

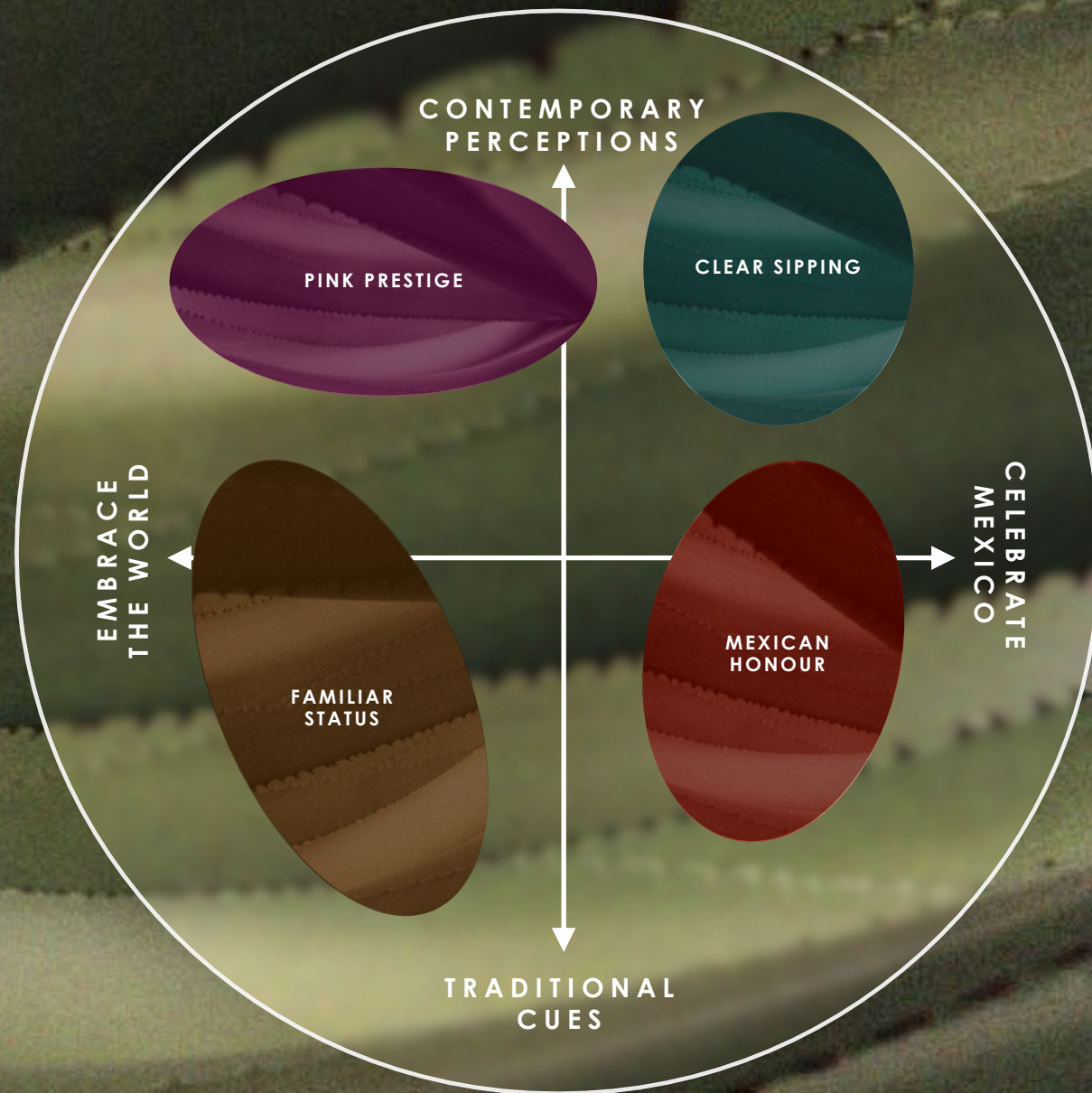
TREND SNAPSHOT

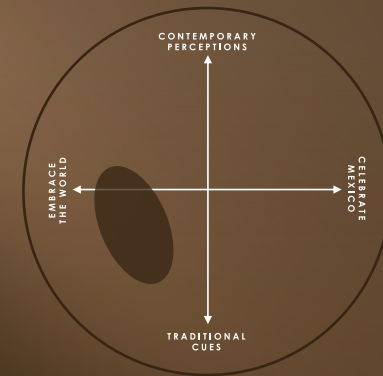
TEQUILA CATEGORY



INTRODUCTION

This deck gives insight into trends in the Tequila category using examples from challenger, mainstream and culturally relevant brands. We have identified 4 key trends and ask what this means for the brands across your Tequila portfolio.





FAMILIAR STATUS

Inspired by the world of viniculture and the opening-up of the gin category, Tequila brands are tapping into new, earlier daytime drinking occasions with borrowed rituals and a blush serve that is recruiting new audiences straight into the category at a premium price-point.

CHALLENGER



STORYWOOD TEQUILA SPEYSIDE

While many Tequilas rest in ex-Whisky barrels, Storywood's latest reposado champions the 7months of aging in ex-Speyside Single Malt casks to borrow status from the world of Scotch and recruit Whisky drinkers to the category.

CONSUMER NEED

- Clear Taste Expectations
- Familiarity in a Crowded Category

MAINSTREAM



DRAGONES MIZUNARA

The first reposado Tequila rested solely in highly sought-after Japanese Mizunara Oak barrels. This rare Tequila from Casa Dragones leverages consumer knowledge of Oak barrels, typically associated with Japanese, Scotch, and Irish Whiskies.

CONSUMER NEED

- Intriguing & Complex Taste
- Rarity and Uniqueness

CULTURAL



TONINO LAMBORGHINI

Launched by supercar brand Lamborghini, this range of luxury Tequilas targets status-seeking drinkers. Leverages cues of quality and flair, and offers synergies of craftsmanship, tradition, and family.

