Benchmarking of London Dry style gin products

Neil Scrimgeour, Simone Madaras, Eric Wilkes[1]

[1] Affinity Labs, PO Box 197, Glen Osmond (Adelaide) SA 5064, Australia

Corresponding author's email: neil.scrimgeour@affinitylabs.com.au

The global gin market

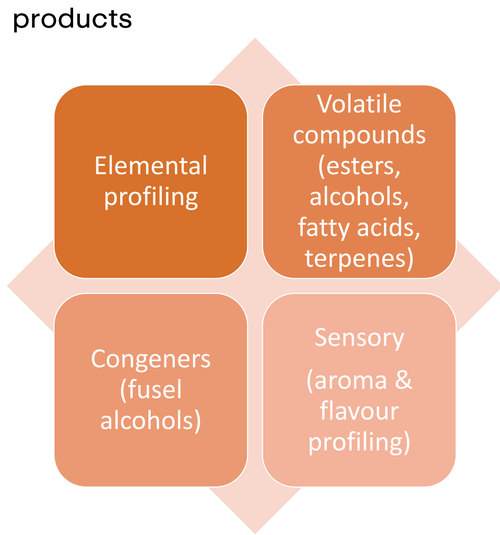
- Estimated global gin market US$17 billion in 2024 (approx. 11% of global spirits market). In 2024, global gin sales grew by approx. 16%.
- Gin sales being driven by increasing popularity of craft cocktails and growing awareness of premium gin brands.
- Particularly popular in Europe and North America, where it accounts for a significant share of spirits market.
- Off-premise revenue US$10.1bn in 2024. On-premise revenue US$5.4bn.
- Gin sales expected to grow annually by 3.7% (CAGR 2025-2033).

Why is benchmarking important?

- Evaluate your product against the best in the market.
- Identify gaps and areas where your product needs improvement or modification.
- Understand how your product compares to others - what sets you apart or where do you need to catch up.
- Can stimulate innovation and inspire new product development.
- Helps to position your product more effectively and identify opportunities to create a unique proposition.
- Understand your product's weaknesses.
- Provides data and insights to inform strategic decision-making and set objectives for product development.

