

Insights Report

Unpacking
key category
trends

Hear from
our Heads of
Category

Highlighting the jobs
to be done in F26

Insights powered by Quantum





Insights Report

This is a pivotal moment for our business. After taking a hard look at the key macro trends shaping our categories, we've zeroed in on the critical growth drivers - or as we call them, the **Jobs to be Done** - that we believe will set Liquor up for long-term success in Australia.

We know we can't tackle these challenges and opportunities alone. That's why we recently wrapped up a series of **Category Deep Dive** sessions with our supplier partners, digging into these category jobs and surfacing big opportunities for how we can better meet the changing needs of consumers together. The feedback we received was overwhelmingly positive, and we want to thank everyone who leaned in and contributed.

Across the board, we're seeing major shifts: a rising preference for mindful drinking and lighter, more sessionable styles, combined with cost-of-living pressures that are reshaping value perceptions and purchase behaviors. It's not just about *what* people are drinking, it's about *how, when, and why* they're choosing it, and that's what's ultimately shaping category performance.



James Marinelli,
Head of Category Strategy and Insights

Each category comes with its own challenges and opportunities. **Premix** is booming but needs to keep pace with generational change and constant innovation. **Spirits** faces the tough task of staying relevant with younger drinkers while managing the decline in traditional segments. **Beer & Cider** must shift perceptions, especially with younger audiences, while tapping into mindful, premium, lighter styles. And **Wine** needs to rethink its offer for a new generation of drinkers. There's no one-size-fits-all as each space requires tailored strategies and a sharp understanding of what's really driving consumer decisions.

We believe the strategies we've laid out provide a clear roadmap for where the liquor industry is heading next. Whether it's reimagining the path to purchase, innovating with new flavors, embracing digital, or doubling down on customer education, these insights challenge all of us to get fit for the future.

Happy reading!

- James

Category Deep Dives

38 Total Liquor

46 Beer & Cider

60 Spirits

76 Premix

92 Wine



Deep Dive: Total Liquor

Discover the latest trends, strategic opportunities, and evolving customer behaviours shaping the industry as we deep dive into the nuances of our category.



The Liquor industry is undergoing significant transformation, driven by shifting customer behaviours, emerging trends, and evolving drinking occasions across all categories. As customers become more intentional and discerning in their decision-making, the landscape is being reshaped by preferences for mindful consumption, lighter styles, and value-driven options. These changes are influencing not only what customers drink but also how, where, and why they choose to enjoy their beverages, presenting exciting opportunities for innovation and growth within the industry.



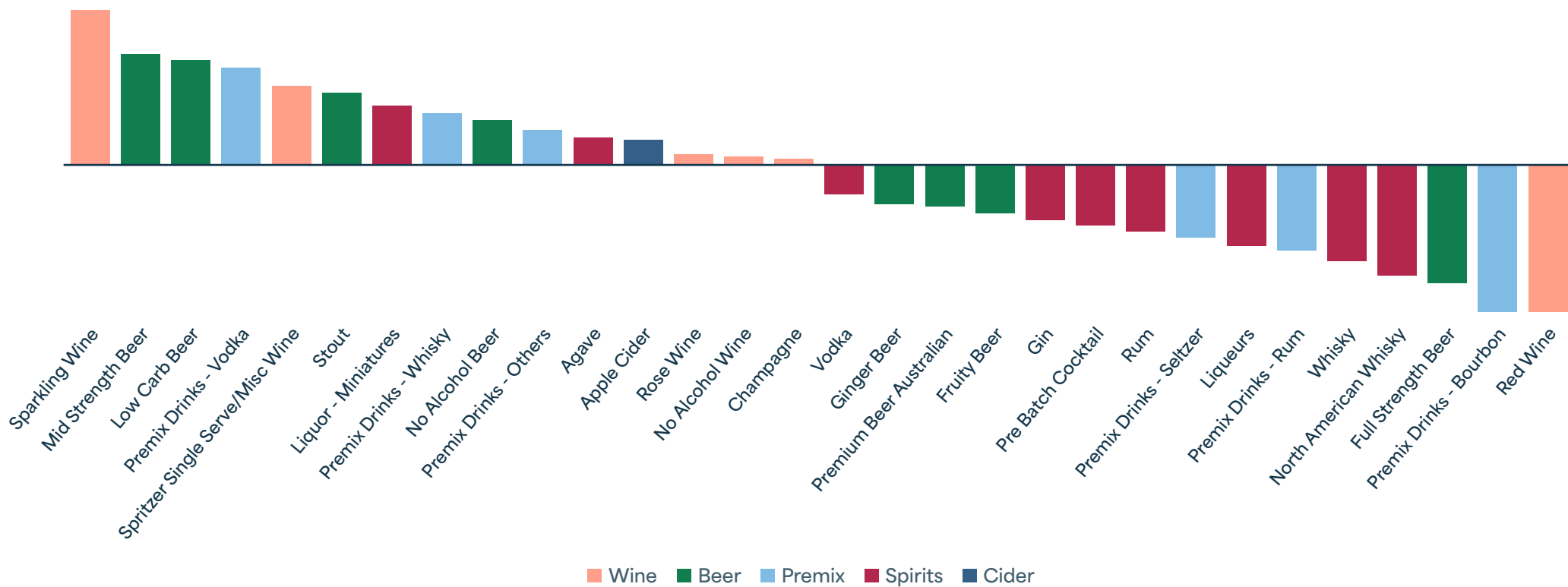
What's currently trending with customers

Customer Penetration Growth

Last 13 Weeks

Top Growing

Top Declining





Trend #1 **Meaningful connections**

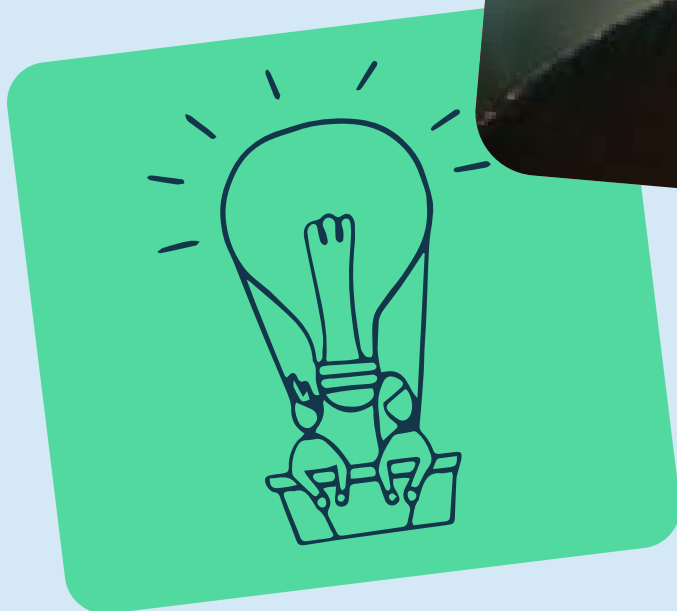
A shift to small, social catch-ups from everyday, at-home occasions.

The trend towards meaningful connections is continuing to reshape the Liquor landscape as customers become more intentional about their drinking occasions. We're seeing a decline in relaxed, at-home occasions, such as unwinding alone or with a partner, while smaller, informal social catch-ups are on the rise.

These social occasions tend to have higher serves per session, but their overall frequency is lower than that of everyday, at-home occasions resulting in net volume decline across the Liquor category.

For suppliers, this structural change in the occasion landscape presents significant opportunities. Products that cater to these smaller, social gatherings such as versatile, crowd-pleasing options that can be shared are likely to resonate strongly. There's also scope to develop premium offerings that enhance the quality of these experiences and align with customers' focus on connection and choicefulness.





Trend #2: Lighter styles

Across all categories, lighter, more sessionable options are driving growth.

The evolving occasion landscape is directly influencing the types of products customers seek, with lighter, sessionable styles taking the lead. These styles are ideal for social, up-tempo gatherings, where customers prefer beverages that are sessionable, refreshing, and widely appealing.

Lighter styles are flourishing across categories:

Beer

Sub-categories like low-carb, mid-strength, and lighter-flavoured Beers (e.g., Lagers and Hazy Pale Ales) are outpacing heavier, more full-flavoured options.

Wine

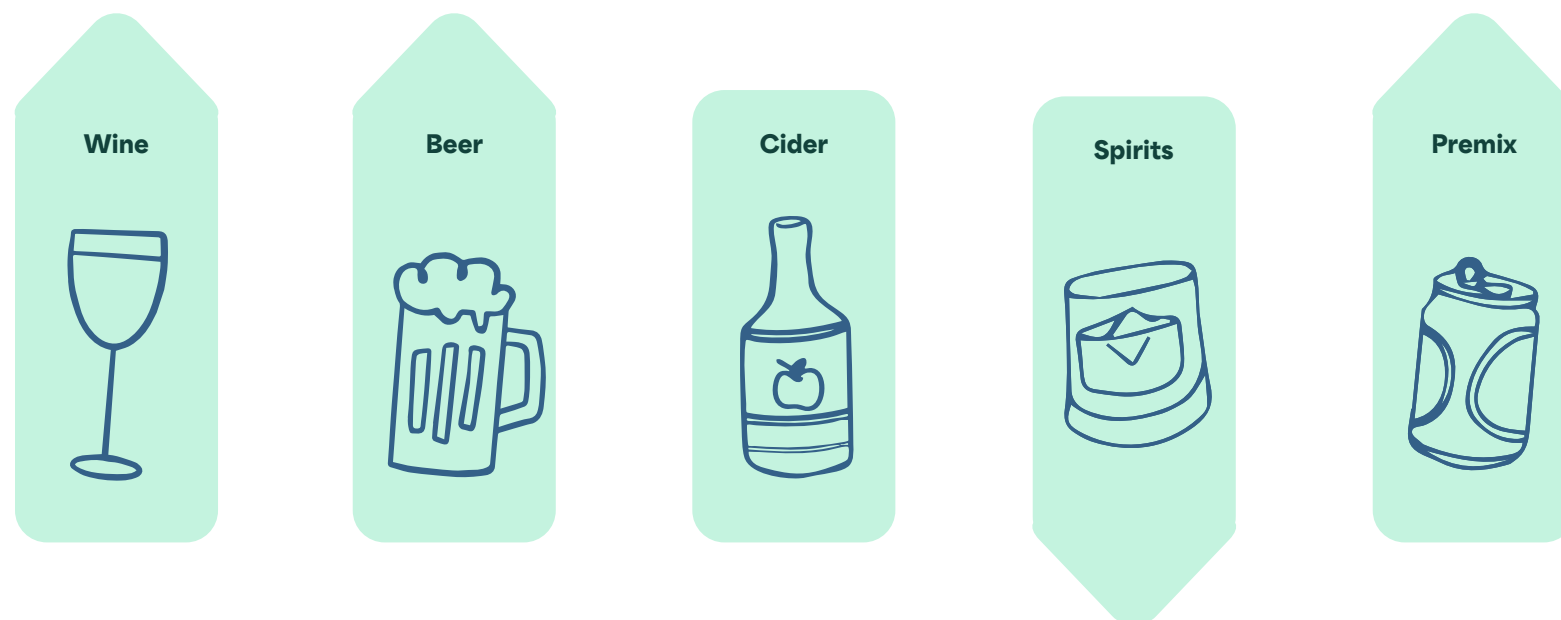
Sparkling Wines, Rosé, and single-serve Spritzers are performing strongly, reflecting the shift towards approachable, versatile choices.

Premix

Vodka-based Premix drinks and flavoured options are leading growth, particularly those that are sessionable and flavour-forward.

Category Performance

Growth by Category



Growing Category Share

- Sparkling Wine
- Spritzer Single Serve/Misc
- Cask Wine
- Rose Wine
- Low Carb Beer
- Mid Strength Beer
- Ginger Beer
- Stout
- Cider - Apple
- Agave
- Vodka
- Liquor - Miniatures
- Aperitifs & Digestifs
- Premix Vodka
- Premix Whisky

Declining Category Share







- Red Wine
- Champagne
- White Wine
- Full Strength Beer
- Premium Beer International
- Craft Beer Australian
- Cider - Flavoured
- Cider - Pear
- Gin
- Liqueurs
- Rum
- Pre Batch Cocktail
- Premix Bourbon
- Premix Seltzer
- Premix Gin
- Premix Rum

This trend is not limited to younger generational cohorts; it is a broader macro preference across all age groups. Customers are gravitating towards lighter styles for their versatility and alignment with mindful consumption behaviours.

Suppliers have the opportunity to expand premium lighter styles, catering to customers who are looking for balance between elevated experiences and sessionable options.

