



## INTRODUCTION

*The power of the serve continues to drive category growth of ready-to-serve batched cocktails. During the COVID-19 pandemic, people were unable to enjoy their favourite cocktails in bars across the world. Venues rushed to batch their cocktails and serve housebound customers in a bid to retain sales while their premises remained closed.*

Three years on, people's love for cocktails hasn't subsided and the growth of the ready-to-serve (RTS) batched cocktail market isn't slowing down. So, how are brands jumping on the trend, and is it one to stay?

In this report we will:

- Uncover how RTS batched cocktails have evolved over the years
- Identify macro trends influencing their growth
- Understand consumer buying behaviours
- Examine how brands are moving into this space and taking market share
- Conclude our findings and thoughts on the future of RTS premium batch cocktails

*“For the purpose of this report, we’ll refer to batched cocktails as RTS (ready-to-serve). These are products that include multiple serves for sharing and are predominantly sold in glass bottles.”*

### Section 01 - Batched Cocktail Market Overview

#### HOW HAVE BATCHED COCKTAILS EVOLVED?

This global trend is being primarily driven by the UK and US markets. Originally, ready-to-serve (RTD) cocktails were brought to market in can form for convenience, but businesses have continued to expand offerings as popularity surged.

According to the drinks market analysis experts IWSR, the RTD/RTS cocktail format is growing faster than any other alcoholic drink category. (Sweeney, 2022)

In 2022, drinks business AJ Barr stated that the sale of cocktails for home consumption has risen 44% year-on-year and is worth GBP 92 million, of a total RTD/RTS market of GBP 509 million. (Milliken, 2022)

The more recent introduction of RTS batched cocktails in bottles speaks to a new audience. They fulfil a different drinking occasion than the original canned cocktails and offer a more premium experience.

## MARKET SIZE

The global RTD/RTS cocktail market size is predicted to reach USD 2.43 billion by 2030. It is expected to expand at a compound annual growth rate of 13.4% from 2022-2030. (Report Linker, 2022)

Supermarkets accounted for the largest revenue share of over 65% in 2021, playing a key role in RTD/RTS brands and ranges having wide consumer reach.

The bottles packaging segment captured the largest revenue share in 2021 due to a global aluminium shortage and growing consumer awareness of the need to be more environmentally friendly.



Image Credit: Tails Cocktails



## MOST LOVED SERVES ARE MAKING THE CUT

We've noticed that brands offering RTS batched cocktails are sticking with the much-loved favourites to drive appeal.

In the UK on-trade, the Pornstar Martini accounts for 15.3% of all cocktails served, closely followed by the Mojito (12.4%) and the Espresso Martini. Brands hero these serves in their premium batched cocktail ranges as they're already popular and easy to sell in large volumes. (Brown, 2019)

According to Jason Simpson, Sales Director at drink manufacturer and flavour house Simpsons Beverages, "Our classic range of flavours - including Mojito, Strawberry Daiquiri, On The Beach, Margarita and Piña Colada - are very popular."

But it's not just fruity favourites making the line-up. Classic cocktails like the Negroni, Old Fashioned and Manhattan are becoming a permanent feature the catering to a wide range of tastes.

## THE WORLD'S BEST-SELLING CLASSIC COCKTAILS 2022

Conducted by Drinks International with 100 global bars who rank their best-selling classic cocktails.

01	NEGRONI
02	OLD FASHIONED
03	DRY MARTINI
04	MARGARITA
05	DAIQUIRI
06	APEROL SPRITZ
07	ESPRESSO MARTINI
08	MANHATTAN
09	MOJITO
10	WHISKY SOUR

## WHICH CONSUMER NEEDS ARE DRIVING THIS TREND?



Image Credit: Tails Cocktails



Image Credit: Glenfiddich



Image Credit: Atopia

# 01

### CONVENIENCE IS KING

People are increasingly looking for the convenience of a perfect serve without having to buy multiple bottles of ingredients that end up going to waste.

