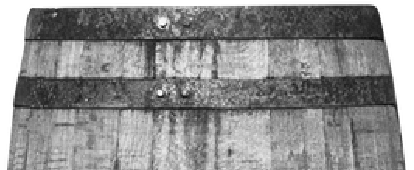
SPIRIT OF THE NATION:
UK DISTILLING CENSUS (2025)

Carried out July to October 2025
Responses: 138 submissions; 133 valid entries after cleaning
Coverage: Around 25% of active UK distilleries (craft-weighted; multinationals were invited but did not participate)

How to read this
This is a baseline, not a completed entry from of every producer.
Insights reflect a craft-weighted sample, with a strong England share.
Use the themed briefs for deeper context and triangulation - most answers are simple in and of their own right - but become powerful once combined.

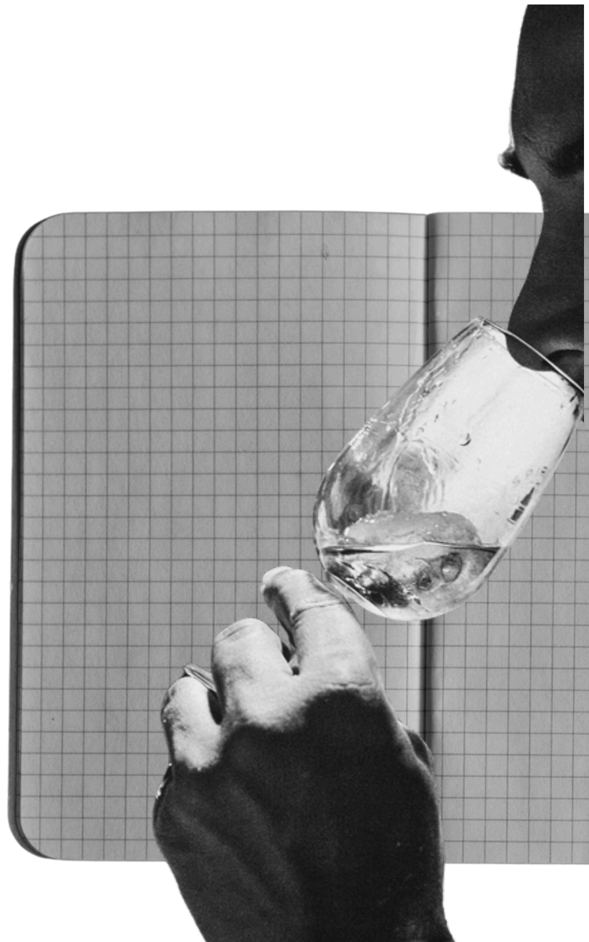


Where to find more
Census Hub (raw data, methodology, insights packages)

Three themed briefs:

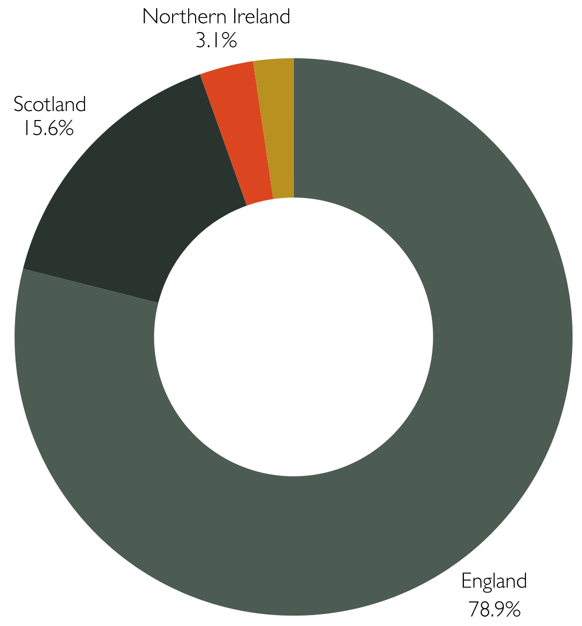
People, Skills & Capacity
Commerce, Supply Chain & Resilience
Sustainability & Tourism

Contact
For commentary or press: **Olivier@everglowspirits.com**

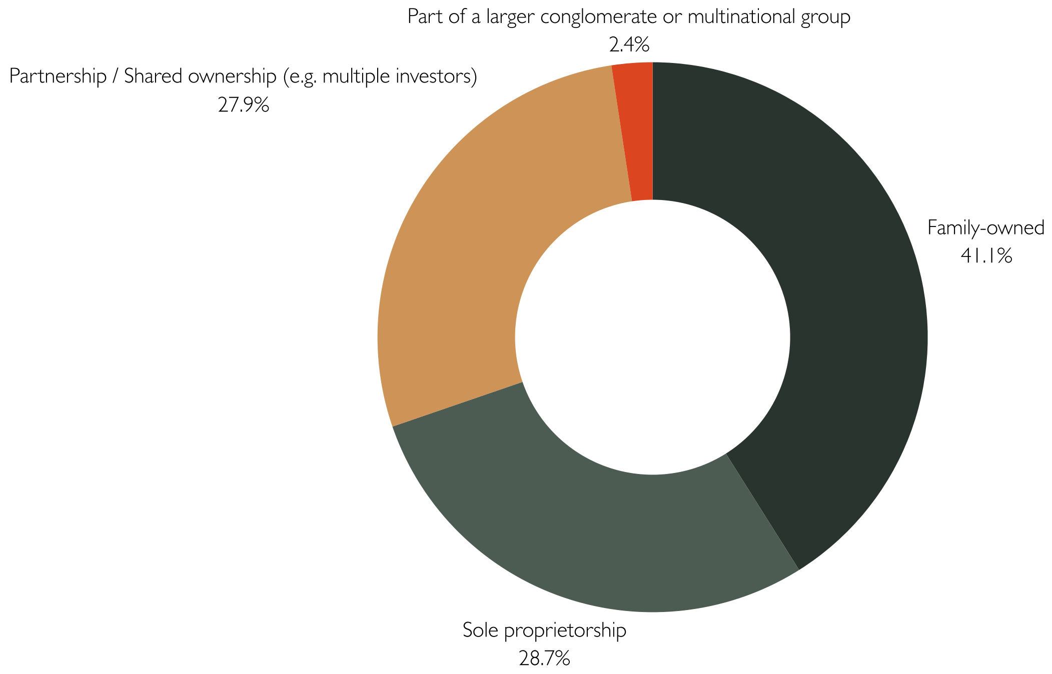


WHO ENTERED & WHERE ARE THEY FROM?

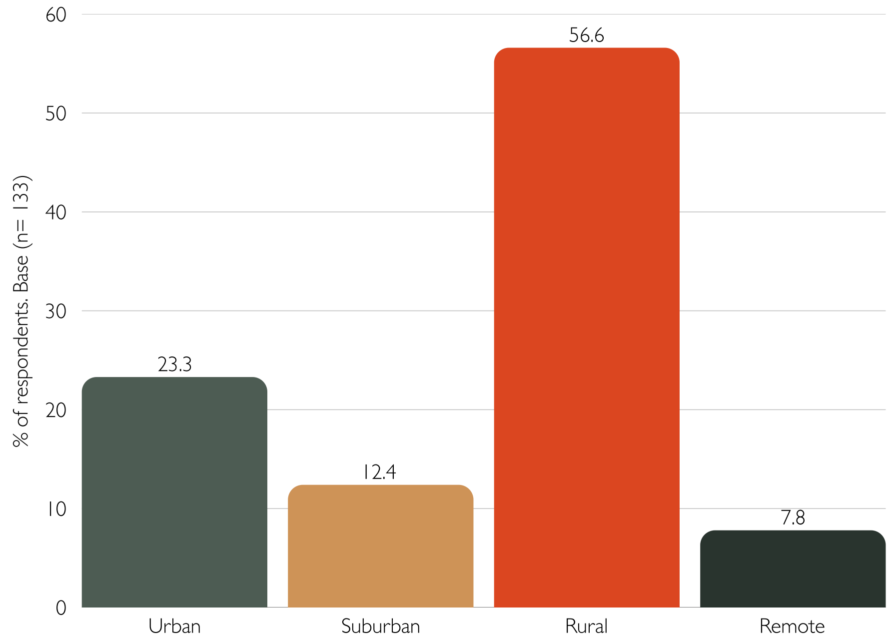
WHERE IS YOUR DISTILLERY BASED?