Changing Generational Preferences

Growth by Generation

<p>Gen Z</p> 	<p>▲ Growing Category Share</p> <ul style="list-style-type: none"> • Premix Vodka • Mid Strength Beer • Sparkling Wine • Low Carb Beer 	<p>▼ Declining Category Share</p> <ul style="list-style-type: none"> • Premix Bourbon • Premix Seltzer • Vodka • Gin
<p>Younger Millennials</p> 	<p>▲ Growing Category Share</p> <ul style="list-style-type: none"> • Premix Vodka • Mid Strength Beer • Sparkling Wine • Low Carb Beer 	<p>▼ Declining Category Share</p> <ul style="list-style-type: none"> • Premix Seltzer • Gin • Premix Bourbon • Full Strength Beer
<p>Older Millennials</p> 	<p>▲ Growing Category Share</p> <ul style="list-style-type: none"> • Premix Vodka • Mid Strength Beer • Low Carb Beer • Agave 	<p>▼ Declining Category Share</p> <ul style="list-style-type: none"> • Premium Beer International • Whisky • Premix Bourbon • Gin
<p>Gen X</p> 	<p>▲ Growing Category Share</p> <ul style="list-style-type: none"> • Premix Vodka • Low Carb Beer • Mid Strength Beer • Sparkling Wine 	<p>▼ Declining Category Share</p> <ul style="list-style-type: none"> • Full Strength Beer • Premium Beer International • Gin • Premix Bourbon
<p>Baby Boomers</p> 	<p>▲ Growing Category Share</p> <ul style="list-style-type: none"> • Low Carb Beer • Premix Vodka • Mid Strength Beer • White Wine 	<p>▼ Declining Category Share</p> <ul style="list-style-type: none"> • Full Strength Beer • Premium Beer International • Gin • Premix Bourbon
<p>Traditionalists</p> 	<p>▲ Growing Category Share</p> <ul style="list-style-type: none"> • White Wine • Rose Wine • Fortified Wines • No Alcohol Beer 	<p>▼ Declining Category Share</p> <ul style="list-style-type: none"> • Full Strength Beer • Mid Strength Beer • Cask Wine • Premium Beer International

Trend #3 Value seeking

Shifts into economical pack sizes and Ultra-Convenience.

Cost of living pressures are driving value-seeking behaviours across the Liquor market, with customers adapting their purchasing habits to maintain access to preferred products while managing budgets.

Suppliers should consider balancing affordability with customer expectations around quality and convenience. Products that help customers weigh up value such as trusted brands in larger formats at lower cost per litre or premixed solutions that save time, will resonate strongly with budget-conscious customers.

Value-based opportunities:

- **Economical pack sizes:** Larger formats and multipacks are gaining popularity, with customers seeking cost-per-litre savings.
- **Downgrades in format:** Customers are shifting from slabs to smaller pack sizes (e.g., four-packs and ten-packs) to hit absolute price points.
- **Ultra-Convenience:** Ready-to-drink formats and compact packaging are becoming more desirable, as convenience factors into customers' value equations.

Fastest-growing sub-categories

Non-Alcoholic Spirits & Beers

Low-Carb & Mid-Strength Beers

Premium Sparkling Wine

Ready-to-Drink Cocktails

Value Pack Sizes (larger formats, multipacks)

Vodka Premix

Ginger Beer

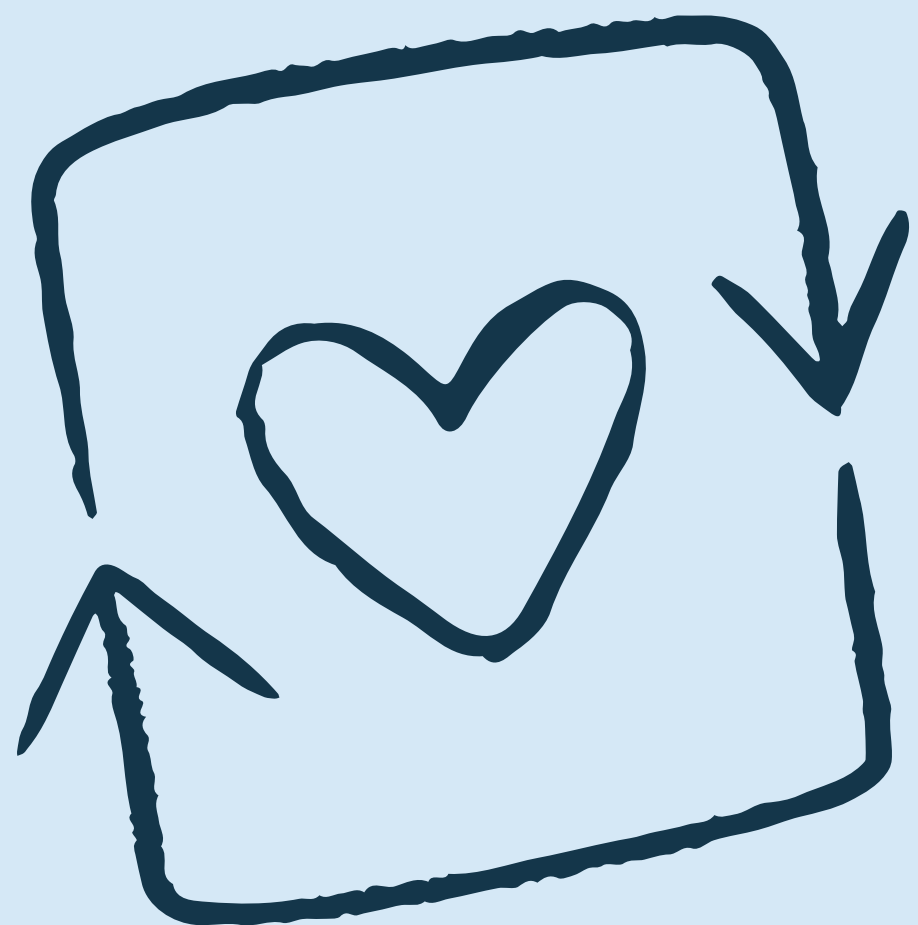
Sales growth contribution by flavour

Tropical Fruits (mango, passionfruit, pineapple)

Citrus Blends (lime, lemon, yuzu)

Ginger & Spice

Botanical & Herbal Notes





Deep Dive: Beer & Cider

The world of Beer and Cider is bubbling with change as customer tastes evolve, lifestyles shift, and more people lean into mindful drinking and premium, exciting new options. At this year's Beer

and Cider Deep Dive livestream, we tapped into the latest trends shaking up the scene. The takeaway? There's never been a better time to team up and create something incredible.





Trend #1 Mindful choices

Low-carb, mid-strength, and zero%* alcohol options are here to stay.

Mindful choices are no longer just a trend – they’re becoming a staple of how Aussies drink, with full strength Beer declining since 2020.

Low-carb beers are leading the charge, experiencing impressive growth and these brews are certainly hitting the sweet spot for customers.

Mid-strength Beer continues to expand beyond its Queensland stronghold, gaining popularity nationwide. With an approachable flavour profile and sessionability, mid-strength options are proving to be a go-to for social occasions.

Customers are also increasingly keeping a six-pack of zero*-alcohol Beer on hand for whenever the moment calls for it. This growing demand highlights a significant shift towards balance and flexibility in drinking occasions.

Interestingly, it’s not just the younger crowd driving this shift. Gen X is jumping on board too, mixing in mindful options with their regular Beer habits.

Looking ahead, it’s all about expanding the range of lower alc options and giving the Light Beer segment a bit of a modern makeover to keep pace with what customers are seeking.

Low-carb Beer

continues to appeal to customers focused on mindful consumption.

Mid-strength Beer

seen growth in popularity in Australia.

Zero%* alcohol Beer

remains a smaller but steadily growing segment.

*Contains not more than 0.05% ALC/VOL



Trend #2 Premium lighter styles

Sessionable Beers meet premiumisation

Sessionable Beers are stepping into the premium spotlight, offering a fresh opportunity to bring Gen Z males into the Craft Beer fold. To do this, it's all about delivering the right balance - combining the stylish craft aesthetics they love with approachable flavours, reasonable pricing, and smart placement.

Premium, more sessionable Beers are proving to be a hit, especially those supported by standout brewing expertise. These refreshing options are perfectly positioned to appeal to customers looking for that sweet spot between quality and value.

For suppliers, it's the ideal moment to lean into this trend by creating high-quality Beers that encourage customers to trade up by offering the looks with more accessible, sessionable liquids.

The shift is clear: heavier Craft Beer styles like Wheat Beers, IPAs, and Amber Ales are on the decline, signalling an appetite for more sessionable alternatives. By introducing lighter, smoother styles, there's a real opportunity to deliver sessionable liquids and brands that inspire customers to trade up - especially among Gen Z males. With refreshing, approachable brews, we can help this group find their way into more premium offers, creating an onramp to Craft Beer.

Lighter and sessionable Craft styles are in growth such as Hazy, Summer/Session Ale and XPAs.

Japanese Lager is now the **#2 International Beer** style, behind Mexican. This is driven by the approachable and dry flavour profile and brands that appeal to younger consumers.

Maintain momentum of **Premium Lighter Styles** and give shoppers a reason to trade up on sessionable lower bitterness styles.

Trend #3 Ginger and Flavoured Beers

Continue momentum with next wave of flavour exploration.

Flavoured beers, with Ginger Beer leading the charge, have gone from being a quirky niche to a crowd favourite - and it's the younger drinkers, like Gen Z and younger Millennials, who are driving this boom. Why? Consumers love the sociability of Beer but the taste (bitterness) remains the number one barrier, particularly for females and younger consumers. Ginger Beer is the perfect alternative.

“Fewer but bigger innovation launches, backed by eye-catching marketing campaigns, can go a long way.”

The opportunities here are huge, especially for suppliers ready to get creative. Think bold, exciting new flavours or even low sugar or higher alcohol by volume (ABV) options that stand out from the pack.

Gender-neutral branding is also a big win, helping these products appeal to a broad, diverse audience. And rather than flooding the market with a tonne of ideas, fewer but bigger innovation launches, backed by eye-catching marketing campaigns, can go a long way.

By pushing the boundaries in flavour exploration and doubling down on innovation, Ginger and Flavoured Beers are perfectly placed to keep their momentum rolling and drive growth across the Category.

Ginger Beer is the second **fastest growing segment** over the last year.

Growth coming through from range differentiation across **low sugar and higher ABV.**

Gen Z over indexes in customer penetration of Flavoured Beer.

Beer and Cider Jobs to be done for F26+

These detailed strategies aim to address specific customer needs and trends within the Category, ensuring that we continue to lead in market innovation, customer engagement, and satisfaction.



Growth Frontiers

Mindful Choices

Better align to customers' lifestyle goals.

Accelerate Ginger & Flavoured

Continue momentum with next wave of flavour exploration & drive trial with underserved audiences.

Craft Connection

On board Gen Z males into Craft faster by delivering Craft aesthetics with sessionable styles, accessible prices & improve local range relevance.

Cider Glow Up

Drive Cider reappraisal with MilZ through new 'cool' brand entrants & pushing the boundaries in flavour & benefit.



Maintain Momentum

Exclusives

Drive retailer differentiation and loyalty with exclusive brands, activations and first to markets.

Premium Lighter Styles

Give shoppers a reason to trade up on sessionable lower bitterness styles.

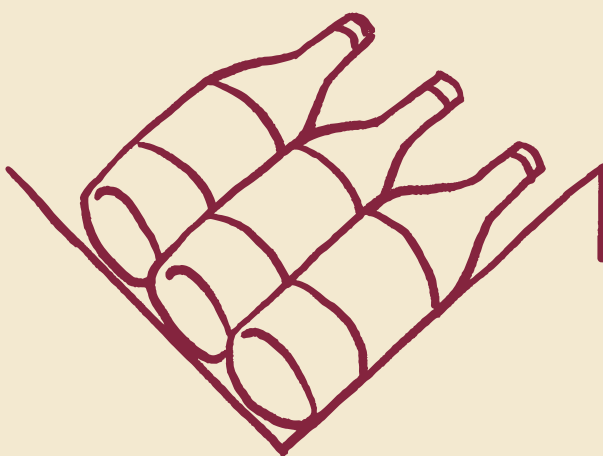
Longer Horizon

Invite MilZ Females

Recruit MilZ females by increasing suitability of Beer by better meeting taste preferences & aspirations.

Ease of Shop

Optimise space & reduce friction to purchase, ensuring we deliver the right range in the right stores.



Let's shine a spotlight on a few of these:

1. Craft connection

Objective: To maintain Craft's premiumisation of the Beer Category while driving growth through lighter styles, local brands, and customer education.

- **Lighter styles in Craft to target Gen Z:** Focus on sub-categories like XPA, Session Ales, and Summer Ales, which are winning with consumers due to their approachable and sessionable qualities.
- **Local Craft brands:** Highlight hyperlocal brands that perform strongly within their communities and ensure the right range is in the right stores to meet customer demand.
- **Customer education:** Support emerging trends and the local Craft community through targeted messaging, events, and in-store activations that educate customers on Craft Beer's unique appeal.

2. Mindful choices

Objective: Amplify the mindful Beer choices trend by expanding the low-carb, mid-strength, and zero*-alcohol segments to meet evolving customer lifestyles and values.

