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Irish whiskey makers shift growth plans to India, Poland and Germany after U.S. demand weakens

IWSR data show those markets posted double-digit gains from 2019 to 2025, with Jameson leading the surge in India

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Irish whiskey producers are looking beyond the United States for growth as weak trading conditions in their largest market push brand owners toward faster-growing countries such as India, Poland and Germany, according to market analysis published on Tuesday, November 17, by Global Drinks Intel using IWSR data.

The report said growth in the U.S. has been difficult to achieve in both volume and value because of economic pressure and a broader moderation in drinking. That has increased the urgency for Irish whiskey companies to find new sources of demand in other parts of the world.

IWSR data cited by Global Drinks Intel showed that, between 2019 and 2025, India, Poland and Germany all posted double-digit compound annual growth in both volume and value for Irish whiskey. The U.K., which also sits below the U.S. in market size, was described as close behind those three countries.

The shift matters across beverage alcohol because it offers a clearer map for where export growth may be found if the U.S. remains subdued. For spirits companies, and for distributors and retailers that depend on imported brands, the data points to where marketing, route-to-market and portfolio investment may increasingly move as producers try to reduce their reliance on a single large market.

India has drawn the most attention. Global Drinks Intel said the market’s rapid expansion has been led by Jameson, the flagship Irish whiskey brand owned by Pernod Ricard. The publication said Jameson has built a strong following by combining accessible pricing and flavor with heavy brand recognition. Other Irish whiskey makers are expected to watch closely to see whether Jameson’s success helps widen consumer awareness of the category and creates openings for smaller brands. The same basic opportunity could emerge in other developing markets, including parts of Latin America and Central and Eastern Europe, as consumers broaden their spirits choices.

The analysis also pointed to an important split inside the category. Most global attention on Irish whiskey has focused on blends, which account for most volumes, and on single pot still, the style most closely associated with Ireland. But Irish single malt, while still a small segment, appears to be growing faster than Irish whiskey overall.

Yury Surin, chief marketing officer at Stoli Group, told Global Drinks Intel that consumers are changing the way they buy rather than sharply increasing the amount they drink. He said buyers are purchasing fewer bottles but choosing them more carefully, a pattern that can benefit single malt positioning but does not necessarily translate into easy volume growth.

Surin identified France and Ireland’s global travel retail channel as two standout markets for The Irishman, one of Stoli Group’s Irish whiskey brands, alongside Writers’ Tears. He said interest in Irish single malt is growing, but he also described a difficult pricing environment. According to Surin, Scotch whisky is under pressure and shelves are crowded with promotions and price cuts, leaving less room for smaller brands to fund innovation, in-store support and other activation work needed to stand out.

He also said consumer understanding of Irish single malt remains limited. Stoli Group positions The Irishman as a single malt from Ireland rather than relying only on the category label, and uses its blended expression, The Harvest, as an entry point for new drinkers. The Harvest combines 70% single malt and 30% single pot still. Surin said many whiskey drinkers still mainly associate Irish whiskey with smooth blends and do not yet realize that Ireland also produces single malt, making tastings and direct trial especially important for building awareness.