modern Distillery Age

JULY 17, 2026 | MODERN DISTILLERY AGE VOLUME 17 | NUMBER 7

China Transformed: Growth Opportunities in a Reshaped Market

by The IWSR Drinks Market Analysis, www.theiwsr.com

China's beverage alcohol market is in the midst of a structural reset as the decline of business-occasion drinking clears the way for a new consumer model: younger, more casual and more personal. For brands that understand this shift, meaningful growth opportunities still exist.

For most of the past two decades, the engine driving China's beverage alcohol market has been banqueting and business entertainment. Now that has largely switched off — and is unlikely to return to its previous heights in the foreseeable future — a new dynamic has taken its place characterized by younger LDA consumers, casual social occasions, home consumption and the rapid rise of on-demand delivery.

According to IWSR analysis, 2026 will see a mixed performance in China with early indicators suggesting that some categories in the market might have bottomed out, while categories such as baijiu continue to decline and categories such as imported white spirits and RTDs continue to grow — meaning that, for businesses willing to track the new consumer reality rather than wait for the old one to return, there are genuine windows of opportunity.

This comes after a challenging 2025 for the Chinese market with total beverage alcohol (TBA) volumes falling by -4%, or by -2% excluding national spirits (baijiu). But this masks dynamic growth for some categories, such as white spirits, and signs of promise in whisky, white wine, premium beer and RTDs.

"After another difficult year in 2025, alcohol consumption in China is migrating away from obligation and gifting and towards personal enjoyment, casual social occasions and value," said Shirley Zhu, IWSR China Research Director. "This shift is reshaping who buys, what they buy, where they buy it and how much they are willing to spend. Younger LDA consumers are embracing casual drinking, and they remain largely absent from high-end wine and most premium brown spirits. Meanwhile, older drinkers are being more selective and cautious as business occasions have yet to return. Home consumption has started to grow across spirits and wine alongside the expansion of smaller formats, on-demand delivery (O2O in China) and solo or small-group drinking."

Right place, right time: the new occasion landscape

The shift away from business-oriented gifting and entertainment to personal enjoyment is manifesting itself in many different ways, transforming channels — across the on-premise, off-premise and e-commerce — and creating dynamic growth opportunities such as at-home consumption and increasingly popular miniature formats.

"The on-premise has been going through significant changes, shifting from large, high-energy venues towards smaller bistros, cocktail bars, fusion restaurants and live houses (venues with live music)," noted Zhu. "However, business occasion dining, historically the engine of premium sales, has largely disappeared."

In the off-premise, hypermarkets and supermarkets have declined as convenience stores (CVS) surge driven by demand for smaller formats and

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Breakthru Beverage Group

Breakthru Beverage Group has been named a 2026 U.S. Best Managed Company for the fifth consecutive year, maintaining its Gold status. Sponsored by Deloitte Private and *The Wall Street Journal,* the program recognizes outstanding U.S. private companies.

The 2026 designees are U.S. private companies that have demonstrated excellence in strategic planning and execution and a commitment to their people, as well as maintaining financial performance and governance. This year's class is making investments in digital transformation, including AI, demonstrating the ability to drive sustainable growth and showing resilience during times of volatility.

Breakthru earned the distinction of Gold Honoree, which is awarded to companies that have been recognized as a Best Managed Company for four to six consecutive years. This reflects consistent achievement and a commitment to ongoing development and growth.

"Being recognized once again as a Best Managed Company reflects the positive impact of our people, the strength of our company and the commitment to excellence that guides our operations," said Breakthru CEO Tom Bené. "As we celebrate our 10-year anniversary, this milestone achievement underscores our strong position and the intentional investments we've made in our business and people."

Applicants are evaluated and selected by a panel of independent judges focused on assessing hallmarks of excellence in four key areas: strategy, ability to execute, corporate culture and governance/financial performance. They join a global ecosystem of honorees from more than 46 countries recognized by the Best Managed Companies program.

Breakthru to Acquire Republic National Distributing Company's Interests in Joint Venture Businesses in Kentucky and Indiana

Breakthru Beverage Group has entered into a Letter of Intent to acquire Republic National Distributing Company interests in its joint venture businesses with National Wine & Spirits in Kentucky and Indiana. Upon closing of the transaction, Breakthru Kentucky and Breakthru Indiana will be fully integrated into the Breakthru family, expanding Breakthru's operations to 18 states.

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miniatures. E-commerce — a staple of the Chinese drinks market — continues to grow as at-home consumption gains in significance.

"On-demand delivery is the standout growth driver as consumers embrace instant retail from local stores, as well as from small warehouses and delivery centers," said Zhu. "Popular orders include cold beer, white spirits with mixers and ice or a bottle of wine or whisky."