- **Lifestyle alignment:** Cater to customers with products that balance intentional awareness, such as low-carb Beers, light Beers as well as mid-strength options, whilst continuing to strengthen zero* alc offerings.
- **Growth focus:** Support the increasing relevance of mindful Beer choices through NPD, marketing campaigns, and in-store activations that meet flavour profile needs and maintain momentum in this space.
- **Year-round relevance:** Build on insights showing that mindful options like zero*-alcohol Beers are becoming part of regular lifestyle choices, even outside peak months.

*Contains not more than 0.05% ALC/VOL

3. Accelerate Ginger and Flavoured Beer

Objective: Stay ahead in the Ginger and Flavoured Beer segments by driving differentiation and innovation to attract younger drinkers and expand the Category.

- **Bold flavours:** Explore exciting new flavours and functional attributes like low sugar and higher ABV to keep customers engaged.
- **Gender-neutral branding:** Introduce lighter and refreshing styles with branding that resonates across demographics, addressing barriers for non-traditional Beer drinkers.
- **Marketing momentum:** Boost marketing campaigns behind Ginger and Flavoured Beer to sustain growth and ensure fewer but bigger launches that create impact.

4. Premium lighter styles

Objective: Drive premiumisation within lighter Beer styles to meet customer demand for refreshing, less bitter options during key seasonal and celebratory occasions.

- **Premium options:** Expand lighter Beer offerings from brands with strong brewing credentials, encouraging customers to trade up for special events or seasonal moments.
- **Evolving tastes:** Address changing customer preferences by promoting premium lighter styles as a refreshing, sessionable alternative with reduced bitterness.
- **Innovation opportunities:** Collaborate to deliver high-quality products that align with evolving consumer expectations for lighter, premium Beer styles.
- **Invite MilZ females:** Recruit MilZ females by increasing suitability of Beer by better meeting taste preferences and aspirations.

5. Cider glow up

Objective: Reinvigorate the Cider sub-category by introducing modern premium brands and flavours for Millennials and Gen Z.

- **Emerging trends:** Focus on higher ABV, bold flavours, and low sugar options to reignite excitement in Cider while continuing to support traditional brands for older generations.
- **Cost of living advantage:** Leverage Cider's better value per litre compared to other categories to attract budget-conscious shoppers.
- **Innovative branding:** Develop compelling premium brands with fresh, modern imagery to rebuild Cider's relevance among younger drinkers.

6. Ease of shop

Objective: Simplify the Beer category navigation to address barriers for Gen Z and improve customer confidence across all segments.

- **Getting it right:** Focus on ensuring the Beer category is optimised for the right stores, offering the *right* product range, and aligning with the right seasonal opportunities. This includes tailoring the range to meet local preferences and needs while capitalising on peak demand periods. We also want to make sure macro space is optimised to support growing categories.
- **Omnichannel alignment:** Align marketing messaging, point of sale materials and online navigation to create seamless experiences for the in-store & Ultra Convenience customer.
- **Customer insight:** Use data-driven insights to refine category range, to ensure the right stores are optimised for the right time of year. Aligning merchandising flow to better service our customers' shopping behaviours.

“At the heart of every winning strategy is a solid foundation.”



“But it’s not just about ticking boxes - it’s the executional excellence that really makes the difference.”



Gill Webb,
Head of Beer and Cider

A Note from Gill Webb, Head of Beer and Cider

Back to basics: Why the fundamentals matter

At the heart of every winning strategy is a solid foundation, and for the Beer and Cider categories, it's all about nailing the fundamentals. Having the right product, at the right price, in the right store might sound simple, but it's what sets great strategies apart from the rest. These fundamentals are the secret sauce that keeps customers coming back for more while driving growth for our supplier partners.

But it's not just about ticking boxes - it's the executional excellence that really makes the difference. Think optimised store layouts that make it easier for customers to find their favourites (or discover something new), eye-catching

marketing activations that grab attention and spark excitement, and clever promotional strategies that offer real value while encouraging trade-up opportunities.

By focusing on these essentials and pairing them with innovative thinking, we can continue delivering what customers want while helping suppliers thrive. Whether it's bold new flavours, premium lighter styles, or mindful options, getting the fundamentals right ensures that everything we do counts. It's all about combining consistency with creativity to build a Beer and Cider category that's as dynamic and exciting as the customers it serves.

The Jobs to Be Done reflect our commitment to driving growth in the category while meeting evolving customer needs. By focusing on mindful choices, lighter styles, local Craft, and innovative flavours, we can ensure Beer & Cider remains relevant across all occasions and demographics.

There's work for us to do, and there's work for you to do - but together, through collaboration and a shared focus on customer insights, we can create compelling products and memorable experiences.

Together, let's continue to innovate, push boundaries, and elevate the Category to new heights.

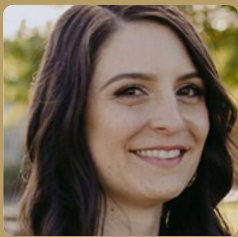
Cheers to an exciting year ahead seeing all of that come to life in the Beer and Cider category!

Meet the team



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Gill Webb

Retail Brand Pricing and Promotions



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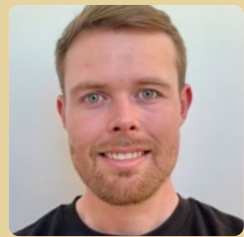
Endeavour Range and Innovation



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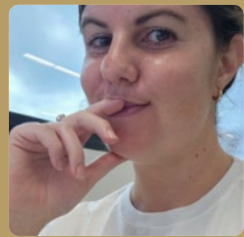
Finance Business Partner
Tony Hicks



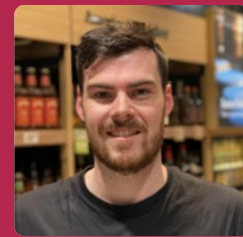
ACM Pinnacle
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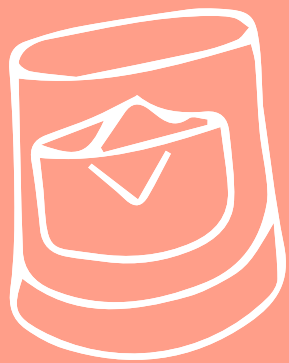


Category Insights Specialist
Lachy Saines

Deep Dive: Spirits

The Spirits category continues to evolve in response to changing customer occasions, broader market trends, and economic pressures. Explore the insights underpinning growth opportunities and strategies for sustainable success in this dynamic space.





Trend #1 Lighter Styles

Sessionable, lighter options are driving growth across all Spirits sub-categories.

Customer preferences for lighter styles continue to shape sales across all categories. Products that are lighter in flavour and carbs are outperforming heavier, bolder alternatives, particularly in social settings.

Lighter styles are not only recruiting new customers into the Spirits category but also retaining existing ones by staying relevant to evolving occasion needs.



Agave: Tequila and Mezcal continue to lead growth, driven by customer interest in cocktail and flavour exploration.

Vodka: A staple across all demographics, Vodka's versatility and neutrality position it as a reliable choice for both casual and premium occasions.

Limoncello and Aperitifs: Showing strong growth, particularly among younger generations, as customers embrace flavour-forward, sessionable options in Beer and Premix.

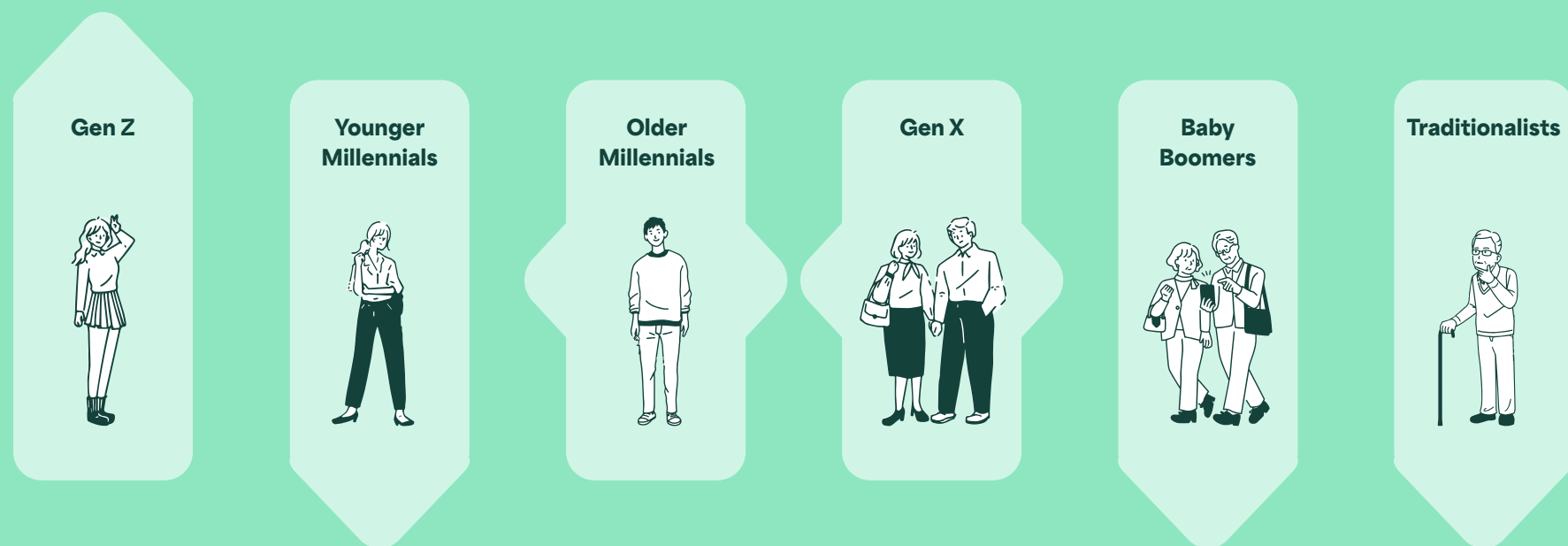
Trend #2 Younger Millennials driving decline, Gen Z driving growth

Whilst Younger Millennials are disproportionately driving decline in the Spirits category with cost of living pressures and at-home occasions changing their purchasing decisions, Gen Z is emerging as a key growth demographic.

Gen Z's growing share of the customer base is driving category performance in segments like Agave and Vodka, while traditionalist customers are organically declining as they age.

Spirits

Growth by Generation



Growing Category Share

- North American Whisky
- Vodka
- Agave
- World Spirits
- Liquor - Miniatures
- Aperitifs & Digestifs

Declining Category Share

- Gin
- Whisky
- Rum
- Liqueurs
- Pre Batch Cocktail
- Zero%* Alcohol
- Brandy

*Contains not more than 0.05% ALC/VOL



Younger Millennials have continued to feel cost of living impacts, with customers continuing to leave the category with price being a key lever.

Category share amongst Gin and Rum has declined, as it loses relevance with Older Millennials and Gen X.

Gen Z has shown strong affinities with lighter based Spirits, with Vodka and Agave based Spirits having the most relevance to MilZ.



“Customers are adapting their spending habits to maximise value.”

Trend #3 Value Seeking

Customers are seeking better value propositions and are switching into more affordable options.

Economic pressures are reshaping customer purchasing decisions across the Spirits category, with value-seeking behaviour becoming more

evident. Customers are adapting their spending habits to maximise value.

Balancing affordability with customer expectations around quality and innovation will be crucial in maintaining relevance within the category.

Trading up to larger pack sizes: Customers are opting for 1L bottles over 700ml to achieve better cost-per-litre savings.

Shifting to more affordable alternatives: Some customers are moving from premium Spirits or switching into other categories like Beer and Premix.

Strategic gifting: Events like Black Friday are being leveraged for premium Spirits at discounted prices, highlighting customers’ desire for quality at accessible price points.



Spirits jobs to be done for F26+

To address the challenges and opportunities within the Spirits category, we have identified six key strategic priorities, divided into two pillars: **Growth Frontiers** and **Maintain Momentum**.