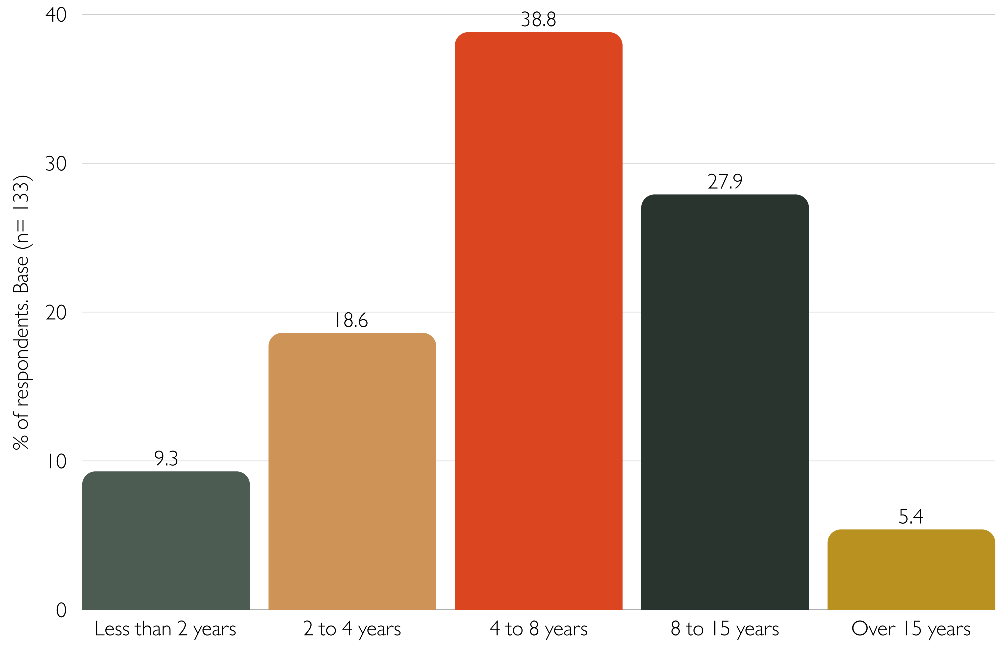
WHAT BEST DESCRIBES YOUR DISTILLERY'S OWNERSHIP MODEL?



WHERE IS YOUR DISTILLERY LOCATED IN RELATION TO URBAN CENTRES?



HOW MANY YEARS HAS YOUR DISTILLERY BEEN OPERATING?



GEOGRAPHICAL SKEW (AND WHAT THAT MEANS)

Uptake was strongest in England, lighter in Scotland. Read the following pages with that in mind; the picture is highly reflective of English craft distilling today but less so north of the border.

We worked to secure responses from all four nations; yet coverage still leans English, which tells you something about where the appetite for shared data is right now. It is also potentially due to the fact that Scotland has long benefited from more active, well-resourced associations and widely cited datasets.

Irrespective of the reason - the response rate (and pattern) suggests a clear need. Craft distilleries wanted a credible, open snapshot they could use with partners, funders and policymakers.

PLACE AND MATURITY

Most respondents sit in rural or remote settings, and a majority are younger than ten years old. That combination matters as small teams, selective local labour pools, and early-stage systems all shape how production, tours and sales get done.

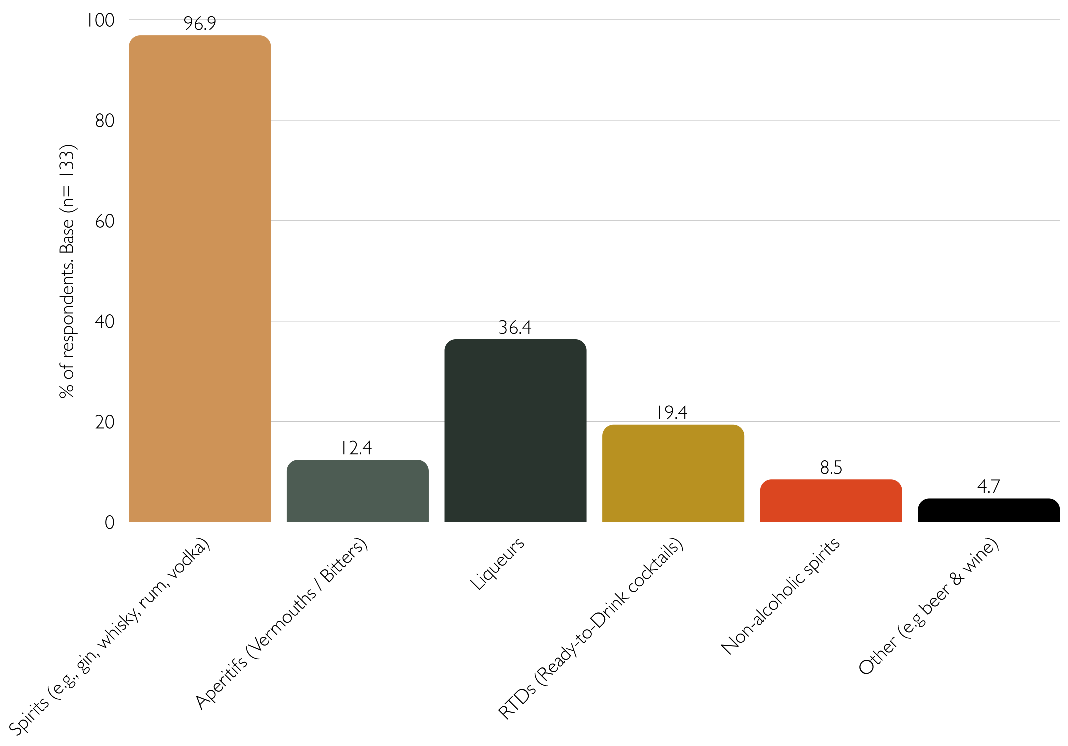
OWNERSHIP THAT LOOKS LIKE FAMILIES, NOT BOARDS

Alongside limited companies, a large share identify as family-run. Think husband-and-wife teams, siblings, multi-generation groups. It helps explain the sector's community feel and the realities of evenings/weekends spent hosting, not just producing. Craft distilling is as much a business as it is a way of life. With an eye to the future - the move to shared ownership in other markets has also been scale signal.

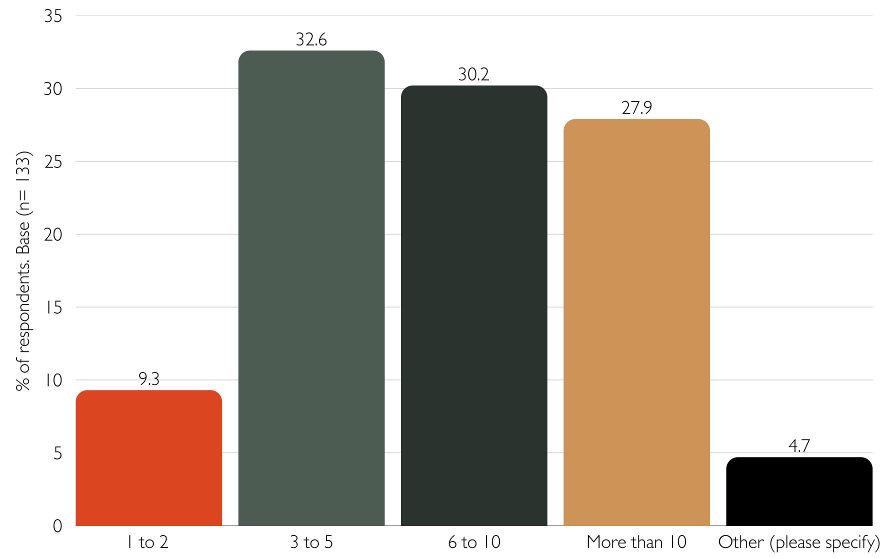
Where you see shared ownership or multiple investors, you often see sites that are scaling (recapitalisation, acquisitions, new lines) or companies that generate larger turnover and the need for cashflow was a major ceiling. While a small side input now, as the sector matures, that data point may be a vital barometer that speaks to ambitions, scale and community

WHAT DO THEY MAKE?

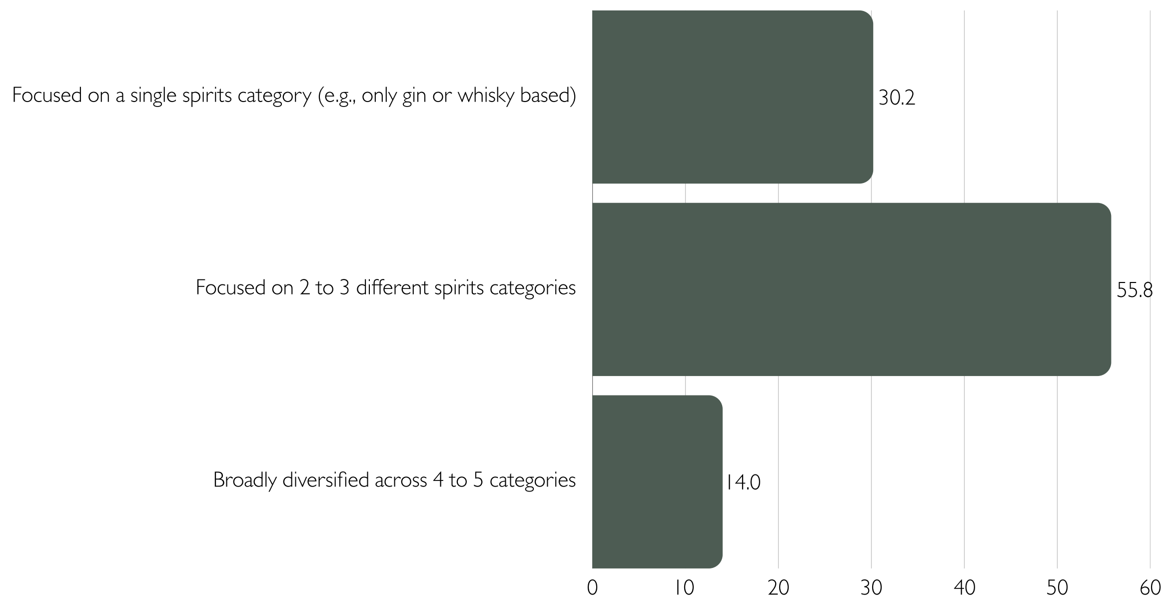
WHAT TYPES OF PRODUCTS DOES YOUR DISTILLERY CURRENTLY PRODUCE?