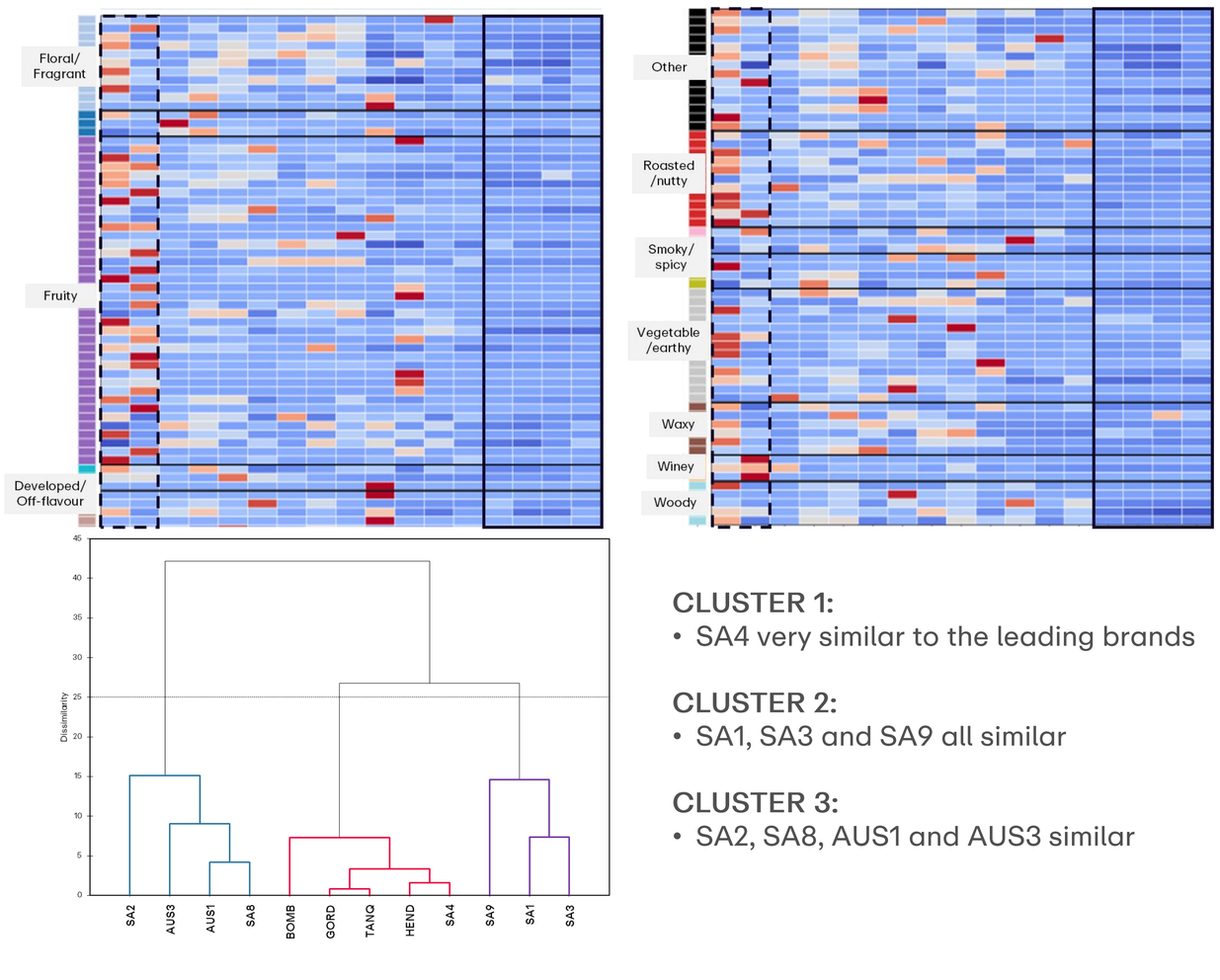
Analytical approach

Chemical and sensory methods used to highlight differences in commercial gin products



- 18 products screened chemically
- 12 products screened sensorially (QDA)
- Samples coded to protect brand identity

Volatile compound profiling

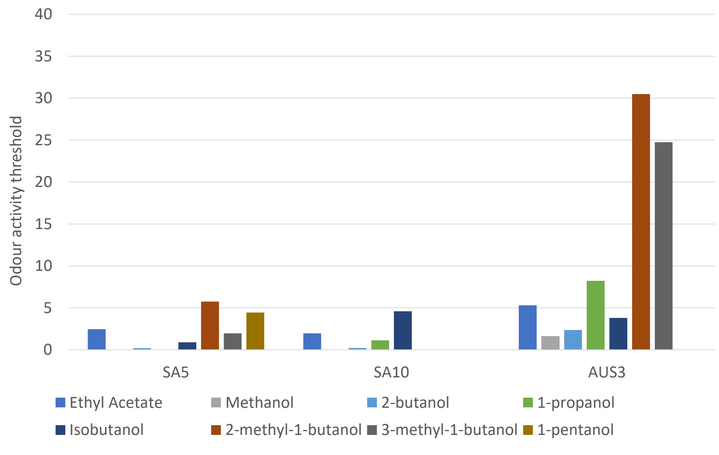


CLUSTER 1:
- SA4 very similar to the leading brands

CLUSTER 2:
- SA1, SA3 and SA9 all similar

CLUSTER 3:
- SA2, SA8, AUS1 and AUS3 similar

Congener analysis



- Only three gin products contained congeners above the relative odour activity value (OAV).
- The most significant were:
  - ethyl acetate (*fruity, sweet*)
  - iso-butanol (*sweet, banana-like*)
  - 3-methyl-1-butanol (*solvent-like, musty*)
  - 2-methyl-1-butanol (*alcoholic, fruity*)

