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THE PREMIUM SPIRITS MARKET IN SPAIN

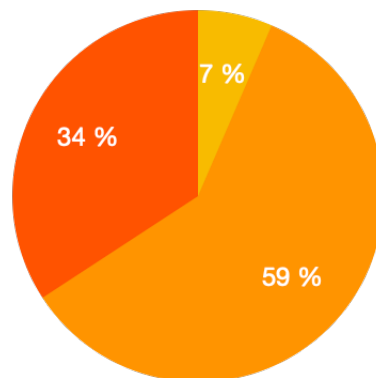
Short survey of the sector

11.02.2021

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The distilled and spirits sector has been experiencing a slight decline in domestic sales of between 2.5% and 3% in 2019, but exports are becoming increasingly important. Within consumption in Spain, and according to IWSR data, whisky is the one that reaches the highest level of premium thanks to American whisky, Irish whiskies and Japanese whiskies. Gin is the next most important distillate in Spanish consumption, followed by vodka, dark rum and, in last place, brandy.

● Premium ● Standar ● First Price



The hospitality sector in Spain is a good indicator of how the Spanish economy is performing, as in 2019 alone, Spain had 242,443 establishments, although in the last two years it has suffered a loss of up to 3,600 bars. Despite this, restaurant chains have been growing, by 7% in 2019, bringing the number of establishments to 9,370 across the country. The hotel and catering sector is a channel that is particularly sensitive to current political events, especially with the passing of the covid-19, which has put the hotel and catering sector at a critical moment, and international politics have also affected the sector, whether protectionist policies in the United States or the recent Brexit.

Distribution of distillate consumption in Spain

	SUPER PERMIUM	PREMIUM	STANDAR	FIRST PRICE	TOTAL (ML)
GIN	3,5 %	6,2 %	56,4 %	33,9 %	45,4
WHISKY	2,1 %	8,8 %	76,0 %	13,1 %	41,5
Scottish	2,7 %	5,9 %	78,0 %	13,4 %	29,1
National (Spanish)	0,0 %	0,2 %	82,0 %	17,0 %	8,7
American (US & Canada)	2,0 %	57,8 %	37,5 %	2,7 %	3,2
Others (Irish & Japanese)	7,7 %	8,7 %	83,6 %	0,0 %	0,5
RON	1,5 %	3,5 %	68,0 %	27,0 %	28,7
White	0,0 %	0,1 %	70,0 %	29,9 %	3,9
Dark	1,8 %	4,0 %	68,0 %	26,2 %	24,2
BRANDY	0,6 %	2,4 %	21,8 %	75,2 %	15,0
VODKA	6,8 %	0,4 %	47,2 %	45,6 %	10,1

Data by Alimarket

Not only national and international policies affect the economy and development of the sector, consumer habits are changing, especially with the trend towards health care and a healthier lifestyle. Technology and digitalisation mean that people are spending more time at home than they used to do years ago, which means that night-time consumption is gradually shifting to daytime consumption, snacking, etc.

It is the price that determines the type of distilled beverage range, whereby those costing more than € 20 are considered premium or super premium.



Top premium whiskies in Spain

BRAND	COMPANY	SALES (2018)
Jack Daniel's (original, Gentleman Jack, Single Barrel)	BROWN-FORMAN ESPAÑA	2.600.000
Johnnie Walker (Black, Gold Reserve, Double Black, Blue, Platinum, White)	DIAGEO ESPAÑA	960.000
Cardhu (15, 18 & Cash Reserve)	DIAGEO ESPAÑA	710.000
Chivas Regal (12, 18, 25, & Extra)	PERNOD RICARD ESPAÑA	690.000
The Macallan (Amber, Rare, Cask, Master Edition, Ruby, 12, 15, 18 & 25)	MAXXIUM ESPAÑA	200.000
Glenfiddich (12, 15, & 18)	VARMA	125.000
Dyc Malt 10 & 12	MAXXIUM ESPAÑA	100.000
Buchanan's 12	DIAGEO ESPAÑA	95.000
J&B 15	DIAGEO ESPAÑA	70.000
Knockando 12	DIAGEO ESPAÑA	65.000
Glenrothes (Vintage Reserve, 12 & 10)	MAXXIUM ESPAÑA	45.000

Data by Alimarket

The gin category has been declining for years in terms of domestic sales, despite being the leading player in terms of launches and new products. Within gins, there are two very strong lines: flavoured gin and handcrafted gins. One of the distributors with the most representation in flavoured gin is Central Hisúmerm, which has more than 80 gin references in its catalogue, i.e. 33% of its sales. Among the new additions to its catalogue are the following:

City of London		
Tom Gin	Murcian Orange Gin	Authentic Gin
Lemon Gin	Christopher Wren Gin	Sloe Gin
The Square Mile Gin	Rhubarb & Rose	
Liverpool		
Rose Petal	Lemongrass & Ginger	Liverpool Organic Gin
Valencia Orange		

Data by Alimarket

The distributor Icon Spirits has recently launched "June", a fruity gin with two product lines: "G'Vine Gin" and "Nouaison Gin", a product designed for daytime consumption.