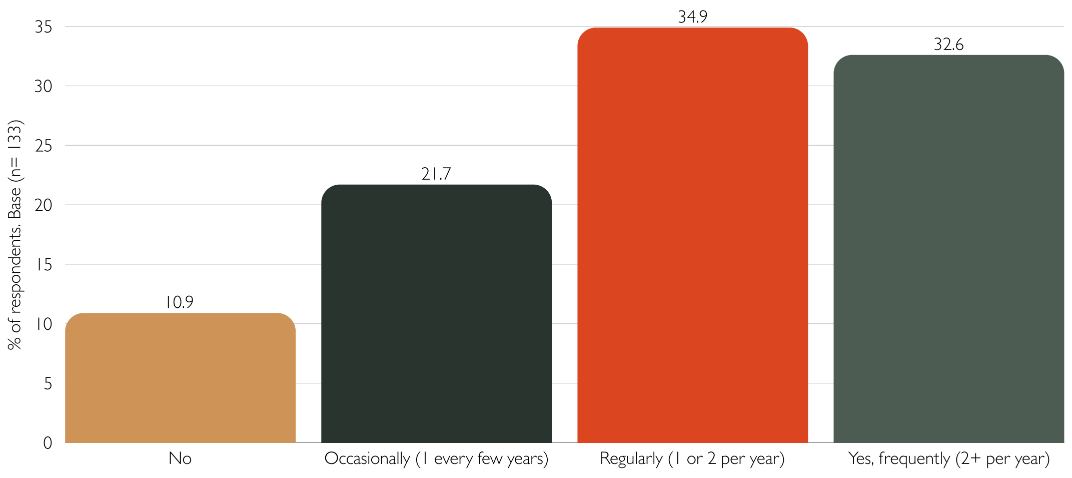
HOW MANY PERMANENT PRODUCTS (SKUS) DO YOU HAVE?



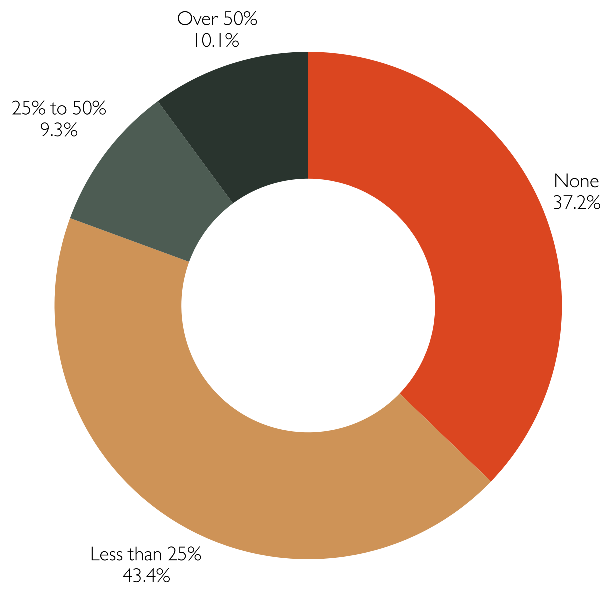
HOW DIVERSE IS YOUR PRODUCT RANGE?



DO YOU PRODUCE SEASONAL OR LIMITED-EDITION PRODUCTS?



WHAT PROPORTION OF YOUR PRODUCTION IS PRIVATE-LABEL OR CONTRACT DISTILLING?



SKU COUNT AND CREATIVITY

Most respondents make core spirits (as you'd expect in a distillery census), with meaningful participation in multiple categories, especially in liqueurs. Yet only a smaller share in No & Low. That mix points to broad entry points but also explains small-plant realities. Namely that certain categories (e.g. from scratch whisky/rum or alcohol-free) demand different kit, batch sizes and QA flows than a gin/liqueur-led setup - and thus why some sites will find it hard to diversify.

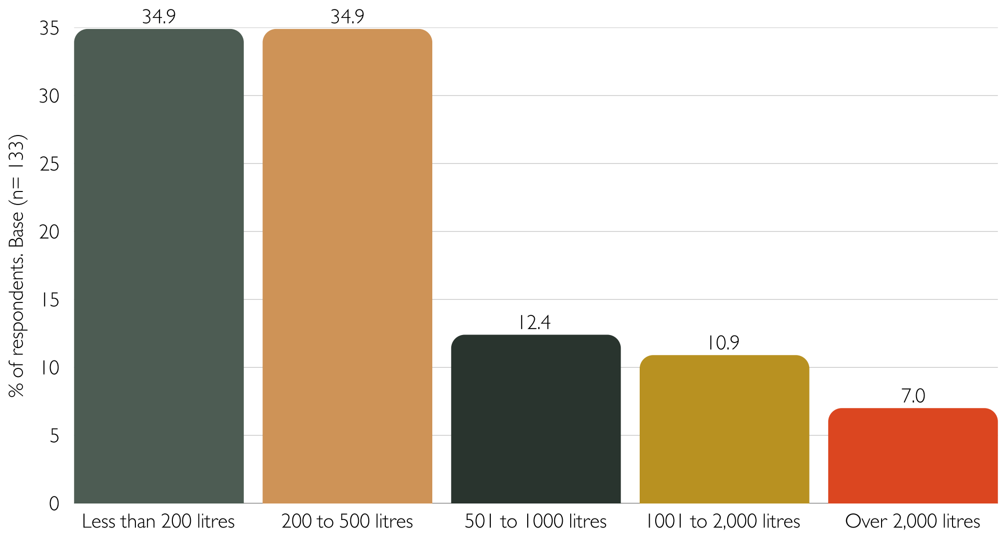
The results show that product portfolios are wide and that most carry several permanent SKUs. There's a notable share run limited editions each year too. Clearly, width fuels creativity and keeps brands active with their communities. But it also multiplies changeovers, packaging specs and training depth on tiny teams. Combined with team-size and "everything in-house" answers (later); SKU count becomes a potential capacity lever / ceiling.

BRAND BUILDERS VS PRODUCERS

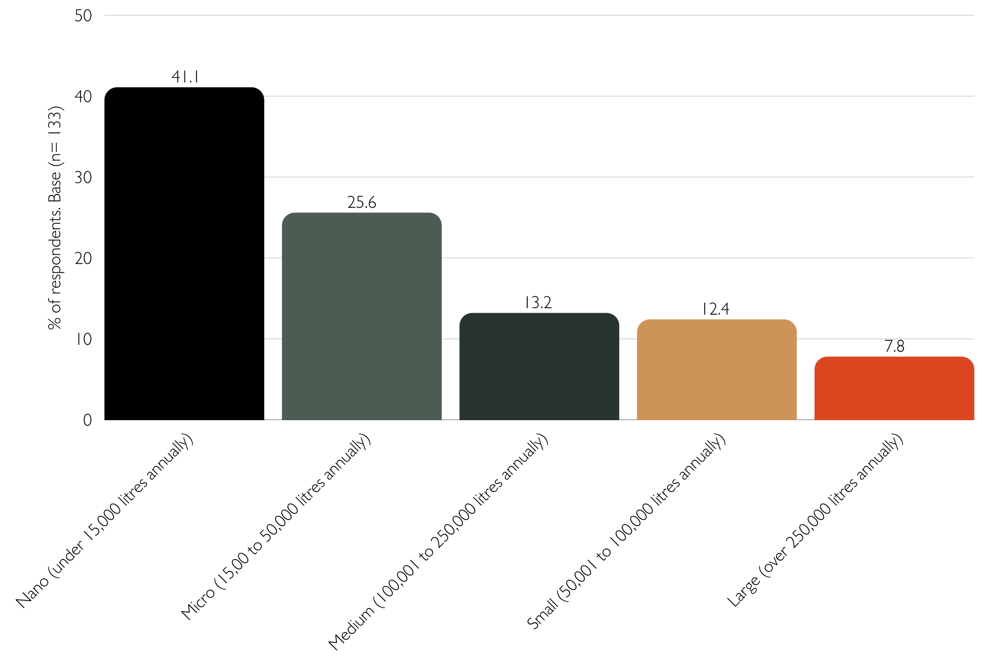
Private/white-label shows up, but own-brand production dominates. The centre of gravity is still brand-building rather than contract volume, which affects how working capital is used (stock, packaging, launches) and where marketing time goes.

IN WHAT WAY AND AT WHAT KIND OF SCALE?

WHAT IS THE AVERAGE VOLUME OF A SINGLE BATCH PRODUCED AT YOUR DISTILLERY?