These changes mean brand owners need to devise channel strategies that take into account China's new market infrastructure and not just its old one.

A clear opportunity: imported white spirits

The increasingly important cocktail bar ecosystem and on-demand delivery are key distribution vehicles for white spirits, which provide the standout near-term growth opportunity in the Chinese market. Beer volumes fell by -2% in 2026

According to IWSR data, gin volumes rose by +20% in China during 2025, and there were double-digit gains for vodka and rum, also, albeit off relatively small bases.

"Gin is expanding across all price bands, while vodka's growth is largely concentrated in standard-and-below, but with broad geographic reach," said Zhu. "Meanwhile, rum's gains are led by white rum. All are benefitting from the increasing influence of cocktail culture, casual and home drinking occasions and the penetration via all channels of lower-tier cities."

Mixed momentum: whisky

The picture for whisky in China is an uneven one, but there are grounds for optimism, including lower-priced Scotch, plus gains for U.S., Irish and Japanese whisky off relatively small bases. In February 2026, import tariffs on whisky were cut from 10% to a provisional rate of 5% giving the category a near-term structural advantage versus other international spirits.

Overall whisky volumes in China were up +3% in 2025, according to IWSR data, with Scotch down -1% and U.S. whiskey up +5%. Japanese whisky and Irish whiskey outperformed the category by some distance, both with double digit increases.

For Scotch, entry-level blends gained ground on the growth of on-demand channels, while longer-aged products (18 years and above) continued to struggle. Value blended Scotch volumes rose +41% in 2025 off a small base, while the larger standard price tier was up +2% — the only two price segments to see increases.

"Scotch volumes were broadly flat last year supported by resilience in standard blended Scotch and entry-level malt Scotch as consumers traded down," said Zhu. "But high-end Scotch is going through an adjustment and will take some time to destock and recover."

Japanese whisky's outperformance was underpinned by genuine historical supply constraints and larger allocations in 2025, while U.S. whiskey's gains — coming despite trade tensions with Beijing — were built on the highball serve.

China's domestic whisky industry is emerging as a notable market development with a reported 50-plus distilleries now operating. While the segment is in its embryonic stages, it is likely to increase broader category awareness driving long-term consumption growth.

Wine looks to white and sparkling

Still wine continues to struggle in China with volumes dropping by another -19% in 2025, according to IWSR data, driven by an identical decline for red wine. White wine, which was down by -14% last year, now has a small but growing (9%) share of the market. Meanwhile, Champagne volumes fell by -15% in 2025, but non-Champagne sparkling wine edged up +1%.

"Red wine is currently suffering a structural decline in China thanks to its connection with gifting and business occasions," said Zhu. "There is no quick fix for this. But white wine is growing its share, with German Riesling and New Zealand Sauvignon Blanc leading the way due to their lighter, more aromatic styles.

"Sparkling wine is gaining traction at hotel brunches and during casual daytime settings, and one of the most significant country-level wine opportunities could be South Africa: import tariffs on South African wine were cut to zero in May 2026."

At the same time, China's own wine producers have been investing heavily in quality production and winery tourism with the latter serving as a useful tool for consumer engagement.

Format and flavor: beer and RTDs

Beer volumes fell by -2% in 2025, but a period of qualified premiumization is continuing with the premium price tier rising by +7%, and the standard-and-below price band declining by -2%.

On-demand cold beer is now a key battleground, and zero-sugar or low-calorie products have an increasingly strong appeal for health-conscious drinkers.

"Some consumers are upgrading their beer consumption from value to standard products," said Zhu. "While the premium segment grew, it was driven by brands offering big promotions."

RTDs outperformed the declining TBA market last year with a flat performance boosted by the category's affordability and breadth of choice. New drinkers are migrating across from beer and wine during casual drinking occasions, and a raft of innovations — from wine-based spritzers to tea-flavored products and the use of regional ingredients — is helping to maintain interest.

The long game: China's future

A number of challenges and opportunities will shape the future of China's beverage alcohol market. These include the moderation trend that has now penetrated baijiu with some products now bottled at 40% ABV and below, rather than the traditional 50% ABV and above.

Meanwhile, the growth of China's domestic whisky industry is both a competitive threat as emerging domestic

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products vie with imported brands and also a potential benefit as it raises awareness levels helping to build the overall category with Chinese consumers.

The wine landscape is gradually shifting with white wine and sparkling wines gaining traction. Opportunities, such as the removal of import tariffs for South African products, could help further progress these developments.

