers

Spirit prices rising in NI, falling in RoI

Figure 12: Consumer price index vs alcohol beverage and spirit prices, UK (including NI), January 2016-December 2017

Figure 13: Consumer price index vs alcohol beverage and spirit prices, RoI, January 2016-November 2017

Healthier lifestyles impacting alcohol consumption in RoI

Figure 14: Per capita alcohol consumption, RoI, 2000-16

Increase in NI consumers drinking alcohol

Figure 15: Percentage of consumers aged 18+ who drink alcohol, NI, 2015/16 and 2016/17

Spirits sector grows in RoI

Figure 16: Year-on-year percentage growth rates for alcohol consumption, by category, RoI, 2015-16

Gin usage increasing in UK; vodka in decline

Figure 17: Usage of vodka and gin, UK (including NI), 2016 and 2017

Public Health (Alcohol) Bill poses a challenge to drinks industry

GB visitors decline but overseas markets hold potential for Irish vodka and gin

Figure 18: Estimated total of overnight trips, IoI, NI and RoI, 2012-17

Domestic tourism provides vodka and gin growth opportunities, particularly in NI

Figure 19: Top 5 activities done by consumers during last short break (in Ireland or abroad), NI and RoI, September 2017

RoI consumers see personal finances improve

Figure 20: Financial health of Irish consumers, RoI, January 2017-January 2018

Figure 21: Financial health of Irish consumers, NI, January 2017-January 2018

Companies and Brands - What You Need to Know

Gin category sees strong NPD levels

Vodka and gin brands making eco-friendly packaging claims

Growing demand for gin sees brands expand capacity

Who's Innovating?

High level of NPD in alcoholic beverages

Figure 22: Total new alcoholic drinks launched, UK and Ireland, 2013-17

Beer remains the dominant category, but vodka and gin NPD rising

Figure 23: Total new alcoholic drinks launched, by sub-category, UK and Ireland, 2013-17

Figure 24: Total new alcoholic drinks launched, by sub-category, UK and Ireland, 2013-17

Unflavoured products lead NPD in vodka and gin categories

Figure 25: New products launched in the vodka category, by top five flavours, UK and Ireland, 2013-17

Figure 26: New products launched in the gin category, by top five flavours, UK and Ireland, 2013-17

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Environmental claims top specified claim made by vodka and gin brands

Figure 27: New vodka and gin products launched, by top five claims, UK and Ireland, 2013-17

More limited edition products entering the market

Competitive Strategies - Key Players

Bacardi

Key facts

Product portfolio

Brand NPD

Recent developments

Beam Suntory/Catalyst Brands

Key facts

Product portfolio

Brand NPD

Recent developments

Diageo

Key facts

Product portfolio

Brand NPD

Recent developments

Drumshanbo Gunpowder Irish Gin

Key facts

Product portfolio

Brand NPD

Irish Distillers Pernod Richard

Key facts

Product portfolio

Brand NPD

Shortcross Gin

Key facts

Product portfolio

Brand NPD

Recent developments

William Grant & Son Ltd

Key facts

Product portfolio

Brand NPD

The Consumer - What You Need to Know

Most consumers haven't drunk white spirits in the last six months

White spirits drunk in pubs and bars and while on holiday

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

EMAIL: reports@mintel.com



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Recommendations important in winning new white spirit drinkers

Usage of White Spirits

Most consumers do not drink white spirits

Figure 28: Types of white spirits drunk in the last six months, by method of consumption, NI and RoI, October 2017

Consumers of low affluence show low usage of white spirits

Figure 29: Consumers who have not drunk spirits in the last six months, by gender and social class, NI and RoI, October 2017

Irish Millennials prefer vodka with a mixer

Figure 30: Consumers who have drunk vodka with a mixer (eg cola/tonic) in the last six months, by gender and age, NI and RoI, October 2017

Gin with a mixer popular among younger consumers

Figure 31: Consumers who have drunk gin with a mixer (eg cola/tonic) in the last six months, by age, NI and RoI, October 2017

Occasions for Drinking White Spirits

White spirits most likely to be drunk in pubs and bars

Figure 32: Usage occasions for white spirits, NI and RoI, October 2017

Affluent consumers drink white spirits at parties

Figure 33: Consumers who have drunk white spirits at a party (my home/friend's home), by social class, NI and RoI, October 2017

Rural consumers choosing white spirits to relax at home

Figure 34: Consumers who drink white spirits when relaxing at home, by location, NI, October 2017

Figure 35: Consumers who drink white spirits when relaxing at home, by location, RoI, October 2017

Irish women drinking white spirits in pubs and bars

Figure 36: Consumers who drink white spirits at a pub or bar, by gender and age, NI and RoI, October 2017

Attitudes towards White Spirits

Irish consumers open to receiving white spirits as a gift

Figure 37: Agreement with statements relating to white spirits, NI and RoI, October 2017

Men enjoy receiving white spirits as a gift

Figure 38: Agreement with the statement 'I enjoy being given white spirits as a gift', by gender and social class, NI and RoI, October 2017

Young consumers seeking advice from friends and family when trying new white spirits

Figure 39: Agreement with the statement 'I have tried a new white spirit after a recommendation by friends/family', by age, NI and RoI, NI and RoI, October 2017

Sugar putting 25-34-year-olds off pre-mixed drink

Figure 40: Agreement with the statement 'Concerns about added sugar put me off pre-mixed drinks', by age, NI and RoI, October 2017

Appendix - Data Sources, Abbreviations and Supporting Information

Data sources

Market size rationale

Generational cohort definitions

Abbreviations



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 EMAIL: reports@mintel.com