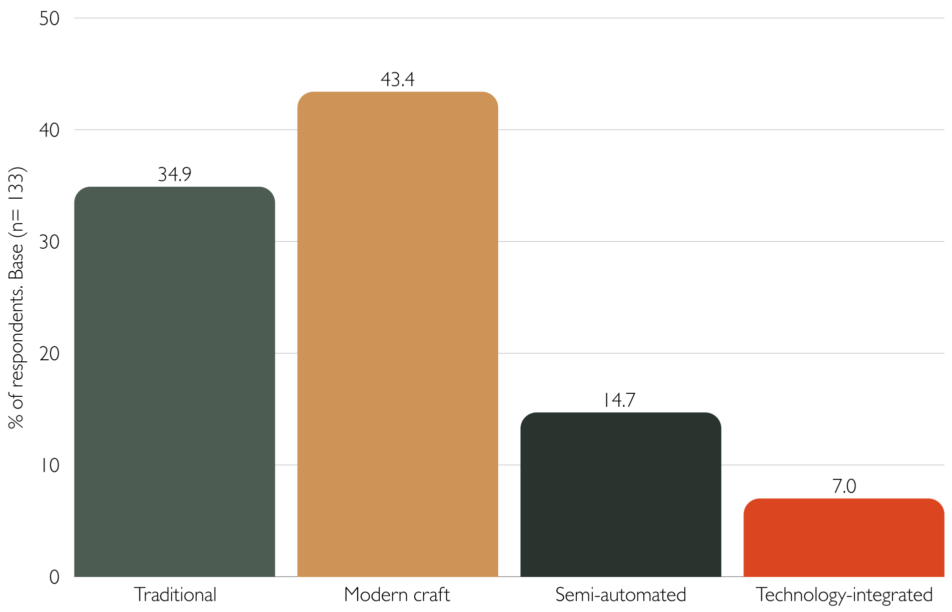


WHAT IS THE SIZE OF YOUR DISTILLERY IN TERMS OF PRODUCTION CAPACITY?



DO YOU OUTSOURCE PART OF YOUR PRODUCTION

HOW WOULD YOU DESCRIBE YOUR PRODUCTION METHODS?



PRODUCTION CYCLES

Most respondents run small batches, with a large share sub-500 L. The majority of craft operations seem optimised for short cycles: fast turnarounds, frequent changeovers, and tight control by the same people who host visitors and ship cases. Production styles lean traditional/modern-craft, not high automation. So, you're looking at hands-on processes where skill and SOPs carry performance.

That matters because batch size is destiny. Sub-500 L makes gin and liqueurs straightforward; from-scratch whisky or rum is harder to make commercially viable at this scale once you factor in mash volumes, losses, effluent, energy etc.

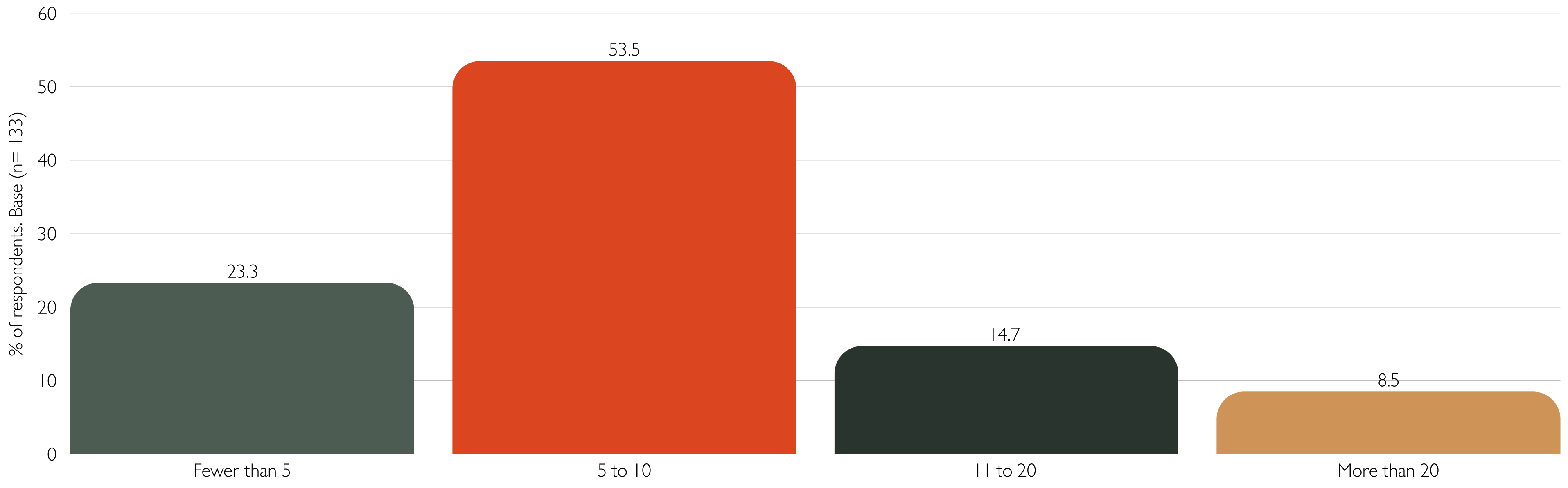
CAPACITY & OPERATIONAL REALITY

Annual output shows a healthy pyramid rather than a hollow middle - there's presence across tranches and not just nano at one end and juggernauts at the other. This is important to note as it shows that scaling is possible, even if difficult. The UK picture doesn't show a hard ceiling where policy or economics "cap" growth; it shows rungs to climb.

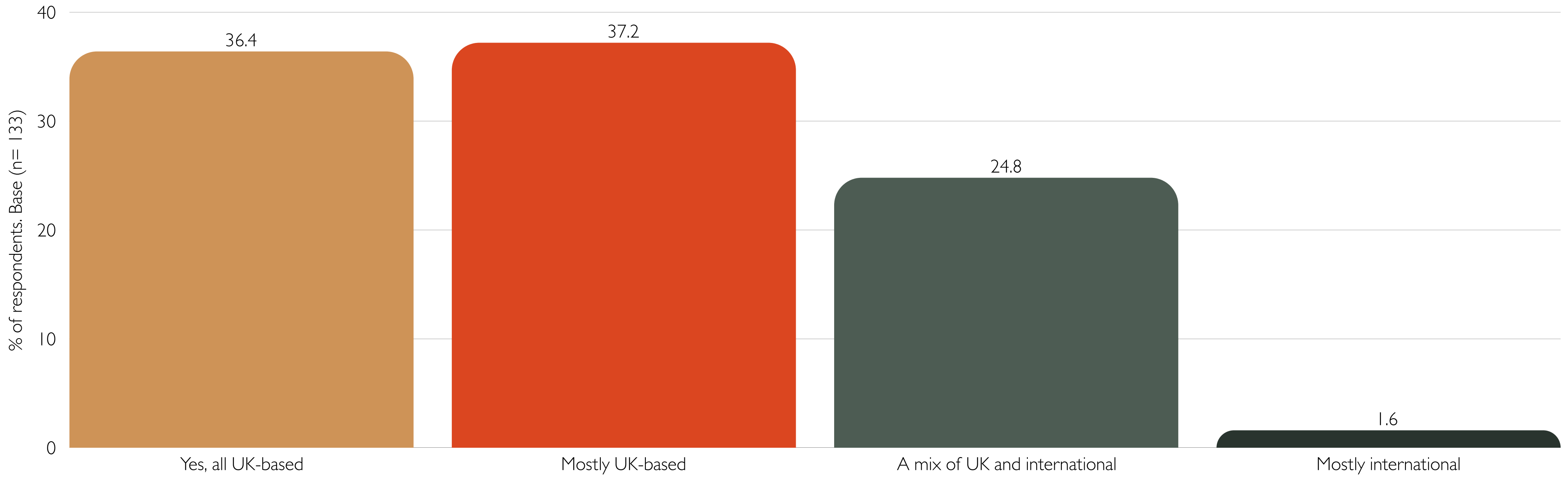
So much is done in-house (making, bottling, storage, fulfilment). You're looking at small teams carrying the full chain. Therefore capability lives in multi-skilled people, not headcount alone. Triangulate this with SKU breadth and limited editions: creativity is high, but so are changeovers needs and training depth. Moreover, it goes a long way to explaining why mixed-capability training beats siloed but more specialist courses.

UPSTREAM SUPPLY CHAIN

HOW MANY RAW MATERIAL SUPPLIERS DO YOU NEED TO PURCHASE FROM TO CREATE YOUR PRODUCTS? (EXCLUDING UNIVERSAL UTILITIES SUCH AS POWER, WATER)



DO YOU SOURCE YOUR MATERIALS (E.G., NEUTRAL SPIRIT, GRAIN, BOTTLES, CLOSURES) FROM UK-BASED SUPPLIERS?



INBOUND SUPPLY & ANCHOR BUYERS

Most producers buy from five to ten suppliers, with some stretching to a dozen or more as portfolios widen. It also shows that UK-based vendors dominate the chain; and that where inputs originate abroad (e.g. botanicals), distillers typically purchase through UK intermediaries rather than sourcing directly overseas.

That is key for policy makers and support - even nano sites channel steady spend into the domestic economy, across a multitude of material inputs such as glass, closures, labels, logistics, and raw ingredients. The buying power aggregates locally despite small order sizes per site. Distilleries are anchor buyers and supporting that strengthens both their route to market and reduces friction upstream - meaning spend is recycled quickly into other UK suppliers and sectors.