"The government alcohol ban at official functions constitutes a continuing structural headwind for premium spirits in the on-premise, which will persist throughout the first half of 2026," added Zhu. "Another defining challenge in the market is the recruitment of younger LDA consumers who are largely absent from premium brown spirits and wine — hence continuous efforts from Cognac producers to engage with a younger audience."

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U.S. Bartenders' Guild U.S. Cocktail Championship Finals

The United States Bartenders' Guild will hold the inaugural United States Cocktail Championship (USCC) National Finals at the Sazerac House on Canal Street in New Orleans at Tales of The Cocktail on July 21. Sazerac will also function as the exclusive spirits host, with Sazerac brands utilized in all the cocktails created in the USCC Finals in both the flair and classic categories.

"The US Cocktail Championship is a competition for bartenders, by bartenders, with categories and parameters designed to help elevate competitors' skill and prepare them for global competition," said USBG Executive Director Bo Shuff. "We're excited that in this inaugural year that Sazerac, one of our industry's leading family of brands, is supporting the community in a way that makes competitions like the USCC possible."

Blue Note Bourbon Expands to Indiana & Nebraska

B.R. Distilling's Blue Note Bourbon in Tennessee is now distributed in Indiana and Nebraska, bringing its total reach to 26 U.S. states via Vino Indiana and Quench Fine Wines, respectively. B.R. Distilling also selected Heritage Wine & Spirits as its new distributor in Kentucky.

"Choosing the right distribution partners is one of the most important decisions a growing whiskey brand can make," said Dan Jurkovic, National Sales Director, B.R. Distilling Co. "As consumer demand for Blue Note Bourbon increases, we're excited to welcome these three new distribution partners to our network. Their market expertise, strong retail relationships and shared commitment to building premium spirits brands will help us expand our reach while ensuring more consumers have access to our award-winning portfolio. We look forward to working together to accelerate growth in these key markets."

Blue Note's whiskey portfolio is distilled in Kentucky and aged just north of downtown Memphis where the Mississippi and Wolf Rivers collide.

"The long summers filled with infamous Memphis heat and cooler evenings forces the whiskey deep into the oak, creating an unmistakably rich flavor that's bold yet smooth," according to a company statement.

The portfolio in 750-ml bottles includes the flagship Juke Joint (~$35), Toasted (formerly known as Crossroads; ~$45), Uncut (~$50) and Straight Rye Whiskey (~$35).

In recent years, Blue Note has also introduced several special whiskies: Premium Small Batch, Single Barrel Reserve, Special Reserve, 17-year and Honey Rye and Honey Bourbon Cask.

Bacardí Takes Full Ownership of Teeling Irish Whiskey

Bacardí Limited has completed a transaction that makes the family-owned company the sole owner of the Teeling Whiskey Company and the Teeling Irish whiskey brand. Founders Jack and Stephen Teeling will remain a part of the brand, shaping its future and driving growth for the long term as strategic advisors.

This follows the successful relationship the two companies have enjoyed since Bacardí acquired a minority stake in the Dublin-based whiskey company in 2017. Bacardí subsequently increased its stake to become the majority shareholder in 2022.

Since Bacardí first established its relationship with Teeling, the brand has more than doubled in size and significantly grown its global presence. Teeling is now exported to more than 80 markets around the world.

"My brother and I both know that at Bacardí, Teeling is in the best possible hands," said Jack Teeling. "Working closely with the Bacardí team over the last nine years has proven to us that as a family-owned company, Bacardí appreciates the value of everything the Teeling brand stands for, and its commitment to raising the bar for Irish whiskey. Now, as Teeling and the fabulous team in Dublin fully join the Bacardí family, we are excited to see everything they will achieve in the years ahead."

Bacardí Announces Regional Leadership Moves

Bacardí Limited has made several internal moves.

Ignacio "Nacho" Del Valle

Ignacio "Nacho" Del Valle will become Regional President, Latin America, Caribbean. He most recently led Europe, in addition to Latin America & Caribbean. A veteran of Bacardí, his career with the company spans 30 years in commercial and production roles across markets. He began his Bacardí career at the country management level, and over the years he has increased his scope following delivery of targets and leadership.

Vijay Subramaniam

Vijay Subramaniam, currently Regional President for Asia, Middle East and Africa (AMEA) and Global Travel Retail (GTR), moves to the role of Regional President, Europe. He took over the reigns as President of AMEA in 2018 and since then has helped the business achieve new heights across the portfolio of spirit brands in these markets. He has also been responsible for Global Travel Retail where the team maximized strategic brand and commercial opportunities to capture the attention of travelers at some of the top destinations in the world. He began his Bacardí journey in 2013 as Managing Director of India.

