

# IRISH GIN STRATEGY 2022 - 2026

WORKING HAND IN HAND IN **SUPPORTING IRISH GIN**



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David Boyd-Armstrong

## INTRODUCTION

The period 2018-2022 has, despite the challenges presented by a global pandemic, been very successful for the Irish Gin category. We now have at least 37 distilleries producing Irish Gin, 70 plus brands with a broad variety of pink, sloe and other gin variants from these distilleries and have seen sales reach nearly 340,000 9-litre cases in recent years. Our members employ dozens of people across both urban and rural Ireland producing this much-loved spirit and they export to markets across the globe, making Irish Gin a true Irish success story.

Irish Gin as a premium plus product has been firmly established as a world-leader in terms of quality and authenticity. It is important that we both recognise this and work with other organisations across the world to protect the standards which are recognised across Europe (and elsewhere) as to what Gin is. Our aspirations to develop an "Irish Gin standard" that successfully defines the category has helped create the FSAI's approved Guidelines for the Marketing and Labelling of Irish Gin.

Indeed, this is the first time that official guidance in any form has been produced anywhere for the marketing and labelling of Gin and firmly puts the Irish Gin category at the forefront of the global Gin market in terms of transparency and thus quality. There is however, much

still to be done to protect our category within both existing EU regulations and through the coordination of standards with the UK for Irish Gin producers in Northern Ireland following the UK's departure from the EU. This latter point is particularly important given the growing number of Irish Gin producers and brands in Northern Ireland.

We will continue to support the development of a vibrant domestic Irish market for Gin, both Irish and imported. We must seek to avoid unnecessary over-regulation such as labelling requirements which could deter imports of Gin, or which could impose different regulatory regimes on either side of the Irish border. The Irish Gin industry has shown that it can deliver against ambitious targets. Now is the time for us to come together like never before to build on the extraordinary growth that we have enjoyed since the first Irish Gin strategy was written five years ago.

**David Boyd-Armstrong**  
Chairman  
Drinks Ireland | Spirits' Irish Gin working group

**Bryan Fallon**  
Chairman  
Drinks Ireland | Spirits

**Pat Rigney**  
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Director of Drinks Ireland | Spirits

## OUR VISION

To support and enable the growth of Irish Gin at home and abroad through the promotion of the category, encouraging the development of best practice amongst distillers and educating consumers and the trade about the Irish Gin category and its rich variety.



USA  
CANADA  
IRELAND  
U.K.  
GERMANY

## OUR INDUSTRY'S GROWTH TARGET

To grow the Irish Gin category in both volume and value at a rate which is at least the projected global category growth rate (9%) amounting to 480,000 cases by 2026 and double the projected rate in the premium and above space, while supporting our members in recovering from the impact of COVID-19 on our industry. We will also seek to grow our domestic and overseas share of markets which demonstrate an appetite for premium plus priced gin as this will deliver greater long-term value to our members.

## OUR TARGET MARKETS

Ireland is currently the dominant market for Irish Gin with the category little understood outside of Ireland. Developing understanding of Irish Gin in the home market can have a knock-on consequence which is increased awareness and understanding of, and thus potential to grow it as a category, in overseas markets.

Ireland's experience economy sector is a key to this. The pubs, bars and restaurants of the home market are vital to the continued growth of Irish Gin. In many instances the hospitality sector is the first opportunity the Irish consumer and the overseas visitor has to experience new Irish gin brands. The barman behind the bar or the waiter offering suggestions is key to educating the Irish and overseas consumer and providing profile to our many Irish Gin brands.

The following five markets have been identified as priority export targets for the growth of Irish Gin:

- U.K.
- USA
- Germany
- Canada
- Global Travel Retail

The first four are self-explanatory. Global Travel Retail (GTR) is a significant market in its own right being the second and fourth largest markets for Irish Gin's sister categories of Irish Whiskey and Irish Cream. It is also

worth recalling that the GTR Duty-Free operations in all of Ireland's airports are key platforms to showcase Irish Gin to the Irish and international traveller. GTR has in effect been shut down by the COVID-19 pandemic with knock-on consequences for awareness of the category and Irish Gin sales. With the gradual resumption of international travel and a return, over a period of time, to pre-pandemic levels we believe that GTR will retake its place as one of the key target markets for Irish Gin.