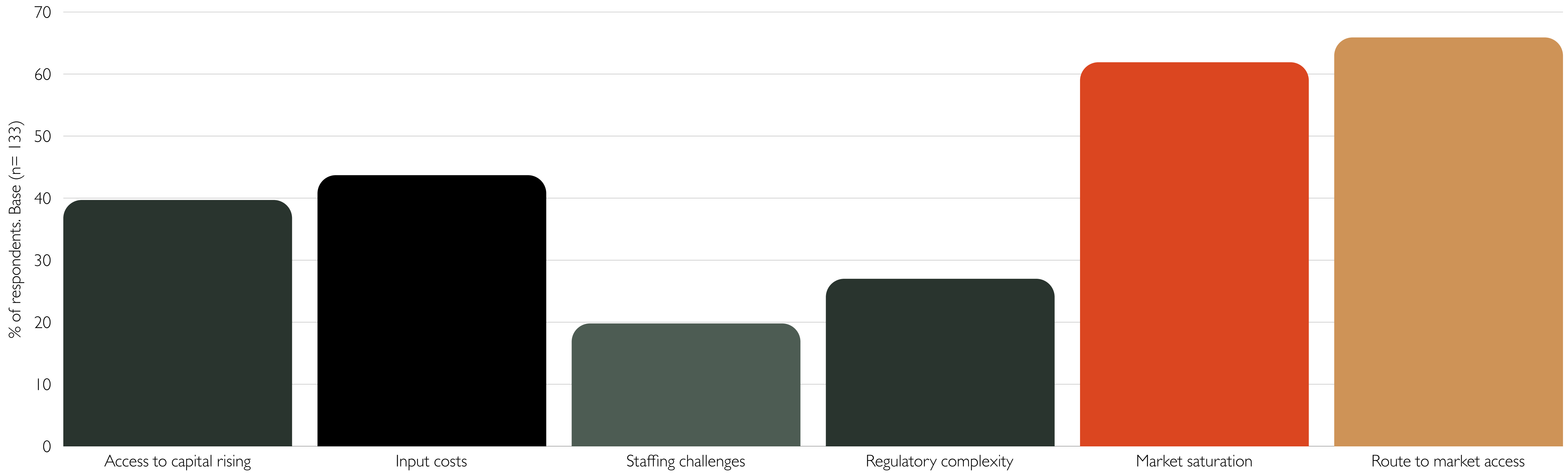
OPERATIONAL PRAGMATISM

There's a practical angle for operations too. More SKUs and categories mean more intake specs, MOQs and changeovers across those 5–10 suppliers. Standardising specs (bottles, closures, label stocks) and agreeing simple intake checks with suppliers releases working capital and time - cash not trapped in mismatched MOQs, minutes not lost to rework.

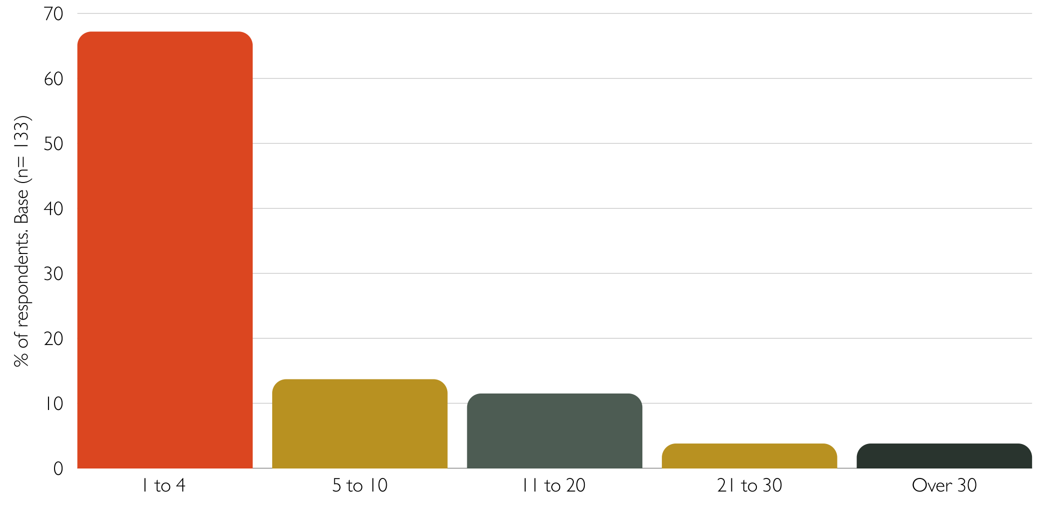
Finally, what these results mean from a policy read. What you're looking at is UK-centred spend but a long tail of small purchasers. Targeted support (shared buying frameworks, bonded logistics options, or micro-grants tied to supplier harmonisation) would help concentrate the buying power to deliver better value, as well as have two-tranche ROI - it stabilises local vendors and improves SME resilience.

AT THE DISTILLERY

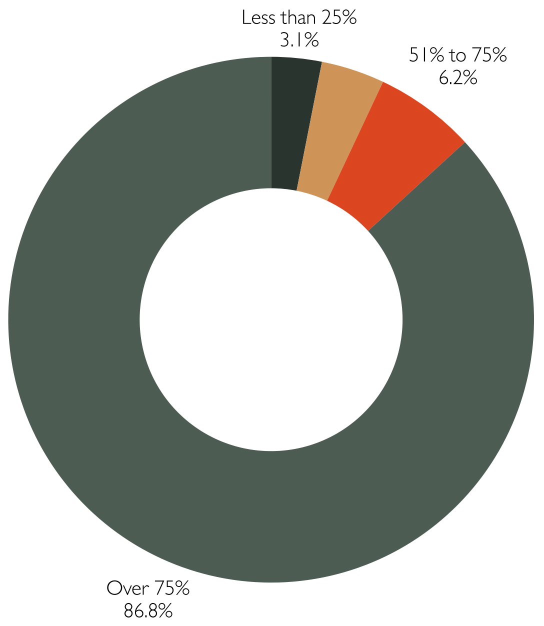
WHAT ARE THE BIGGEST BARRIERS TO GROWTH FOR YOUR DISTILLERY? (SELECT TOP 3)



HOW MANY FULL-TIME STAFF DOES YOUR DISTILLERY EMPLOY?



WHAT PERCENTAGE OF YOUR WORKFORCE IS HIRED FROM WITHIN 50 MILES OF YOUR DISTILLERY?



LIFE IN A CRAFT DISTILLERY

Most sites run with 1–4 full-time staff. Some context though, you're looking at a craft-weighted, England-heavy sample without multinationals. This explains the lean headcounts and faster, smaller-batch rhythms (often gin-led rather than grain-in whisky). That matters as in teams under ten, the same people handle production, tourism, sales, compliance, supply, and finance and therefore capacity lives in mixed skills, not in adding bodies. For those involved in training through, it's clear there is a need to account for a multi-role lens (e.g. short, stackable modules that fit real shifts instead of siloed courses).

Hiring is profoundly local too. Around 87% say three-quarters or more of their workforce live within 50 miles. That makes craft distillers rural anchors - steady employers creating multi-skilled roles in place, not just jobs in plants.

PEOPLE ARE NOT THE GROWTH BARRIER

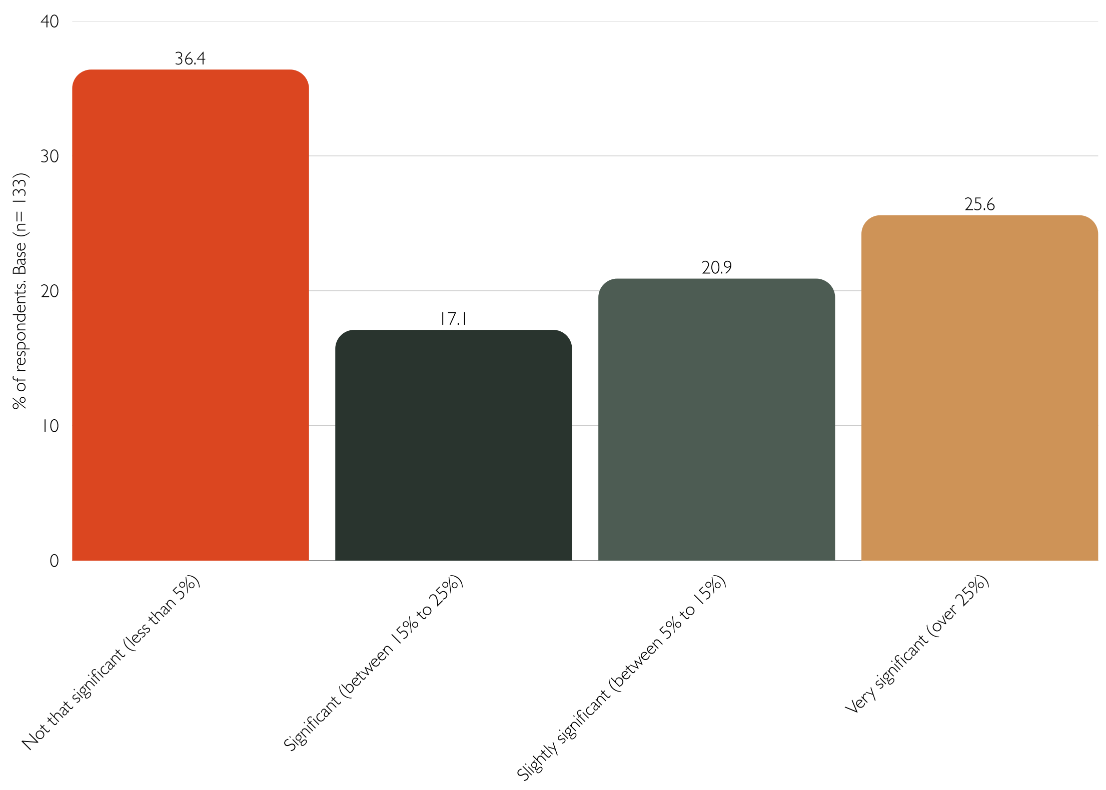
Staffing isn't the roadblock. Owners point instead to route-to-market access, market saturation, and input costs. The data suggests that the constraint isn't finding people; it's giving small teams a clearer path to sell and the headroom to operate.

