

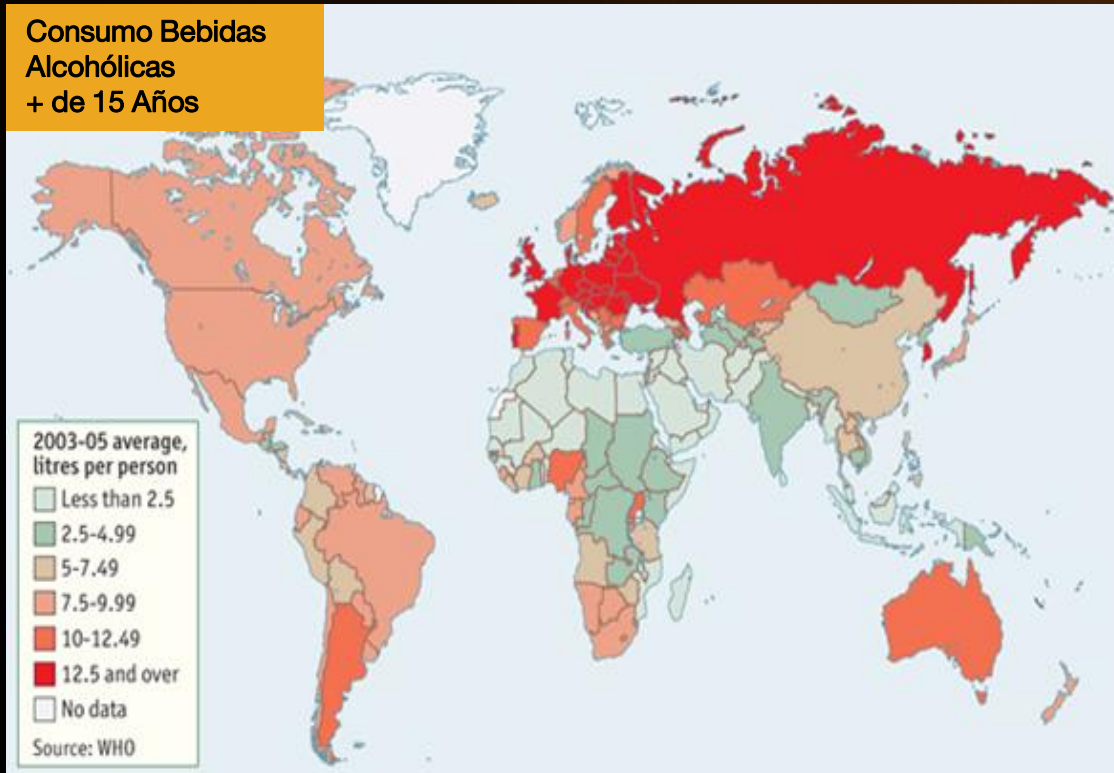


CERTIFICACIÓN INTERNACIONAL EN TECNOLOGÍA Y ANÁLISIS SENSORIAL DE RONES Y DESTILADOS

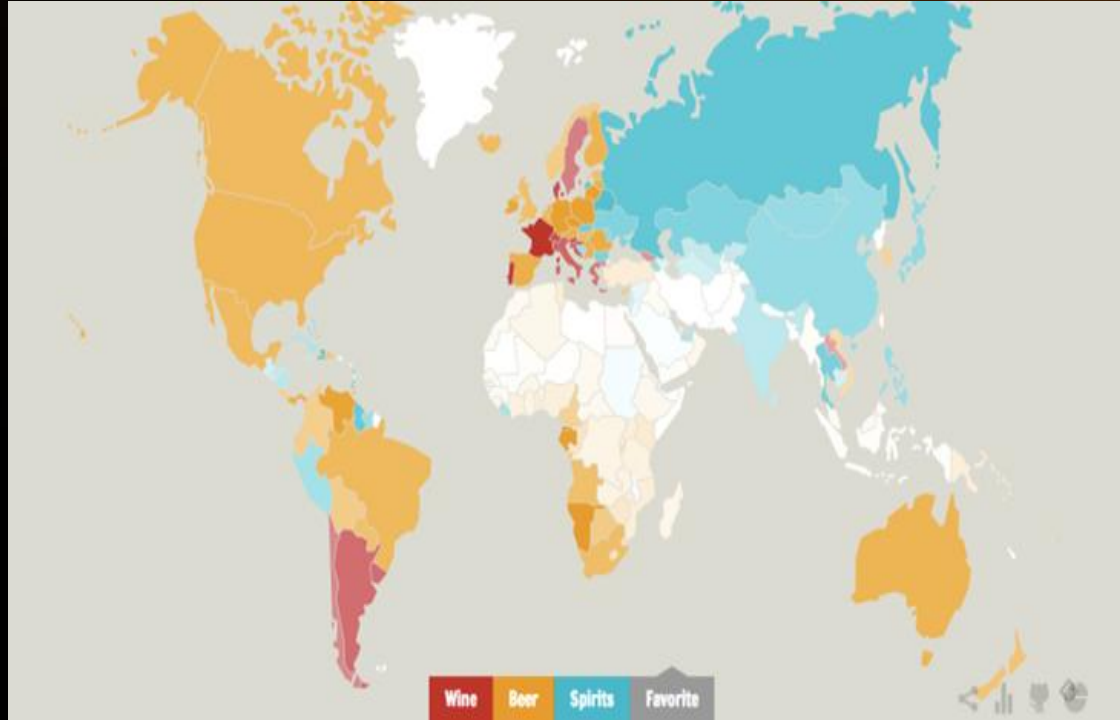
Pedro José Perales García +58 424-273.9287
pperales69@yahoo.com

CONSUMO MUNDIAL DE BEBIDAS ALCOHÓLICAS - TENDENCIA 2022 / 2024

Consumo Bebidas
Alcohólicas
+ de 15 Años

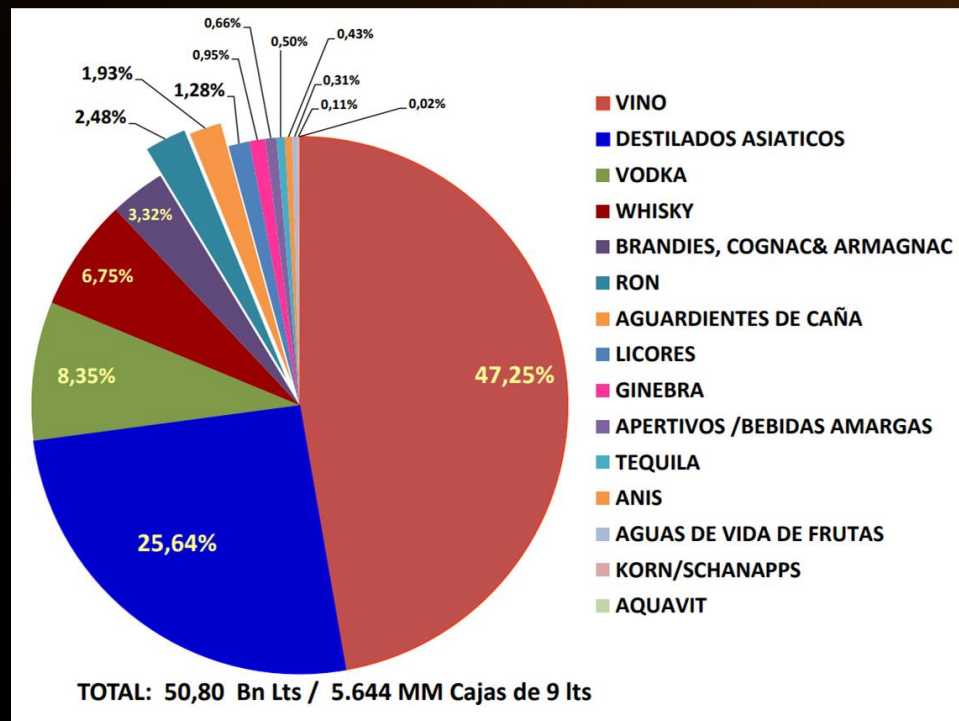


CONSUMO MUNDIAL DE BEBIDAS ALCOHÓLICAS - TENDENCIA 2022 / 2024



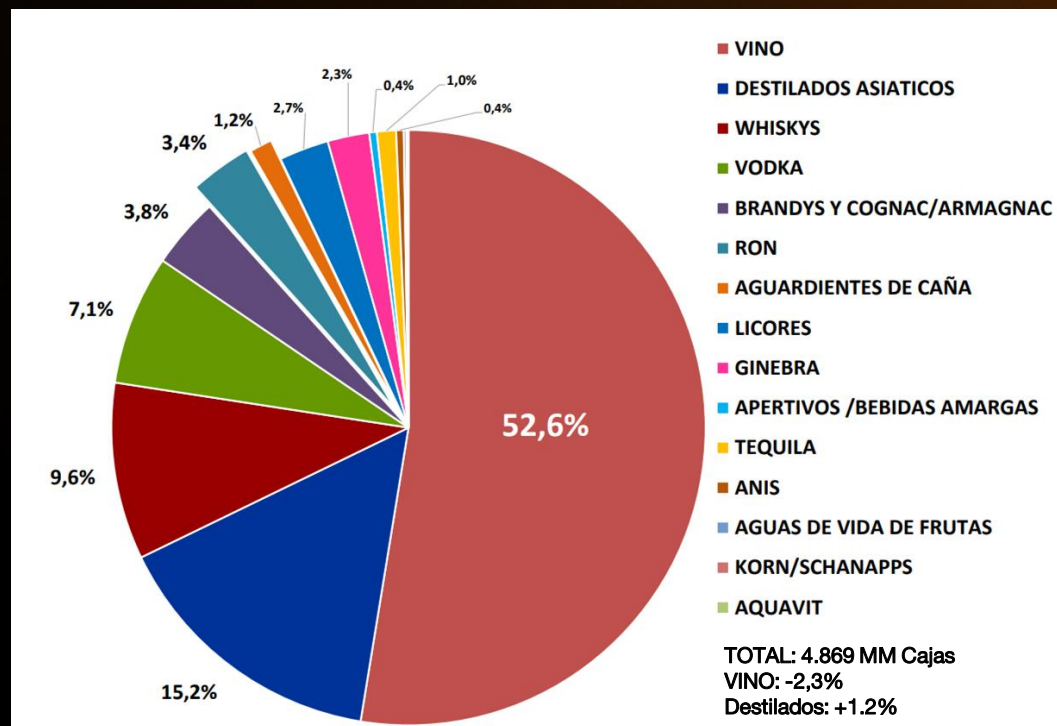
<http://ghostinthedata.com/alcoholmap/>

CONSUMO MUNDIAL DE VINOS, DESTILADOS Y ESPIRITUOSOS 2015



Fuentes: OIV, IWSR, Euromonitor y Cálculos propios

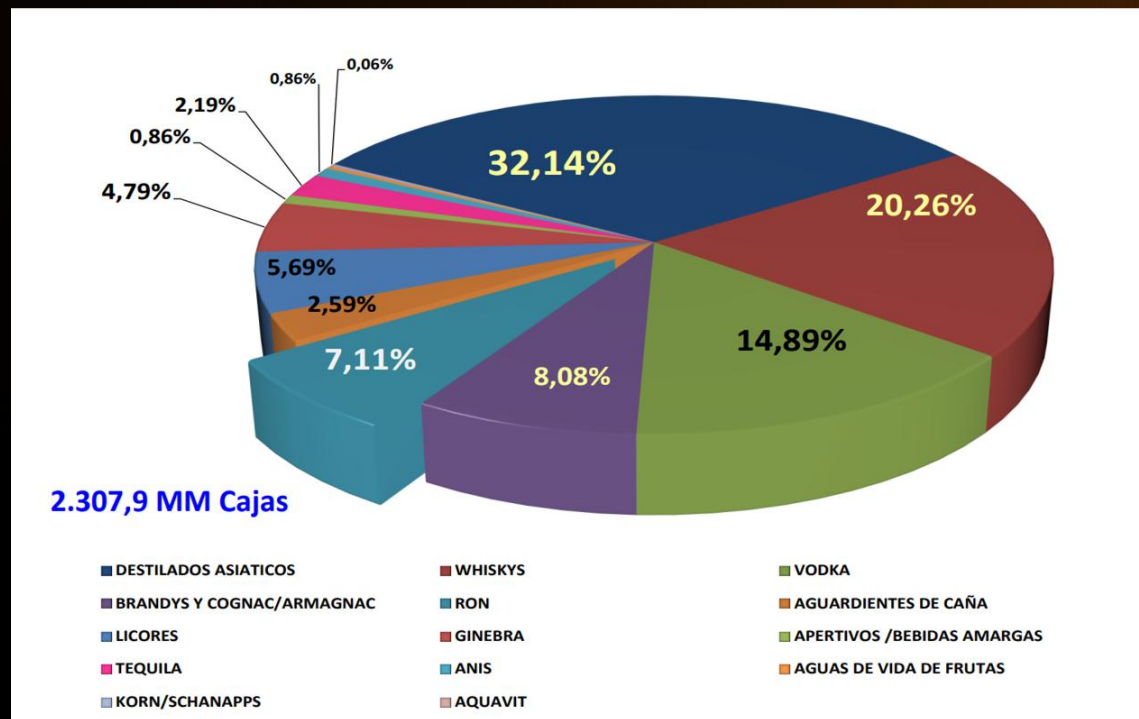
CONSUMO MUNDIAL DE VINOS, DESTILADOS Y ESPIRITUOSOS 2024*



