



# In the Pink:

## Big trends in the gin market

The global success of gin and in particular pink gin clearly demonstrates how powerful a smart drinks strategy is to building a successful brand in today's tough on-premise market. Here's what suppliers and operators need to know.



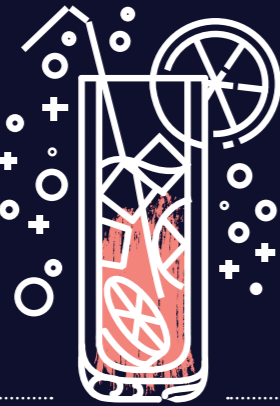
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# THE *gin* MARKET NOW: 10 KEY STATS

## £1.4bn

SALES OF GIN IN BRITAIN IN THE  
12 MONTHS TO MID-MAY 2019



## 55.6%

YEAR ON YEAR  
GROWTH IN GIN  
SALES BY **VALUE**



## £3.13

AVERAGE SELLING  
PRICE OF A 25ML  
GIN SERVE

## 56% / 26% / 18%

SPLIT IN GIN SALES BETWEEN **MAINSTREAM**,  
**PREMIUM** AND **SUPER-PREMIUM** BRANDS

## 8.2

AVERAGE NUMBER OF  
GIN BRANDS STOCKED  
IN THE ON-TRADE



## 247

NEW GIN BRANDS ENTERING THE  
**ON-TRADE** IN THE **LAST FIVE YEARS**



## 8.9 MILLION

 NUMBER OF BRITISH CONSUMERS WHO NOW DRINK GIN OUT-OF-HOME

## 68.6%

PERCENTAGE OF GIN SALES  
GROWTH ACCOUNTED FOR  
BY PINK GIN



## 5.1 MILLION

NUMBER OF BRITISH CONSUMERS  
WHO NOW DRINK PINK GIN IF IT IS  
AVAILABLE



## 65%

OF GIN DRINKERS LIKE TO  
TRY NEW AND DIFFERENT  
BRANDS OF SPIRITS



## SEVEN BIG GIN TRENDS

### 1. Soaring sales

The gin boom shows no sign of slowing. Britain's on-trade gin sales were worth **£1.42bn** in the 12 months to mid-May 2019—**55.6%** up on the previous 12 months.

### 2. Success for both mainstream and premium brands

From value brands to high price artisan distillers, there is strong demand for all segments of the gin market. Sales of mainstream brands leapt by **80.0%** in the last year, but gins in the premium category saw sales rise too—by **24.9%**. Super-premium brands fared even better, with sales up **46.3%**.

### 3. More than two million new drinkers

As the sales figures suggest, gin has attracted many new drinkers in the last few years. Around **8.9 million** British consumers now drink it out of home—**2.3 million** more than 12 months earlier. This eye-catching increase means that more people now drink gin more often than vodka out-of-home.

### 4. Proliferation of range

With sales increasing so rapidly, bars, pubs and restaurants have scrambled to add more gins to their ranges. They now stock an average of **8.2 brands**—well over twice the average of **3.5** just two years earlier.

### 5. A wave of new brands

Retail operators have no shortage of choice when they select their ranges. No fewer than **247** new gin brands have entered the market in the last five years—accounting for nearly a quarter (**24%**) of all new product development (NPD).

### 6. More people drinking with food

The majority of gin purchases are for drink-led occasions. But one in five (**20.0%**) consumers now drink gin only on food-led visits out—up by four percentage points in a year.

### 7. A search for new flavours

With a thirst among consumers for new drinks, emerging gin producers are pushing at an open door. Two thirds (**65%**) of consumers agree that they enjoy trying new or different spirit brands—nine percentage points higher than the general spirit drinkers' average.





# NINE THINGS TO KNOW ABOUT THE PINK GIN PHENOMENON

## 1. Sales have more than doubled in a year

Sales of pink gin in the year to mid-May 2019 were **£392.0m**—a remarkable eight-fold increase on the previous 12 months. Time will tell if pink gin is a fad or here to stay, but for now its sales growth can't be ignored.

## 2. It's attracting new adopters

In line with sales, the number of British consumers drinking pink gin has more than doubled in the last year—from **2.2 million to 5.1 million**. More than half (**54%**) of them say they don't drink gin generally, which suggests that many have been tempted away from other spirits and cocktails to try pink gin.

## 3. Stock is soaring

By mid-May 2019, more than **61,000** licensed venues were stocking pink gin—a number that has more than tripled in the last 12 months.

## 4. Drinkers are often female and young...

Who is drinking pink gin? CGA's BrandTrack survey reveals that seven in ten (**70%**) consumers are female—a higher proportion than for all gin drinkers in general (**60%**). They tend to be young too: more than two in five (**44%**) are aged 18 to 34, and fewer than one in five (**18%**) is aged 55 or over, which suggests they keep an eye on value when out-of-home.

## 5 ... and they eat and drink out often

Well over half (**58%**) of pink gin consumers eat out at least weekly, and two in five (**43%**) drink out weekly—and both figures are higher than for all gin drinkers. But their monthly spend on eating and drinking out is a couple of pounds less,

## 6. Interest varies widely by region...

Levels of interest in pink gin vary significantly from region to region. Across Britain, pink gin accounts for **27.5%** of all gin sales, but the proportion rises to **40.2%** in Lancashire and **38.0%** in the north east. In London, meanwhile, their share is barely half the national average at **16.1%**. Understanding these regional variations, and flexing ranges accordingly, can help bars, pubs and suppliers maximise their sales of all types of gin.

## 7 ... and by segment

There is similar variation in the sales of pink and flavoured gin by venue type. It has a **35.4%** share of all gin sales in drink-led pubs, against the average for all venues of **27.5%**—and it is even higher at **41.3%** in sports and social clubs. But pink and flavoured gin has less traction in restaurants, where its share is **11.1%**. Sales are little better in hotels (**13.7%**) or nightclubs (**17.7%**).

## 8. New brands are pouring in

The surge of interest in pink and flavoured gins has tempted many new producers. Of the **247** new gin brands arriving in the on-trade in the last five years, 44—or one in six—has been a flavoured variety.



## 9. There's room for premiumisation

Although Gordon's dominates the market, there are clear opportunities to upgrade consumers to new pink gin brands at higher price points. The premium and super-premium categories of the pink and flavoured gin market are in exponential growth—albeit from low starting points.

## ... And a new gin trend to watch

Could Mediterranean gin be the next big thing in this category? It accounts for less than 1% of all gin sales at the moment, but volumes have more than doubled in the last year. One in four gin stockists now sells a Mediterranean variety, and some **34,000** outlets have added one to their lists in the last year.

# Master Data Distillers



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## Want to serve up a perfect gin offer?

CGA's rich drinks research and expert analysts can help you understand more of the most crucial recent trends in the spirits and mixed drinks markets. For suppliers seeking to discover what the market wants, and operators needing insights into consumer behaviour and ranging decisions, CGA is the definitive source of information.

Contact us to learn more about our in-depth reports and bespoke analysis services.

## About the data

All figures are taken from CGA's On Premise Measurement Service for the year to 18 May 2019 and BrandTrack consumer survey (February 2019).

Serving cutting edge insights to the eating and drinking out market. Contact us today to learn more.

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