

FLAVORED VODKA 101

Barely half a decade ago, the vodka category's flavored segment seemed to be dominated by headline-grabbing concoctions that infused the spirit with the artificial essences of everything from dessert confections to popular breakfast foods. Whipped cream, blueberry pancakes, marshmallow fluff and gummy bears were all fair game, as far as beverage developers were concerned.

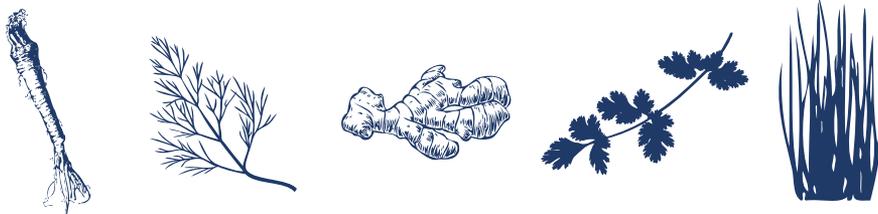
The unconventional flavors, proved—for a little while at least—to be a dependable way for established, mature vodka brands to grab a little more shelf space, and add a little incremental volume to their mostly flat trademarks. For lesser-known brands, it generated press and put them on the radar. But the novelties quickly wore off as consumer tastes evolved. Those brands were good for driving trial, but they generated few repeat purchases.

WHAT WERE THE FIRST FLAVORED VODKAS?

Today when we hear the term “flavored vodkas” we immediately think of products that employ the expertise of flavor houses to approximate the sensory experiences of everything from fruits to those aforementioned indulgent sweets. However, flavored vodka is rooted in the centuries-old Russian and Eastern European tradition of natural vodka infusions. Indigenous fruits—**blackberries** for instance—as well as **roots, herbs** and spices like **ginger, horseradish, dill** and **coriander** are just a few items that have found their way into infusions over the years. One celebrated example is Żubrówka—vodka delicately

flavored with lightly sweet **bison grass**, a grazing favorite of wild bison on the border of Russia and Poland.

In America, Flavored Vodka as a category started in earnest in the late 1980s, with **citrus** expressions prominent among the earliest commercially successful flavors. The pace and diversity of new expressions picked up in the '90s, to the point where homemade infusions—often on display—became a bar trend. Restaurants like Washington, DC's Russia House and New York City's Ukrainian eatery Korchma Taras Bulba are particularly well known for their infusions, usually served in 2-ounce portions to be sipped neat.



DID YOU KNOW?

Compared to neutral vodka, flavored vodkas typically are 5% lower in alcohol by volume and 10% lower in proof—70 proof, as opposed to the standard unflavored 80 proof. The lower proof helps ensure that the flavors can be the star, with alcohol more in the background.



UNFLAVORED
STANDARD:
80 PROOF



FLAVORED
STANDARD:
70 PROOF

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WHAT'S TRENDING NOW?

Despite recent declines in flavored vodka consumption, there's still plenty of opportunity for growth, as producers migrate toward both the tried-and-true and flavors that are trending throughout the drinks and culinary worlds.

- **Citrus fruits** never really go out of style. Expect more focus on citrus, from classic lemons and limes to one of the most popular go-to fruits across the board: grapefruit. Blood orange is another one that has gained a lot of traction.



- Consumers increasingly are spicing things up, so there seems to be continued potential for **chile pepper infusions**. On the much cooler side, **cucumber** is very much on trend. **Savory vodkas** in general also can be the perfect base for a Bloody Mary—especially horseradish, dill and peppery versions and, in some cases even bacon.



- **Hybrid**, or **combo**, flavors are becoming a popular way for producers (and marketers) to bring novelty to flavored vodka. Some seemed perfectly logical (strawberry-banana) others more exotic (Cognac and peach).



- Perhaps counterintuitively, emphasis on **natural ingredients** is another rising trend; this reflects the growing “green” awareness of consumers in general, but also, the plethora of kooky flavors makes it easier for products made with organic/all-natural ingredients to stand out.



FLAVORED VODKA BY THE NUMBERS:

12.36 MILLION

9 LITER CASES SOLD IN 2015



SHARE OF TOTAL VODKA VOLUME: **17.3%**



FLAVORED VODKA VOLUME PEAKED IN 2013, AT ABOUT **14.5 MILLION CASES**

FLAVORED VODKA'S BIGGEST % JUMP WAS FROM 2010-2011: **27.1%**



{MEANWHILE, NEUTRAL VODKA GREW JUST 2.1%}

SOURCE: 2016 IWSR US BEVERAGE ALCOHOL REVIEW

WHERE IS ALL THE FLAVORED VOLUME GOING?

And here is where we zoom in on what someday may be seen as flavored vodka's legacy, which is prompting flavor to start flowing through the whiskey category as well. **Flavored whiskey volume was up nearly 7% last year**, according to the Distilled Spirits Council.

SELLING POINTS

- **Flavor is hot**—it's what people want in beverages, whether it's soda, juices, waters or cocktails. 
- **Giving a gift?** If the recipient has a favorite sweet, fruit or savory flavor, a flavored vodka should thrill them.
- Flavored vodka's first heyday was the '90s...and still holds some nostalgia power for Boomers.

- Trying to lighten up? Flavored vodkas are **lower in alcohol** than unflavored vodka.
- Flavored vodkas are built for **cocktails**—handmade shelf talkers with recipes can maximize this appeal.



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