All of this shapes careers. With small teams likely to stay small, progression looks like depth across functions rather than a narrow ladder. For example, sensory and QA today, tours on Saturday, stock and dispatch on Monday. Experience and leadership looks different, for craft operators.

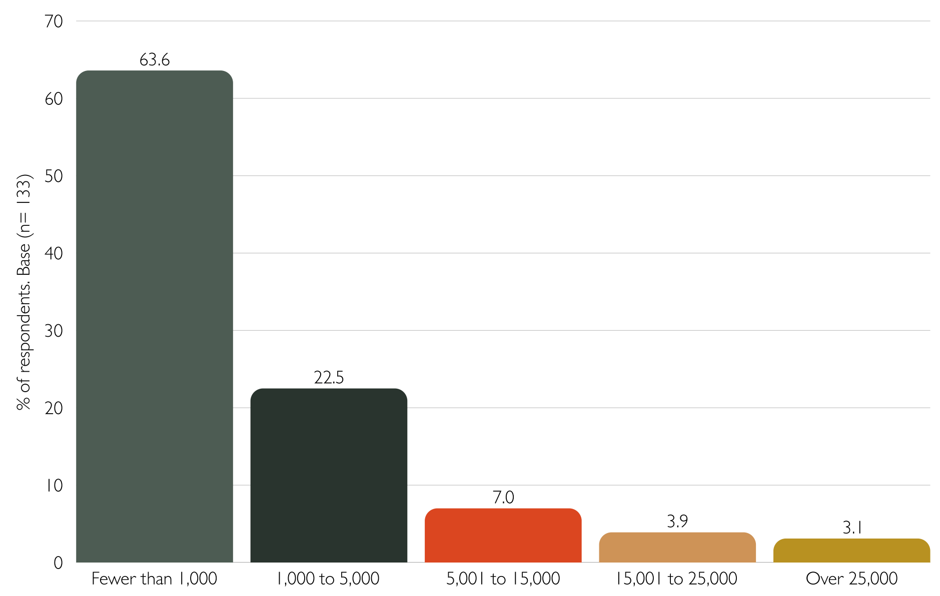
HR and education offers / support / services should reflect mobility and place; support that helps people build skill density in situ will both develop and retain talent without forcing relocation.

TOURISM & LOCAL INTEGRATION

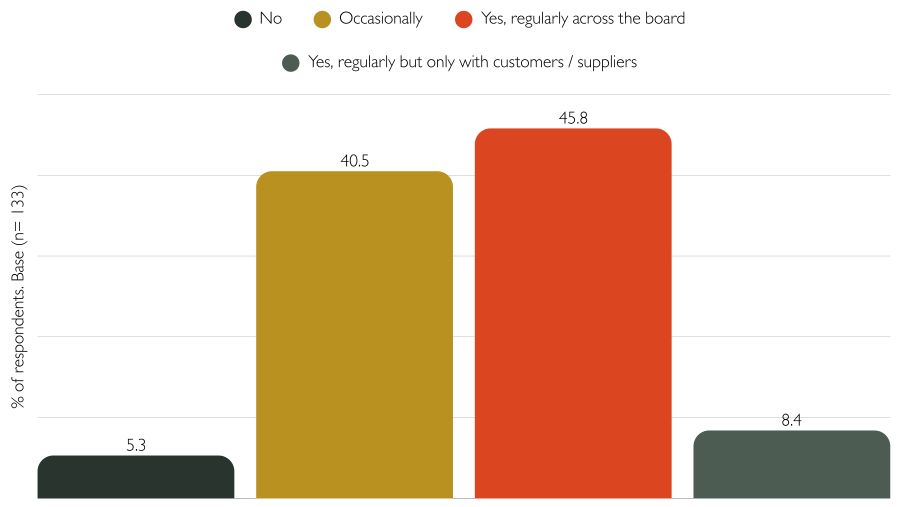
HOW SIGNIFICANT IS TOURISM TO YOUR DISTILLERY'S INCOME?



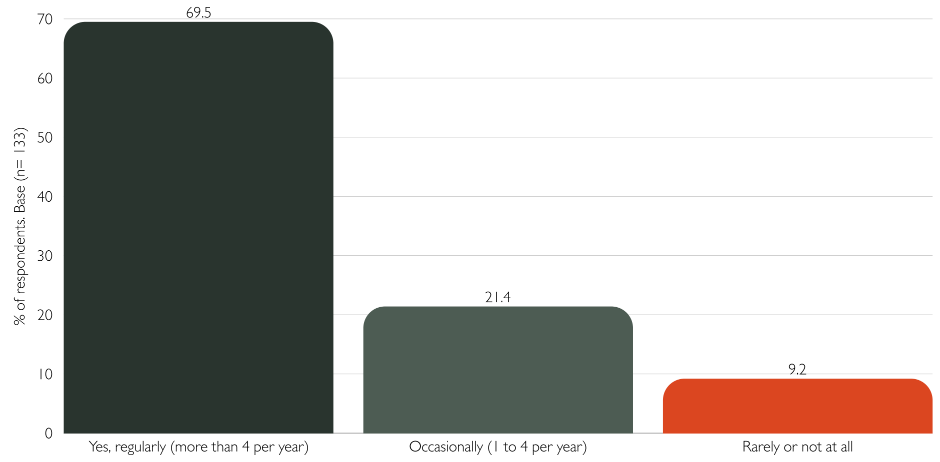
HOW MANY VISITORS DOES YOUR DISTILLERY RECEIVE /HOST ANNUALLY?



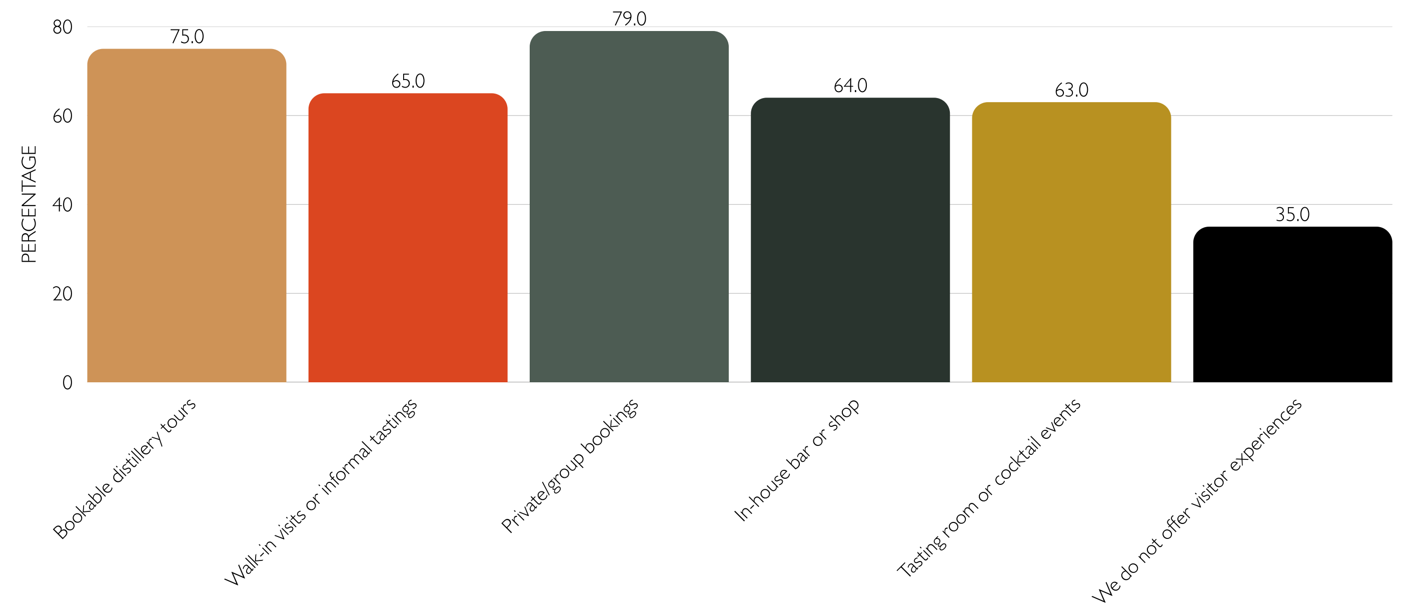
DO YOU COLLABORATE WITH OTHER LOCAL BUSINESSES?



DOES YOUR DISTILLERY PARTICIPATE IN LOCAL (REGIONAL) EVENTS, MARKETS OR FESTIVALS?



WHAT TYPES OF VISITOR EXPERIENCES DO YOU CURRENTLY OFFER? (MULTIPLE CHOICE)



LOCAL HUBS, NOT JUST PRODUCTION SITES

Distilleries are highly embedded locally. You're looking at sites that already offer multiple experience types (bookable tours, hosted tastings, private groups, on-site bars/shops). Despite that breadth, annual visitor volumes are often modest, which points to headroom rather than a demand problem.

Local participation and collaboration run deep. You're looking at a sector that shows up at regional events and works with neighbouring breweries, farms and retailers. This is classic anchor-business behaviour - spend radiates into nearby venues, trails and suppliers.