Top premium Gin in Spain

BRAND	COMPANY	SALES (2018)
Bombay Sapphire (Original/East/Star)	BACARDI	1.470.000
Martin Miller's	ZAMORA COMPANY	520.000
Hendrick's	VARMA	450.000
Rives Special Premium	RIVES PITMAN	455.000
Nordés	GRUPO OSBORNE	420.000
Bulldog	CAMPARI	345.000
G'Vine	ICON SPIRITS	260.000
Tanqueray (Rangpur/Ten/ Bloomsbury)	DIAGEO ESPAÑA	255.000
Brockmans	GRUPO OSBORNE	230.000
Gin Mare	GLOBAL PREMIUM BRANDS	200.000
The Botanical's	CENTRAL HISÚMER	185.000
London N°1	GONZÁLES BYASS	122.000
Mombasa (Club/Colonel Reserve)	UNESDI	120.000
Fifty Pounds	SÁNCHEZ ROMATE	96.000
Pink Royal	CENTRAL HISÚMER	88.000

Data by Alimarket

The Osborne and Gonzalez Byass groups have expanded their range in recent years. In the case of Osborne, "Ampersand" has two varieties: blueberries and honeydew melon, products aimed at a young public. In the second group, Gonzalez Byass, the pink gin "MOM Love" has been presented, following the famous strawberry MOM in 2015 together with its special edition "MOM Rocks". It is important to mention "Puerto de Indias", "Tanqueray Sevilla", "Larios Citrus", "Beefeater Blood Orange" among the flavoured gins.

As for rum in Spain, dark rum is gaining strength within the premium sector, with an increase of 3% in 2019, accounting for 5.8% of premium drinks consumption.

Top premium ron in Spain

BRAND	COMPANY	SALES (2018)
Havana Club (7, 15 & Sel. Maestros)	PERNOD RICARD ESPAÑA	449.000
Brugal (Extra Viejo, 1888, Siglo de Oro)	MAXXIUM ESPAÑA	327.000
Matusalem (23, 15, 10 & 7)	ZADIBE	270.000
Diplomático (Reserva & Rva. Exclusiva)	GLOBAL PREMIUM BRANDS	165.000
Barcelo (Gran Añejo, Imperial, Signio)	VARMA	138.000
Zacapa (23, Centenario XO, Reserva L.)	DIAGEO ESPAÑA	123.000
Bermúdez	CENTRAL HISÚMER	100.000
Cacique 500	DIAGEO ESPAÑA	90.000
Don Papa	WKYREGAL	64.000
Flor de Caña (21, 18, 12 & 7)	OSBORNE	45.000

Data by Alimarket

Top premium brandies in Spain

BRAND	COMPANY	SALES (2018)
Cardenal Mendozan	SÁNCHEZ ROMATE	185.000
Gran Duque de Alba	WILLIAMS & HUMBERT	125.999
Carlos I/Carlois I Imperial	GRUPO OSBORNE	138.000
Larios 1866	GRUPO OSBORNE	60.000
Lepanto	GONZALEZ BYASS	38.000

Data by Alimarket

Top premium vodkas in Spain

BRAND	COMPANY	SALES (2018)
Grey Goose (Ducase, XV)	BACARDI ESPALA	353.000
Belvedere	MOET HENNESSY	270.000
Ciroc	DIAGEO ESPAÑA	199.000
King Peter	RIVES DESTILLERY	65.000
Absolut Elyx	PERNOD RICARD ESPAÑA	29.000

