

# White Spirits and RTDs – UK – 2023

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## This report looks at the following areas:

- The effects of inflation and pressure on household incomes on value and volume sales of white spirits and RTDs in 2022.
- The likely effects on the category of a further income squeeze over 2023-24.
- Shifts in buying channels in the aftermath of the COVID-19 pandemic and with renewed pressure on household incomes.
- Factors influencing purchase of white spirits and whether people are prepared to pay more for these.
- Trends in launch activity for both white spirits and for RTDs and opportunities for further innovation.
- Attitudes towards low/non-alcoholic alternatives to white spirits.

Sustainable production is viewed as important by 57% of white spirits buyers. Sustainability will not lose its importance for shoppers with the income squeeze over 2023-24, as there is no difference by people's financial health in placing some importance on sustainable production. However, makers of higher-priced products will need to highlight aspects beyond sustainability if they are to persuade people to pay the price premium, as less well-off people are less willing to pay more for this aspect.

The cost-of-living crisis has prompted consumers to cut back on buying white spirits in both the on- and off-trade in 2022. Further volume sales decline is expected for 2023-24 as inflation continues to outpace wage growth. However, gifting will help buoy category sales, and RTDs have the potential to benefit from the income squeeze as consumers cut down on going out.

The youth bias in usage of white spirits and RTDs, peaking among 18-34s, means that both are likely to lose out from the projected decline in younger adults over 2021-26.



“As an expensive, discretionary product, white spirits have seen volume sales decline in 2022 amid pressure on household incomes. Marketing messages focused on enhancing at-home occasions and NPD in smaller bottles will help companies to keep white spirits on people's shopping lists amid the cost-of-living crisis.”

– Alice Baker, Senior Food & Drink Research Analyst, February 2023

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Smaller bottles offer a means to keep white spirits on people's shopping lists during the income squeeze. These are seen as allowing them to buy white spirits they could not otherwise afford by 49% of category drinkers/buyers. Smaller formats can also appeal on health grounds, through offering portion control, which should help to align them with the alcohol moderation trend.



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