Vinay Golikeri

Vinay Golikeri is promoted from Managing Director India and Southeast Asia to Regional President AMEA and Global Travel Retail (GTR). He's spent 20+ years at Bacardí in commercial and marketing roles, and for the past three and a half years has been leading and growing top emerging markets. He previously led GTR and brands at the country level. He joins Del Valle and Subramaniam on the company's Global Leadership Team reporting to CEO Mahesh Madhavan.

Robert Ramer – COO, Kōloa Rum

Kōloa Rum in Hawaii has appointed Robert Ramer as COO, effective May 1, 2026. Ramer succeeds Bob Gunter, who was the company's president and CEO for 18 years. In his new role, Ramer will oversee day-to-day operations and lead the company's continued growth and expansion.

Ramer began his career at Kōloa Rum as an operations intern in 2011 before spending a few years pursuing professional baseball, and he then re-entered the corporate world working in enterprise software sales. He returned to Kōloa in 2019 as a Director of Mainland and E.U. Business Development. Over the past six

Robert Ramer

years, he's risen through the organization with a consistent record of driving growth, strengthening global markets and elevating the brand's commercial success.

His leadership momentum continued with his promotion to Chief Commercial Officer, where he spent the past year and a half defining and executing Kōloa Rum's commercial strategy across domestic and international markets. In this role, he oversaw sales, trade marketing and channel strategy.

Chris Sperling – EVP, Breakthru South Carolina, Breakthru Beverage Group

Breakthru Beverage Group has appointed Chris Sperling as Executive Vice President of South Carolina.

Chris Sperling

This appointment brings Sperling back to South Carolina after spending nearly three years leading Breakthru Wisconsin. He brings nearly two decades of industry

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Chris Sperling – EVP, Breakthru South Carolina, Breakthru Beverage Group

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experience and a proven track record of building successful teams, strengthening partnerships and leading growth.

During his previous tenure in South Carolina, Sperling played a key role in releasing the ASPECT fine wine portfolio and helping strengthen execution across critical business areas. With nearly two decades of experience across Breakthru Beverage Group and Connecticut Distributors, he brings a strategic, service-oriented leadership style and passion for developing teams that deliver consultative support, exceptional execution and strong results for customers and suppliers. His combination of industry expertise, market knowledge and people-focused leadership position him exceptionally well to lead South Carolina's next chapter of growth.

John Oliver – VP of Sales, Caledonia Spirits

Caledonia Spirits in Vermont, maker of Barr Hill Spirits, has appointed John Oliver as Vice President of Sales to lead its national expansion.

John Oliver

Oliver, who spent years championing the Caledonia Spirits portfolio as National Trade Marketing Director at Breakthru Beverage Group, will now direct the sales strategy for the company's full super-premium portfolio: Barr Hill Gin, Barr Hill Vodka, Barr Hill Tom Cat Gin, Phyllis Rye Whiskey and the newly released Barr Hill Picnic RTD cocktails.

Oliver joins Caledonia Spirits with over 20 years of experience in the alcohol beverage industry, predominantly in the distribution tier with Breakthru Beverage Group. During his time at Breakthru, he was an integral part of Trident, the company's emerging spirits strategy team. His role as National Trade Marketing Director on the Trident team helped to identify, incubate and grow various emerging spirit brands such as Barr Hill.

Mission Craft Cocktails Exclusive Supply Agreement with Lofted Custom Spirits

Ahead of National Bourbon Day on June 14, Mission Craft Cocktails announced an exclusive new supply agreement with Lofted Custom Spirits for its bourbon and whiskey-based cocktails. On March 3, Mission Craft Cocktails announced its exclusive supply agreement with Productos Finos de Agave for its all of its tequila-based cocktails.

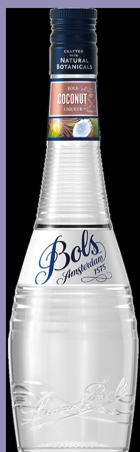
Featuring barrel-aged bourbon whiskey from Green River Distilling in the Mission Craft Cocktails Old Fashioned (40% ABV), the Mission Craft Cocktails Manhattan (32.5% ABV) blends premium rye whiskey distilled and aged by Bardstown Bourbon Co. with semi-sweet vermouth, aromatic bitters, caramel and dried fruits.

"Our exclusive supply agreement leverages the full Lofted Custom Spirits portfolio to give Mission Craft Cocktails a world-class whiskey supply chain, unmatched consistency, innovation capabilities and a premium Kentucky bourbon story," said Mission Craft Cocktails founders Amit Singh and Marcin Malyszko.

"Our aged bourbon and rye have been quite at home in Mission Cocktail's Old Fashioned and Manhattan," said Mark Erwin, CEO of Lofted Spirits. "We're excited to lay down custom barrels as we look toward the long future of this brand and partnership."