Growth Frontiers

Keep It Simple

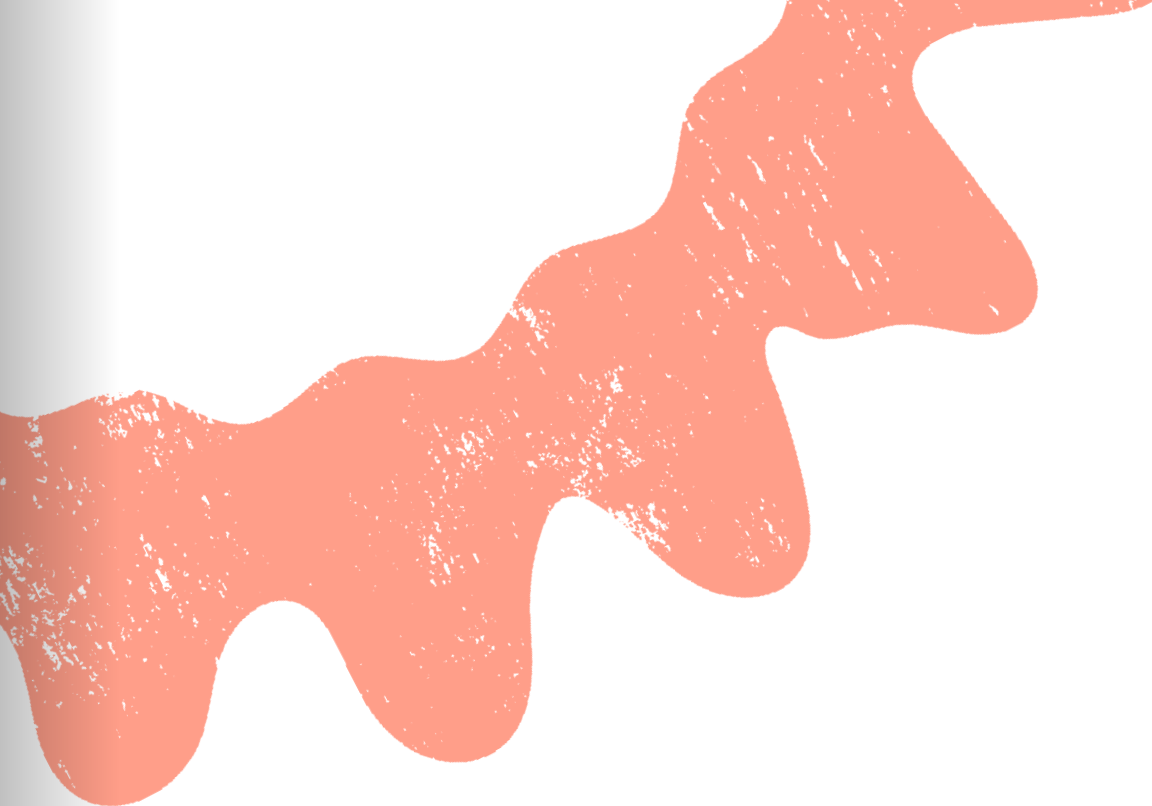
Promote simple serves to make it easier for customers to choose spirits in more wind down, at home occasions.

Accessible Premiumisation

Increase trial of premium products by addressing price accessibility barriers.

Next Gen Dark

Give younger customers dark spirit offers that are relevant to their lower tempo occasions.



Maintain Momentum

Expand Gifting Occasions

Drive mental availability of gifting beyond well established occasions.

Confident Cocktailing

Educate along the path to purchase to inspire customers to cocktail during higher tempo occasions.

Accelerate Tequila

Drive penetration of Tequila and other Agave offers through education and simple serves.



Growth Frontiers

Keep it simple

Objective: To promote simple serves to make it easier for customers to choose Spirits in more wind down occasions.

- **Promote simplicity:** Simple serves, such as Gin and Tonic, and Bourbon and Cola, are the way customers are consuming most frequently.
- **Promotional optimisation:** We want to see more everyday marketing communications around simple serves highlighting versatility and easy mixing.
- **Digital optimisation:** Leverage digital assets to drive bundling.

Accessible premiumisation

Objective: Break down barriers to premium Spirits, such as price points, through trial formats, exclusives, and marketing.

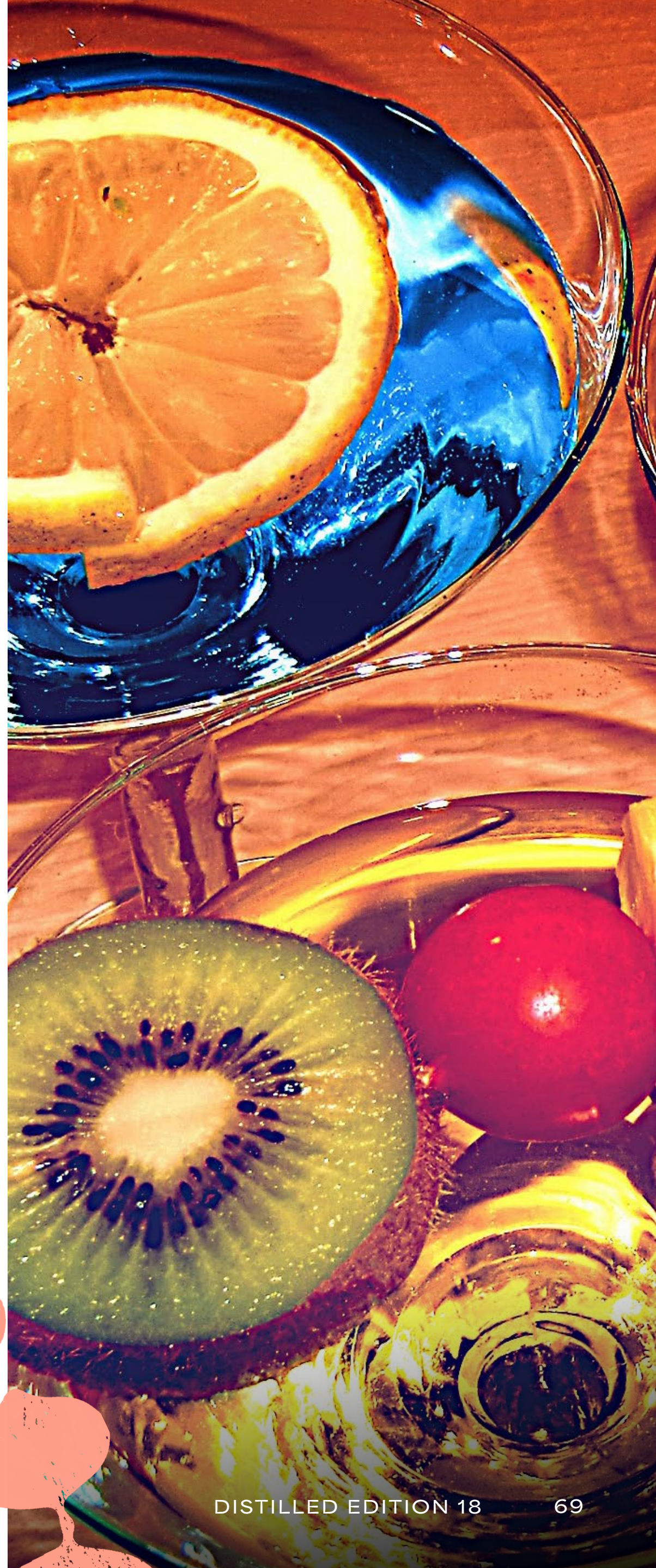
- **Price optimisation:** High entry price points into premium ranges present a risk and potential barrier to our customers which prevents trial. Over 50% of customers have indicated that they would like to buy more premium ranges.
- **Elevating engagement with ‘premium’ language:** Aim to enhance customer engagement by dialling up sophistication, quality, and exclusivity in marketing communications for simple serves, creating a more engaging and aspirational customer experience.
- **Expanding range architecture for ‘premium’ laddering:** Offering a variety of options that elevate the consumer experience and perception of value.
- **Amplifying limited and small-batch releases:** Enhance the focus on limited and smaller releases to create a sense of exclusivity and rareness elevating the consumer experience and highlighting the premium nature of offerings.



Next gen dark

Objective: Innovate and adapt Dark Spirits offerings for our younger customers to future-proof the sub-category.

- **Flavour innovation:** Develop and introduce new flavours or limited-edition releases that cater to the taste preferences of younger customers, who are looking for familiar flavours that are relevant to their lower tempo occasions.
- **Brand partnerships:** Collaborate with popular figures or brands that resonate with customers to enhance brand visibility and appeal.
- **Targeted marketing:** Amplify product relevance of Dark Spirits to younger audiences.
- **Smaller formats:** Leveraging smaller formats to drive product trials and harness key price points.



Maintain Momentum

Expand gifting occasions

Objective: Position Spirits as a versatile, everyday option and drive mental availability of gifting beyond well-established occasions.

- **Amplify ease of shop:** Create a streamlined and user-friendly process that makes it simple and enjoyable for customers to browse and purchase by leveraging off location and gifting formats. We want customers to feel that Spirits are effortless to purchase as a gift.
- **Deliver customer relevance:** Tailor products, services, and marketing strategies to meet the unique needs and preferences of the customers.
- **Offer accessible price points:** Align our pricing with customer expectations while maintaining value for money and competitiveness in the market.

Spirits leads as the strongest overall category for customer engagement and sales during key gifting timelines.

During Christmas week, Spirits becomes the number one category within liquor.

Glass Spirits account for almost 70% of overall alcohol gifting occasions.

“The Spirits category is at a fascinating crossroads.”



Confident cocktailing

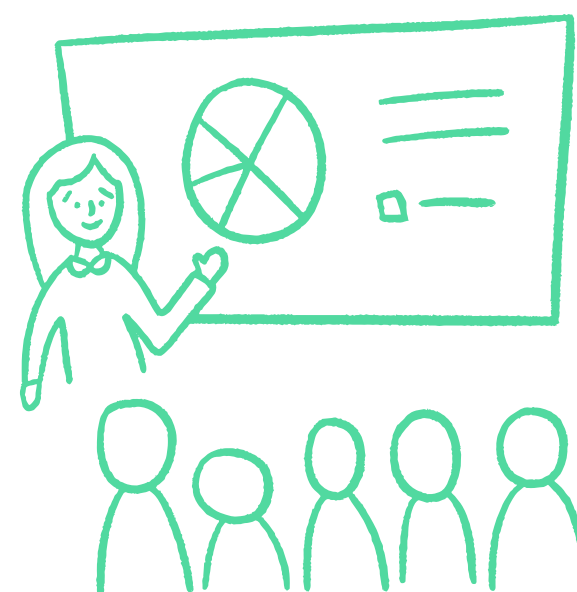
Objective: Overcome barriers to home cocktail-making through education along the path to purchase with bundles, and on-premise inspiration.

- **Promotional bundling:** Effectively drive cross-category affinities by encouraging customers to explore complementary products, enhancing convenience, and delivering perceived value.
- **On-premise connection:** Provide engaging on-site education to address the decline in cocktail consumption post-COVID by offering practical demonstrations, tips, and resources that simplify the cocktail-making process and build customer confidence.
- **Educational initiatives:** Develop and promote easy-to-make cocktail recipes that simplify the cocktail-making process and make it more accessible for 'at-home' entertainers. For example, a QR code on-shelf, neck tag featuring the recipe etc.

Accelerate tequila

Objective: Drive penetration of Tequila and Agave offers through education and simple serves.

- **Strategic communications:** Help customers understand Tequila through occasional relevance and ways to consume Tequila.
- **Visual merchandising:** Visual merchandising opportunities to help consumers understand the intricacies of Tequila and individual elements of different blends of Tequila types.
- **Educational initiatives:** Build on Tequila's phenomenal growth by enhancing customer education and connecting Agave Spirits to understand the versatility of the Spirit and building on familiar flavour profiles.





“Our role as a team is to support you in navigating this exciting yet complex landscape.”



Sarah Hall,
Head of Spirits & Premix

A Note from Sarah Hall, Head of Spirits & Premix

The Spirits category is at a fascinating crossroads, evolving alongside shifting customer behaviours, broader market trends, and the undeniable impact of economic pressures. While challenges are present, so too are the opportunities for growth, innovation, and deeper customer engagement. Together, we have the chance to shape the future of this dynamic category, ensuring it remains vibrant, relevant, and sustainable for years to come.

Customer preferences are shifting rapidly. The rise of sessionable, lighter styles reflects the growing demand for versatile options. Agave Spirits, Vodka, and Aperitifs are leading the charge, reshaping how customers interact with the category. At the same time, economic pressures are driving value-seeking behaviours, with customers exploring larger pack sizes, trading down, or seeking affordability without compromising on quality.

Younger Millennials, impacted by cost-of-living pressures, are reshaping their purchasing habits, while Gen Z is emerging as a key growth demographic. This generational shift underscores the importance of staying relevant to evolving needs and occasions.

To drive sustainable growth, we must focus on innovation and accessibility. Lighter styles are recruiting new customers while retaining existing ones. Accessible premiumisation, through trial formats and exclusive offerings, is breaking down barriers to premium Spirits. Gifting occasions continue to expand, with Spirits leading the way in customer engagement. And confident cocktailing is overcoming barriers to at-home cocktail-making, making it easier and more enjoyable for customers to experiment and create.

Our role as a team is to support you in navigating this exciting yet complex landscape. Whether through targeted marketing, strategic pricing, or enhanced educational initiatives, we are here to help you unlock opportunities across all sub-categories. Together, we can inspire customers, foster loyalty, and ensure that the Spirits category remains a cornerstone of the Liquor industry.

As we look ahead to FY26 and beyond, I encourage you to embrace these trends and strategies with confidence. By working together, we can deliver value, elevate the customer experience, and ensure that the Spirits category thrives in the face of change.