# 02

### ELEVATED MOMENTS

There's an increasing demand for more premium at-home offerings across categories that elevate a moment.

# 03

### DRIVEN BY EASE & QUALITY

With an eye on value for money, consumers want to enjoy a consistent, high-quality serve without hassle or a process that takes too many steps.

## Section 02 - Market Entry Strategies

### THREE ATTENTION-GRABBING APPROACHES

We have identified three strategies that brands are adopting to enter the RTS batched cocktail market, illustrating the power of the serve to bring freshness to consumers.



Image Credit: The Glenlivet



Image Credit: Tails Cocktails



Image Credit: Mirror Margarita

#### Hero Serve Forward

Established brands launching into market with bottled versions of their hero serves.

*The Glenlivet, Grey Goose, Campari*

#### Portfolio Approach

Global drinks businesses launching new ranges showcasing their portfolio of spirits.

*William Grant & Sons, Bacardi, Beam Suntory*

#### Disruptors/Innovators

Disruptors and innovators launching into market with advanced tech, flavours and styles.

*Mirror Margarita, Tayēr + Elementary, Pimentae, Mr Lyan*

#### A) HERO SERVE FORWARD

When big brands bet on their hero serve – they bottle it.

This approach is being utilised by globally recognised brands that have a clear serve strategy and a strong affinity with bartenders and consumers alike.

To some, it's a great opportunity for brands to expand market reach and engage with a new consumer base outside of the on-trade environment.

However, others might argue that there's the potential to erode brand reputation, so these businesses need to ensure quality is at the forefront to maintain consumer trust.

Businesses often leverage their existing branding design and structure, borrowing brand equity for consumer reassurance and buy-in.

#### Did you know...

North America dominated the global ready to drink cocktails market with a share 33.59% in 2022

(Grand View Research, 2022)

## EXAMPLE 1: THE GLENLIVET

The Glenlivet is the second best-selling single malt globally. Driven by its mission to redefine single malts, it has launched premium RTS cocktails featuring innovative first-to-market technology.

Unlike other RTS cocktails on the market, The Glenlivet Twist & Mix cap keeps the natural flavourings separate from the single malt whisky until you're ready to enjoy.

Simply twist the cap to release the natural flavourings and create an instant batch of freshly freshly-mixed cocktails. The innovative technology makes it easy for consumers to enjoy bar-standard cocktails at home.

### COMMERCIALS

**Availability:** US exclusive

**Size:** 37.5cl

**Price Point:** USD 21.99

**Servings:** 8

### THE LATEST RELEASE FEATURES TWO SKUS:

Old Fashioned  
New Manhattan

### CAMPAIGN MESSAGING

The primary line used across digital comms is "Experience the New Way to Cocktail", inviting consumers to expand their perception of whisky and experience a "new twist to traditional cocktailing" for modern drinkers.

The secondary messaging focuses on communicating the benefits of the range to upgrade the RTS drinking experience, with a bar-worthy serve at home in three simple steps.

The Glenlivet Twist & Mix brings together 'easy' and 'excellent' in a glass for elevated moments with friends.



Image Credit: Glenlivet



## EXAMPLE 2: GREY GOOSE

Grey Goose is a 100% French vodka brand owned by Bacardi. It entered the RTS market with its premium take on the Martini, having established a reputation among drinkers and bartenders worldwide as the vodka for the perfect Martini. Each RTS bottle includes its signature vodka, along with dry French vermouth and orange bitters.

Grey Goose Marketing Vice President Martin de Dreuille explains that the Martini is often considered too difficult to perfect at home. (Carruthers, 2022) This offered an opportunity to create premium faultless Martinis with a fuss-free serve process – a bar-standard cocktail without the need for a bartender.

### COMMERCIALS

**Availability:** US exclusive

**Size:** 75cl

**Price Point:** USD 29.99

**Servings:** 10



Image Credit: Grey Goose



Image Credit: Campari

## EXAMPLE 3: CAMPARI

Campari is a world-renowned brand with over 160 years in the industry. Its unmistakable, vibrantly red Italian bitters lie at the heart of many popular classic cocktails including the Negroni.