Fuentes: OIV, IWSR, Euromonitor y Cálculos propios

*Preliminar

CONSUMO MUNDIAL DE VINOS, DESTILADOS Y ESPIRITUOSOS 2024*



TOTAL: 2.307,9 MM
Cajas de 9 lts +1,2% Vs
2023

Fuentes: IWSR, Euromonitor y Cálculos propios

*Preliminar

Category volume sales

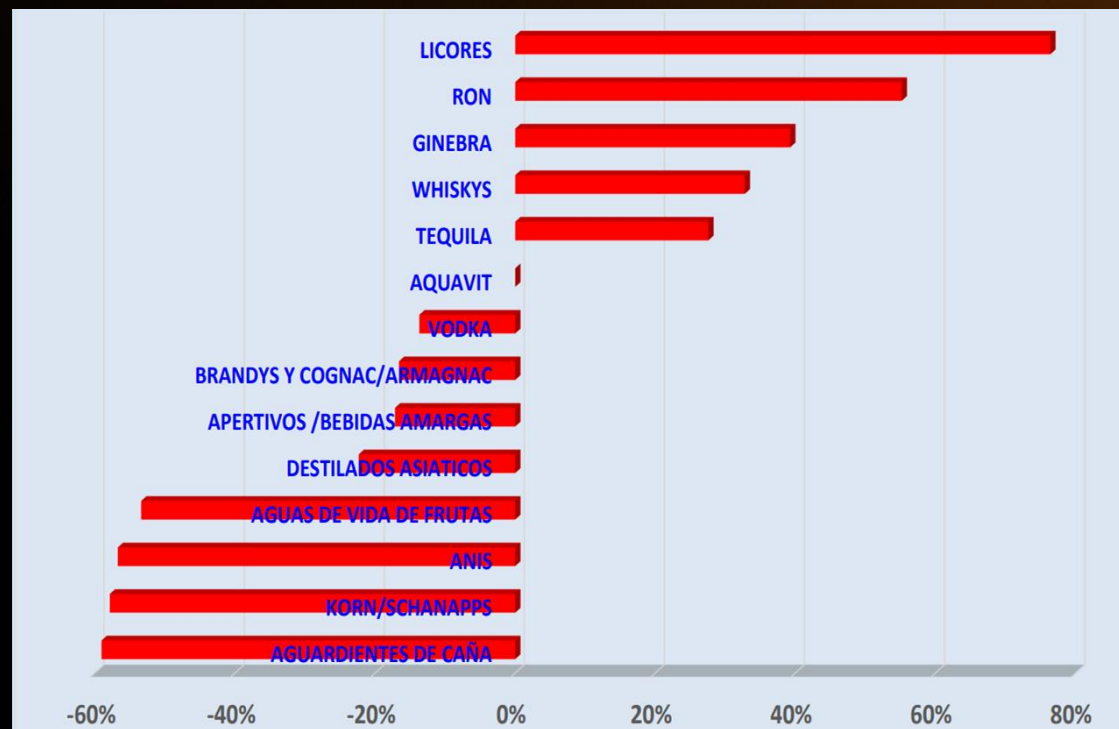
Figures: million 9l-case sales

Category	2023	2024*	%+/-
Spirits	2,279.7	2,307.9	1.2%
Brandy	165.7	170.6	3.0%
Cognac	13.9	13.1	-6.2%
Liqueurs	129.0	130.7	1.3%
Rum	159.8	164.7	3.0%
Tequila and mezcal	46.2	47.6	3.1%
Whiskies	463.3	480.1	3.6%
Gin	104.9	108.2	3.2%
Vodka	338.4	338.4	0.0%

Source: Euromonitor International

*Forecast figures

EVOLUCIÓN DEL CONSUMO DE DESTILADOS Y ESPIRITUOSOS (2000 -2024*)



Fuentes: IWSR, Euromonitor y Cálculos propios

*Preliminar

RHUM

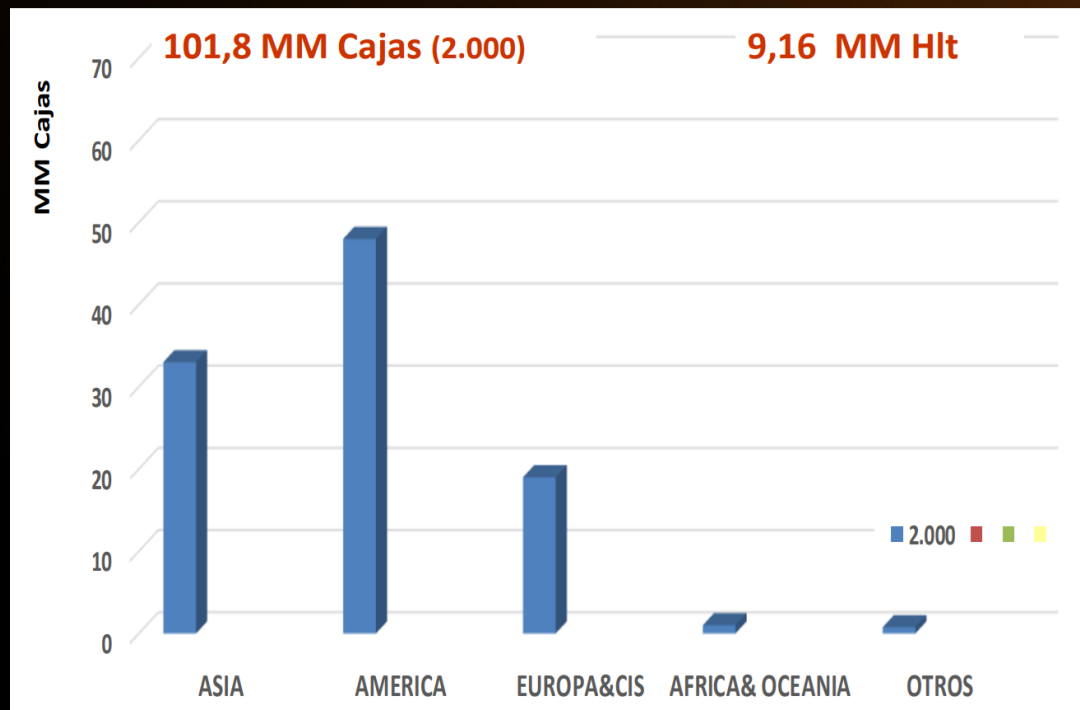


EL RON, DESTILADO O ESPIRITUOSO DEL CARIBE Y DE ASIA

NEGRITA

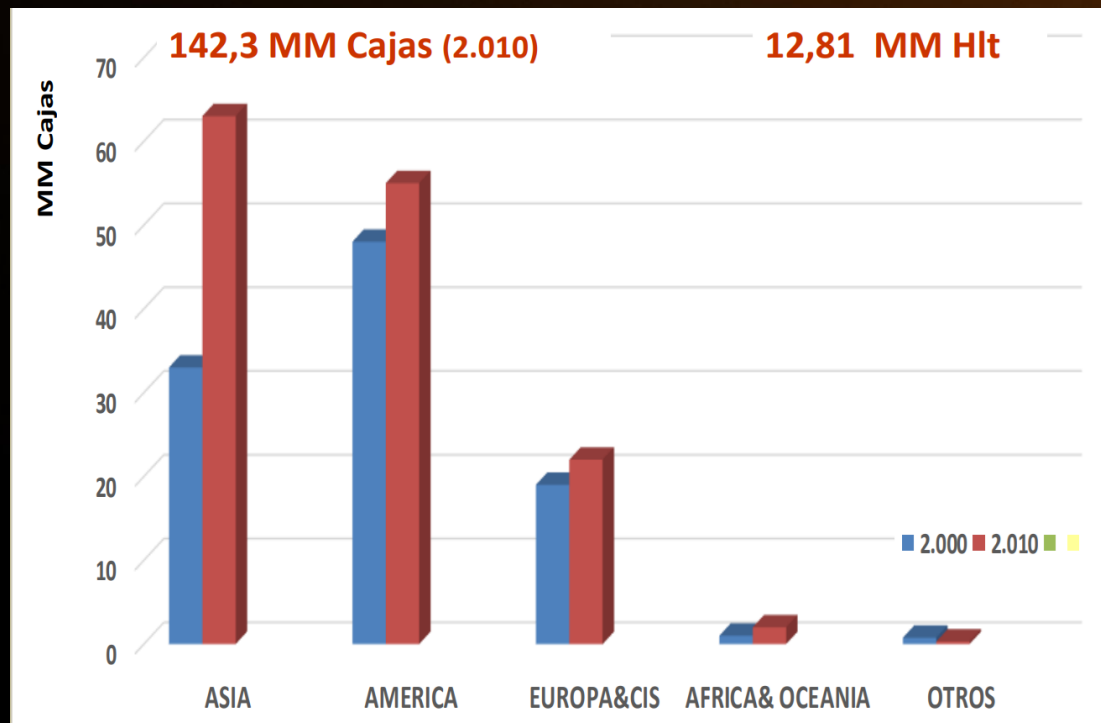


EVOLUCIÓN DEL CONSUMO DE RONES POR REGIONES (2000 - 2024*)



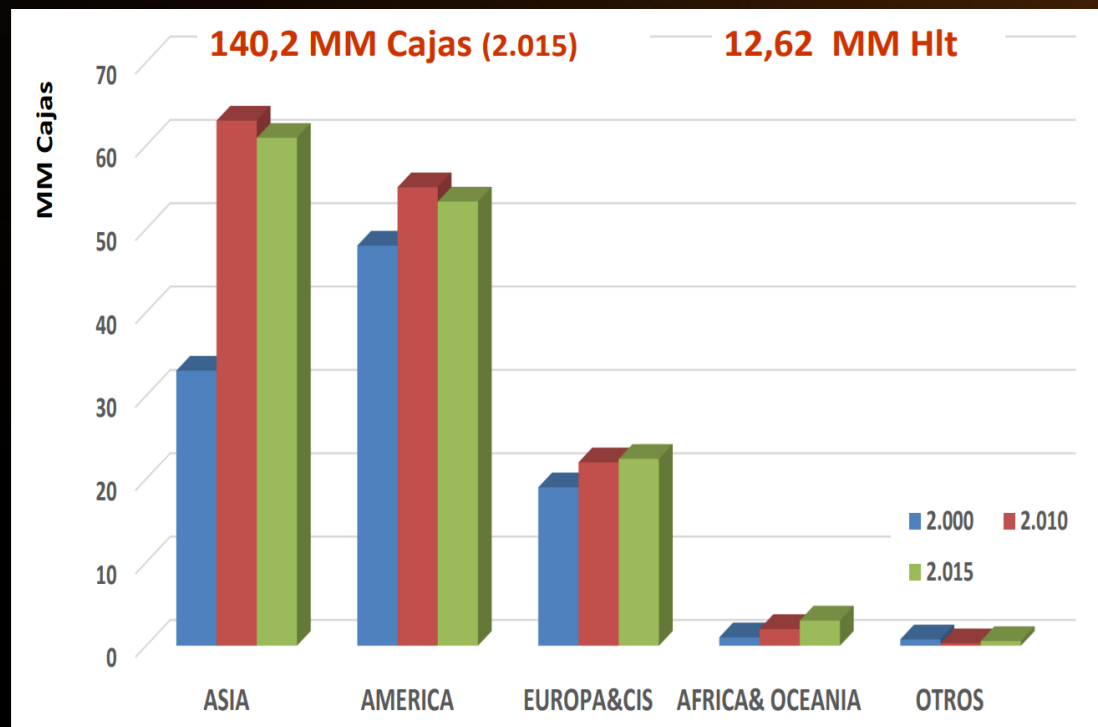
Fuentes: IWSR y Cálculos propio

EVOLUCIÓN DEL CONSUMO DE RONES POR REGIONES (2000 - 2024*)



