

Mezcal Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Mezcal is a traditional, iconic Mexican distilled beverage obtained from varied species of agaves. Regardless of the area of production, the process always consists of five stages: harvesting the agaves, cooking, crushing, fermentation, and distillation. It is produced in a large area of Mexican territory, a large part of which is protected by the Denomination of Origin mezcal (DOM). Over time, the word mezcal has evolved from a generic name to a more specific term used to describe the agave-distilled beverages produced in the territory protected by the DOM under the Mexican official standard which defined Mezcal as a "Mexican distilled alcoholic beverage, 100% from maguey or agave, obtained by distillation of fermented juices with spontaneous or cultivated microorganisms, extracted from mature heads of maguey or cooked agaves, harvested in the territory covered by the DOM." Currently, the authorized areas include the entire states of Oaxaca, Zacatecas, Durango, Guerrero, and San Luis Potosi, and some municipalities of Michoacán, Tamaulipas, Guanajuato, Puebla, Morelos, Estado de Mexico, and, very recently, Sinaloa.

The Mezcal Market is expected to grow with a significant CAGR of 12.05% during the forecast period (2025- 2033F). The mezcal market has observed exponential growth in recent years, driven by the increasing demand for artisanal and craft products. Nowadays, consumers are willing to spend more on drinks that offer a special experience. Moreover, the trend of premiumization in the alcohol industry and mezcal's distinctive qualities make it an appealing choice for those looking for a more sophisticated drink.

For instance, on September 11, 2023, Bacardi Limited, the largest privately held international spirits company in the world, announced the completion of a transaction that makes the family-owned company the sole owner of ILEGAL Mezcal®, a leading

super premium artisanal mezcal.

On 28 January 2022, Diageo announced that it had completed the acquisition of Casa UM, owner of the premium artisanal mezcal brand, Mezcal Único.

Based on product type, the market is segmented into mezcal Joven, mezcal reposado, and mezcal Aneja. The mezcal Joven market dominated the market in 2024 due to the rising popularity of premium and artisanal spirits, changing tastes among consumers, and the increasing trend of mezcal-based cocktails. Many drinkers enjoy the unaged version of Joven because it allows consumers to experience the full, unaltered flavor of the agave. Joven is something that can be lost in the aging process and is particularly appealing because it retains the fresh, natural taste of agave. As more people seek to enjoy the pure taste of agave, sales of Joven mezcal are expected to rise in the coming years. On November 27, 2022, Illegal Launched A Rare Aged Mezcal called 7 Year Añejo expression. Añejos are commonplace in the world of tequila, where the designation denotes a spirit which spent between 1-3 years maturing in barrels.

Based on category, the market is segmented into 100% Agave and blend. Among these, the 100% Agave market the largest portion of global revenue in 2024 as they are ideal for consumption. Consumers are becoming more perceptive and are increasingly drawn to the purity and authenticity of 100% agave mezcal. This category offers a cleaner, more natural taste reflecting the true flavors of the agave plant, which appeals to those who appreciate high-quality, artisanal spirits. As people want to learn more about the craft and tradition behind mezcal production, they are opting for 100% agave because it is seen as more genuine and premium. Blended mezcal is often made with a mix of agave and other ingredients and is still widely available. The focus on 100% agave is growing as drinkers look for a more authentic and unadulterated drinking experience. This shift reflects a broader trend in the spirits industry where consumers are willing to pay more for higher-quality, single-origin products that have a distinct and original flavor profile. As per the Consejo Mexicano Regulador de la Calidad del Mezcal A.C. (COMERCAM), 2023, the vast majority of mezcal production is in the Artesanal Category at 93.7%. Ancestral makes up only 35%, likely due to much of the mezcal that would fall into that category not being certified mezcal. The Mezcal category, which is primarily more industrial mezcal, makes up 5.94% of production totals. Blancos or Jovens make up 97.37% of production, Abocados con make up 1.35%, and Destilados con, previously classified as Pechugas, make up 1.28% of

production.

Based on the distribution channel, the market is segmented into on-premise and off-premise. In 2024, the on-premise segment controlled the global market and generated the highest percentage of total revenue in the mezcal market. The on-premise segment consists of bars, pubs, and restaurants, which are expected to play a major role in the mezcal market. More people choose to drink in these settings because they enjoy the social atmosphere and the ease of having their drinks served to them. With the increase in disposable income, people are now looking for experiences, not just products, and going out for a drink has become a trendy way to unwind and connect with others. On top of that, as with the rising holiday trends, more people are willing to spend on leisure activities like dining out or meeting friends for a drink. This increase in spending is helping to boost demand for mezcal and other spirits in bars and restaurants.

For a better understanding of the market, the growth of the Mezcal market is analyzed based on their worldwide demand in regions such as North America (U.S., Mexico, and the Rest of North America), Europe (Germany, France, U.K., Spain, Italy, Rest of Europe), Asia-Pacific (China, Japan, India, Rest of Asia-Pacific), Rest of World. Mezcal is starting to make its mark in the Asia-Pacific region as more people show interest in unique, handcrafted spirits. In places like Japan, China, South Korea, and Australia, drinking habits are changing, especially among younger city dwellers who are curious and open to trying something different. Adding to this, the young generation of drinkers wants to have the experience and know about the cultural roots behind the drink they are sipping. In many emerging cities of the Asia Pacific region, like Tokyo, Seoul, and Shanghai, more bars and restaurants are adding it to their menus, often using it in creative cocktails that highlight its bold character. Travel, social media, and global food trends are also playing a part in sparking curiosity about mezcal across the region. With the growing online shopping and specialized liquor stores, more people are getting the chance to try it for themselves. With the growing awareness, mezcal is likely to keep gaining ground. Its mix of quality, cultural depth, and a bit of adventure is helping mezcal stand out in the crowded and competitive market.

Some of the major players operating in the market include Ilegal Mezcal (Bacardi Limited), Mezcal Vago, Wahaka Mezcal, Mala M?a Mezcal, Mezcal Uni?n (Diageo plc), Del Maguey Inc. (Pernod Ricard), MONTELOBOS MEZCAL (Campari Espala Sl.), Rey Campero (Mexico), Casa Cort?s (Mexico), and

Xiaman Spirits GmbH.

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