While these priority export markets have been identified, there are other markets which also offer potential for sales of Irish Gin priced at premium and above. Some of these, **Scandinavia, Australia** and possibly **Spain** could, if circumstances converge, easily overtake **Germany / Canada** in the coming years. Other markets that members look to include **Western Europe**, particularly **France; Eastern Europe**; the **Middle East** particularly **Dubai and Abu Dhabi** and **Eurasia** with a focus on **Russia**.

**Asia** and **China** specifically have to be a target for Irish Gin. This is not to say it will be an easy market for Irish Gin as questions remain over the Chinese and Asian consumer's understanding of or appetite for white spirits. However they are target markets for all spirits categories simply because of size and growing stature and value heritage, which Irish distilling has, and innovation which drives much of the Irish Gin category.



## OUR GOALS

To deliver on the vision and growth targets, this Strategy sets out key goals and a number of actions. Drinks Ireland | Spirits and it's Irish and other gin producers will work to coordinate and oversee delivery as well as working to implement agreed-industry initiatives.

## GOAL No.1

TO PROMOTE WORLD-LEADING STANDARDS FOR QUALITY AND AUTHENTICITY

### ACTION 1.1

We will work, as Irish Gin producers and Drinks Ireland to promote and defend the category, in partnership with the Department of Agriculture, Food and the Marine, the Food Safety Authority of Ireland, the Department of Agriculture, Environment and Rural Affairs in Northern Ireland and other agencies on both sides of the border to promote and defend definitions of what can be called and constitutes gin and distilled gin and how other descriptors can be used.

### ACTION 1.2

We will work with statutory agencies in the Republic of Ireland to seek adherence to and enforcement of the strict rules on the marketing and labelling of gin and distilled gin to ensure consumers know what they are buying. And will work to encourage the adoption of similar rules in Northern Ireland.

### ACTION 1.3

We will work globally as Irish Gin producers to promote and defend the Irish Gin category working with, amongst others the Department of Agriculture, Food and the Marine and the Department of Agriculture, Environment and Rural Affairs in Northern Ireland to take action against infringements of existing standards and labelling rules for gin and work with other recognised bodies, such as **The Gin Guild** and the **Wine and Spirits Trade Association (WSTA)** in the UK, **spiritsEUROPE**, **DISCUS**, the **World Spirits Alliance** and others in international markets to promote and defend the agreed standards.



## GOAL No.2

TO SUSTAIN A VIBRANT HOME MARKET FOR GIN

### ACTION 2.1

We will continue to support the development of a vibrant domestic Irish market for gin, both Irish and imported. Our aim has to be to grow the category overall in Ireland whilst also highlighting the local nature of Irish Gin products and the important role they play in the economic viability of the hinterlands that their producers are based in.

### ACTION 2.2

We will actively support the development and expansion of experiences, suitable to each member, throughout the island of Ireland.

### ACTION 2.3

We will work with appropriate media and statutory partners to promote consumer awareness and provide consumer advice on Irish Gin and Food pairing.

### ACTION 2.4

We will work to ensure that Irish Gin takes advantages of the potential that E-commerce has to grow and reach new customer both at home and overseas.



## GOAL No.3

TO PROMOTE IRISH GIN WORLD-WIDE, STARTING IN OUR TARGET MARKETS

### ACTION 3.1

We will work as Irish Gin producers to develop a consumer-focused narrative on Irish Gin which can support international promotional activities. Irish gin in nearly all cases is a premium plus product which requires a bespoke approach.

Though we compete with one another on a day-to-day basis we will endeavour to collaborate as members to promote and grow the category as a whole in specific markets.

### ACTION 3.2

We will seek tailored support from Bord Bia and Invest NI to identify, develop new and expand existing routes-to-market and new market opportunities in the target markets identified in this Strategy.

### ACTION 3.3

We will work with Ministers, Bord Bia and Invest NI to promote Irish Gin in trade missions, promotional campaigns, trade fairs and events in the target markets identified in this Strategy, with reference to practical considerations and constraints which may exist.

### ACTION 3.4

We will work with Ireland's and the UK's Embassy network to ensure that Irish Gin is served and promoted at diplomatic events and at key times of the year.