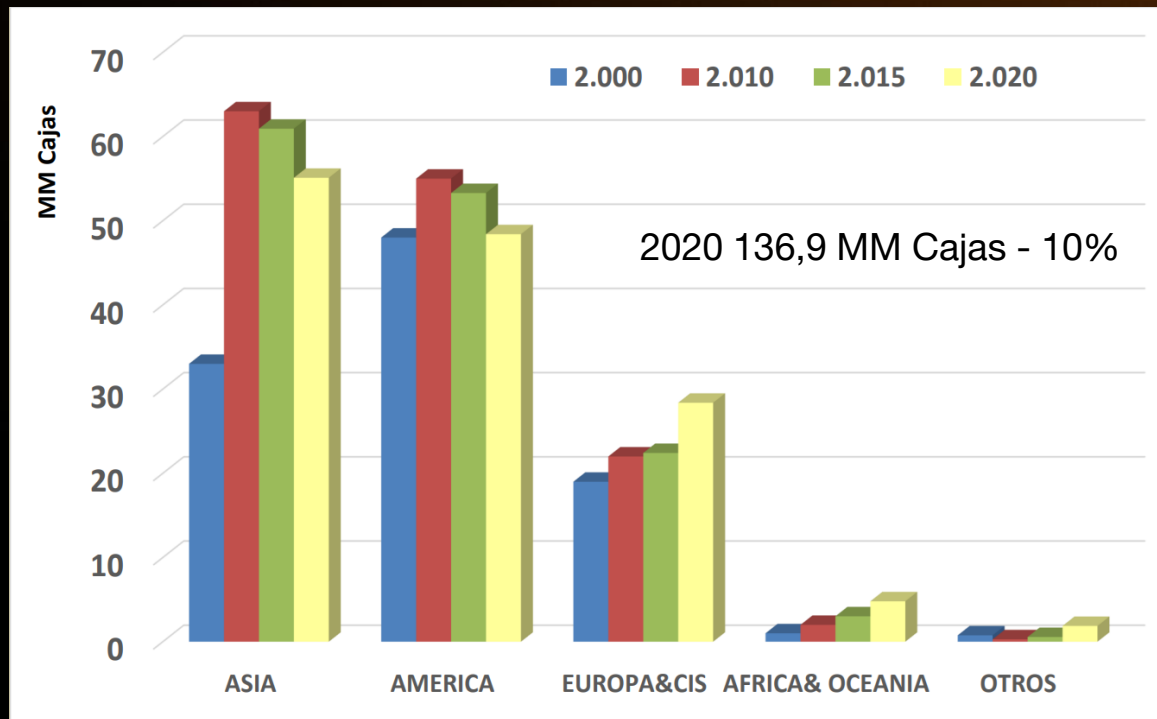
Fuentes: IWSR, thespiritsbusiness.com y Cálculos propios

EVOLUCIÓN DEL CONSUMO DE RONES POR REGIONES (2000 - 2024*)



Fuentes: IWSR, thespiritsbusiness.com y Cálculos propios

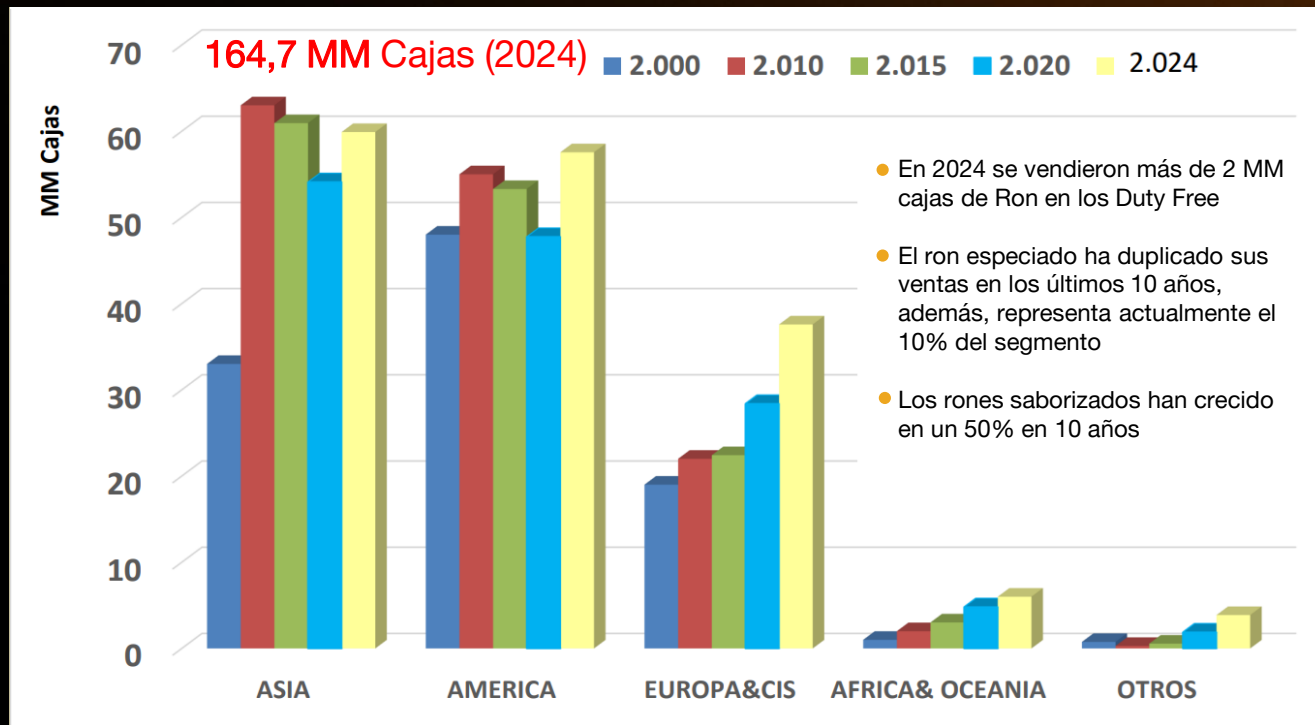
EVOLUCIÓN DEL CONSUMO DE RONES POR REGIONES (2000 - 2023*)



150,6 MM Cajas (2019)
136,9 MM Cajas - 10%
(2020)

Fuentes: IWSR, thespiritsbusiness.com y Cálculos propios

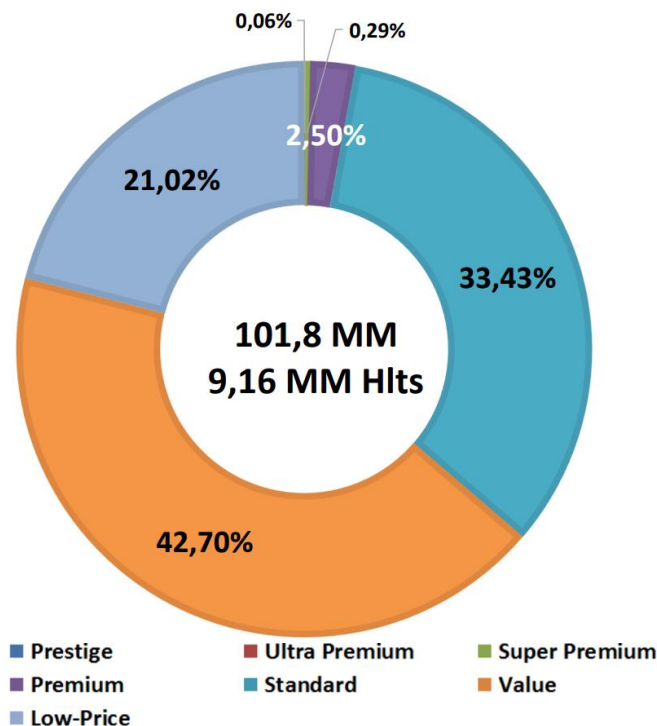
EVOLUCIÓN DEL CONSUMO DE RONES POR REGIONES (2000 - 2024*)



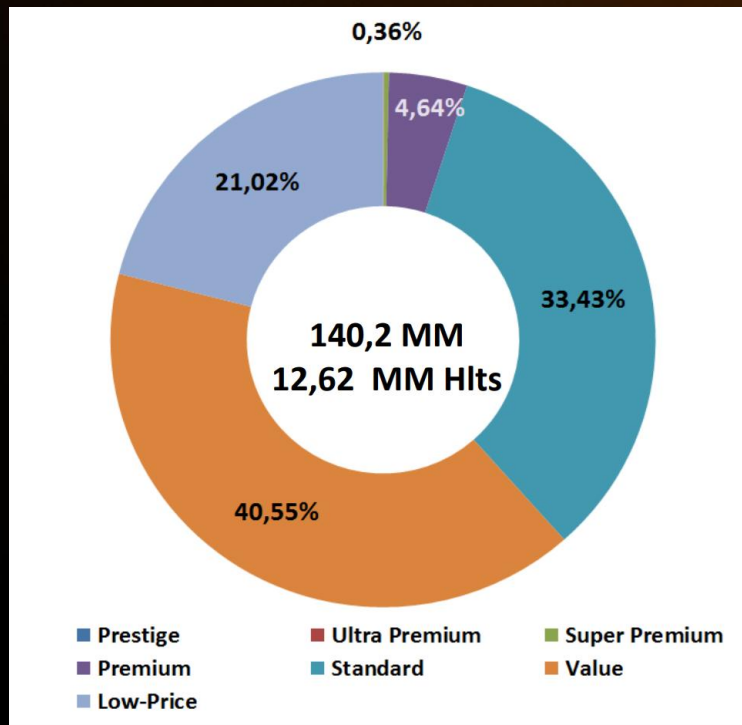
136,9 MM Cajas (2020)
146,3 MM Cajas (2021)
157,9 MM Cajas (2022)
159,8 MM Cajas (2023)

Fuentes: IWSR, thespiritsbusiness.com y Cálculos propios

DISTRIBUCIÓN DE LAS VENTAS POR CATEGORÍA (2.000)

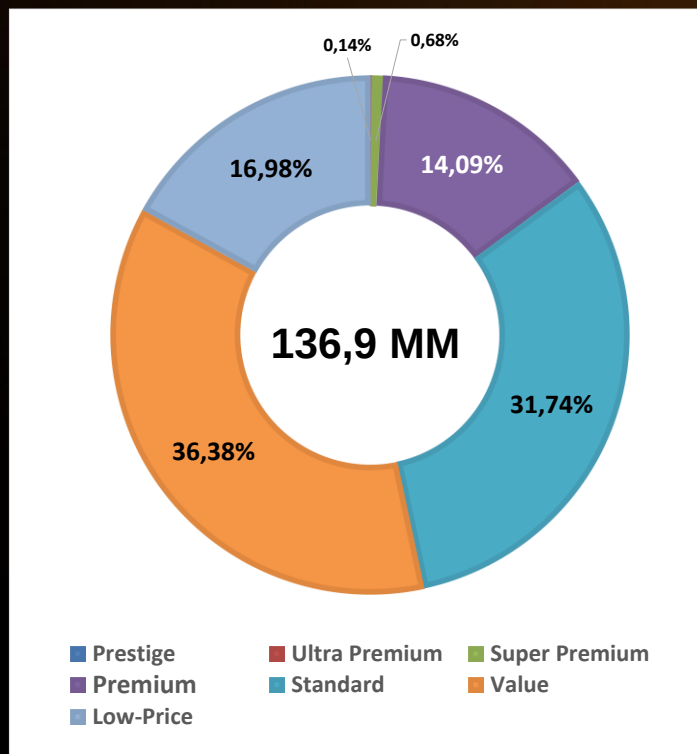


DISTRIBUCIÓN DE LAS VENTAS POR CATEGORÍA (2015)



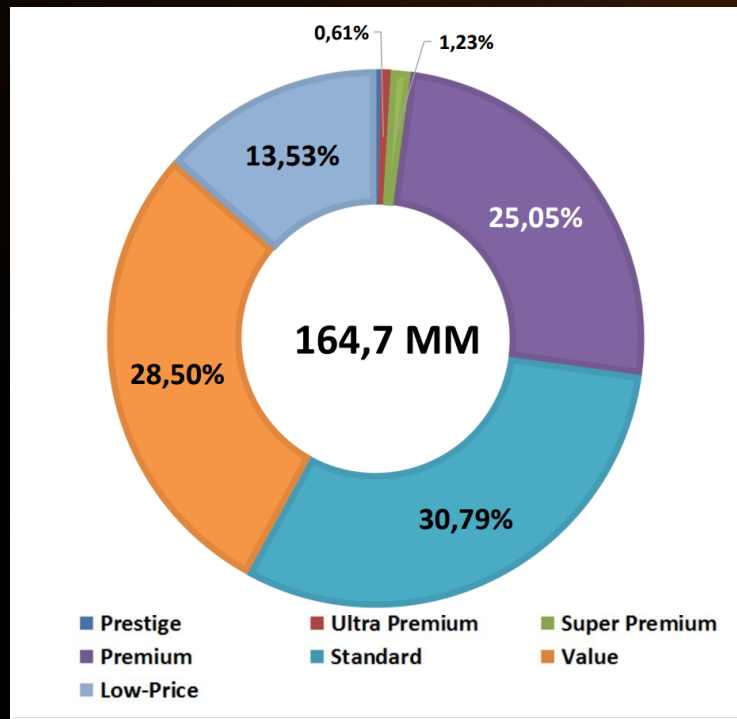
Fuentes: IWSR, thespiritsbusiness.com y Cálculos propios

DISTRIBUCIÓN DE LAS VENTAS POR CATEGORÍA (2020)



Fuentes: IWSR, [Thespiritsbusiness.com](https://thespiritsbusiness.com) y Cálculos propios

DISTRIBUCIÓN DE LAS VENTAS POR CATEGORÍA (2024*)