The RTS batched Campari Negroni captures people's love for this serve and offers it in a simple to serve bottle. For the perfect serve, consumers simply pour over ice and add a slice of orange.

This brand bucks the trend with bottle and label designs that stray away from the existing Campari brand look and feel.

### COMMERCIALS

**Availability:** UK and Online retailers

**Size:** 50cl

**Price Point:** USD 20 approx

**Servings:** 5

## Key Learnings

We've noticed that many brands utilising the Hero Serve Forward strategy use similar bottles, labels and branding to their core ranges to act as a visual cue to consumers. This tactic makes the RTSs instantly recognisable on shelf and builds overall brand equity.

B) Portfolio Approach

**GLOBAL PORTFOLIOS TAKE A PIECE OF THE PIE**

Global drinks businesses that have multiple highly popular, well-recognised brands within their portfolio are creating new brands of RTS batched cocktail ranges.

These ranges are designed to fit a variety of drinking moments and occasions. They feature reputable spirits that consumers already know and love, pairing them in popular cocktails to encourage purchase.

Each business leverages three things: **Brand, Spirit, Serve**

**EXAMPLE 1: TAILS COCKTAILS FROM BACARDI**

Owned by Bacardi, Tails Cocktails is an exclusive range of premium RTS drinks that offers a cross-category selection.

The range comprises of six popular cocktails premium Bacardi spirits: 42 Below Vodka, Dewar’s Scotch, Bacardi Carta Blanca Rum and Bombay Sapphire Gin.

Tails Cocktails is a collection of shake and pour cocktails – that takes the hassle out of making some of your favourite cocktails at home. Aside from glass and garnish, all you need for the perfect serve in seconds is “Ice. Shake Shake. Pour.”

**Tails Cocktails:**

- Whisky Sour
- Rum Daiquiri
- Espresso Martini
- Passion Fruit Martini
- Raspberry Cosmopolitan
- Gin Gimlet

**COMMERCIALS**

**Availability:** UK & Ireland, Netherlands, Belgium, Germany, Austria, Australia and Online retailers

**Size:** 50cl

**Price Point:** GBP 15

**Servings:** 4



Image Credit: Tails Cocktails





Wonderworks produced POS assets to support Tails Cocktails in the off-trade



Image Credit: Tails Cocktails



## EXAMPLE 2: BATCH & BOTTLE FROM WILLIAM GRANT & SONS

Owned by William Grant & Sons, Batch & Bottle is a range of RTS batched cocktails utilising premium cross-category spirits from the group portfolio.

Appealing to those looking to elevate drinking moments and occasions, the range comprises a number of popular cocktails showcasing four premium spirits: Monkey Shoulder Whisky, Hendrick's Gin, Reyka Vodka and Glenfiddich Whisky.

### COMMERCIALS

**Availability:** UK, US & major Online retailers

**Size:** 50cl

**Price Point:** GBP 23

**Servings:** 6

### *Batch & Bottle:*

Lazy Old Fashioned

Gin Martini

Rhubarb Cosmopolitan

Scotch Manhattan

Passionfruit Martini



Image Credit: Batch & Bottle



### EXAMPLE 3: ON THE ROCKS FROM BEAM SUNTORY

On The Rocks is a range of batched RTS cocktails featuring four of Beam Suntory’s premium spirits brands: Knob Creek Bourbon, Hornitos Tequila, EFFEN Vodka, Larios Gin and Cruzan Rum.

#### COMMERCIALS

**Availability:** Primarily US & Canada

**Size:** 37.5cl

**Price Point:** USD 11.99

**Servings:** 4



Image Credit: On The Rocks

#### *On The Rocks:*

- The Pineapple Margarita
- The Old Fashioned
- The Cosmopolitan
- The Mai Tai
- The Daiquiri
- The Aviation
- The Espresso Martini

#### *Key Learnings*

Balancing quality and convenience is key for these ranges adopting a Portfolio Approach. Brands have to show consumers how easy their products are to use. The perfect cocktail can be made in a matter of moments with zero fuss and no waste.