Bols Coconut Liqueur

Bols in The Netherlands has extended the 30+item liqueur line with Bols Coconut (21% ABV) in a one-liter bottle exclusively for bars and restaurants in the U.S. alongside the new Go Coco-Nuts campaign. A 750-ml retail release is planned for 2027.



Running from July through December, the program includes point-of-sale materials, bartender advocacy, public relations, trade media, geo-targeted digital advertising, digital rebates and a national on-premise trial initiative designed to increase trial, menu visibility and repeat purchase.

Guests at participating bars and restaurants can receive \$3 back on one Bols Coconut cocktail, or \$5 back on two by scanning a QR code. Geo-targeted digital advertising will direct consumers to participating accounts, while consumers in eligible states can also purchase Bols Coconut through the Lucas Bols online shop, where available.

The release is further supported by bartender education, cocktail inspiration and trade partnerships designed to help operators capitalize on growing demand for tropical cocktails while expanding menu variety with minimal operational complexity.

Chicken Cock Whiskey Old Glory Kentucky Straight Rye

Chicken Cock Whiskey in Kentucky has released Old Glory (50% ABV), which is Chicken Cock Kentucky Straight Rye Whiskey blended with Laird's Apple Brandy, as a limited-time release. This is the first time both brands have collaborated to produce a brandy-whiskey blend, marking a new moment with two historical spirits companies spanning a combined 416-year history.

The blend combines 70% Chicken Cock Kentucky Straight Rye Whiskey with 30% Laird's Apple Brandy, with both components aged a minimum of four years.

A 750-ml bottle sells for about \$65, and only 12,000 bottles are available.

Passoã New Bottle Design

Passoã Passion Fruit Liqueur (20% ABV) from Lucas Bols has redesigned its bottle and its new "Taste the Sunset" summer campaign. The new design features a matte black bottle featuring a signature transparent window that reveals Passoã's orange color — a design created to strengthen shelf and back-bar visibility while reinforcing the brand's tropical identity.

A 750-ml bottle sells for about \$22. A one-liter bottle is available for bars and restaurants.

Jack Daniel's Halo MK1 Tennessee Whiskey

The Jack Daniel Distillery has released Jack Daniel's Halo MK1 Tennessee Whiskey (58.7% ABV), a super-premium collaboration with the McLaren Mastercard Formula 1 Team featuring custom packaging and specially crafted Tennessee whiskey.

Halo MK1 Tennessee Whiskey starts with Jack Daniel's signature grain bill of 80% corn, 8% rye and 12% malted barley. After being "charcoal mellowed" through 10 feet of sugar maple charcoal, the whiskey is aged in handcrafted new American white oak barrels built from staves aged in the open air for a prolonged period.

The 58.7% ABV salutes McLaren Racing founder Bruce McLaren, whose first race car was #58 and an Austin 7 Ulster model.

Beginning with the release's design, the HALO structure of McLaren's Formula 1 race car has been reimagined as the vessel for a bottle of Jack Daniel's Tennessee Whiskey, which features a hand-finished cork and custom medallions. Materials integrated into the packaging, such as alloy metal, micro-suede and carbon fiber print, are inspired by those McLaren uses to construct its Formula 1 cars.

A one-liter bottle sells for about $600.

Old Fourth Spirits Portfolio Rebrand

Old Fourth Distillery (O4D) in Georgia, Atlanta's first legal distillery since Prohibition, has rolled out a comprehensive rebrand for its portfolio of spirits. After 12 years in the market, the brand has a redesigned label, elevated bottle and a refreshed visual identity starting with its signature spirit: O4D Vodka.

Touching every element of the brand's visual identity including glass, label, logo and colors, the rebrand will roll out across O4D's full product portfolio, including Dry Gin and Honey Barrel Aged Gin, with Lawn Dart Lemon Ginger Vodka to follow.

At the heart of the new label is a reimagined version of the "stacks" imagery, a nod to a building of deep significance in Atlanta's history and a symbol that traces back to O4D's original logo.

The Stacks in the Cabbagetown (formerly the Fulton Bag and Cotton Mills) neighborhood of Atlanta is a historically significant 19th-century industrial complex. Founded in 1881 by Jacob Elsas, it was a major Atlanta employer and the heart of a "mill village" for workers. The site is famous for its iconic 71-foot tower, red-brick architecture and 1990s redevelopment, which is prominently displayed on the O4D label.

Tequila Ocho & Ferrand Cognac Barrel Select Añejo

Tequila Ocho, a single-field, single-estate tequila, has released the limited small-batch Tequila Ocho Barrel Select Añejo (44.4% ABV), which aged for a year in seasoned French oak cognac casks from Ferrand Cognac.