## GOAL No.4

TO SUPPORT THE VIABILITY OF IRISH GIN DISTILLERIES

### ACTION 4.1

We will work with statutory agencies including Bord Bia, Invest NI, Enterprise Ireland, Local Enterprise Offices, Fáilte Ireland, Tourism NI and Tourism Ireland to ensure the provision of support, including grant funding, for the ongoing development of Irish Gin distilleries in terms of expertise, capacity, innovation, trade and promotion as well as tourism.

### ACTION 4.2

We will work to develop an Irish Gin tourism model to promote gin focused visitor experiences in distilleries where Irish Gin is produced. This will include the development of tourism and educational experiences as promotional tools, a source of revenue to the distilleries and a distinct Irish Gin experience which can stand independently of any other category offering that a distillery might offer. We will seek to share best practice and provide opportunities for members to upskill their team to provide such experiences in a manner that is appropriate to each individual distillery.

### ACTION 4.3

We will continue to lobby to protect gin producers and products on sale in Ireland from excessive excise levels and over-regulation such as labelling requirements which could deter gin imports or impose different regulatory regimes on either side of the Irish border.

Supports for including, amongst others:

- promoting tourism to Irish Gin producing distilleries across the island
- promotions in the home market and overseas
- active participation and involvement in overseas trade missions
- support to develop E-commerce strategies and platforms, and
- market and consumer insights research for the overseas market.