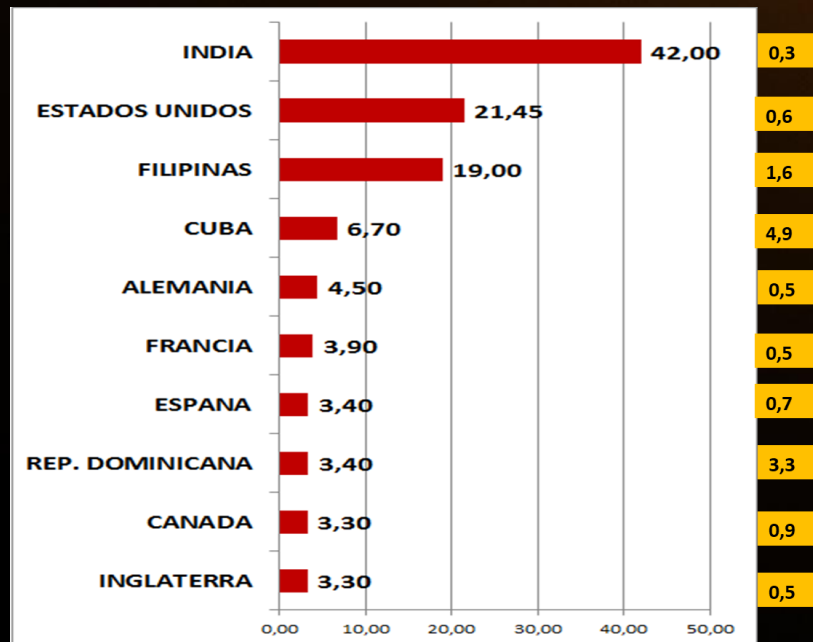


*Preliminar

Fuentes: IWSR, [Thespiritsbusiness.com](https://thespiritsbusiness.com) y Cálculos propios

PRINCIPALES CONSUMIDORES DE RON (2024)*

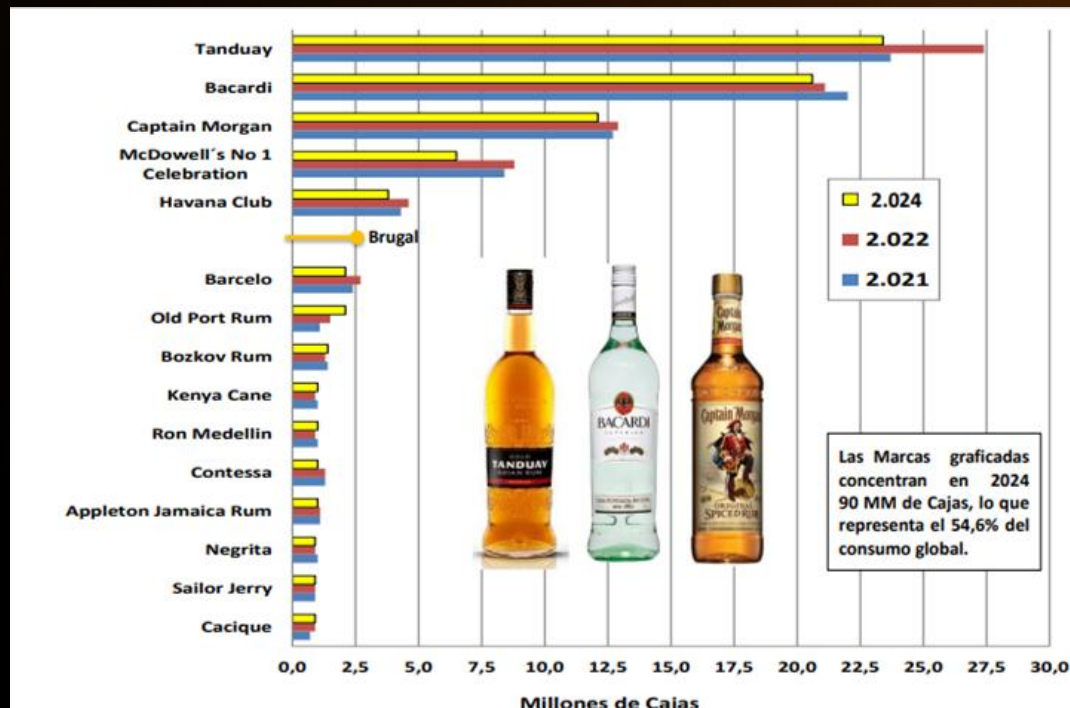
Consumo: **164,9 MM** Cajas



Fuentes: IWSR y Cálculos propios

*Preliminar

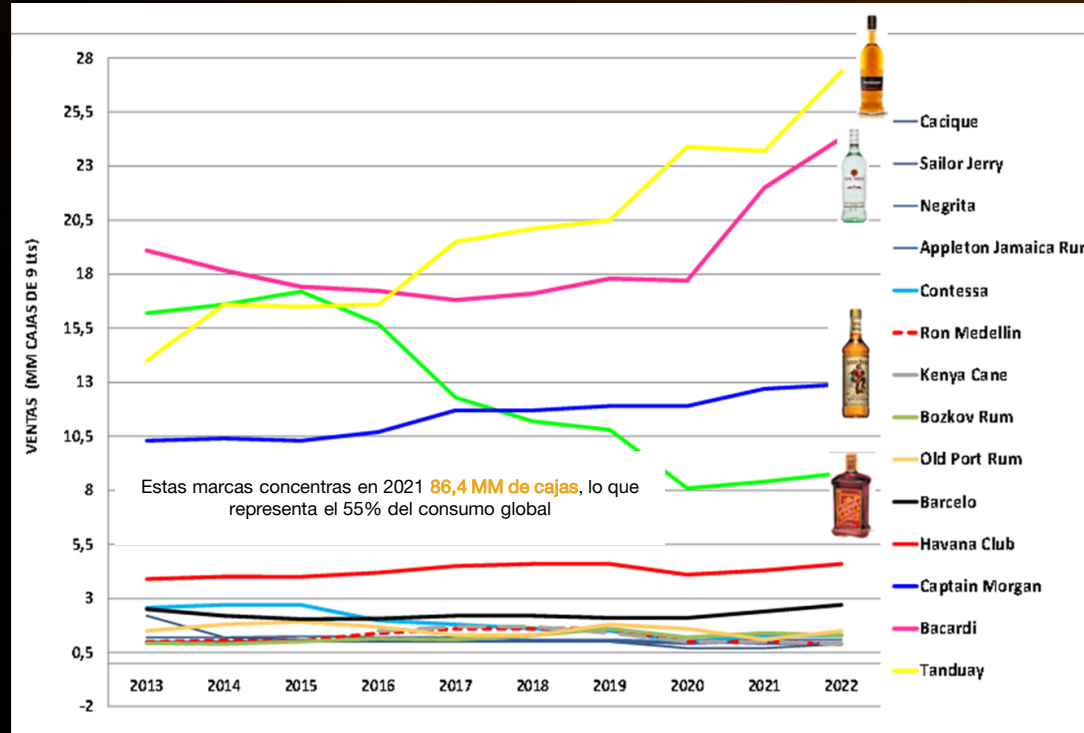
CONSUMO DE MARCAS LÍDERES DE RON EN EL MUNDO (2024)*



*Preliminar

Fuentes: thespiritsbusiness.com, Euromonitor y Cálculos propios

CONSUMO DE MARCAS LÍDERES DE RON EN EL MUNDO (2024)*



*Preliminar

Fuentes: thespiritsbusiness.com

CONSUMO DE MARCAS LÍDERES DE RON EN EL MUNDO (2024)*

Rum		Figures: million 9l-case sales					
Brand	Owner	2020	2021	2023	2023	2024	%+/-
Tanduay	Tanduay Distillers	23.7	23.6	27.4	23.4	23.8	1.9%
Bacardí	Bacardí	17.2	19.2	21.1	20.6	19.7	-4.2%
Captain Morgan	Diageo	11.9	12.7	12.9	12.1	11.5	-5.0%
McDowell's Rum	United Spirits	8.1	8.4	8.8	6.5	6.1	-5.7%
Havana Club	Pernod Ricard	4.1	4.3	4.6	3.8	3.3	-13.8%
Barceló	Ron Barceló	2.1	2.4	2.4	2.2	2.2	0.2%
Bozkov	Stock Spirits Group	1.2	1.4	1.3	1.4	1.4	-0.7%
1965 Spirit of Victory	Radico Khaitan	0.4	0.6	0.9	1.2	1.2	5.2%
Old Port	Amrut Distillers	1.6	1.2	1.5	2.1	1.2	-43.7%
Contessa	Radico Khaitan	1.1	1.3	1.3	1.3	1.1	-13.4%
Kenya Cane	Diageo	1.0	0.9	0.9	0.8	1.1	39.5%
Kraken	Proximo Spirits	1.0	1.1	1.1	1.0	1.0	-2.9%

*Preliminar

Fuentes: thespiritsbusiness.com



TANDUAY™

THE WORLD'S #1 RUM

www.tanduayusa.com

f TanduayUSA 📷 TanduayRUM



THE KNOWLEDGE OF TANDUAY RUM

**INTENSE
AMBER
COLOR**

BOTTLE DESIGN

The Asian inspired pattern and T logo on the bottle convey quality and creates a sensual experience. It also reflects the craftsmanship of the company in producing a quality rum. The Heritage Asian Cane on the caps links to the original ancient noble sugarcane where our rum originated. Rum of distinction EST 1854 notes the company's longevity and experience for almost 164 years.

**+UP 7
YEARS
AGED**

**40%
ABV
SPIRIT**

AVAILABLE



**GOLD
RUM
STYLE**

NOSE

Medium intensity and complex aromas. Presence of molasses, mature honey, almond taste, burnt sugar, toasted oak, orange peels, vanilla, and tobacco flavors. Refined and elegant nose.



PALATE

Well-structured and bodied. Good balance of alcohol levels and acidity/sweetness. Persistent in harmony. The caramel flavors persist on the finish, with vanilla and wooden notes.



**AGED UP TO 7 YEARS IN
BOURBON BARRELS, WITH
A TASTE PROFILE OF
MATURE HONEY WITH HINTS
OF TOASTED OAK, ALMOND
AND VANILLA.**



TANDUAY FACTS

- Tanduay won its first international award in 1878, a Gold medal from the Exposition Universelle, Paris.
- On 1943 Gen. Douglas MacArthur ordered the closure of all distilleries and the Japanese Imperial forces occupied Tanduay Quiso.
- Tanduay celebrated its 150th anniversary in 2004. In 2006, the El Salvador Plant was completed. As the decade came to a close, Tanduay Asian Rum was launched in the USA.
- The origin of Tanduay Holdings Inc. can be traced to 1937 when The Manila Wine Merchants Inc. was incorporated. This company was basically an amalgamation of several business interests, the important one for our discussion being the Manila Steamship Company which held agricultural interests in the Western Visayas and had been producing rum (and other spirits) in the Philippines since at least 1893. In 1999, the Manila Wine Merchants Inc. formally changed their name to Tanduay Holdings.

AWARDS

Golden Lion Medals (Silver Medal, 2017)
International Taste and Quality Institute (3 Gold Stars, 2016 - 2017)
Miami Rum Renaissance Festival (Gold Medal, 2013)
Madrid International Rum Conference (Gold Medal, 2015)
Mundo Selection (Gold Medal, 2014 - 2017)
International High Quality Trophy, 2016
Rum and Cachaça Masters (Gold Medal, 2017-2018)
San Diego Spirits Festival (Gold Medal, 2015)
San Francisco World Spirits Competition (Silver Medal, 2014 and 2018)
Tastings.com Best Buy Bar Review (Gold Medal, Best Buy Bar @ 90 Points)
Tastings.com International Review of Spirits (Gold Medal @ 90 Points, 2016-2018)
Ultimate Spirits Challenge (88 Points, 2013 and 2015)
Wine & Spirits Wholesalers of America (Silver Medal, 2016)
World Drink Awards (Category Winner for Columbian 50% to 10 Years old, 2018)



CONNOISSEUR

NOSE

Medium intensity and complex aromas. Presence of molasses, mature honey, almond taste, burnt sugar, toasted oak, orange peels, vanilla, and tobacco flavors. Refined and elegant nose.

Other Opinions: Slightly fruity with toasted cane and grass notes, figs, rambutan, oak vanilla with suggestions of coconut in the background. Fruity note developing later on. Similar but better than the silver, in that it has more oak influence with more char and vanilla notes. Intriguing toasted caramel with aromas of coconut crème brûlée, bright red maraschino cherries, dark honey, golden raisin, and toasted oak. Aromas of bright red maraschino cherries, dark honey, golden raisin, and toasted oak with a supple, prickly, fruity light body and a peppery, cheery graham cracker, toasted coconut, and grenadine finish.

PALATE

Well-structured and bodied. Good balance of alcohol levels and acidity/sweetness. Persistent in harmony. The caramel flavors persist on the finish, with vanilla and wooden notes.

Other Opinions: Molasses, sugar cane, oak vanilla, nutmeg, slightly creamy mouthfeel, nicely rounded with persimmon like notes and a slightly drying finish. Expressive flavors of vanilla, tropical fruit, and notes of clean, new oak graham cracker, toasted coconut, and grenadine.