A 750-ml bottle sells for about $125.

Breckenridge Rye Whiskey

Breckenridge Distillery, dubbed the World's Highest Distillery, founded in 2008 by Bryan Nolt at 9,600 feet above sea level in Breckenridge, Colorado, has released Rye Whiskey (50% ABV) with a mash bill of 80% rye.

A 750-ml bottle sells for about $35–$40.

Lost Lantern's United States of Bourbon

Lost Lantern in Vermont has released United States of Bourbon, the first-ever blend of bourbon from all 50 states.

The project brings together bourbon from one distillery in every state, with each distillery visited and vetted by Lost Lantern co-founders Nora Ganley-Roper and Adam Polonski. The inaugural United States of Bourbon release includes two recurring expressions, 100 Proof and Cask Strength, alongside the limited 1776 Edition, a one-time-only blend of bourbon from the nation's first 13 states created to commemorate America's 250th anniversary.

* United States of Bourbon 100 Proof: 50% ABV; components range from 2–10 years old; non-chill filtered; no color added; 6,780 bottles ~$80

* United States of Bourbon Cask Strength: 61.45 ABV; components range from 2–10 years old; non-chill filtered; no color added; 3,300 bottles; ~$100

* United States of Bourbon 1776 Edition: 60.7% ABV; components range from 4–8 years old; non-chill filtered; no color added; 1,776 bottles; ~$200.

Barrell Bourbon Batch 038

Barrell Craft Spirits in Kentucky has released Barrell Bourbon Batch 038 (58.48% ABV). It's a blend of straight bourbon whiskeys distilled in Kentucky (12 years old), Indiana (9 and 10 years old), Tennessee (12 and 15 years old) and Maryland (8 years old). The derived mashbill is 79% corn, 17% rye and 4% malted barley.

A 750-ml bottle sells for about $85.

Probitas Green Label Blended Rum

Altamar Brands has released Probitas Green Label Blended Rum (57% ABV), which is a blend of three rums from two of the most iconic rum distilleries in the Caribbean: Foursquare Rum Distillery in Barbados and Hampden Estate in Jamaica. No sugar or neutral/multi-column spirits are added.

A 750-ml bottle sells for about $35.

Glenmorangie Harrison Ford Limited Edition

Actor Harrison Ford partnered with the Glenmorangie distillery in Scotland and Director of Whisky Creation Dr. Bill Lumsden MBE to create Glenmorangie Harrison Ford Limited Edition (46% ABV). The whisky uses classic bourbon cask-aged Glenmorangie with a parcel of rare whisky finished in toasted Portuguese red wine casks.

A 750-ml bottle sells for about $100.

Sagamore High Rye Straight Bourbon Whiskey

Sagamore Whiskey in Maryland has released High Rye Straight Bourbon Whiskey (54% ABV). It features a mash bill of 60% corn, 25% rye and 15% malted rye,

and it aged for six years in new charred American white oak barrels.

A 750-ml bottle sells for about $50.

Tequila Partida High-Proof Reposado Single Barrel Program

Tequila Partida, an additive-free tequila founded in 2005 and part of The Lucas Bols Company, has released the U.S. debut of its High-Proof Reposado Single Barrel Program, a tightly allocated release celebrating 20 years of additive-free tequila while offering leading bars, restaurants and retailers access to rare, fully customizable expressions crafted at the distillery.

The program, which began rolling out in March, is limited to just 20 barrels nationwide with early allocations already secured by top-performing accounts ahead of the official announcement and highlighting strong demand for distinctive, additive-free tequila offerings in the premium segment.

Each barrel yields approximately 240–282 bottles (750-ml) and can be bottled between 45%-55% ABV, allowing partners to tailor their selection to their clientele. Every barrel develops its own unique flavor profile, creating a one-of-a-kind expression that supports premium positioning, storytelling and repeat consumer engagement.

The reposado is aged a minimum of six months in custom-toasted, single-use American oak barrels previously used for bourbon.

Partners can select their exclusive barrel through one of two tailored experiences:

Immersive Tequila Valley Experience

- Walk through agave fields alongside expert jimadors
- Tour the distillery and production facilities
- Taste and select their barrel with José Valdez in the aging room

Select partners are invited to travel to Tequila Valley, Mexico, for a hands-on selection journey walking agave fields alongside jimadors, exploring the distillery and tasting barrels with José Valdez. This transforms the program from a product into a story-driven experience — deepening connection, credibility and long-term engagement.