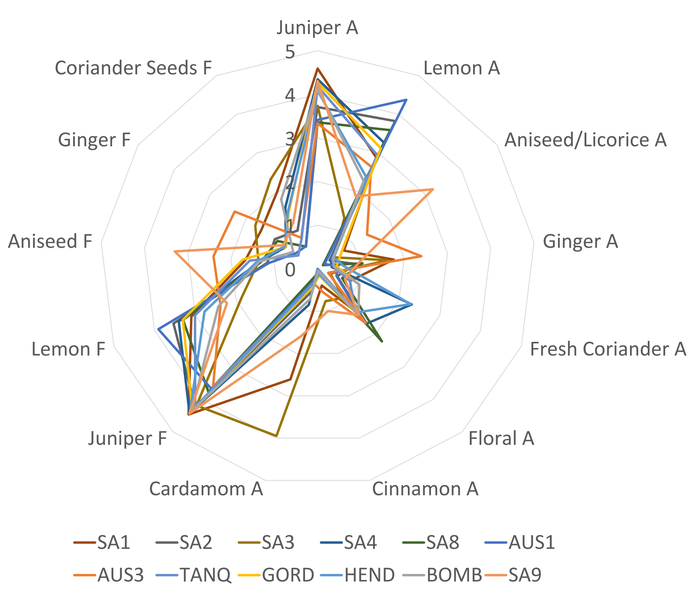
Terpenes

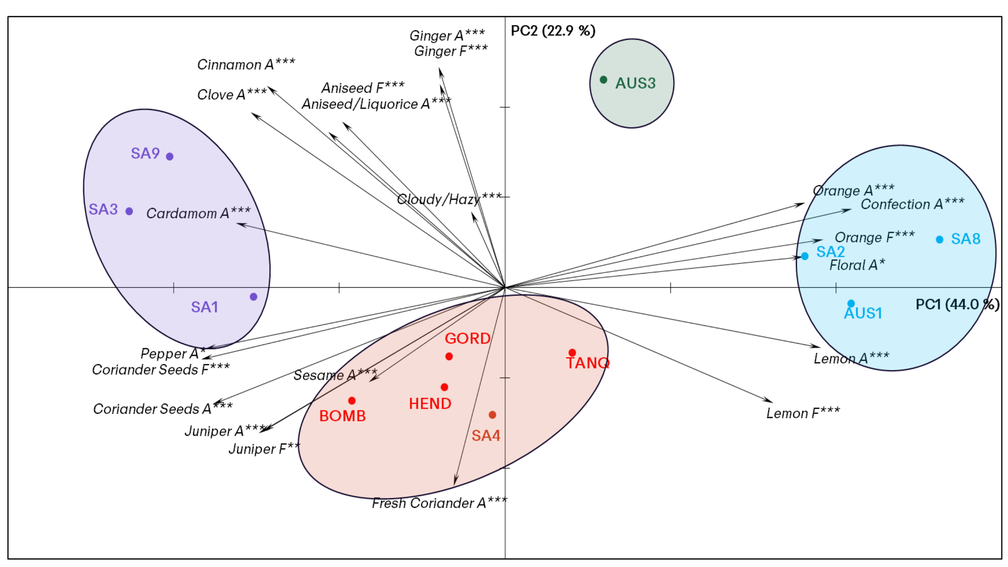
- The most significant terpenes included myrcene, α-humulene and β-ocimene (*earthy, woody, herbal*), as well as gamma-terpinene, limonene and linalool (*citrus, spicy*).
- Gin sample SA5 exhibited relatively high levels of these compounds, compared to the others.
- Overall terpene levels were generally lower in the global brands of Bombay Sapphire, Hendrick's, Gordon's and Tanqueray.

Key outcomes

- Market leading gins have dominant *coriander, pepper* (and *juniper*, of course) characters
- Terpenes dominate as expected (α-Pinene, β-Myrcene, Limonene, Linalool, Geraniol)
- Ester compounds (with fruity attributes) very high in some gin products
- SA gins characterised by high *orange, cardamom, confection* and *floral* characters
- A number of gin products show concentrations of fusel alcohols (pungent)

Sensory profiling





Affinity Labs would like to acknowledge the involvement of the following Australian producers:

- Reform Distilling (SA)
- Hill Street Distillers (SA)
- Bass and Flinders Distillery (Vic)
- LARK Distilling Co (Tas)
- LOBO Spirits (SA)
- Threefold Distilling (SA)
- Polemic Aperitif Lab (SA)
- Blackwattle Distilling Co (NSW)
- Applewood Distillery (SA)
- Pluto Spirits (SA)

Powered by AWRI