EYE

Medium golden and transparent aspect. Intense amber color with warm gold and bronze hints, luminous and bright.

Other Opinions: Bright golden amber color. Light golden colour. Clear pale yellow gold.

CONNOISSEUR



NOSE

Medium intensity and complex aromas. Presence of molasses, mature honey, almond taste, burnt sugar, toasted oak, orange peels, vanilla, and tobacco flavors. Refined and elegant nose.

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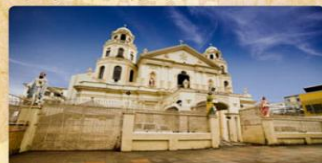
6 THINGS ABOUT TANDUAY DISTILLERIES

STARTED BY PRODUCING
TANDUAY RUM IN LARGE 10-GALLON
BLOWN GLASS BOTTLES
WITH A NARROW NECK CALLED

DAMA JUANAS



The story of **Tanduay** is a triumph that deeply inspired a nation. Its glorious beginnings can be traced as one of the companies under Ynchausti y Cia, a "conglomerate" founded in 1854 by Don Jose Joaquin Ynchausti, Joaquin Elizalde, joined by Uncle Juan Bautista. They were later on joined by Valentin Teus with an "Alakan" or a distillery which was originally located in Hagonoy, Bulacan.



A print ad released in 1901 showed products sold in 10 gallon bottles called 'demi juanas.' Management was fully entrusted to the Elizaldes after Joaquin Jose's untimely death in 1920.

Upon Manila's liberation, servicemen queued up from the Tanduay Quiapo gate to the vicinity of **San Sebastian Church** to buy rum.



Tanduay celebrated its Centennial in 1954. Three years after, Tanduay's El Maestro, Señor Faustino Munarriz was hired in 1959.

The first batch of Tanduay Rum Five Years was harvested in 1965. Years after, the product earned its first 2 medals from Monde Selection in 1971.

El Kapitan bought Tanduay Distillery from the Elizaldes and the acquisition made waves and was marked as one of the biggest corporate transfers during that time.

ABOUT PHILIPPINES

- The Philippines is located at the southeast part of Asia with 7,641 islands which were surrounded by the vast sea of water namely the Pacific Ocean and South China Sea.
- The Philippines' location on the Pacific Ring of Fire and close to the equator makes the Philippines prone to earthquakes and typhoons, but also endows it with abundant natural resources and some of the world's greatest biodiversity.
- The volcanic history of the archipelago combined with the wide plains available throughout the nation make the Philippines a prime spot for growing crops for domestic use and export.
- The Central Luzon, Cagayan Valley and Negros are among the many places with fertile soil in the Philippines. This land is the nation's primary source of livelihood. The chief crops of the nation include rice, corn, abaca, tobacco, and sugarcane.
- In 1521, Ferdinand Magellan, a Portuguese explorer who was serving the Spanish crown, landed in the Philippines on his voyage to circumvent the globe and search for spices. He explored the islands and named it Archipelago of San Lazaro. Spain continued to send expeditions to the island for financial gain and on the fourth expedition, Commander Ruy Lopez de Villabona, named the islands: Philippines, after Prince Philip (later King Philip II), heir to the Spanish throne. Spain ruled the Philippines for 356 years.



FERDINAND
MAGELLAN

MORE INFORMATION

MARKET AVAILABILITY:
CURRENTLY AVAILABLE IN
THE STATES OF
CALIFORNIA, NEW YORK,
FLORIDA, AND ILLINOIS



THE #1 SELLING RUM* IN THE WORLD MARKET

*THE DRINKS INTERNATIONAL MAGAZINE BASED ON 2017 SALES

SOURCE

Molasses. The company harvests the molasses and sugarcane used to create their rum from fields adjacent to the distillery in Bacolod.

AGING

Aged up to 7 years in bourbon barrels, with a taste profile of mature honey with hints of toasted oak, almond and vanilla.

www.TANDUAYUSA.com

f @TanduayUSA t @TanduayUSA @tanduayusa Tanduay USA



About Tanduay Asian Rum Gold

The original Tanduay distillery located at Calle Tanduay (now, J. Nepomuceno Street) in Quiapo, Manila has been Tanduay's prime production facility until it was decommissioned on April 2013.

Tanduay Distillers, Inc. announced that production will be relocated to a larger facility located in Cabuyao, Laguna, capable of producing 100,000 cases a day. The original distillery's production capacity was at 30,000 cases a day. Portions of the original distillery will be converted into a museum to showcase the history and heritage of Tanduay. The distillery may be reopened in the future, if needed, to serve as backup production facility.

SOUTH CHINA SEA

PHILIPPINE SEA

PHILIPPINES

CELEBES SEA

PACIFIC OCEAN

LOCATED
AT THE SOUTHEAST
PART OF ASIA

the **rumlab**
KNOWLEDGE
THE RUM LAB.COM

CUBA



Cuba Produce rones de *cuerpo ligero, frescos, sobrios y equilibrados*. Algunos con cuerpo y añejamiento en roble. Producidos a partir de melaza y por **Destilación Continúa**.



La Isla tiene registradas **34 marcas** comerciales de ron. La más famosa es la marca Havana Club distribuída en exclusividad por la empresa francesa Pernod Ricard.



Marcas importantes: Havana Club, Mulata, Arecha, Varadero, Santiago, , Matusalen, Caney, Legendario, Bocoy, Bucanero, Caribbean Club



CUBA



Cuba produce **16 Millones de Cajas**

Tienen **11 Fábricas para Exportación**

El Consumo per Cápita es **4,9 litros**. (**7,1 millones de cajas**) que equivale al 44% de la producción, mientras que el otro 56% (**8,9 millones de cajas**) equivale a la exportación

Habana Club produce **4,6 millones de cajas**, mientras que las otras marcas producen entre todas solo **4,3 millones de cajas**

PUERTO RICO



Puerto Rico produce rones de **cuerpo ligero, frescos, sobrios y equilibrados**, muy similares a los cubanos. Algunos añejos tienen cuerpo y estructura. Producidos a partir de melaza y por **Destilación Continua**.



Puerto Rico produce **21,3 MM de Cajas de Ron**, de los cuales Bacardí produce el 86% siendo la planta destiladora de San Juan, la mas grande del mundo. Esta marca es la número uno en ventas en EE.UU



Marcas importantes: BACARDI, DON Q, Ron Palo Viejo, Ron Granado, Ron Llave, Ron Rico, Don Pepón

REPÚBLICA DOMINICANA



El ron es la bebida nacional de República Dominicana y uno de sus productos **más reconocidos a nivel internacional**. Se produce en Santiago, Puerto Plata y Santo Domingo. Producidos a partir de melaza y jugo de caña y por **Destilación Continua**.



Produce rones de **cuerpo ligero y frescos, son elegantes** con aromas y cuerpo definido. Sus rones añejados en roble son complejos



REPÚBLICA DOMINICANA



República Dominicana produce **7,8 MM de Cajas de Ron**, siendo el segundo consumidor per cápita del mundo con 3,3 lts por persona (3,7 MM Cajas).



El 52,5% se exporta, siendo el principal destino de exportación de RD es España con el 65% del total exportado.



Principales marcas: Bermúdez, Barceló, Brugal, Siboney, Matusalen, Macorix, Carta Real y Optimus, Punta Cana, UNIX, entre otros.

JAMAICA



En esta isla se producen rones muy aromáticos, densos, pesados y a veces especiados, que se diferencian de otros con facilidad. Producido por **Destilación en Alambiques y Destilación Continua**



Produce **3,5 MM de Cajas de Ron** en solo 5 destilerías, las cuales cuentan en la actualidad con tecnología moderna. En 1.893 existían 143 destilerías y en 1948 solo 25.



Produce rones blancos, rones añejos, ron negro u oscuro y el particular Over Proff (de 50 a 75 GAL)



BARBADOS



En esta isla se produce rones **aromáticos, densos, pesados y a veces especiados**. Mezclan principalmente rones de columna con rones de alambiques. También produce rones ligeros. Producido por **Destilación en Alambiques y Destilación Continua**. Producen Rones Ingleses e Industriales, utilizando Melaza (Importan el 80%)



Produce **1 MM de Cajas*** de Ron en solo 5 destilerías. Cuentan con la Destiladora de ron más antigua del Mundo de 1.703 con la marca Mount Gay



BARBADOS



Produce Ronces Blancos, Ronces Dorados, Ronces Añejos (2 a 10 años) y Ronces OverProff (154 Overproff = 77 GL).



MARTINICA



En esta isla se produce rones muy aromáticos, densos, pesados y a veces especiados, que se diferencian de otros con facilidad. Producido por Destilación en Alambiques en lotes. Tienen un ron industrial que utiliza melaza como materia prima y destilación continua (Ron Negrita).



Produce 1,8 MM de Cajas de ron en solo 8 destilerías, de las cuales 7 trabajan con jugo de caña (85%) y una con Melaza(15%). No todas operativas



DOC RON AGRÍCOLA DE MARTINICA DESDE 1.996



MARTINICA



80% **Rones Blancos** (min 6 semana de reposo sin añejamiento y hasta 3 meses añejamiento)



20% **Rones Dorados**

- **Eleve Sous bois ó Ambre:** mínimo 1 Año y envejecido en toneles de 700 a 1.000 lts.

- **Vieux:**

* **Añejo ó VO** min 3 Años

* **VSOP** min 4 años

* **XO** min 6 Años (también los milessime/añada + 6 años)



Principales marcas: Saint-James, Clément, La Mauni, Depaz o Trois-Rivières y Ron Negrita. *Martinica, Guadalupe y Marie Galante



COLOMBIA



Colombia produce rones de **cuerpo ligero, frescos, sobrios y equilibrados**. Algunos añejos tienen cuerpo y estructura. Producidos a partir de melaza y por Destilación Continua.



Los valles colombianos producen **2,5 MM de Cajas de Ron** en su mayoría destilerías públicas y unas pocas privadas. Existe producción en los valles de Antioquia, Boyacá, Caldas y Cali.



COLOMBIA



VENDEN SUS RONES CON LA DENOMINACIÓN **RON VIEJO**



Marcas importantes: Ron Viejo de Caldas, Santa Fe, Ron Medellín, Ron Marquez del Valle. La Hechicera, Parce, Coloma, Gobernador, Dictador, Puro Colombia, Calibio y Cierva Dorada , Amuleto



RONES DE LAS ISLAS OCCIDENTALES GUAYANA Y SURINAM

- En las colonias británicas, norteamericanas, francesas, holandesas, islas franco anglófonas, Guyana y Surinam, se producen una cantidad importante de marcas y variedades de ron. En su gran mayoría son producidas por **Destilación en Alambiques** y a partir de melazas y jugo de caña (Rones estilo frances).
- La mayoría son rones ***muy aromáticos, especiados, pesados y densos.***
- Recientemente los principales destiladores de esta región constituyeron una asociación llamada The West Indies Rum and Spirits Producers' Association (WIRSPA), con el fin de integrarse y fortalecer su presencia comercial global. Actualmente está integrada por empresas de Trinidad y Tobago, Haití, Surinam, St. Vincent & Granadinas, Antigua, Santa Lucía, Barbados, Granada, Guyana y Belice. Martinica también produce rones de esta categoría.



OTROS PAÍSES PRODUCTORES

NICARAGUA

Produce ron de calidad internacional, Ron Flor de Caña



HAÍTÍ

Produce un ron de incuestionable calidad, elaborado a base de jugo de caña y de melazas. Se utiliza una doble destilación **Ron Barbancourt**.



FILIPINAS

La producción de Ron de este archipiélago se limita a dos marcas con nombres de sus islas: **Pandy** y **Tanduay**



OTROS PAÍSES PRODUCTORES

GUYANA

Estos rones se reconocen por la caña de azúcar de **Demerara**, que les permite producir bebidas de calidad sobre todo cuando tienen buen tiempo de añejamiento.



GUATEMALA

Destacan las industrias licoreras Botrán e Industria Guatemalteca, productora orgullosa de su producto estrella **“Ron Zacapa centenario”** el cual ostenta el título de: “El ron número uno en el mundo” durante los últimos 5 años.



VENEZUELA



Venezuela produce rones de cuerpo ligero, frescos, sobrios y equilibrados. Produce también una gran variedad de rones añejos premium y ultra-premium. Producidos a partir de melaza y por **Destilación en Continuo y algunos en Alambiques**



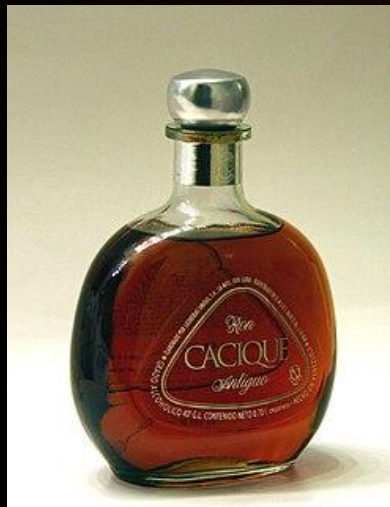
Venezuela produjo en 2.023/2024 Aprox. 2,0 MM de Cajas de Ron, de los cuales el 80% se exportaron y los principales destino fueron Europa, USA y LA.



