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Texas emerges as a key growth market for premium gin amid global slowdown

Consumer optimism and preference for high-end spirits set Texas apart from other US states and international markets

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Premium gin brands are facing new challenges in mature markets, but recent data points to Texas as a promising area for future growth. According to IWSR’s latest market analysis and consumer research, while the global boom in high-end gin is

slowing, certain regions and states still offer opportunities for expansion.

In the United Kingdom, once a leader in premium gin consumption, volumes of premium-plus gin fell at an average annual rate of 12% from 2020 to 2024. Sub-premium gins also declined by 11% over the same period. The outlook remains difficult, with IWSR forecasting a further 4% annual drop in premium-plus gin volumes through 2029. Similar trends are seen in Denmark and Switzerland, where premium-and-above gin volumes declined by 3% and 4% respectively between 2020 and 2024. Both countries are expected to see little or no growth in the coming years.

Japan stands out as an exception, with total gin volumes growing by 14% annually from 2020 to 2024. Premium-and-above gins grew even faster, at 18%. However, this growth comes from a small base, and most of the market is dominated by value and standard-priced products. In 2024, only 9% of Japan’s gin market was premium or above. Local brands control most of the market share, making it difficult for imported gins to gain traction. According to Marten Lodewijks, President of IWSR US, imported gins have struggled for two consecutive years as local brands invest heavily in marketing and appeal both to Japanese consumers and tourists.

In the United States, overall growth for premium-and-above gin has been modest. From 2020 to 2024, volumes increased by just 3% annually and are expected to remain flat through 2029. However, a closer look at individual states reveals significant differences. Using IWSR’s US Navigator tool, analysts identified Texas as a standout market for premiumization within the gin category.

In 2024, premium-and-above gins accounted for 36% of all gin sold in Texas—higher than Illinois (33%), New York (30%), and Florida (21%). While Texas is not a large market for gin by volume, its consumers show a strong preference for higher-end products. This trend is supported by consumer sentiment data from IWSR’s Bevtrac research conducted in March 2025. Texans reported higher optimism about their financial future compared to Japanese consumers: 49% of Texans said they felt positive about the future versus just 19% of Japanese respondents. Additionally, more Texans (37%) said their personal finances were in good shape compared to Japanese consumers (22%).

Gin consumption rates also support the case for Texas as a growth market. Sixteen percent of legal drinking age respondents in Texas reported consuming gin in the past six months, slightly higher than Japan’s rate of 13%. While only 8% of Texans had consumed a gin-and-tonic recently—compared to Japan’s 13%—the cocktail culture in cities like Austin and Dallas is strong and continues to grow.

Marten Lodewijks notes that Texas offers a unique opportunity for super-premium gin brands due to its high level of premiumization and positive consumer outlook. He points out that targeted analysis like this allows companies to make informed decisions about where to focus their efforts based on brand positioning and price tiers.

The ability to compare raw sales data with consumer insights across different regions is becoming increasingly important as global markets shift. For brand owners navigating today’s complex beverage alcohol landscape, identifying specific states or cities with favorable conditions could be key to future success. In Texas, the combination of consumer optimism, financial confidence, and a taste for premium products makes it an attractive target for super-premium gin brands looking for new growth opportunities.