Meet the team

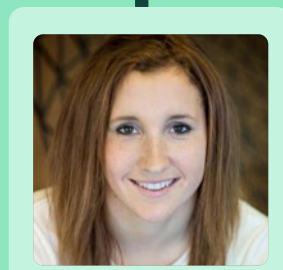


**Head of Endeavour
Spirits & Premix**
Sarah Hall

Trading - Retail Brands Pricing & Promotions



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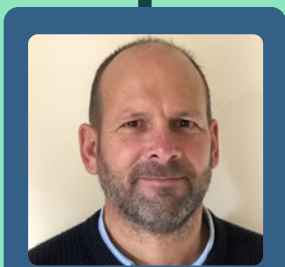


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Katie Greenleaf



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Endeavour Range and Innovation



CM Range
(Dark Spirits -, Whisky
NAW, Rum & Brandy,
World Spirits)
Hamish Fyfe



CM Range (Light Spirits
- Vodka, Agave, Gin,
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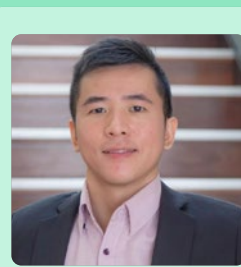


CM Range
(Premix)
Rachael Smoker

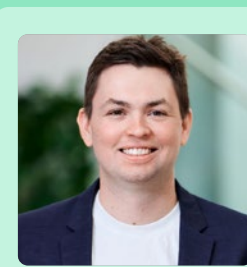


ACM
Craft & Local Spirits
Ed Cass

Finance, Insights & Pricing Optimisation



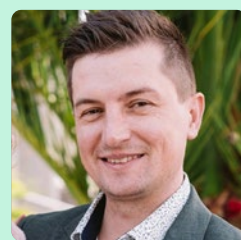
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Deep Dive: Premix

Premix continues to outperform other liquor categories, delivering growth that defies broader market trends. The Category is appealing due to its versatility, sessionability, and alignment with evolving customer preferences. With significant

growth contributions from lighter styles and flavour-forward innovations, Premix is well-positioned to sustain its momentum. However, challenges such as declining penetration rates and headwinds in Dark Premix highlight the need for targeted strategies in F26.





Trend #1 Generational shifts in growth

Premix expands beyond younger generations.

While younger generations, particularly Gen Z, remain key drivers of Premix growth, Gen X has emerged as a resilient contributor, accounting for significant growth over the past year. Gen X customers are habitual and increasingly seeking new opportunities within the Category. This broader generational appeal reflects a shift in customer preferences, making Premix relevant across a wider demographic.



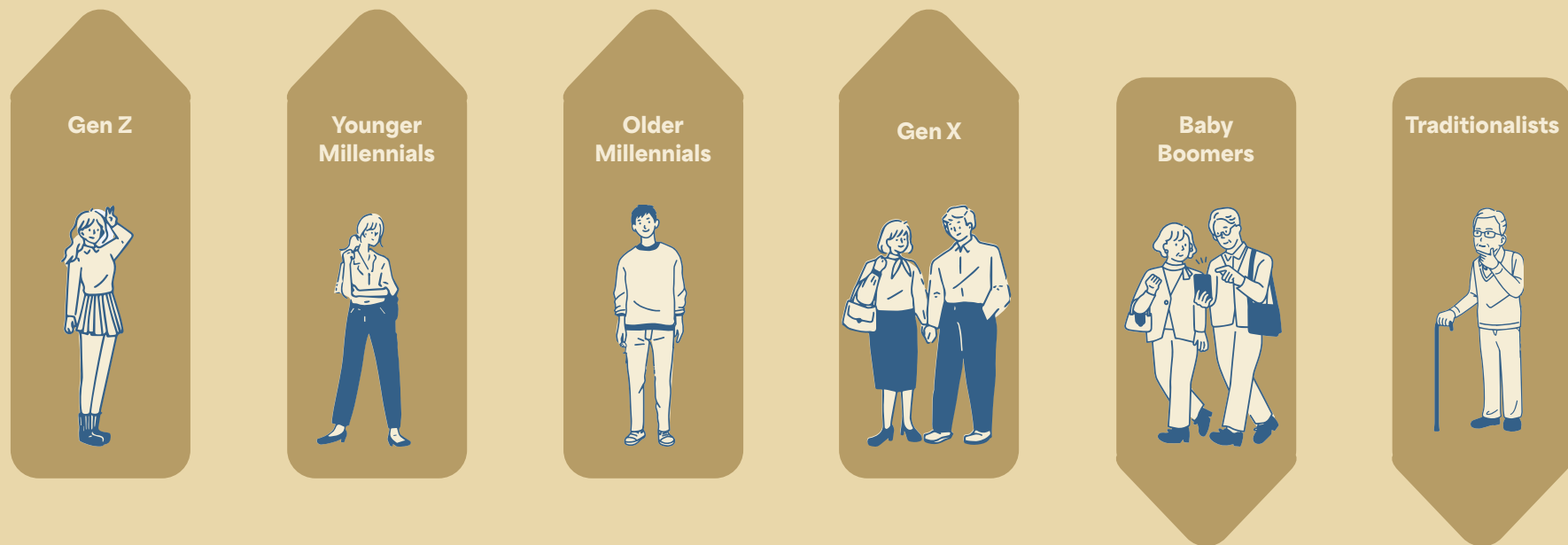
Growth has shifted from being driven exclusively by younger generations, **with Gen X delivering highest \$ growth.**

Gen Z growth has stemmed primarily from **lighter Premix styles**, where previously it has been a mix of both lighter and darker styles.

Younger Millennials have seen a lower level of growth than Older Millennials, which is reflective of the impact of **cost of living pressures.**

Category Performance Overview

Premix



Growing Category Share

- Vodka
- Whisky

Declining Category Share

- Bourbon
- Rum
- Seltzer
- Gin
- Premix Others

Trend #2 New Product Development (NPD)

Innovation fuels growth in a fast-paced category.

The role of NPD has been pivotal to the performance of the Premix Category. In 2019, Premix NPD accounted for \$1.50 out of every \$10 in total NPD sales across Endeavour Group. By 2024, this contribution had grown significantly, with Premix NPD delivering \$5 out of every \$10 in NPD sales - a remarkable 3.3 x growth.

Flavour-forward innovations, especially those anchored in vodka-based products, have been particularly successful. Seasonal and limited-edition releases create urgency and excitement, while bold collaborations and exclusive lines drive trial and strengthen the core Premix range.

“The role of NPD has been pivotal to the performance of the Premix Category.”



In 2024, NPD accounted for 11% of category sales yet drove a staggering 70% of growth.

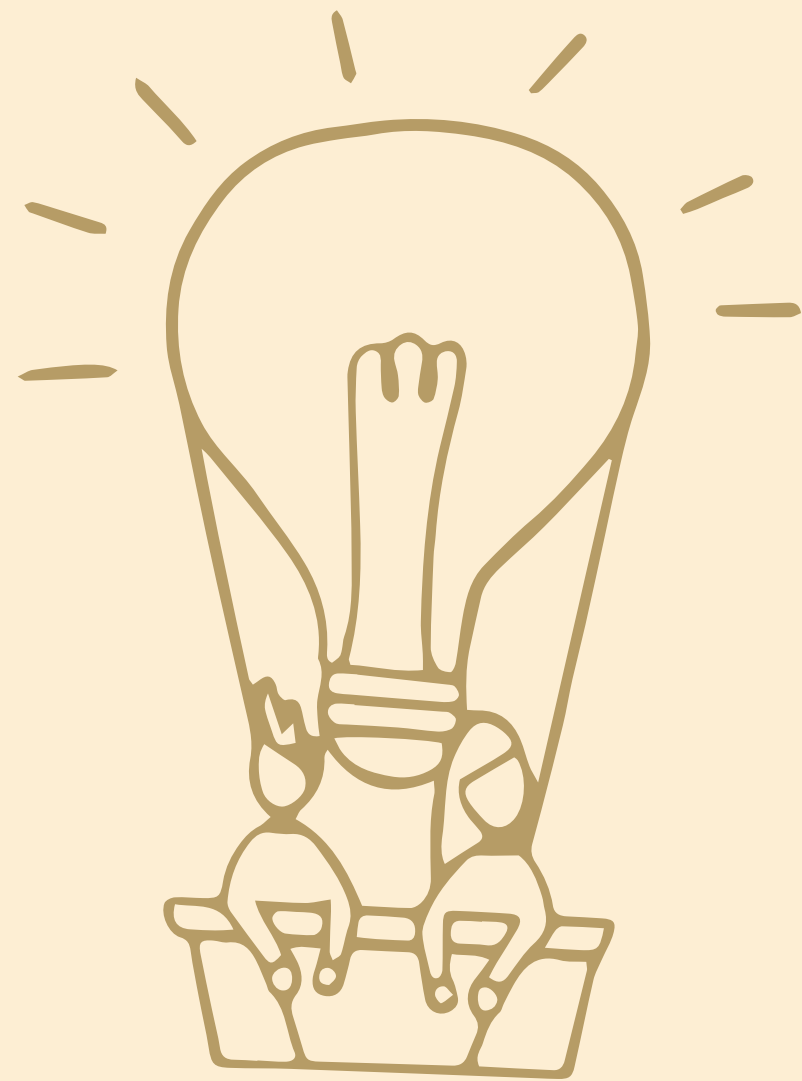
Vodka has grown as a result of a significant amount of relevance across all generational groupings, driven by purposeful NPD.

Category growth has been driven primarily through familiar flavours, with over 70% of category growth coming from lemon flavoured products.

Trend #3 Light styles drive penetration

Sessionability remains king in social occasions.

Lighter, flavour-forward styles are outperforming darker Premix options, as customers seek sessionable and familiar flavours. While Dark Premix remains valuable due to repeat purchasing and brand loyalty, addressing headwinds in this sub-category is key to unlocking further growth opportunities.

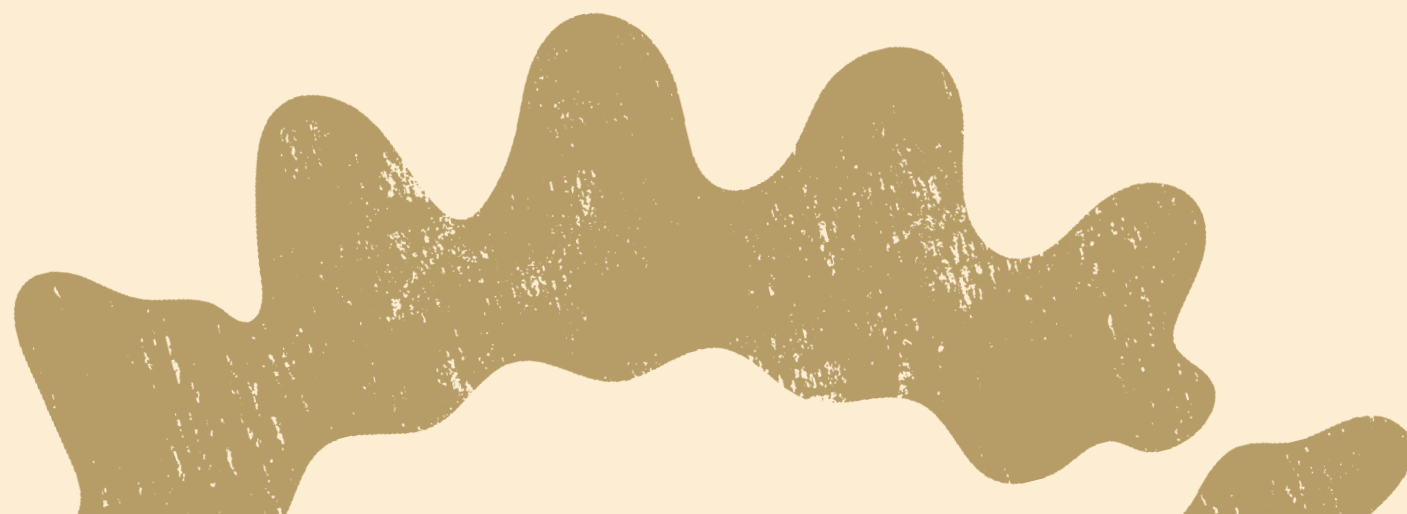


“Address declining relevance in Dark Premix by developing new propositions.”

Dark premix is losing relevance with younger consumers.

The introduction of **flavours and lighter styles** has resulted in a presence of Premix in higher tempo occasions.

Tonic and Seltzer based premixes have lost relevance with younger consumers.







Premix jobs to be done for F26+

The Premix Category is primed for continued growth, but targeted strategies are essential to address current headwinds, maximise opportunities, and ensure sustained momentum. The following 'Jobs to Be Done' framework outlines the key priorities for F26, focusing on enhancing customer engagement, refining product offerings, and driving innovation across the Category.



Growth Frontiers

Re-imagine Premix path to purchase

Leverage prestore and instore triggers to deliver the right messages and experiences at the right moments

Dark Premix Evolution

New propositions to position dark premix to meet young consumers' functional and emotional needs in wind down occasions

Maintain Momentum

Familiar Flavours

Popular and easy to understand flavours to drive recruitment and exploration

Give our regulars a reason to return

Retailer of choice for premix by delivering value and availability on every shop

Growth Frontiers

1. Re-imagine the Premix path to purchase

Objective: Leverage pre-store and instore triggers to deliver the right messages and experiences at the right moments.