Data by Alimarket

Main manufacturers and marketers of premium spirits in Spain

COMPANY/GROUP	TOTAL NET SALES 2018 (M€)	% DISTILLATES ON SALES	% PREMIUM ON DISTILLATES	TOP PREMIUM BRANDS
PERNOD RICARD ESPAÑA, S.A.	314,38	90 %	60 %	Beefeater 24, Havana Club 7, The Glenlivet, Chivas Regal, Ginial, Plymouth
MIGUEL TORRES, S.A.	257,80	20 %	100 %	Jaime I, Torres 15, Torres 20, Reserva del Mamut, El Gobernador, Rocado, Magdala
GONZÁLEZ BYASS, S.A.	231,14	40 %	100 %	The London No1, Nomad, MOM, Whyte & Mackay, Botran
BEAM SUNTORY SPAIN, S.L.	222,97	100 %	40 %	Bowmore, Laphroaig, Maker's Mark, Sauza, Hibiki, Courvoisier, DYC Single Malt 10 y 15 años
GRUPO OSBORNE, S.L.	218,00	40 %	90 %	Nordés, Brockmans, Flor de Caña, Zubrowka, Russian Standard
DIAGEO ESPAÑA, S.A.	215,47	100 %	70 %	Tanqueray Ten, Cardhu, Zacapa, Johnnie Walker Blue Label, Talisker, Ciroc
ZAMORA COMPANY	196,52	60 %	80 %	Matusalem, Martin Miller's, José Cuervo, Bushmills, Yellow Rose, 1800
MAXXIUM ESPAÑA, S.A.	181,29	100 %	50 %	Jim Beam, Maker's Mark, Brugal 1888, The Macallan, Gin No3, The Glenrothes
BACARDI ESPAÑA, S.A.	180,00	60 %	60 %	Bacardi 8, Eristoff Gold, Grey Goose, Bombay Shappire, Patrón
IMPORT. Y EXPORT. VARMA, S.L.	140,29	80 %	60 %	Barceló Imperial, Hendrick's, Glenfiddich, The Balvenie, Ron Bayou, Tequila Cenote, Elit Vodka
MOET HENNESSY ESPAÑA, S.A.	95,00	5 %	100 %	Hennessy, Belvedere, Ardbeg, Glenmorangie
BODEGAS WILLIAMS & HUMBERT, S.A.	84,23	55 %	70 %	Botanic, Dos Maderas, Gran Duque de Alba

SÁNCHEZ ROMATE HERMANOS, S.A.	11,50	80 %	70 %	Fifty Pounds, Ingenio Manacas, Cardenal Mendoza, Barber's Gin, Pig Nose
CASALBOR TRADE, S.L.	11,02	70 %	80 %	Wint&Lila, Sheridans, Pampero Aniversario, Knockando
TEICHENNÉ, S.A.	10,46	70 %	30 %	Level Gin, Tabú, Old Level, Kinross, Tres Ochos, L'Abre, Teichenné
CENTRAL HISÚMER, S.L.	5,43	100 %	100 %	The Botanical's, Pink 47, Pink Royal, Filliers, Whitley Neil, Hayman's, Brecon, Blanton's
AMER GOURMET, S.L.	5,05	90 %	100 %	Karlsson's Gold, Cointreau, Remy Martin, Louis XIII, Le Tribute, Santísima Trinidad
UNESDI DISTRIBUCIONES, S.A.	4,49	80 %	60 %	Mombasa, Millonario, Xellent
GRUP DESTILERÍAS DEL MARESME, S.A.	4,38	60 %	15 %	5Th Distilled Gin, Incense Liquors, Clan MacMillan
ABCLIQUEUR, S.L	4,48	70 %	100 %	Don Papa, Koval Gin, Glengoyne, Ben Nevis, Les Canailles, Calle 23
HIJOS DE PABLO ESPARZA BOD. NAVARRAS, S.A.	3,00	100 %	50 %	Las Cadenas, Basarana
IBER LICOR, S.L.	2,67	100 %	100 %	Cartavio, Ron del Barrilito, Zaya, Corralejo, Nobushi
QANTIMA GROUP	2,27	70 %	100 %	.Sikkim gin, Yamazakura, Deadhead Rum, Legend of Kremlin, Outer Space, Cannagin
DESTILERÍA SÍDERIT, S.L.	2,00	199 %	80 %	Síderit, Síderit Lactée
DESTILERÍA URBANA, S.L.	0,82	90 %	100 %	Santamaña, Lola y Vera, Mentidero, Bendita
ICON SPIRITS, S.L.	no data	100 %	100 %	G'Vine', 'Nouaison Gin', 'No 3 London Dry Gin', 'June' 'Kraken', 'Bushmills' , 'Gran Centenario'
TROPS BEVERAGES, S.L.	no data	100 %	100 %	Ballix, Mangocello, Manila

Data by Alimarket

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In terms of premium mixers, ranges such as "Signature Mixers" and "Seventeen Contemporary Mixers" from Coca-Cola and Global Premium Brands have been launched, with sales as expected. In terms of mixer brands, Schweppes dominates the category, with the entry of Coca-Cola's Royal Bliss in 2017, which has managed to enter supermarkets in a segmented way through its four varieties. Then comes, once again from Coca-Cola, "Coca-Cola Signature Mixers", aimed at mixers with whisky, rum, tequila or bourbon, whose main audience is young people, not only in Spain but also in Europe.

Leading premium mixers brands in Spain

COMPANY	BRAND	VOL. 2019 (MI)
SCWEPPEES	Schweppes	7,5
DAMM	Fever-Tree	3,5
COCA-COLA EUROPEAN PARTNERS	Royal Bliss	2,0
MAGNIFIQUE BRANDS	Original Tonic	0,5
INDI ESSENCES	Indi & Co	0,3
WYKREGAL	Fentimands	0,2
GLOBAL PREMIUM BRANDS	1724	no data
RED BULL SPAIN	Red Bull Organics	No data

Data by Alimarket

References:

"Destilados Premium, nuevas formas de llegar al consumidor" by Alimarket

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