## OUR MEMBERS



**XIN GIN**

GALWAY



**SILKS**

IRISH DRY GIN

MEATH



**KINSALE**

GIN

CORK



**CLONCULLEN**

IRISH GIN

MAYO



**THE EXILES**

IRISH GIN

DUBLIN



**NINTH WAVE**

IRISH GIN

DOWN



**SKELLIG SIX 18**

ARTISAN POT DISTILLED GIN

KERRY



**DINGLE**

ORIGINAL GIN

KERRY



**Irish Distillers**  
Pernod Ricard

**METHOD AND MADNESS**

IRISH MICRO DISTILLED GIN

CORK



**MICIL**

IRISH GIN

SPICED ORANGE GIN

GALWAY



**DRUMSHANBO**

GUNPOWDER IRISH GIN  
IRISH GIN WITH A HINT OF  
SARDINIAN CITRUS

LEITRIM



**BLACKWATER**

NO.5 GIN  
WEXFORD STRAWBERRY GIN  
BARRY'S TEA GIN  
JUNIPER CASK GIN

WATERFORD



**SHORTCROSS**

IRISH GIN  
ROSIE'S GARDEN PINK GIN  
CITRUS DRIZZLE GIN  
BARTENDER SERIES ONE GIN

DOWN



**SLIABH LIAG DISTILLERS**

**AN DÚLAMÁN**

IRISH MARITIME GIN  
SANTA ANA  
ARMADA STRENGTH GIN

DONEGAL



**BLOOD MONKEY**

IRISH CRAFT GIN  
SPICED STORM IRISH GIN

DUBLIN



**MINKE**

IRISH GIN  
SLOE GIN

CORK



**WEAVERS**

DRY GIN  
**ECHLINVILLE**  
IRISH POT STILL GIN  
**FECKIN**  
IRISH GIN

DOWN



**GLENDALOUGH**  
DISTILLERY

**GLENDALOUGH**

WILD BOTANICAL GIN  
ROSE GIN  
SEASONAL GINS  
GINTERESTING SERIES

WICKLOW



**MÍL**

IRISH POT STILL GIN  
**HA'PENNY**  
DUBLIN DRY GIN  
RUBARB GIN

DUBLIN



**AITEAL**

DISTILLED IRISH GIN  
**SLINGSHOT**  
DISTILLED IRISH GIN

LONGFORD



**GRACE O'MALLEY**

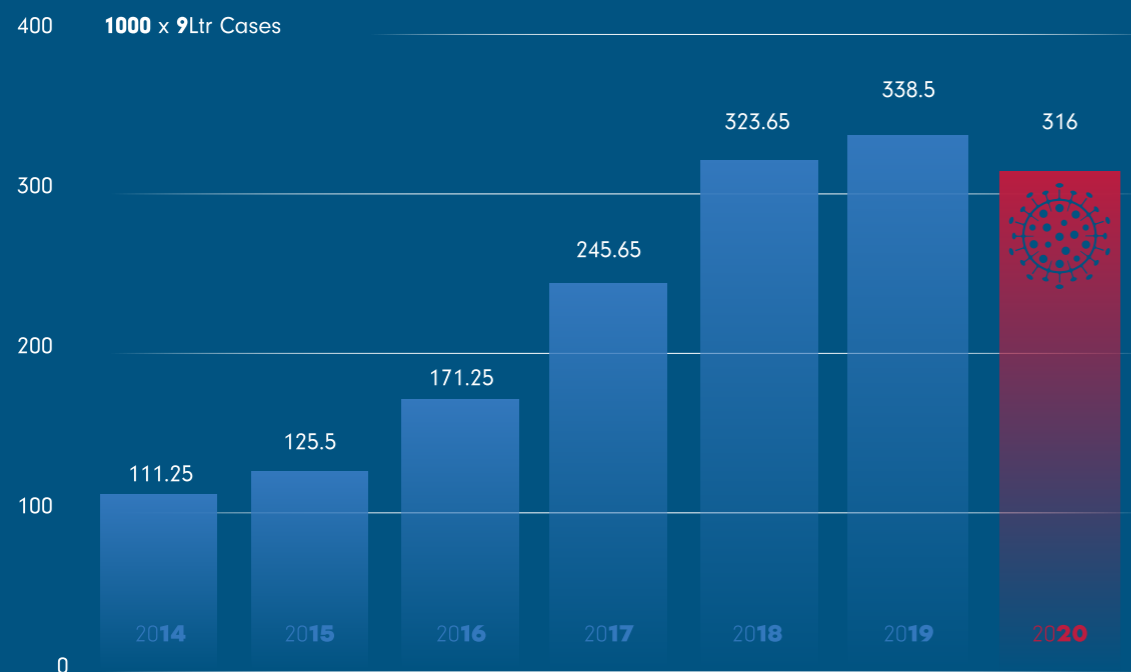
IRISH GIN

MAYO

Cliffs of Moher, Co. Clare



## GIN / IRISH GIN SNAPSHOT



OVERALL GIN SALES (GIN & IRISH GIN)

2014 - 2020  
GROWTH +184%

Source: Drinks Ireland | Spirits Market Report 2020

The gin and Irish Gin category registered its first decline in growth in 2020 since the 'boom' started picking up speed in 2015. While the 'boom' had been slowing in recent years it nonetheless reached a peak in 2019 of 338,500 nine litre cases sold which represented an increase of 204.3% on the 2014 total.

Much of the small decline in 2020 from this peak can be placed at the door of the COVID-19 pandemic, and the restrictions in place in the on-trade, a key consumer channel for Irish Gin, during the year and the complete shutdown of GTR.

This fall in gin and Irish Gin sales in 2020 will not continue in the coming years. We are optimistic for the category and believe it will rebound as economies reopen, the on-trade comes back to life and GTR returns, over a period of time, to pre-pandemic levels.

Forecasts for the next four-year period suggest that the growth in gin and Irish Gin has not ended and while unlikely to be as strong as the 2014-20 period the category will continue to grow and the decline in 2020 will, in our view, come to be seen as a COVID-19 related blip.





**Drinks Ireland | Spirits** exist to promote the interests of the Irish spirits industry in Ireland and internationally. We provide a strong and effective voice at the national, EU and global levels on issues such as taxation, labelling, trade and the ongoing international protection of a number of Ireland's Geographic Indicators (GIs) for spirits.

Our objective is to ensure that optimal international trading conditions exist for the Irish spirits industry. Membership is open to all branded spirits manufacturers and suppliers. The association offers information, representation and advice to its members, and provides a forum for members to network, share best practice and collaborate on issues that impact the industry.

**Drinks Ireland | Spirits** is a part of **Drinks Ireland**.



**Drinks Ireland** is the **Ibec** sector association that represents the interests of alcohol drinks manufacturers, brand owners and suppliers on the island of Ireland. Drinks Ireland is globally unique as it represents all categories of alcohol products in one umbrella organisation through its various trade associations.

Drinks Ireland | Beer  
Drinks Ireland | Cider  
**Drinks Ireland | Spirits**  
Drinks Ireland | Wine  
Irish Whiskey Association