- **Proactive evaluation of range performance:** Regularly assess product performance to ensure shelves are stocked with high-impact, fast-moving items that resonate with customers.
- **Strategic use of media platforms:** Amplification in the right media platforms to generate mental availability of Premix, ensuring customers associate the Category with a variety of shopping missions.
- **Tailor ranges to store-specific missions:** Customise product offerings based on local shopper behaviour and store missions. For example, prioritise immediate consumption options at a local BWS and family stock-ups at the closest Dan Murphy's.
- **Increase availability with initiatives:** Ensure consistent stock levels for high-demand items by maintaining a minimum of five days' supply, reducing missed sales opportunities and building customer trust.
- **Drive mental stock availability:** Use impactful trade and marketing strategies, such as eye-catching displays and digital ads (e.g., "Try me for \$4"), to keep Premix products top-of-mind for customers. Clear, memorable messaging enhances awareness and reinforces Premix as a go-to option in every shopping mission.

2. Evolve Dark Premix to build relevance for younger consumers

Objective: Address declining relevance in Dark Premix by developing new propositions to position Dark Premix to meet young consumers' needs in wind down occasions.

- **NPD for younger generations:** Innovate liquids and brands that reflect younger generations' lifestyles and values, such as sustainability, creativity, and authenticity.
- **Innovate around wind-down occasions:** Create products and experiences designed for relaxed settings, such as evenings at home or casual gatherings. Position Dark Premix as the ideal companion for unwinding, using packaging and messaging that evoke comfort and ease.
- **Build strong messaging:** Develop lifestyle-driven branding for Dark Premix that associates the sub-category with memorable occasions, such as outdoor adventures or 'at-home' events like BBQs or watching sport events. Use evocative storytelling to make Dark Premix synonymous with wind-down moments and enjoyment.
- **Familiar flavours:** Reinforce customer recruitment and exploration by offering bold, recognisable flavours alongside seasonal and limited-edition releases. This dual strategy strengthens the core range while encouraging trial and repeat purchases.



Maintain Momentum

3. Familiar flavours

Objective: Leverage bold and recognisable flavours to attract new customers while retaining existing ones, driving exploration and repeat purchases.

- **Focus on recruitment and exploration:** Introduce flavours that cater to both new customers and loyal shoppers, ensuring the range appeals to diverse taste preferences. Everyday favourites such as cola and lemonade remain key to engaging a wide audience.
- **Leverage global flavour trends:** Tap into global trends to create innovative flavour combinations that intrigue adventurous customers while maintaining familiarity for others.
- **Seasonal and limited-edition releases:** Drive excitement and create urgency with seasonal and exclusive offerings. These releases strengthen the core range and encourage trial, exploration, and repeat purchases.

4. Enhance value to give regulars a reason to return

Objective: Strengthen customer loyalty by delivering value propositions that incentivise repeat purchases and foster long-term engagement.

- **Expanding flavours in familiar and flavour-led brands:** Expand well known flavours and brands that are popular and easy to understand, to drive recruitment and exploration to align with current and future trends.
- **Competitive pricing and bundle deals:** Offer multi-pack discounts, exclusive bundles, or loyalty rewards to create value for regular customers and encourage repeat visits.
- **Stock reliability:** Ensure popular products are consistently available, reducing customer frustration and reinforcing trust in the reliability of the Premix offering.



The role of product life cycles

Premix innovation requires agility. Endeavour Group dynamically updates its range three times per year to keep pace with customer trends and preferences. The first 90 days following a product launch are critical for establishing baseline sales and driving customer excitement. Suppliers are encouraged to focus on differentiation, scalable exclusives, and robust go-to-market plans to maximise success.

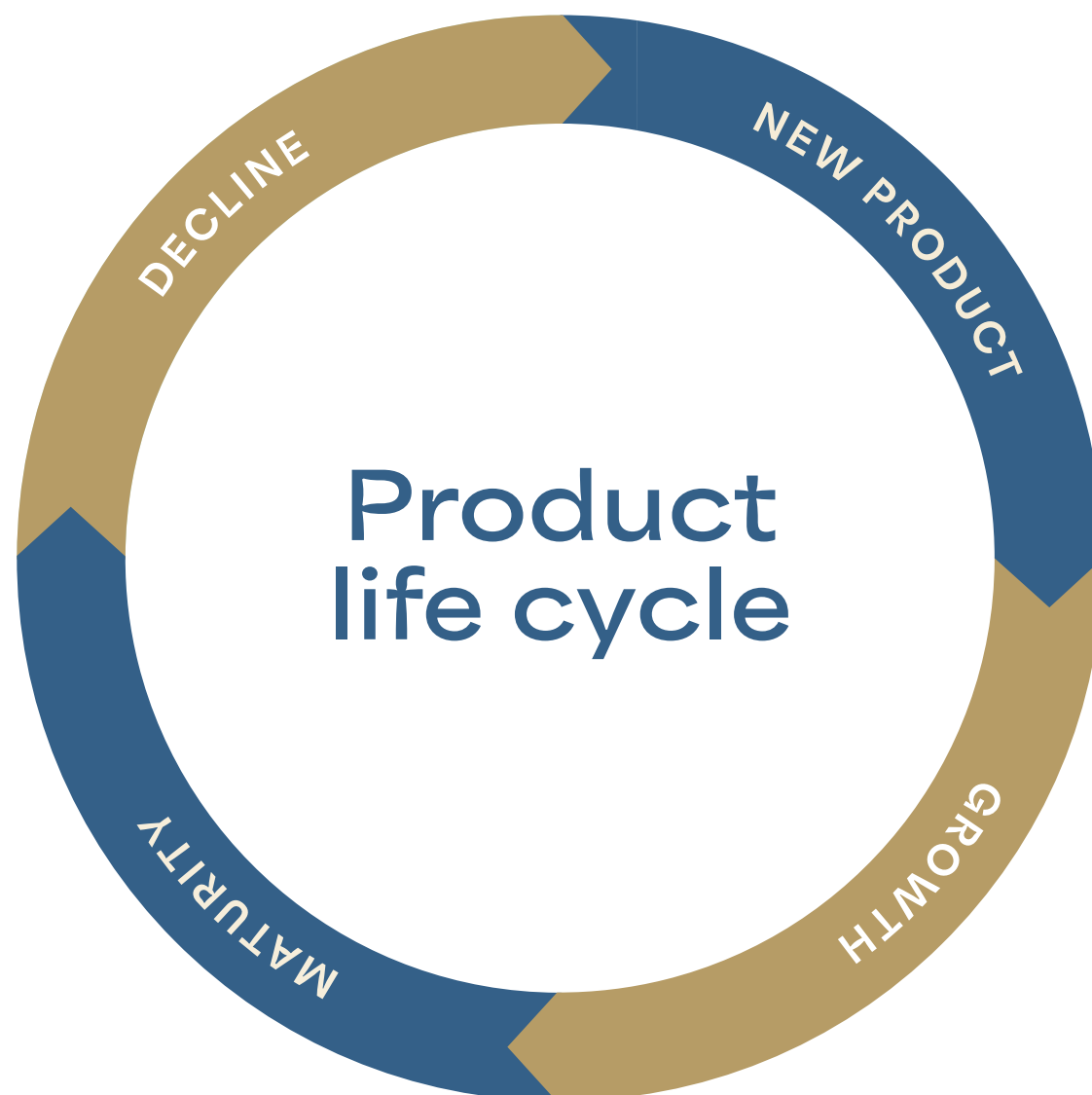


> Decline

We exit the range to create space for new innovation.

> Maturity

Customers begin to move onto the next trend.



> New Product Launch

Liquid on lips & trial.

> Growth

Drives customer & category excitement.



Sarah Hall,
Head of Spirits & Premix

A Note from Sarah Hall, Head of Spirits & Premix

The Premix Category has demonstrated remarkable resilience and growth, thriving due to its versatility, sessionability, and ability to adapt to customer preferences. As we enter F26, sustaining momentum will require a clear focus on aligning products with diverse customer occasions, such as social gatherings, wind-down moments, and high-tempo events.

There's a few things we should all really lean into to help us drive the strategy for F26.

- Reflecting on past successes and challenges is critical; by sharing insights and embracing transparency in our learnings, we can refine our approach and make smarter, and more customer-centric decisions. Innovation must be fast and agile, adopting a “fail fast” mentality that allows us to experiment, learn, and iterate quickly.

- Setting clear hurdle rates ensures we maintain high standards for product performance, while true innovation pushes boundaries to surprise and delight customers with bold formulations, unique packaging, and engaging storytelling.
- Exclusivity is a powerful tool for differentiation, offering limited-edition releases, collaborations, and unique formats that give customers a compelling reason to shop with us.
- Delivering value in every product through quality, flavour, and experience is essential to retaining loyal customers while attracting new ones.
- Breaking barriers to entry by simplifying the shopping experience and making products approachable will help expand the customer base, while being first to market with bold innovations ensures Premix remains at the forefront of customer interest.
- Flavour expansion of familiar and flavour-led brands will continue to align with current and future trends, driving excitement and repeat purchases.

Together, with our suppliers and partners, we can set benchmarks for innovation, deliver exceptional value, and ensure Premix continues to outperform expectations, not just as a Category, but as a staple of the Australian drinking experience.



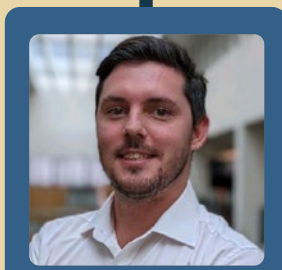
“We can set benchmarks for innovation, deliver exceptional value, and ensure Premix continues to outperform expectations.”

Meet the team

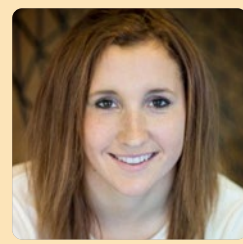


**Head of Endeavour
Spirits & Premix**
Sarah Hall

Trading - Retail Brands Pricing & Promotions



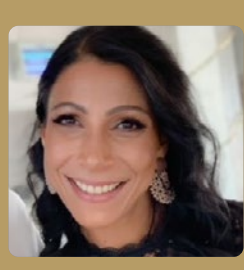
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Premix)**
Calum Susko



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Trading (Spirits
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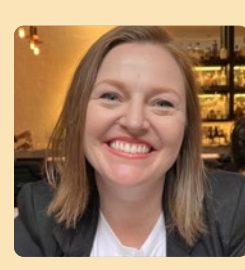
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Spirits**
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Premix**
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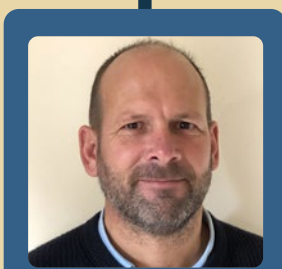


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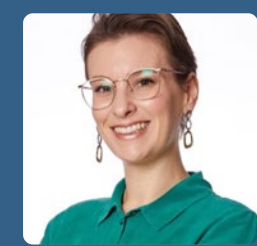
Endeavour Range and Innovation



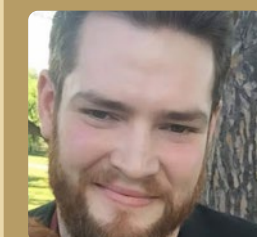
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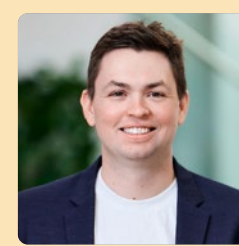


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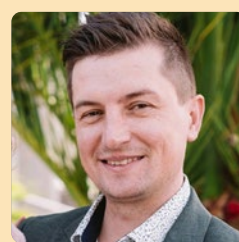
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Category
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Deep Dive: Wine

Over the past few years, we've talked a lot about the challenge of keeping wine relevant for Gen Z and Millennial shoppers. Thanks to the incredible work we have all done on innovation and NPD over the past 12 to 24 months, we're now seeing real progress. Wine is currently

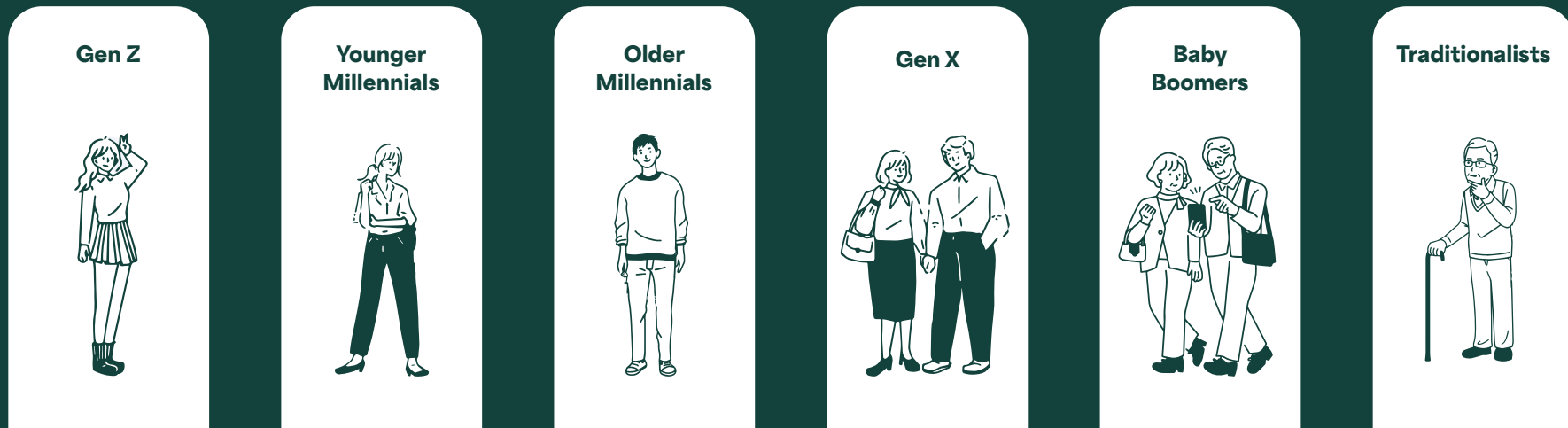
the fastest growing category among Gen Z customers!