Guided Sample Selection

Alternatively, accounts can select their barrel through a curated three-sample tasting kit presented by a Lucas Bols sales manager, providing a streamlined yet still highly personalized selection process.

Bottles begin at $49 for a 750-ml size, and each bottle features the account name, barrel number and selection date. As a bonus, each purchase includes a branded barrel head or full aging barrel.

Blue Run USA 250th Anniversary Commemorative Bourbon Packaging

Blue Run Spirits in Kentucky (part of Molson Coors Beverage Company) has released its USA 250th Anniversary Commemorative Packaging, a limited-edition presentation of Blue Run Kentucky Straight High Rye Bourbon Whiskey (55.5% ABV).

The bottle sets Blue Run's modern design into a patriotic frame and features the brand's signature Viceroy butterfly hand-applied in navy with white star accents, creating a distinctive focal point against the amber whiskey inside. A red-and-white striped tax strip adds a tailored closure atop the bottle's cut glass. The commemorative design is elevated by labels printed in 22K gold ink.

A 750-ml bottle sells for about $90.

Modern Distillery Age Tasting Panel

In this week's tasting panel, we have notes on six U.S. whiskies.

All spirits are tasted blind. The panelists know only the style and ABV. The notes are a distillation of the panelists' comments.

The panelists vary with each panel but often include: Dave Schmier (Independent Spirits Expo), Frank Whitman (food & drinks writer), Ernie Adamo (spirits lover), Steve DeFrank (spirits lover), Dave Sokoloff (spirits lover), Phil Simpson (Asbury Park Distilling), Thomas Henry Strenk (drinks writer), Melissa Dowling (Editor of *Cheers*), Kyle Swartz (Managing Editor of *Beverage Dynamics, Cheers* & *StateWays*) and Gregg Glaser (Publisher/Editor of *Modern Distillery Age*).

Michter's Distillery

Louisville, Ky.

Michter's US*1 Barrel Strength Sour Mash Kentucky Whiskey, 55.6%, ~$120

Amber with an aroma that's buttery and pastry-like with tart red fruit, lemon zest, caramel, toffee and smoke. Rich in the taste with cinnamon, nutmeg, dried apples, toffee, caramel and cinnamon. A full body. A long finish with alcohol warmth and tannins.

Michter's Single Barrel Kentucky Straight Rye, 46.4%, ~$200

Amber with an aroma of caramel, toffee, vanilla, citrus fruit, rye, toasted oak and white pepper. In the taste are caramel, red and black fruits, cinnamon, baking spices, rye spice and pepper. A full, viscous body. A long and warming finish with pepper, rye spice, oak, baking spices, dried fruits and chocolate.

Michter's Single Barrel 10 Year Kentucky Straight Bourbon, 47.2%, ~$185

Amber with an aroma of caramel, vanilla, cherries, chocolate and spices. In the taste are butterscotch, caramel, maple, vanilla and cinnamon. A full, silky body. A medium-warm finish with chocolate, dark berries, oak and mint.

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The Jack Daniel Distillery

Lynchburg, Tenn.

All with a mash bill of 80% corn, 12% malted barley & 8% rye; "mellowed" through 10 feet of sugar maple charcoal; aged in new American white oak barrels; 700-ml bottles

14-Year-Old Batch 2, 58.8% ABV, ~$150

Amber with an aroma of maple, brown sugar, baking spices, bananas, molasses and oak. In the taste are cinnamon, maple candy, caramel, vanilla, butterscotch, leather, oak and tobacco. A full body. Finishes with caramel, oak, baking spices and alcohol warmth.

2-Year-Old Batch 4, 53.5% ABV, ~$100

Amber with an aroma of maple syrup, brown sugar, vanilla, graham crackers and oak. In the taste are cinnamon, maple candy, caramel, vanilla, oak and baking spices. A full body. A medium-long finish with brown sugar, caramel, oak, lingering spice, pepper and alcohol warmth.

10-Year-Old Batch 5, 48.5% ABV, ~$90

Amber with an aroma of cooked apple, caramel and oak. In the taste are molasses, chocolate and barrel spices. A full body. A long finish with lingering spice, caramelized sweetness and alcohol warmth.

The *Modern Distillery Age Tasting Panel* meets once or twice a month. Samples are sent by distillers and importers and are tasted blind. Samples can be sent to:
Modern Distillery Age
228 Silvermine Avenue
Norwalk, CT 06850

Total Spirits Categories — Current 52 Weeks Ending June 14, 2026

Total U.S. Multi-Outlet with C-Store (Supermarkets, Drugstores, Gas/C-Stores, Mass Market Retailers, Military Commissaries and Select Club & Dollar Retail Chains. Stats from Circana, a Chicago-based market research fim.