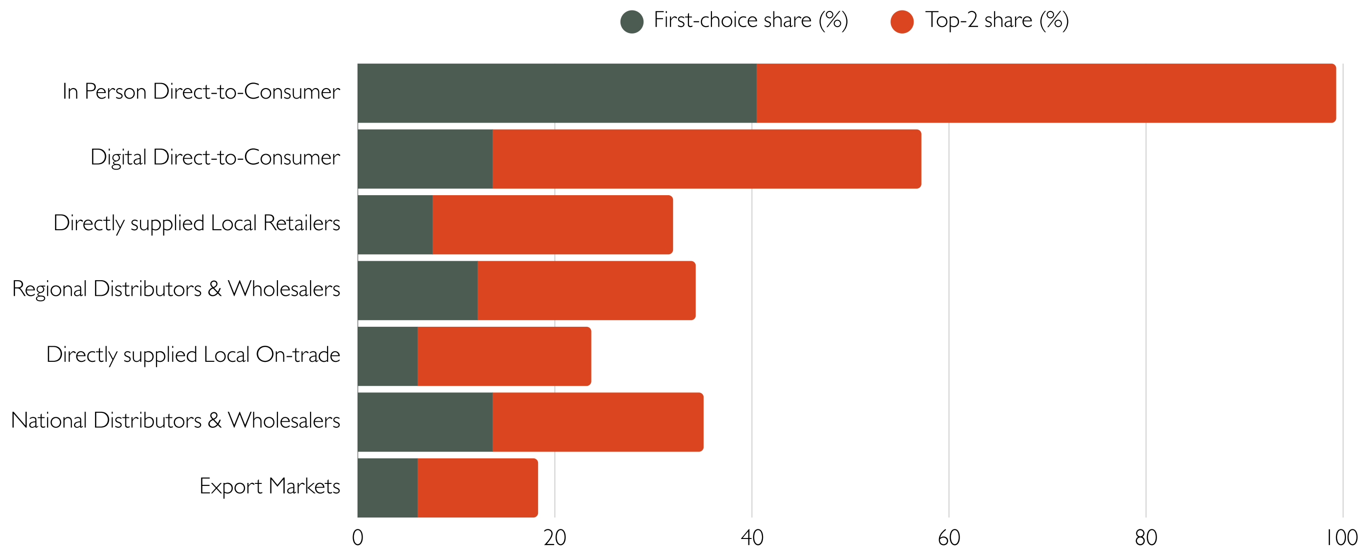
TOURISM & SUSTAINABILITY ARE LINKED

When you cross reference the data, tourism and sustainability reinforce each other. Experience-led sites tend to move faster on visible improvements (energy and waste reduction, refills etc.) because visitors see them. It suggest that eco-visible upgrades pay twice: smoother operations and a better guest story that supports premium positioning.

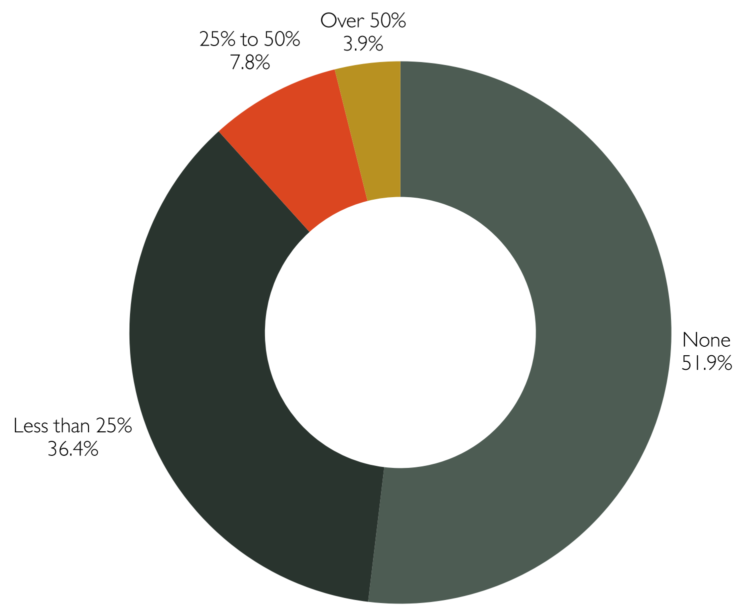
The infrastructure exists; the gap is choreography. Distilleries have the capacity, the offers and community ties already in place. Incremental investment into clear tours, capture-every-visitor discipline etc. could lift yield per visit without new headcount.

DOWN STREAM ROUTE TO MARKET

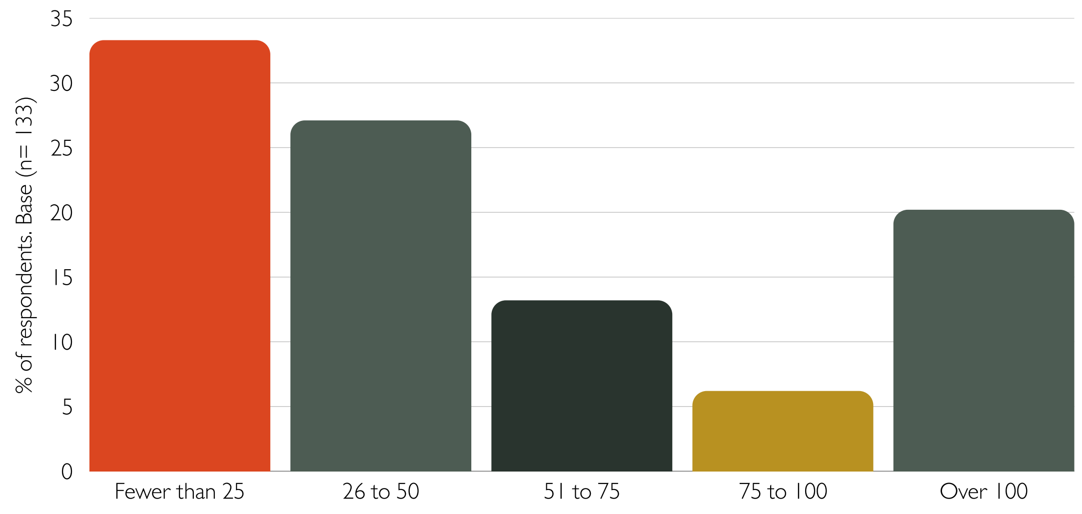
RANK THE ROUTE TO MARKET CHANNELS FROM MOST TO LEAST IMPORTANT.



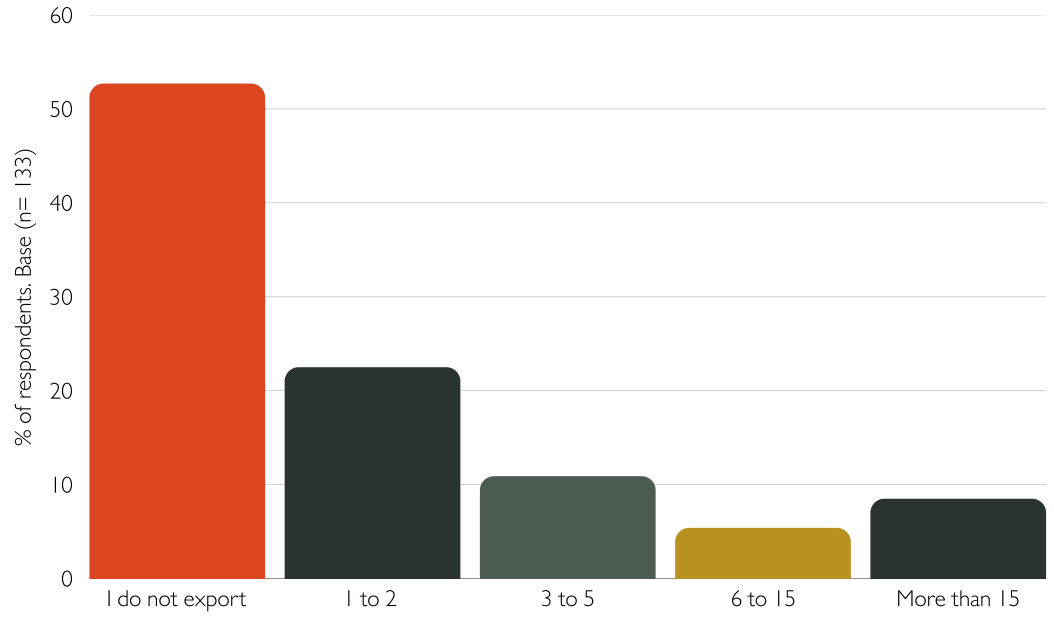
WHAT PROPORTION OF YOUR SALES ARE EXPORT-FOCUSED?



HOW MANY TRADE ACCOUNTS/CUSTOMERS DOES YOUR DISTILLERY SERVE? (DIRECTLY SUPPLIED B2B. A DISTRIBUTOR / IMPORTER THAT SUPPLIES 100 ACCOUNTS COUNTS AS 1.)



HOW MANY COUNTRIES DO YOU EXPORT TO?



OUTBOUND GOODS

You're looking at a route-to-market pattern defined by small teams, short customer lists, and high reliance on direct-to-consumer (D2C) sales. Roughly half of producers sell directly, both in-person and online, and this channel plays an outsized role in UK craft spirits.

D2C isn't just about better margins though; it's the channel that moves product fastest, builds loyalty, and keeps cash flow visible. For rural or remote distilleries, it's often the bridge between operating sustainably and standing still.