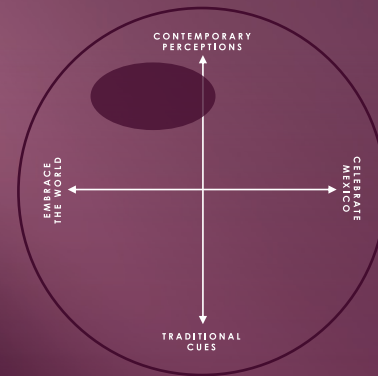
CONSUMER NEED

- Badging Status
- Aspirational Luxury

FAMILIAR STATUS

What adjacent and further-out categories could Tequila brands borrow from to recruit new premium drinkers?

Beyond the barrel, where can familiarity influence Tequila consumers' drinking behaviours, rituals, and expectations?



PINK PRESTIGE

Inspired by the world of viniculture and the opening-up of the gin category, Tequila brands are tapping into new, earlier daytime drinking occasions with borrowed rituals and a blush serve that is recruiting new audiences straight into the category at a premium price-point.

CHALLENGER



CASARIO ROSADO

The first Tequila naturally coloured pink with the 'red spots' from harvested agave piña. A sign of maturing sugars, the red residue is added to the distillation process for a naturally sweeter liquid and beautiful blush tequila.

CONSUMER NEED

- Pioneering Stories
- Naturally Sweet: Nothing Added

MAINSTREAM



NEURITA (FLAVOURED AGAVE SPIRIT)

Tequila infused with Raspberry, Strawberry, and Pomegranate – made for mixing into a sweeter, light margarita cocktail. Without added sugar.

CONSUMER NEED

- Clearly Defined Serve
- Sweeter, Lighter Moments

CULTURAL



CELOSA ROSE

Leveraging the luxury world of Californian wines, Celosa Rose is a 100% organic joven tequila rested in Napa Valley wine barrels for a blush Tequila with hints of red berries and a smooth finish.