	Dollar Sales Dollar Sales		Dollar Share of Spirits Dollar Share of Spirits		Case Sales Case Sales	
	Current	% Change vs YA	Current	Change vs YA	Current	% Change vs YA
SPIRITS	$14,365,880,749	3.6%	100.00	0.00	109,164,288	8.8%
WHISKEY	$4,147,564,068	-3.4%	28.87	-2.09	17,063,730	-4.3%
PREMIXED COCKTAILS	$2,861,414,621	38.6%	19.92	5.02	36,433,894	42.9%
VODKA	$2,501,738,785	-2.2%	17.41	-1.03	19,144,737	-2.5%
TEQUILA	$1,577,635,023	0.0%	10.98	-0.39	5,257,549	1.4%
CORDIALS	$833,485,296	0.8%	5.80	-0.16	4,182,426	0.3%
SPIRITS SELTZER CENTRIC	$754,720,261	-0.3%	5.25	-0.21	13,163,280	-1.3%
RUM	$580,097,768	-7.1%	4.04	-0.46	4,196,646	-7.1%
BRANDY/COGNAC	$444,222,882	-7.5%	3.09	-0.37	1,482,931	-5.6%
NON-ALCOHOLIC MIXERS	$403,669,795	-1.0%	2.81	-0.13	6,804,142	-4.1%
GIN	$261,332,249	-5.2%	1.82	-0.17	1,434,954	-6.1%

	Case Share of Spirits Case Share of Spirits		Price per Case Price per Case		Price per 750 ml Volume Price per 750 ml Volume	
	Current	Change vs YA	Current	Change vs YA	Current	Change vs YA
SPIRITS	100.00	0.00	$131.60	-$6.55	$10.97	-$0.55
WHISKEY	15.63	-2.14	$243.06	$2.33	$20.26	$0.19
PREMIXED COCKTAILS	33.38	7.98	$78.54	-$2.49	$6.54	-$0.21
VODKA	17.54	-2.03	$130.68	$0.42	$10.89	$0.03
TEQUILA	4.82	-0.35	$300.07	-$4.17	$25.01	-$0.35
CORDIALS	3.83	-0.32	$199.28	$0.92	$16.61	$0.08
SPIRITS SELTZER CENTRIC	12.06	-1.23	$57.34	$0.59	$4.78	$0.05
RUM	3.84	-0.66	$138.23	$0.06	$11.52	$0.00
BRANDY/COGNAC	1.36	-0.21	$299.56	-$5.97	$24.96	-$0.50
NON-ALCOHOLIC MIXERS	6.23	-0.84	$59.33	$1.85	$4.94	$0.15
GIN	1.31	-0.21	$182.12	$1.72	$15.18	$0.14

NABCA May 2026 Control States Results

Control States reported softer spirits and wine performance in May driven in part by fewer selling days across several markets. Spirits sales declined, with 9L volume down -1.7% and $Vol down -4.4%, resulting in a -2.7% price mix. The calendar shift included five fewer selling days overall with four less selling days in Utah and one less selling day each in Alabama, Mississippi, Montana and North Carolina. Michigan reported three additional selling days. On a rolling 12-month basis, spirits remained down -1.1% in 9L volume and -3.1% in $Vol yielding a -2.0% price mix.

Category performance was broadly negative, with cocktails (led by canned RTDs) the only segment posting growth, up +21.8% in 9L volume and +21.7% in $Vol. Tequila remained relatively stable, down just -0.2%, while Scotch continued to contract across nearly all states except Oregon.

In the on-premise channel, spirits sales declined -3.1% in 9L volume and -5.2% in $Vol with most states reporting decreases. Exceptions included Idaho, Michigan and North Carolina. Rolling 12-month results show modest 9L volume growth of +0.4% but continued softness in $Vol down -1.7% resulting in a -2.1% price mix.

On-premise wine trends were similarly challenged with May 9L volume down -9.8% and $Vol declining -6.2%. Despite this, price mix improved +3.7%. Rolling 12-month results for on-premise wine have declined modestly with 9L volume down -4.2% and dollar sales down -2.7% yielding a +1.5% price mix.

Tasting Events & Competitions

GREAT INTERNATIONAL BEER, CIDER, MEAD & SAKE COMPETITION

GIBCMSC

Year #28 – November 7, 2026
Also judged: Spirits RTDs, Hard Seltzer, Hard Kombucha, No-Alcohol Beer
Deadline for entry forms is October 10, 2026
www.gibcc.com
The longest-running and largest such competition on the East Coast.

INDEPENDENT Spirits Expo

ISE

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New York City — June 2026
New Orleans — July 2026
Chicago — September 2026