As teams scale, the distribution mix broadens. The majority serve fewer than 50. This matters as small headcounts can't sustain complex B2B sales networks, so regional distributors and collaborative category routes become critical. When access to these channels narrows (through oversaturation, cash-flow delays, or delistings) however, the shock will travel quickly down to the smallest sites. This pattern was echoed in the top-cited barriers to growth: route-to-market access and saturation both above 60%.

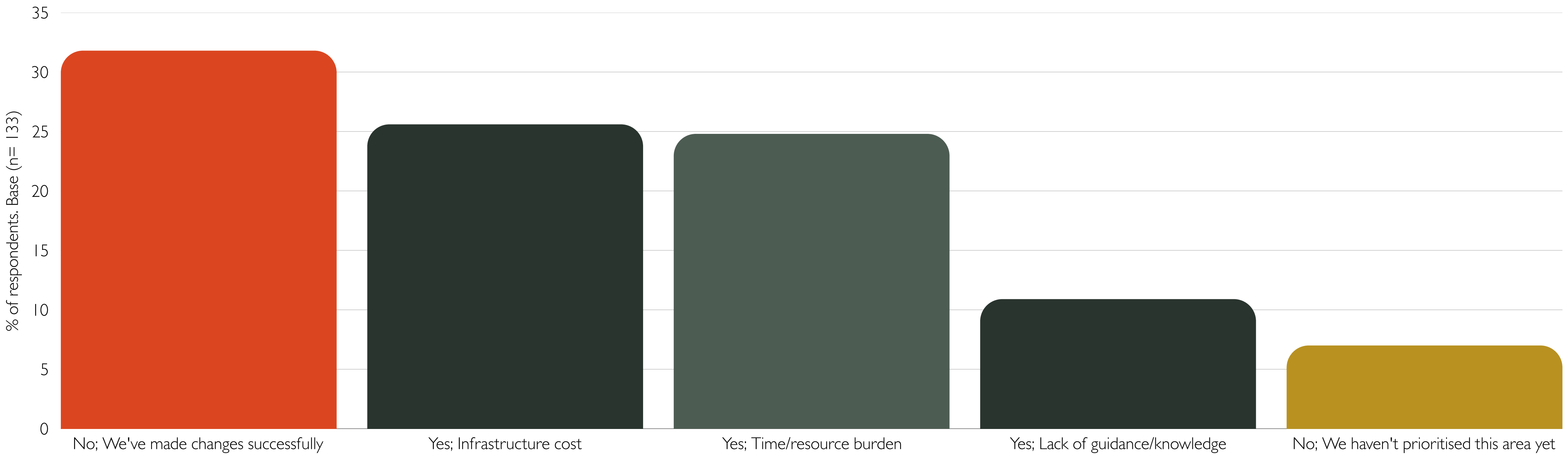
CRAFT PRODUCERS EXPORT WELL

Export adds a layer of optimism. Even in this craft-weighted sample, nearly half report exporting to at least one market. That's an extraordinary baseline given their size, suggesting strong potential for targeted export-readiness and co-funded trade initiatives.

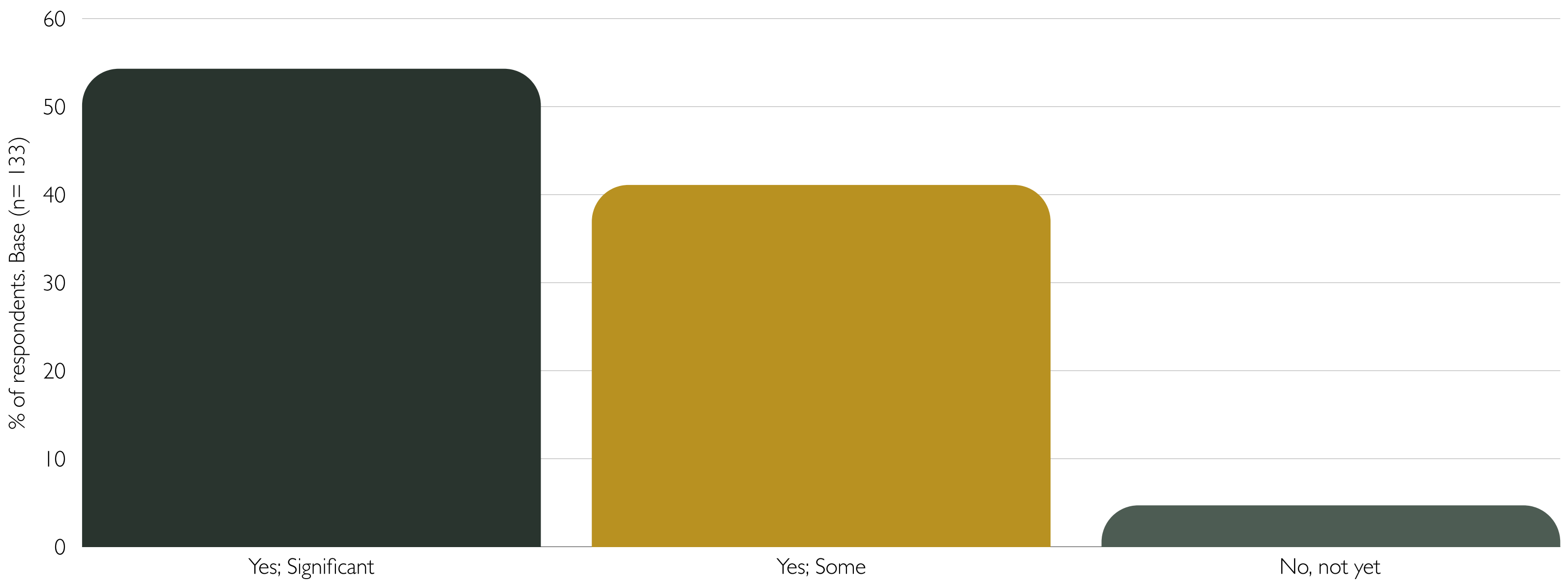
For associations, this is where coaching and clustering could make an immediate difference. Help first-timers navigate duty structures, compliance, and bonded logistics, while LEPs and government focus funding on trade missions and reciprocal agreements. The infrastructure is there; what's missing is the scaffolding to help small producers climb it faster.

SUSTAINABILITY INITIATIVES

HAVE YOU ENCOUNTERED SPECIFIC CHALLENGES IN ADOPTING MORE SUSTAINABLE PRACTICES?



HAVE YOU TAKEN ANY STEPS TOWARDS ENVIRONMENTAL SUSTAINABILITY IN YOUR OPERATIONS?



AN ENGAGED SECTOR

You're looking at two top-line questions that get interesting only when paired with the rest of the dataset. On their own, they say: most producers have acted on sustainability, and the main blockers are time, resource and infrastructure cost - not "lack of guidance."

Improving this involves overcoming a pragmatic, not philosophical gap. The sector knows what to do; the pinch is install time, CAPEX, and running changes on small plants.

Layer in scale and method and the picture sharpens however. Small batches, hands-on processes, and everything in-house mean the quickest wins are eco-visible, light-lift upgrades as they do not demand new headcount.

Bottom line: hands and hardware over handbooks. If support buys install time and kit, small teams can execute what they already understand.

For details on priority measures and how associations and LEPs can structure funding, see the separate insight pack on Sustainability × Tourism.

USING THESE RESULTS

HOW TO CITE
Everglow Spirits (2025). Spirit of the Nation: UK Distilling Census.
Fielded July–October 2025.

Results PDF and dataset are available at:
everglowspirits.com/courses/spirit-of-the-nation-uk-distilling-census/

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Free to use with attribution and a link to the hub page.
When quoting figures, include the year and add that the sample is craft-weighted for context. Please note that not all totals sum to 100% due to multi-select questions.

WHERE NEXT?

This deck is the baseline; the three themed briefs are where it turns into action. We've grouped and triangulated the dataset into: People, skills & capacity, Commerce, supply chain & resilience, and Operations, sustainability & tourism. Links to all three and the raw data/CSV live on the hub page.

Each brief goes deeper than these slides cross-referencing methods, scale, portfolio breadth, place, tourism and barriers - to surface patterns you can act on.

DISTILLERS

For distillers, the briefs translate findings into practical moves you can run next week: build skill density inside small teams; tighten SOPs; rationalise SKUs and harmonise packs; treat tourism as a core channel that feeds CRM and repeat orders; use simple KPIs to track improvement.

ASSOCIATIONS, EDUCATORS AND GUILDS

For associations and guilds, the focus is mixed-capability support that matches how craft actually works: short, stackable training blocks; install-time and small-plant hardware co-funding (hands and hardware, not more handbooks); shared specs and bonded logistics; and regional visitor routes (trails, passports) that members can plug into. The briefs include ideas for programmes that are easy to stand up and easy to prove.

LOCAL ENTERPRISE AND POLICY MAKERS

For LEPs, DMOs and local government, the aim is least disruption, maximum gain. Co-fund eco-visible visitor upgrades that lift both experience and footprint; back place-based skills sprints delivered locally; offer patient capital for capacity-making premises moves; and support export readiness where small teams already have a foothold. Each brief flags the likely ROI and the simple metrics to track it.

STAYING INVOLVED

The aim for this project is to build a universal data set for distilling in the UK and the plan is to grow and improve next year. If you have gained value from this information, please join the mailing list on the hub page to take part in next year's cycle.