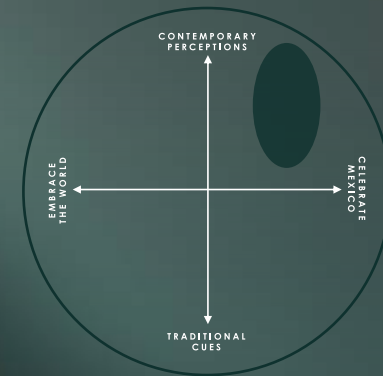
CONSUMER NEED

- Clear Sustainability Credentials
- Luxury Associations

PINK PRESTIGE

How do you avoid just being 'pretty in pink' and labelled as a 'gendered proposition'?

Does the rise of 'Pink-Tequila' mirror the flavour-revolution of the Gin Category? Can Tequila sustain the growth?



CLEAR SIPPING

Dark spirits have traditionally demanded a premium positioning, denoting age and complexity. As consumer demand grows faster than the agave on Mexican estates, brands are looking to premiumise perceptions around their younger, white spirits.

CHALLENGER



CASA LOTOS SOTOL

Though not technically a Tequila, Casa Lotos have just launched their Sotol into the US market. Distilled from wild Sotol agave harvested in Chihuahua, this Blanco spirit is educating drinkers on the complexities of agave spirits to discover and explore.

CONSUMER NEED

- New Discoveries
- Discerning and Complex

MAINSTREAM



DON JULIO ALMA MIEL

A premium joven Tequila expertly blended with oven-roasted agave honey. A slightly sweeter drop, rich in flavours of roasted agave and creamy caramel, made to be sipped and savoured.

CULTURAL



EL RAYO PLATA LIMITED EDITION

Celebrating the magic of their award-winning Blanco ('Plata') Tequila, El Rayo have launched their first Limited Edition bottle featuring bespoke contemporary Mexican artwork from Alejandra Garcia y Gutierrez.

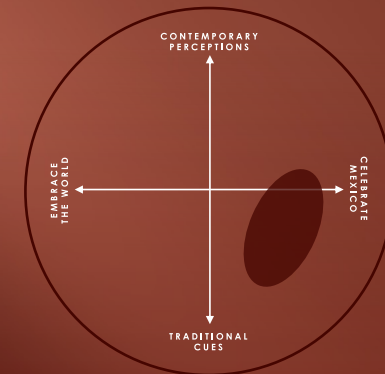
CONSUMER NEED

- Contemporary Premiumisation
- Authentic Collaborations

CLEAR SIPPING

How do you educate consumers that the darker the Tequila, the further from the complexities of agave that taste has become?

How can focusing innovation on; the agave; the barrel; the water; the yeast; be elevated to build premium credentials with younger liquids?



MEXICAN HONOUR

As the Tequila as grown, consumers have become increasingly aware of the sustainability issues of the category. Brands are responding by placing an increasing emphasis on their role in the communities they work with, telling new stories of Mexican heritage and sustainability.

CHALLENGER



TROMBA

A range of premium Tequilas that places an emphasis on their replanting initiative, which focuses on endangered agave species, native to Mexico.

CONSUMER NEED

- Giving Back
- Proactive Sustainability

MAINSTREAM



MAESTRO DOBEL ATELIER TRAJINERAS ED.

The second annual release of limited editions, celebrating the skilled artisans of Oaxaca with hand painted bottles in the style of 'alebrijes': small, wooden figurines depicting fantastical Mexican creatures.

CONSUMER NEED

- Celebrating Provenance
- Compelling Stories

CULTURAL



CASA DEL SOL

Spearheaded by Mexican-American Eva Longoria, Casa Del Sol all-female brand promotes the protection and preservation of traditional Mexican culture, with a specific focus on the role of women in local communities.

CONSUMER NEED

- Credible Celebrity Connection
- Social Cause & Purpose

MEXICAN HONOUR

All Tequila brands have a credible link to Mexico; what are the unexplored, authentic, and newly compelling angles?

How can celebrating Mexican heritage go beyond pack design, and become a part of the liquid story?



THANK YOU

TO ORGANIZE A SESSION WITH OUR STRATEGISTS TO FIND
THE 'WAY-IN' FOR YOUR BRAND, PLEASE CONTACT:

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