VENEZUELA



Venezuela en 2026 cuenta con 34 marcas de Ron de 23 empresas: **17 marcas de ron con DOC**, 17 sin DOC. Las más famosa a nivel global son las marcas **Cacique**, **Pampero** distribuidas en exclusividad por las empresas Bardinet y Grupo Montenegro y **Diplomático** de Brown Forman.



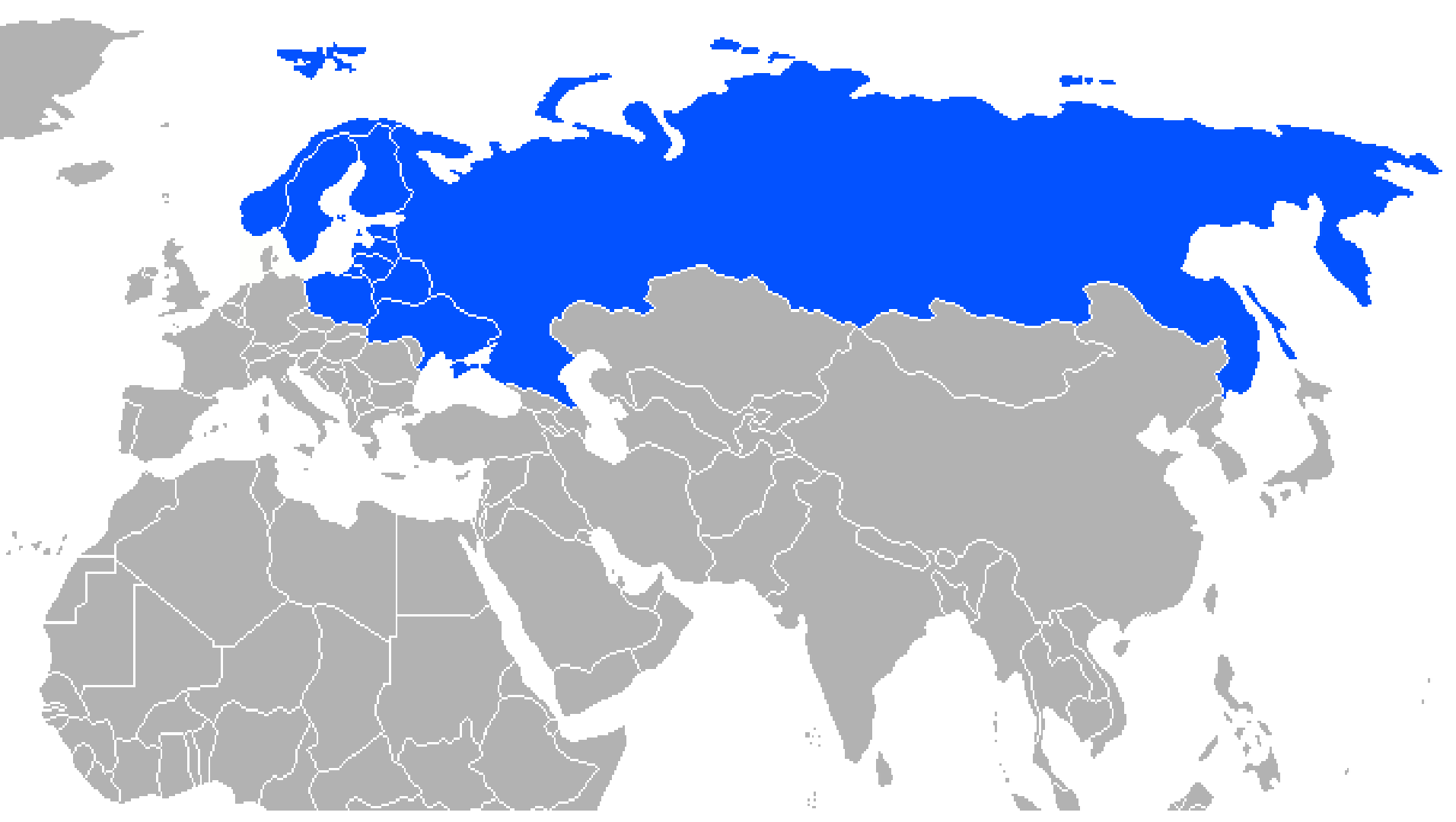
VENEZUELA



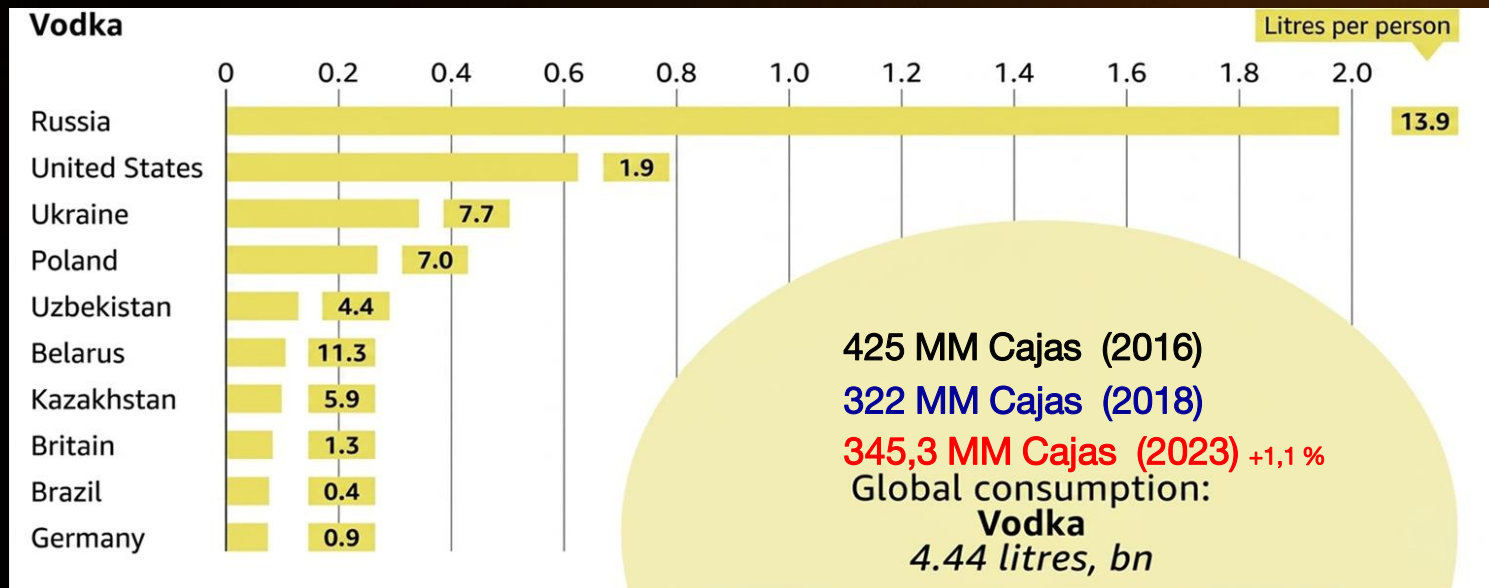
Marca con DOC RDV: Barrica, Bucare, Caballo Viejo, **Cacique**, **Calazán**, Cañaveral, **Carúpano**, **Diplomático**, Estelar, Ocumare, **Pampero**, Quimera, **Roble Viejo**, **Santa Teresa**, Tepuy y **Veroes**. El Muco

Angostura, Anónimo (Don Nadie), **Caribú**, Dinastía, Dracuron, Emperador, El Nacional, Siglo XX, Corsario, Mestizo, **Grand Márquez Dorado**, La Joya Colonial, Piedra Rota (Artesanal), **Tawala Origen**, Terepaima, Ron Gayon y **Ron 1905 Chumaceiro**.

[No producción y en Anaquel: Castro, San Agustín y Macuro]



VODKA



Vodka

Figures: million 9l-case sales

Brand	Owner	2020	2021	2022	2023	2024	%+/-
Smirnoff	Diageo	23.0	26.5	28.1	26.0	24.4	-6.1%
Absolut	Pernod Ricard	9.6	11.7	13.0	11.9	12.0	0.5%
Hlibny Dar	Bayadera Group	8.5	9.2	8.6	9.1	10.0	9.9%
Żubrówka	Maspex Group	10.0	10.8	10.5	9.5	9.5	-0.2%
Magic Moments	Radico Khaitan	3.5	3.7	4.8	6.2	7.1	15.8%
New Amsterdam Vodka	Gallo	5.3	5.1	5.1	5.0	4.9	-2.8%
Arkhangelskaya	Novabev	3.0	3.3	4.0	4.4	4.7	5.6%
Żołądkowa (including Gorzka)	Stock Spirits Group	4.6	4.9	4.2	4.4	4.3	-3.0%
Soplica	Maspex Group	4.3	4.2	4.1	4.2	4.2	0.8%
Five Lakes (Pyat Ozer Vodka)	Alcohol Siberia Group	4.1	4.2	4.2	4.2	4.2	1.2%
Grey Goose	Bacardi	2.9	3.9	4.2	4.2	4.1	-2.6%
Nemiroff	Nemiroff	5.1	5.6	2.4	3.4	4.1	20.8%
Talka	Roust	2.8	3.3	2.7	3.2	3.6	15.6%
Tsarskaya/Imperial	Ladoga	1.4	1.4	1.6	2.3	3.6	43.5%
Collection Gold							
Skyy	Campari Group	3.2	3.3	3.4	3.3	3.2	-3.3%
Kozatska Rada	Bayadera Group	2.2	2.5	2.6	2.6	3.1	17.3%
Ketel One	Diageo	2.7	3.4	3.2	3.0	3.0	0.0%
Belenkaya	Novabev	3.9	3.4	3.4	3.4	2.8	-15.2%
Green Mark	Roust	2.6	2.6	1.9	2.6	2.6	14.2%
Husky	Alcohol Siberia Group	0.9	0.9	1.3	1.6	2.5	55.1%
White Birch (Belaya Beriozka)	Alcohol Siberia Group	0.7	0.9	1.3	2.0	2.4	22.9%