There's still work to do to build on this momentum and ensure Wine's long-term appeal, but the green shoots are definitely showing.

“Wine is currently the fastest growing category among Gen Z customers.”

Performance by Generation

Wine



Wine Share of Alcohol Wallet



Share of Wine Category Sales



Top Sales Growth Segments

- | | | | | | |
|---|---|--|---|--|--|
| <ul style="list-style-type: none"> • Spritz • Shiraz • Pinot Noir • Prosecco • Pinot Gris / Grigio | <ul style="list-style-type: none"> • Spritz • Bagnum • Pinot Gris / Grigio • Chardonnay • Pinot Noir | <ul style="list-style-type: none"> • Spritz • Bagnum • Pinot Gris / Grigio • Spritzer SS • Pinot Noir | <ul style="list-style-type: none"> • Bagnum • Spritz • Pinot Gris / Grigio • Prosecco • Riesling | <ul style="list-style-type: none"> • Bagnum • Pinot Gris / Grigio • Spritz • Riesling • Spritzer SS | <ul style="list-style-type: none"> • Bagnum • Spritz • Spritzer SS • Champ Vintage • Pink Moscato |
|---|---|--|---|--|--|

Wine Sub-Category Preferences

Sub-Categories

Segments

Growing Category Share

Sparkling Wine
Spritzer Single Serve
Bagnums
Rose
Lighter in Alcohol Wine
(>0.5% to <10% ABV)
Zero%
(0 to 0.5% ABV) ▲

Red

- Pinot Noir & Blends
- Nebbiolo & Blends
- Other Varietals ▲

White

- Pinot Gris/Grigio
- Riesling
- Moscato & Sweet ▲

Bubbles

- Spritz
- Prosecco ▲

Rest

- Bagnums
- Spritzer Single Serves
- Port & Tawny
- Rose - Pink Moscato
- Lighter In Alc
- Zero % ▲

Declining Category Share

Red Wine
Champagne
White Wine
Cask Wine
4 & 5L ▼

Red

- Shiraz Blends
- Merlot & Blends
- Shiraz
- Cabernet Sauvignon
- Malbec & Blends
- Tempranillo & Blends ▼

White

- Sauvignon Blanc
- Sauvignon Blanc & Sémillon Blends
- Other Blends ▼

Bubbles

- Champagne - Non Vintage
- Sparkling - Non Vintage
- Cava ▼

Rest

- Cask Wine 4 & 5L ▼

**For marketing purposes, we include in this category Wine and Wine products with an ABV greater than 4% and less than or equal to 10%.

Trend #1 Flavourful and vibrant Wines

Uplifting experiences that resonate across generations

Customers' desire for uplifting and vibrant experiences is shaping the Wine category. Flavourful wines, particularly those with bold, refreshing, or effervescent profiles, are gaining ground. These styles suit the occasion needs, offering drinks that feel celebratory and energising.

Flavoured Wines, such as Moscato and Spritz, are proving particularly popular among MillZ consumers, serving as an approachable entry point into the category. Their sessionable nature and bright, familiar flavours resonate with Millennials and Gen Z, while also maintaining appeal among older generations.

We're also generating interest among existing customers by highlighting 'flavourful' wines with simple

flavour descriptors and consistent semiotics. For example, calling out Buttery Chardonnay directly on the packaging, coupled with the consistent use of yellow packaging cues in that varietal, ensures the flavour profiles are clear and enticing.

Products that "pop" visually can stand out in a crowded marketplace and capture the attention of customers. Combining known flavours, while establishing and reinforcing packaging semiotics is crucial to their success in the marketplace.

Ultimately, this trend highlights a shift in customer preferences towards uplifting, approachable wines that deliver both sensory enjoyment and are occasion fit. As the industry focuses on innovation in flavour and presentation, the appeal of vibrant and flavourful wines is set to expand further.

Nearly **half of the sales** of flavoured Wines still come from Gen X and Boomers, showcasing the broad appeal of these vibrant options.

Effervescence is a key driver, with Sparkling Wines and Spritzers leading growth.

Packaging also plays a critical role in the success of flavourful and vibrant Wines. **Bright, eye-catching** labels and clear flavour descriptors help customers navigate the category.

Spritz



- 16% Growth New to Wine
- #5 Wine segment Gen Z
- Mainstream / Premium
- Very MilZ
- Light Shopper / Dan's
- High VIC Sales

Buttery Chardonnay



- 9% Share Chardonnay
- +30% Growth
- Mainstream / Premium
- Gen X (vs Chardonnay)
- Core



Trend #2 Lighter tasting Wines

Lighter, refreshing and vibrant Wines are meeting the emotive needs of social occasions.

Historically, Wine consumption was dominated by low-tempo occasions, such as relaxing at home or pairing Wine with meals. However, these moments are declining, particularly among younger generations, who are allocating a greater share of consumption occasions to social gatherings. These settings demand Wines that are approachable, refreshing, and easy to enjoy in a group context, attributes that lighter tasting Wines deliver.

The casualisation of meals, including lighter, globally inspired dishes, pairs well with these approachable varietals. For example, Pinot Grigio and Prosecco complement lighter fare such as salads,

seafood, and vegetarian dishes, making them an increasingly popular choice.

The growing interest in mindful consumption has also contributed to the rise of lighter tasting Wines. Customers are increasingly looking for products that align with their mindful lifestyles, such as wines with lower alcohol content. Baby Boomers are driving the greatest dollar growth in this segment, demonstrating its cross-generational appeal.

Younger generations, particularly Millennials and Gen Z, are also shifting preferences toward lighter, more vibrant styles of wine, with Rosé and Sparkling Wines gaining significant popularity compared to older generations. These varieties align with their desire for fun, versatile, and celebratory options that enhance social occasions.

Continued momentum in lighter tasting liquids such as Pinot G, Prosecco and Pinot Noir.

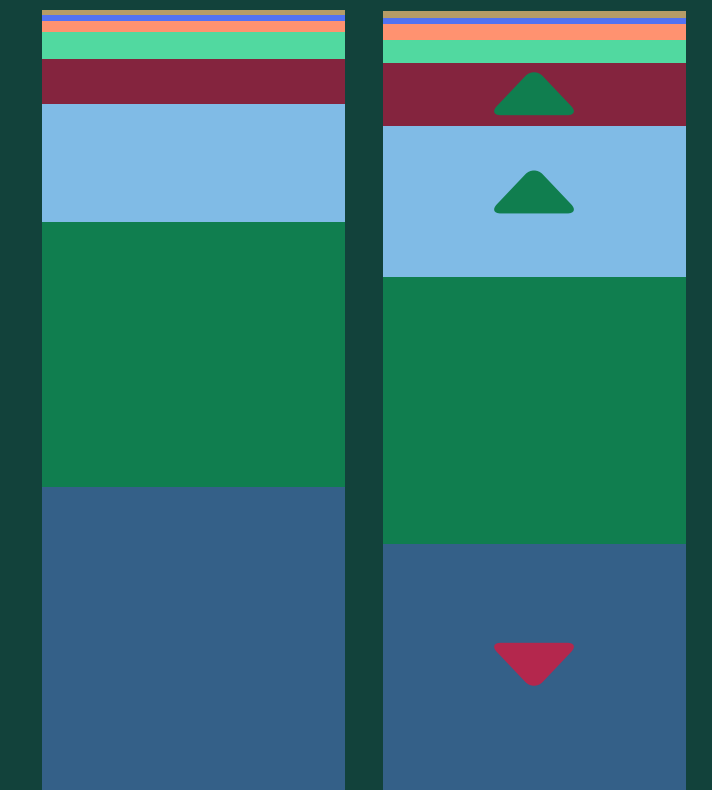
Lighter in Alcohol** wines (4-10% ABV) are experiencing **double-digit growth**, particularly among younger generations.

Younger generations are drinking considerably more Rosé and Sparkling Wine and **preferencing lighter styles**.

**For marketing purposes, we include in this category Wine and Wine products with an ABV greater than 4% and less than or equal to 10%.

Younger generations have distinct preferences

Wine Volume Share Excluding Cask



Total

Gen Z +
Younger Millennials

- Other
- No Alcohol Wine
- Champagne
- Fortified Wines
- Rose Wine
- Sparkling Wine
- Red Wine
- White Wine

Segment	Vol Share Change
White - Moscato & Sweet	Blue
Sparkling - Prosecco	Teal
Red - Pinot Noir & Pinot Noir Blends	Green
Rose - Pink Moscato	Light Green
Rose - Still Rose	Lighter Green
Sparkling - Spritz	Lightest Green
Champagne - Non Vintage	Yellow-Green
Sparkling - Sweet, Moscato & Fruit	Yellow
Red - Sweet Red	Light Yellow
Red - Grenache & Grenache Blends	Yellow-Orange
Red - Tempranillo & Tempranillo Blends	Orange
Red - Shiraz Blends	Light Orange
White - Pinot Gris/Grigio	Lightest Orange
Sparkling - Non Vintage	Lightest Yellow
Red - Cabernet Sauvignon Blends	Light Orange
Red - Merlot & Merlot Blends	Light Orange
Port & Tawny 2L & Over	Light Orange
White - Other White Blends	Lightest Orange
Red - Shiraz	Orange
White - Sauvignon Blanc & Semillon Blends	Light Orange
White - Chardonnay	Light Orange
White - Sauvignon Blanc	Lightest Orange



Trend #3 Format exploration

Innovative solutions for modern wine consumption.

Customers are increasingly open to exploring Wine in alternative formats that address barriers like portion size, portability, and freshness. Bagnums, single-serve cans, and Spritzers are leading the way, proving that the right liquid in the right format can unlock new occasions for Wine. These innovations are making Wine more convenient and relevant in settings where it previously struggled to compete.

“Customers are increasingly open to exploring Wine in alternative formats.”

Non-traditional formats such as Bagnums and Spritzer Single Serve have doubled share.

Success through simple **front of pack** ‘hero’ flavour descriptor coupled with consistent semiotics.

Innovative formats provide new benefits and increased relevance in new occasions.

Bagnums



- 5% New to Wine
- Doubled Share
- Mainstream
- Gen X / Boomer
- Core

Spritzer Single Serve



- 9% Growth New to Wine
- Established brands work best
- Mainstream
- Millennial
- Light Shopper / BWS
- Regional LGAs low Wine share



Wine jobs to be done for F26+

These growth opportunities aim to address specific customer needs and capitalise on trends within the Wine category, ensuring that we continue to lead in market innovation, customer engagement, and satisfaction.



Growth Frontiers

Revitalise Food + Wine Rituals

With a contemporary approach, establish and elevate Food + Wine rituals.

Delicious Wines

Unlock the flavour mega trend in Wine, driving trial and expanding relevance for MilZ.

Fine Wine Mecca

Deliver a best in market Fine Wine discovery experience that inspires engaged wine lovers.

Easy Exploration

Make it easy for MilZ to begin exploring approachable Wines.

Reinvigorate Red

A contemporary expression of red Wine, enhancing loved flavour while overcoming barriers.

Fuel Millennial Discovery

Ensure Wine fulfills Millennials desire to discover and share, capitalising on strength of Wine culture.



Maintain Momentum

Grow Bagnum Love

Expand love for this innovative format, removing consumption barriers, for more customers.

Wine Gifting Solutions

Continue to position Wine as an easy and desirable gift, year-round.

Single Serve Variety

Freedom to enjoy the variety of Wine in an occasion.



Let's spotlight a few of those Jobs:

1. Revitalise food and Wine rituals

Objective: With a contemporary approach, establish and elevate food and Wine rituals.

Customer challenge: Enhancing meals has always been central to Wine's origins. However, Wine is gradually losing relevance in meal occasions due to evolving cuisines, the casualisation of dining and mindful consumption.