### C) The Disruptors/Innovators

#### SMALL BUT MIGHTY OFFERINGS

The disruptors and innovators of the RTS batched cocktail space need to be nimble and think differently to global brands to carve out their place in the market.

These businesses may be small and don't drive the same volumes as it's trickier for them to hit the supermarket shelves, but they offer consumers something unique compared to their larger counterparts. Unlike global brands, the brands aren't spotlighting a particular spirit in their products, opting for generic terms instead.

The brands we've considered in this report have grown from on-trade venues or have been crafted by passionate bartenders who want to offer that bar-standard serve in the comfort of your own home. All were born in venues. This boots-on-the-ground approach to creating unique offerings that they already know their customers enjoy differentiates the disruptors/innovators from the big market players.



#### Mirror Margarita

The inspiration was to create a bottled cocktail both familiar in name and flavour, but strikingly different in appearance - a crystal-clear take on the classic Margarita.



#### Tayēr + Elementary

Their sincere interest in ingredients, unique flavour profiles, intelligent design and meticulous cocktail research makes Tayēr + Elementary stand out from the mainstream players.



#### Pimentae

Pimentae was launched with a passion to showcase the magic of tequila and change people's perception of the liquid.



#### Mr Lyan

Crafted by Mr Lyan, a world-renowned bartender who has launched several of London's top bars, these batched RTSs are designed to eliminate the faff while enjoying a world-class cocktail at home.

### Key Learnings

Innovative use of flavour and interesting techniques is what sets the Disruptors/Innovators apart. They're not afraid to stray off the beaten path and offer consumers a unique drinking experience.

## Section 03 - Observations & Conclusions

### THE FUTURE OF BATCHED COCKTAILS

As consumers are discovering more of their favourite cocktails on the supermarket shelves and online, and as more global drinks companies are launching their own brands, we expect this category to continue to grow.

Innovation and diversification of drinks brands is what keeps consumers interested and excited. Premium RTS batched cocktails appeal to a wide audience and can cater to the needs and demands of people's fast-paced lives.

The rise of premium RTS batched cocktails offers businesses an opportunity to appeal to cocktail lovers and encourage them to interact with their favourite brands outside of the on-trade environment.

### CONCLUSION

**01** RTS batched cocktails appeal to busy, time-poor consumers who enjoy drinking cocktails but **don't want the hassle of having to buy several ingredients** to make the perfect serve at home.

**02** **Familiarity drives consumer appeal.** Brands looking to expand into the RTS batched cocktail market should consider producing a range based on existing popular cocktail styles commonly sold in the on-trade.

**03** Creating a bottled version of an established brand's Hero Serve could **drive greater brand awareness and build affinity** with the at-home consumer.

**04** Supermarkets accounted for the largest revenue share of over 65% in 2021 and were instrumental in brand growth and sales. This is undoubtedly why established brands taking a Portfolio Approach dominate the space.

**05** Disruptor/Innovator brands are launching in the on-trade with the ultimate goal of being stocked in supermarkets. Their **visibility is much lower than larger competing brands which makes it more challenging** for them to thrive in the space.

**06** **This is a trend that won't be ending in the near future.** The global RTD/RTS cocktail market is predicted to be worth USD 2.43 billion by 2030. It is expected to expand at a compound annual growth rate of 13.4% from 2022-2030.

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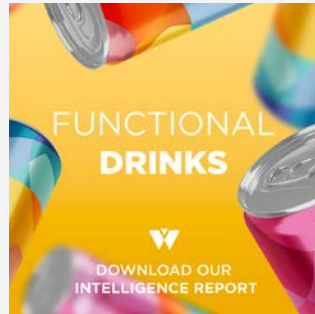
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please don't hesitate to reach out.*