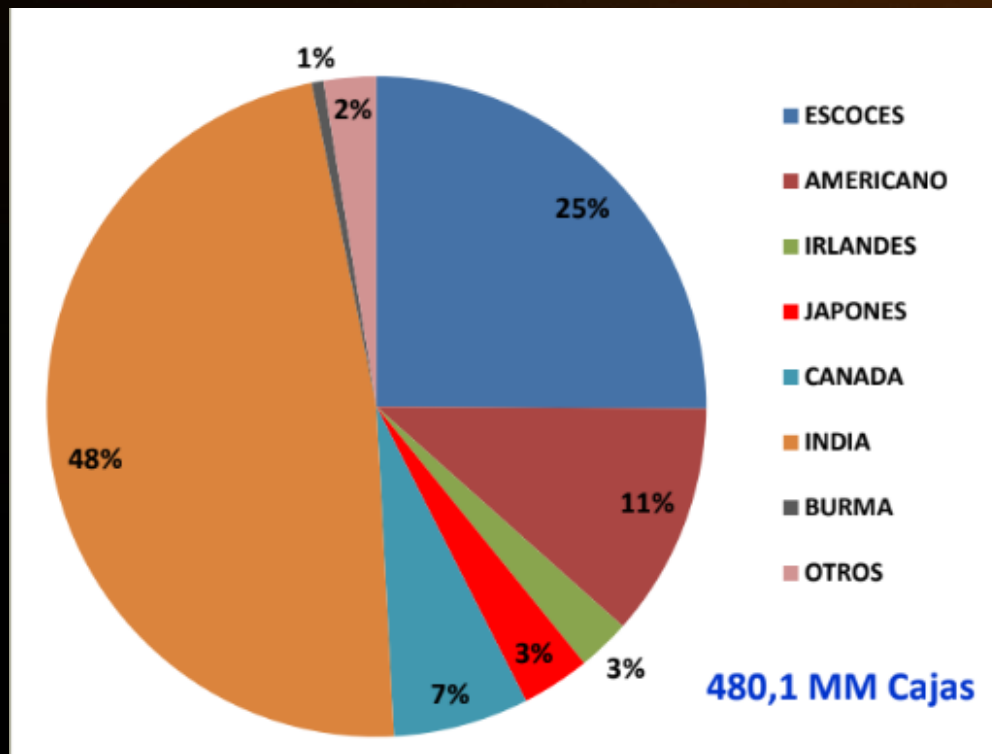
Fuentes: thespiritsbusiness.com



WHISKY

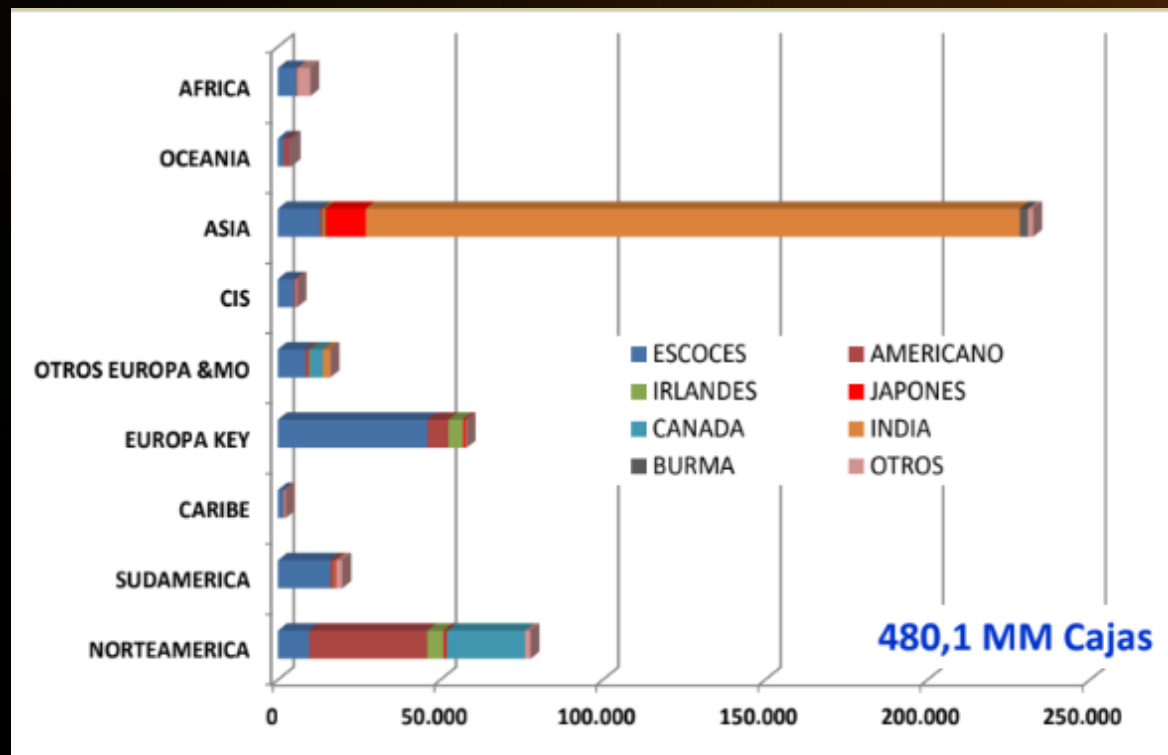


DISTRIBUCIÓN DE LAS VENTAS POR TIPO DE WHISKY (2024*)



*Preliminar

DISTRIBUCIÓN DE LAS VENTAS POR REGIÓN Y TIPO DE WHISKY (2024*)



*Preliminar

PRINCIPALES MARCAS DE WHISKY Y EVOLUCIÓN (2024*)

Scotch whisky

Figures: million 9l-case sales

Brand	Owner	2020	2021	2022	2023	2024	%+/-
Johnnie Walker	Diageo	14.1	19.1	22.7	22.1	21.6	-2.0%
Ballantine's	Pernod Ricard	7.0	8.7	9.2	8.2	9.3	13.9%
Chivas Regal	Pernod Ricard	3.2	4.1	5.2	4.6	4.8	4.8%
Dewar's	Bacardi	2.5	2.8	3.5	3.3	3.3	1.8%
William Lawson's	Bacardi	3.3	3.4	3.5	3.4	3.2	-4.4%
Black & White	Diageo	2.9	3.1	3.6	3.2	3.0	-5.4%
William Peel	Marie Brizard Wine & Spirits	2.7	2.8	2.7	2.7	2.6	-5.1%
Label 5	La Martiniquaise-Bardinet	2.6	2.6	2.5	2.4	2.4	0.0%
J&B	Diageo	2.3	2.8	2.9	2.5	2.4	-4.4%
Buchanan's	Diageo	1.5	2.3	2.5	2.4	2.1	-10.1%
White Horse	Diageo	2.1	2.6	2.6	1.8	2.1	12.6%
Sir Edward's	La Martiniquaise-Bardinet	1.8	1.9	1.8	1.9	2.0	7.5%
100 Pipers	Pernod Ricard	1.3	1.7	2.0	1.8	1.7	-2.8%
Old Parr	Diageo	0.7	1.2	1.5	1.3	1.4	10.0%
Teacher's Highland Cream	Suntory Global Spirits	1.3	1.3	1.3	1.4	1.4	-2.9%
Passport	Pernod Ricard	1.8	2.0	2.2	1.5	1.4	-9.4%
Bell's	Diageo	2.1	2.3	1.8	1.3	1.3	0.0%
The Glenlivet	Pernod Ricard	1.2	1.5	1.7	1.4	1.3	-6.3%
Clan Campbell	Stock Spirits Group	1.3	1.3	1.5	1.3	1.3	-2.3%
Black Dog	United Spirits	0.5	0.7	1.1	1.1	1.2	7.1%
Vat 69	Diageo	1.1	1.3	1.2	1.2	1.1	-2.6%

*Preliminar

Fuentes: thespiritsbusiness.com

PRINCIPALES MARCAS DE WHISKY Y EVOLUCIÓN (2024*)

Indian whisky

Figures: million 9l-case sales

Brand	Owner	2020	2021	2022	2023	2024	%+/-
McDowell's Whisky	United Spirits	25.7	30.1	30.8	31.4	32.2	2.6%
Royal Stag	Pernod Ricard	18.5	22.4	27.1	27.9	31.0	11.1%
Imperial Blue	Pernod Ricard	21.3	24.1	24.0	22.8	22.9	0.5%
Officer's Choice	Allied Blenders & Distillers	20.8	23.2	24.9	23.4	21.3	-9.0%
Blenders Pride	Pernod Ricard	6.6	8.0	9.5	9.6	10.1	5.0%
8PM	Radico Khaitan	9.4	11.4	11.9	12.2	9.6	-20.8%
Royal Challenge	United Spirits	4.3	4.7	7.2	8.6	9.1	6.7%
Iconiiq White Whisky	Allied Blenders & Distillers	N/A	N/A	N/A	1.6	4.5	181.3%
Sterling Reserve Premium Whiskies	Allied Blenders & Distillers	2.8	3.6	5.0	5.1	3.9	-23.5%
Director's Special Whisky	United Spirits	3.1	2.9	3.0	3.3	3.6	9.4%
Signature	United Spirits	1.9	2.0	2.5	2.9	3.9	13.4%
After Dark Whisky	Radico Khaitan	0.5	0.6	0.6	0.9	1.6	74.2%
Oaksmith	Suntory Global Spirits	0.2	0.5	0.8	0.8	1.1	32.3%
Antiquity Whisky	United Spirits	0.6	0.7	0.8	0.8	1.0	10.5%

*Preliminar

Fuentes: thespiritsbusiness.com

PRINCIPALES MARCAS DE WHISKY Y EVOLUCIÓN (2024*)

World whisky

Figures: million 9l-case sales

Brand	Owner	2020	2021	2023	2023	2024	%+/-
American whiskey							
Jim Beam	Suntory Global Spirits	16.4	17.0	16.6	17.0	17.5	2.9%
Jack Daniel's	Brown-Forman	12.3	13.5	14.6	14.3	14.1	-1.9%
Evan Williams	Heaven Hill Brands	3.0	3.1	3.1	3.1	3.1	-1.3%
Maker's Mark	Suntory Global Spirits	2.4	2.6	2.8	3.0	2.7	-10.1%
Jack Daniel's Tennessee Honey	Brown-Forman	2.0	2.2	2.1	2.0	2.0	-3.4%
Seagram's 7	Diageo	2.7	2.4	2.4	2.0	2.0	-11.7%
Bulleit	Diageo	1.8	1.7	2.1	2.0	1.9	-4.5%
Woodford Reserve	Brown-Forman	1.0	1.2	1.6	1.8	1.8	3.4%
Wild Turkey (inc Wild Turkey American Honey)	Campari Group	1.7	1.8	1.9	1.8	1.7	-4.5%
Ole Smoky	Ole Smoky Distillery	0.7	1.0	1.2	1.3	1.2	-6.0%
Irish whiskey							
Jameson	Pernod Ricard	7.7	9.6	11.1	10.2	10.8	6.3%
Bushmills Irish Whiskey	Proximo Spirits	0.8	0.9	1.0	1.1	1.2	5.0%
Japanese whiskey							
Kakubin	Suntory Global Spirits	3.7	3.6	4.3	4.2	4.0	-4.5%
Black Nikka	Asahi Breweries	3.3	3.3	3.5	4.0	4.0	0.0%
Torys	Suntory Spirits	2.0	2.0	2.1	2.5	2.4	-2.2%
Canadian whiskey							
Crown Royal	Diageo	8.1	9.0	8.4	7.7	8.0	4.0%
Canadian Club	Suntory Global Spirits	5.9	6.2	6.5	6.2	5.3	-15.2%
Black Velvet	Heaven Hill Brands	1.8	1.7	1.7	1.6	1.5	-7.6%
Slovakian whiskey							
Fowler's	Ladoga	N/A	N/A	0.2	0.5	1.1	120.0%

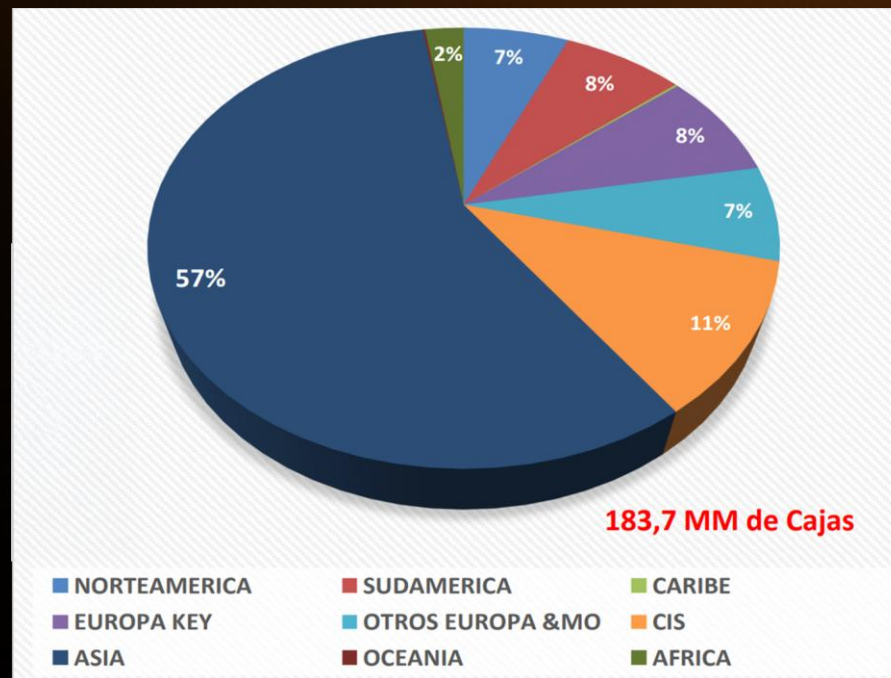
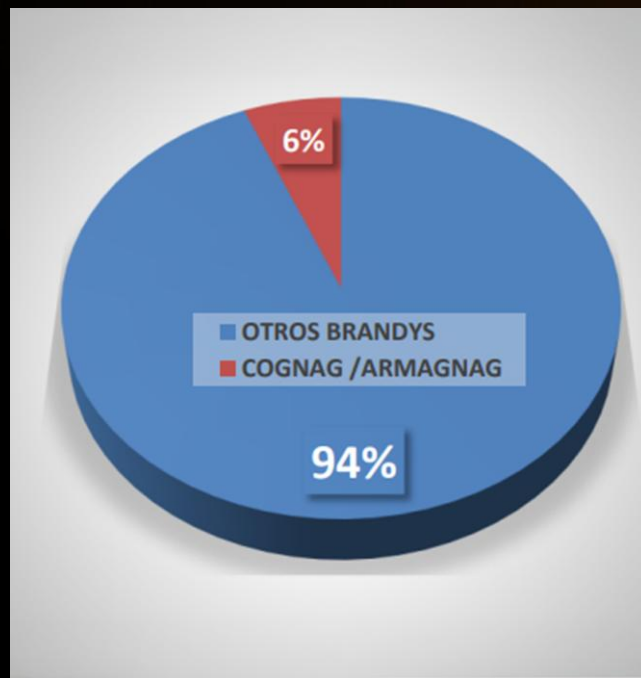
*Preliminar