Strategy:

- **Strengthen association:** Collectively reinforce the iconic relationship between food and Wine, in a contemporary way, relevant for everyday meal occasions.
- **Keep top of mind:** We already have a great range of Wines in the market, therefore the focus is on marketing and communication to keep this iconic match and occasion top of mind.

2. Delicious Wines

Objective: Unlock the flavour mega trend in Wine, driving trial and expanding relevance for Millennials and Gen Z.

Customer challenge: Wine faces both taste and relevance barriers among younger generations, as the flavour differences between varietals are often not well understood.

Strategy:

- **Push the boundaries:** Expand flavoured Wines into new brands and varietals, with bold and creative offers.
- **Disrupt outside Wine aisles:** Take advantage of disruptive colours, ingredients and vibrancy to drive appetite appeal in comms and via the MixIn suite.
- **Encourage exploration:** Highlight key Wine flavours to showcase and revitalise traditional varietals.

3. Fine Wine Mecca

Objective: Deliver a best in market Fine Wine discovery experience that inspires engaged Wine lovers.

Customer challenge: High engagement Wine customers seek unique experiences, access to scarce wines and interact across a variety of retailers and channels.

Strategy:

- **Premium retailer of choice:** Evolve and harness the strength of The Cellar store network.
- **Exceed expectations:** Provide our highly engaged customers access to unique opportunities and events to discover and experience our premium Wine.



4. Easy exploration

Objective: Make it easy for MilZ to begin exploring approachable Wines.

Customer challenge: Challenging and unknown flavours, the use of Wine-specific terminology, narrow occasion perception and a sea of sameness on shelf - together reduce MilZ engagement with the Wine category.

Strategy:

- **Break down barriers to Wine exploration:** Focus MilZ attention on trialing varietals with appropriate flavour profiles, awareness of generation-targeted innovation and relevant consumption occasions.
- **Empower customers to confidently navigate and choose:** Make it easier for MilZ to navigate and select Wines which they, and their friends, will enjoy.

5. Reinvigorating Red Wine

Objective: Redefine the perception of Red Wine to make it more approachable and relevant for upbeat social occasions.

Customer challenge: Heartland Red Wine occasions are declining, with low relevance in growing upbeat social occasions. Newer customers struggle to understand how products are different, what that means for taste. They often assume all Red Wines are big, bold, and warm.

Strategy:

- **Bring vitality and versatility:** Seed approachable flavour segments, think “young, bright and fresh” descriptors, bringing a sense of vitality and freshness through packaging and comms.
- **Challenge the outdated, think contemporary:** Embrace contemporary food rituals, cuisine diversity and varied consumption situations.
- **Reinforce quality credentials for “everyday” options:** With cost of living pressures, reinforce Red Wine credentials and quality at lower price points to retain purchase.

6. Fuel millennial discovery

Objective: Ensure Wine fulfills Millennials' desire to discover and share, capitalising on strength of Wine culture.

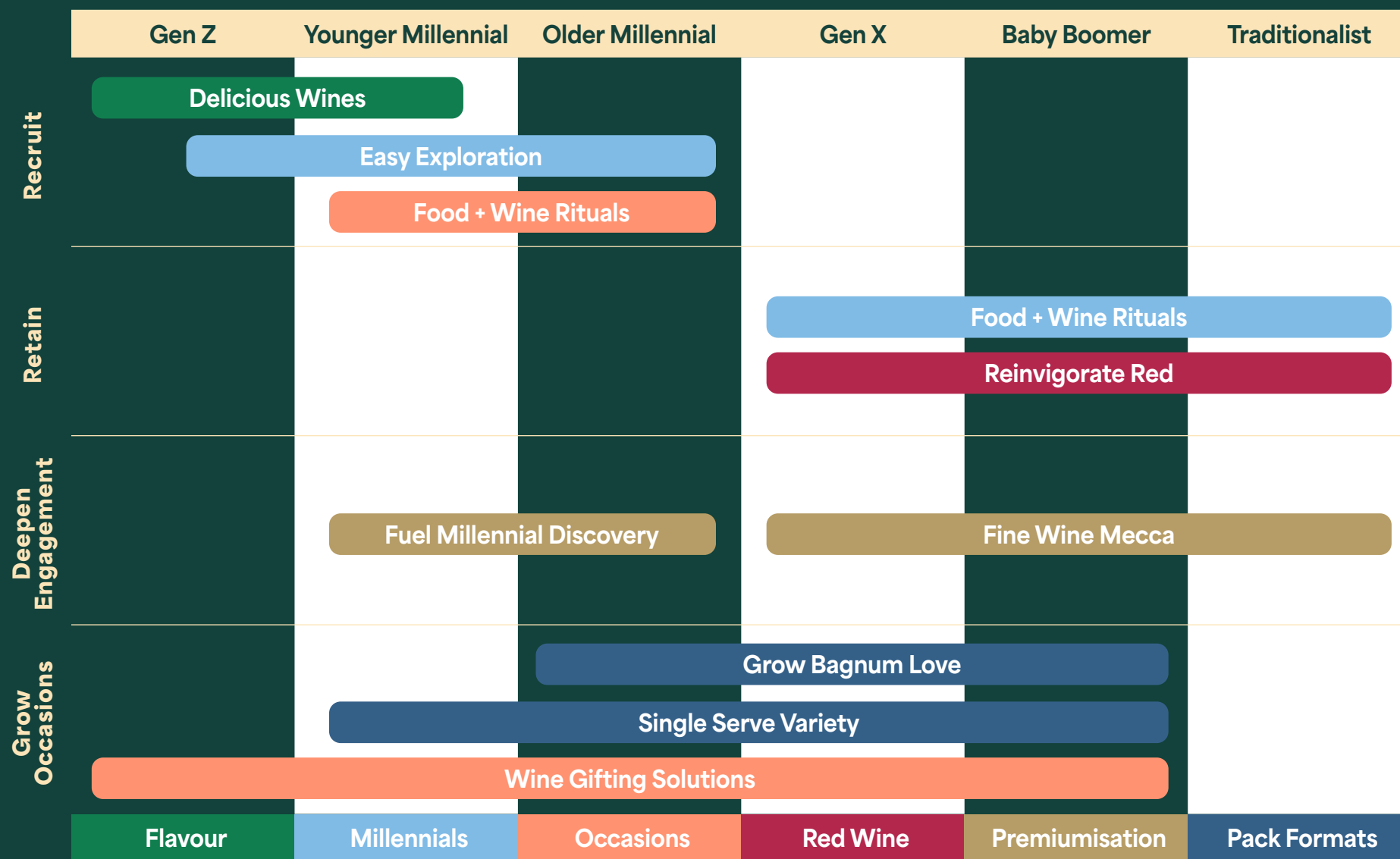
Customer challenge: Millennials are not aging into Wine as prior generations have, posing a long term challenge to Wine volume and varietal shares.

Strategy:

- **Relevant range:** Hero brands and products that innovate, are exciting to engage with and suit Millennials' changing occasions. Be bold and challenge traditions.
- **Relevant communication:** Invest in marketing and communication channels that engage Millennials. Ensure experiential events truly engage, going beyond tasting notes and price.



Wine JTBD Category Growth Metric x Generation



Maintaining Momentum

Easy Exploration

Make it easy for MilZ to begin exploring approachable Wines

Online & In-store Education

Grow Bagnum Love

Expand love for this innovative format, removing consumption barriers, for more customers

Grow Format Awareness

Wine Gifting Solutions

Continue to position Wine as an easy and desirable gift, year-round

Marketing & Merchandising

Single Serve Variety

Freedom to enjoy the variety of Wine in any occasion

Range Optimisation & Merchandising



Leigh Firkin,
Head of Commercial Wine



Andrew Shedden,
General Manager, Premium

A note from Leigh and Andrew

Our vision for the future of Wine is to elevate its relevance across all occasions, embedding it into the fabric of modern life. This means addressing customer barriers, embracing innovation, and adapting to evolving preferences. From casual dining to celebratory moments, Wine must remain an accessible, versatile, and exciting choice for a diverse range of customers.

Innovation plays a key role in achieving this vision. It means rethinking how Wine is presented and experienced, whether through introducing flavour-forward products that resonate with Millennials and Gen Z, simplifying Wine exploration with technology, or amplifying the premium Wine journey for discerning customers. Innovation must also challenge traditional conventions, such as redefining Red Wine's place in casual and modern food rituals, while ensuring Wine aligns with the lighter, mindful consumption trends embraced by younger demographics.

Embracing innovation to grow Wine's relevance, means rethinking every

aspect of the Wine experience.

It's about exploring new styles, flavours, and formats that resonate with evolving consumer preferences.

Achieving this vision isn't a task for one brand or retailer alone. It requires collaboration across the entire industry, working together to push the boundaries of style, flavour, and format. At the same time, we must embrace generational differences to authentically connect with the evolving needs of our customers.

Let's continue to innovate, inspire, and challenge ourselves to ensure the long-term vibrancy and growth of the Wine category.



“Our vision for the future of Wine is to elevate its relevance across all occasions.”

Meet the Fine Wine Buying Team



**General Manager -
Endeavour Premium
(including Fine Wine
Buying Team)**
Andrew Shedden



**Senior Category
Manager - Langton's**
Ramon Gunasekara



ACM
Justin Lane



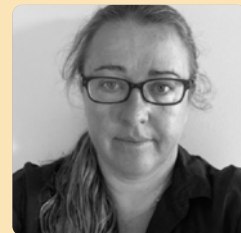
ACM
Caroline Bouchard



ACM
Daniel Parrott



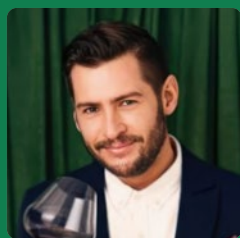
ACM
Zachary Nelson



Category Assistant
Michaela Bennell



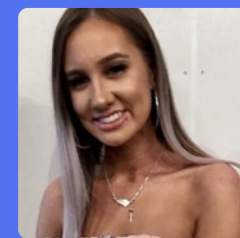
**Category Manager -
Western Region**
Ian Wolfe



**Category Manager -
Eastern Region**
Rob Aitken



**Category Manager -
Imports & Langton's**
Nicholas Rose



MixIn Partner
Chrys Rochecouste



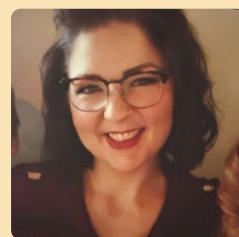
ACM
Anthony Doube



ACM
Rick Blundo



ACM
Gavin Wraith



ACM
Cecilia Tibbertsma



ACM
Greg Wilson

Partner

Meet the Commercial Wine team



**Head of Endeavour
Commercial Wine
& Complementary
Categories**
Leigh Firkin



**Category Manager -
White, Rose and Cask**
Mathew Young



**Category Manager
- Red, Fortified &
Sparkling**
Joe Armstrong
Kristina Poljak
(Maternity Leave)



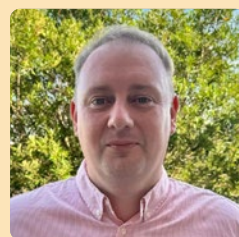
**Category Manager -
Red Wine & Cellar**
Ben Lafford



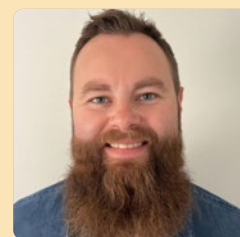
ACM
Shannen Walsh



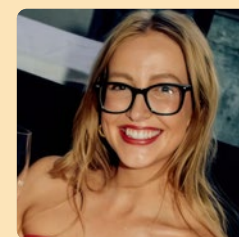
Promotions Specialist
Sean Menezes



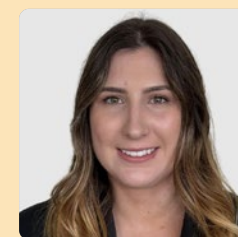
ACM
John Cornforth



Range & Local ACM
Fergal McGuigan



ACM
Lauren Harvey



ACM
Nicola Kralic



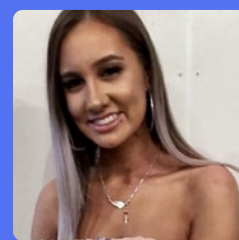
**Category Manager -
White, Rose, Zero Alc,
Cask & Bagnums**
Darren Leivers



**Category Manager
- Champagne,
Sparkling & Fortified**
Tim Yu



**Category Manager
- Complementary
Categories**
Lance Friedman



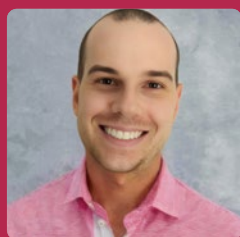
MixIn Partner
Chrys Rochecouste



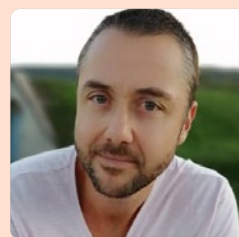
ACM Local
Monica Coker



Promotions Specialist
Mark D'Orazio



ACM
Ricky Young



ACM
Matthew Thompson