Fuentes: thespiritsbusiness.com

BRANDY Y COGNAC



DISTRIBUCIÓN GEOGRÁFICA Y POR TIPO DE LAS VENTAS DE BRANDY (2024)*

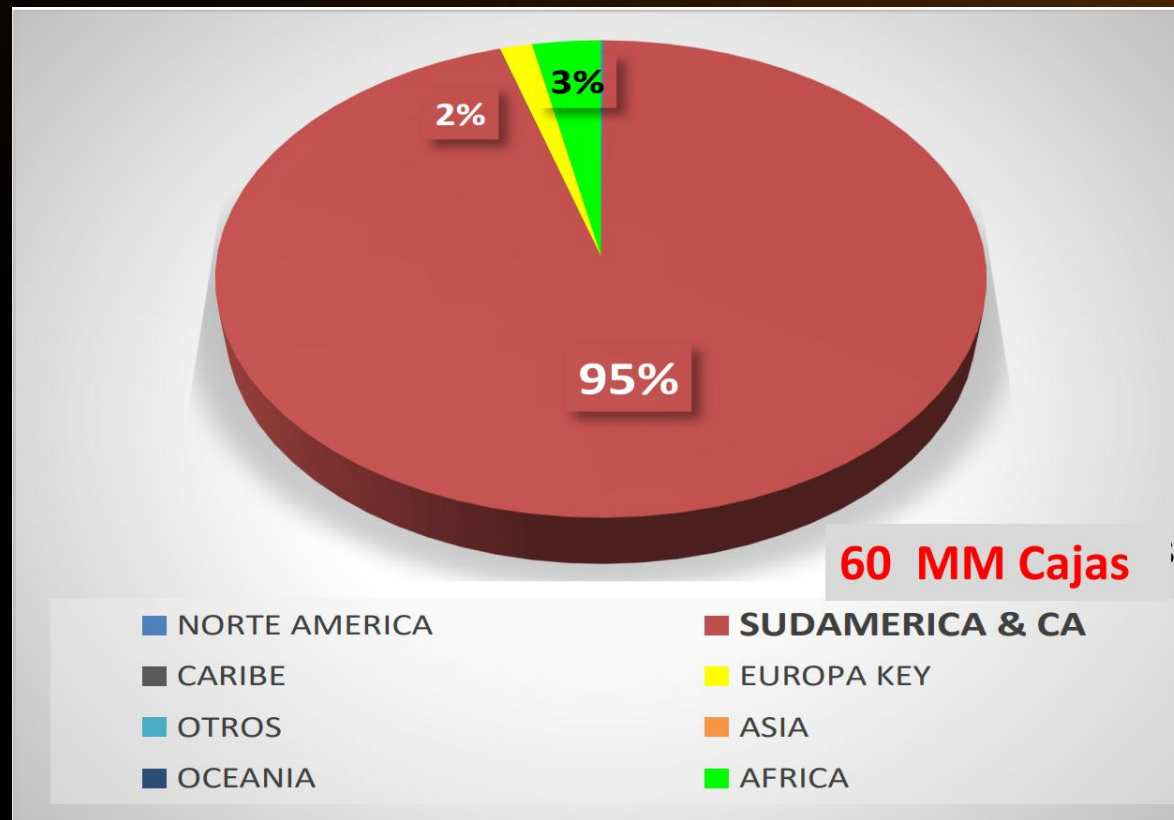


Brandy & Cognac

Figures: million 9l-case sales

Brand	Owner	2020	2021	2022	2023	2024	%+/-
Brandy							
Mansion House Brandy	Tilaknagar Industries	4.8	4.5	7.1	8.3	7.8	-6.5%
Old Admiral Brandy	Radico Khaitan	3.7	3.8	4.3	3.7	4.4	19.3%
Dreher	Campari Group	2.7	2.8	2.4	2.7	3.0	13.2%
E&J Brandy	Gallo	4.0	3.6	3.4	3.2	3.0	-8.0%
Courier Napoleon Brandy	Tilaknagar Industries	0.6	0.7	1.0	1.5	2.0	28.3%
Martell	Pernod Ricard	1.9	2.6	2.3	2.3	1.9	-15.5%
Aznavuri Brandy	Global Beverage Trade	0.3	0.5	0.6	1.1	1.6	45.4%
Silver Cup Brandy	Amrut Distillers	1.3	1.8	1.6	1.7	1.6	-9.9%
Old Kenigsberg	Alliance 1892 Brandy Factory	1.1	1.2	1.0	1.5	1.5	1.3%
Morpheus Brandy	Radico Khaitan	0.8	0.8	1.1	1.3	1.3	3.9%
McDowell's Brandy	United Spirits	1.1	1.0	1.1	1.2	1.2	0.8%
Torres Brandy	Torres	1.1	1.1	1.1	1.0	1.1	4.2%
Christian Brothers	Heaven Hill Brands	1.1	1.2	1.1	1.1	1.0	-8.4%
Cognac							
Hennessy	LVMH	7.8	8.6	7.9	6.5	6.3	-2.9%
Martell	Pernod Ricard	1.9	2.6	2.3	2.3	1.9	-15.5%

DISTRIBUCIÓN GEOGRÁFICA DE LAS VENTAS DE AGUARDIENTES (2024)*



*Preliminar

PRINCIPALES MARCAS Y EVOLUCIÓN (2023*)

Local spirits		Figures: million 9l-case sales					
Brand	Owner	2019	2020	2021	2022	2023	%+/-
Baijiu							
Shui Jing Fang	Diageo	1.0	0.9	1.2	1.3	1.4	11.2%
Cachaça							
Ypioca	Diageo	4.5	4.2	3.6	3.7	3.3	-11.2%
Pisco							
Mistral	Compañía Pisquera de Chile	1.4	1.6	2.3	2.4	2.3	-4.3%
Raki							
Yeni	Diageo	2.5	2.1	2.3	2.3	2.3	0.4%
Tekirdağ Raki	Diageo	0.4	0.6	0.9	0.9	1.1	12.9%
Shochu							
Kanoka	Asahi Breweries	3.4	3.6	3.4	3.5	4.0	14.3%
Ichiko	Sanwa Shurui	7.0	7.1	7.0	7.1	6.5	-8.2%
Soju							
Jinro	Hite-Jinro	86.3	95.3	94.5	100.9	97.4	-3.5%
Chum Churum	Lotte Liquor	25.5	19.9	19.0	26.0	27.0	3.9%

PRINCIPALES MARCAS DE GINEBRA Y EVOLUCIÓN (2024*)

Gin

Figures: million 9l-case sales

Brand	Owner	2020	2021	2022	2023	2024	%+/-
Gordon's	Diageo	6.7	7.4	7.7	7.0	7.7	9.5%
Bombay Sapphire	Bacardi	4.3	4.4	5.2	4.6	4.4	-4.6%
Tanqueray	Diageo	4.1	5.6	5.5	4.7	4.4	-6.4%
Beefeater	Pernod Ricard	2.7	3.3	3.8	3.5	3.3	-3.2%
Seagram's	Pernod Ricard	2.5	2.4	2.5	2.0	2.1	1.0%
Barrister	Ladoga	0.3	0.4	0.7	1.1	1.3	18.2%
Larios Gin	Suntory Global Spirits	1.1	1.2	1.5	1.2	1.1	-9.8%
Gilbey's Gin	Diageo	0.6	1.0	1.2	1.1	1.0	-4.8%

PRINCIPALES MARCAS DE TEQUILA Y EVOLUCIÓN (2024*)

Tequila

Figures: million 9l-case sales

Brand	Owner	2020	2021	2022	2023	2024	%+/-
Jose Cuervo	Proximo Spirits	7.3	7.9	9.2	9.5	8.9	-6.4%
Don Julio	Diageo	1.8	2.7	3.2	3.4	4.4	28.2%
Patrón	Bacardi	3.1	3.2	3.5	3.2	2.8	-11.8%
1800 Tequila	Proximo Spirits	1.9	2.1	2.5	2.9	2.8	-1.2%
Casamigos	Diageo	1.1	2.2	3.2	3.0	2.4	-20.7%
Gran Centenario	Proximo Spirits	1.3	1.7	2.0	1.9	1.8	-5.5%
Espolón	Campari Group	0.9	1.1	1.3	1.6	1.6	14.6%
Hornitos	Suntory Global Spirits	1.6	1.9	2.1	1.9	1.8	-8.9%
Lunazul Tequila	Heaven Hill Brands	0.4	0.6	0.9	1.3	1.7	37.0%
El Jimador	Brown-Forman	1.3	1.4	1.7	1.6	1.3	-14.2%
Cazadores	Bacardi	0.7	0.8	1.0	1.1	1.2	9.1%
Teremana	Siete Buck Spirits	0.2	0.6	0.9	1.0	1.2	17.0%
Olmecca (including Altos)	Pernod Ricard	0.9	1.1	1.1	1.3	1.0	-21.1%

Speciality spirits

Figures: million 9l-case sales

Brand	Owner	2020	2021	2022	2023	2024	%+/-
Anise							
Ricard	Pernod Ricard	4.1	4.3	4.6	4.2	4.2	0.0%
Bitters							
Aperol	Campari Group	5.4	7.1	8.8	9.6	9.9	2.6%
Campari	Campari Group	3.1	3.9	4.5	4.6	4.8	5.5%
Jägermeister	Mast-Jägermeister	7.0	8.7	9.4	9.2	8.5	-7.7%
Ramazzotti	Pernod Ricard	1.1	1.3	1.5	1.2	1.2	-4.0%
Vermouth							
Martini Vermouth	Bacardi	8.6	9.6	9.9	9.6	9.2	-4.3%
Lillet	Pernod Ricard	0.9	1.0	1.3	1.2	1.3	5.0%

Liqueurs

Figures: million 9l-case sales

Brand	Owner	2020	2021	2023	2023	2024	%+/-
Baileys	Diageo	7.1	8.8	8.8	8.2	8.4	1.7%
Malibu	Pernod Ricard	4.4	4.9	4.8	4.4	4.3	-2.0%
Kahlúa	Pernod Ricard	1.6	1.8	1.8	1.9	1.9	2.1%
Lubelska	Stock Spirits Group	1.9	1.9	1.9	1.9	1.9	0.0%
Choya	Choya Umesu	1.7	1.6	1.5	1.5	1.5	1.4%
Disaronno	Illva Saronno	1.0	1.3	1.4	1.4	1.4	0.0%
Amarula	Heineken Beverages	0.9	1.2	1.4	1.2	1.2	13.2%

TOP 150 MARCAS DE BEBIDAS ESPIRITUOSAS MÁS IMPORTANTES POR VOLUMEN

Rank	Brand	Company	Category	2020	2021	2022	2023	2024	%+/-
1	Jinro	Hite-Jinro	Local – Soju	95.3	94.5	100.9	97.4	96.8	-0.6%
2	McDowell's Whisky	United Spirits	Whisky – Indian	25.7	30.1	30.8	31.4	31.2	2.6%
3	Royal Stag	Pernod Ricard	Whisky – Indian	18.5	22.4	27.1	27.9	31.0	11.1%
4	-196	Suntory Global Spirits	RTD	25.0	27.8	27.3	27.8	30.4	9.4%
5	Chum Churum (includes Soonhari)	Lotte Liquor	Local – Soju	19.9	19.0	26.0	27.0	37.5	1.6%
6	Smirnoff	Diageo	Vodka	23.0	26.5	28.1	26.0	24.4	-6.1%
7	Tandauy	Tandauy Distillers	Rum	23.7	23.6	27.4	23.4	23.8	1.9%
8	High Noon	Gallo	RTD	2.9	8.8	16.4	21.0	23.5	11.7%
9	Imperial Blire	Pernod Ricard	Whisky – Indian	21.3	24.1	24.0	22.8	22.9	0.5%
10	Suntory Lemon Sour	Suntory Global Spirits	RTD	16.3	19.0	18.0	20.4	21.9	7.4%
11	Johnnie Walker	Diageo	Whisky – Scotch	14.1	19.1	22.7	22.1	21.6	-2.0%
12	Officer's Choice	Allied Blenders & Distillers	Whisky – Indian	20.8	28.2	24.9	23.4	21.3	-9.0%
13	Bacardi	Bacardi	Rum	17.2	19.2	21.1	20.6	19.7	-4.2%
14	Jim Beam	Suntory Global Spirits	Whiskey – American	16.4	17.0	16.6	17.0	17.5	2.9%
15	Jack Daniel's	Brown-Forman	Whiskey – American	12.3	13.5	14.6	14.3	14.1	-1.5%
16	Kakubin RTD	Suntory Global Spirits	RTD	8.0	9.1	10.3	11.6	12.6	8.8%
17	Absolut	Pernod Ricard	Vodka	9.6	11.7	13.0	11.9	12.0	0.5%
18	Captain Morgan	Diageo	Rum	11.9	12.7	12.9	12.1	10.9	-5.0%
19	New Mix	Brown-Forman	RTD	8.0	7.4	9.1	10.0	10.9	8.4%
20	Jameson	Pernod Ricard	Whiskey – Irish	7.7	9.6	11.1	10.2	10.8	6.3%
21	Jack Daniel's RTDs (excl. JD Country Cocktails)	Brown-Forman	RTD	11.8	10.8	11.3	11.2	10.8	-6.4%
22	Blenders Pride	Pernod Ricard	Whisky – Indian	6.6	8.0	9.5	9.6	10.1	5.0%
23	Hlibny Dar	Bayadera Group	Vodka	8.5	9.2	8.6	9.1	10.0	9.9%
24	Aperol	Campari Group	Speciality – Bitters	5.4	7.1	8.8	9.6	9.9	2.6%
25	Horoyoi	Suntory Global Spirits	RTD	12.3	13.4	12.0	11.2	9.7	-13.2%



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