

Case Study | Alcohol | Bacardi

Patrón leads Tequila in the UK. In Frankfurt, it was on the bottom shelf.

A Shelftrak audit benchmarked the brand's share of Tequila space across eleven UK and European airports — and pinned the loss to a single location, down to exactly how much shelf space Patrón was missing.



CLIENT	CATEGORY	SCOPE	DATA
BACARDI	TEQUILA	11 EUROPEAN AIRPORTS	SHELFTRAK AUDIT, AUG 2024

THE BRIEF

Find the fair-share gap. Then find the stores causing it.

Bacardi asked a straightforward commercial question: is Patrón getting the shelf space its performance has earned, in every store that matters?

Answering it meant benchmarking share of Tequila space, facings and listings against the competition — location by location, fixture by fixture.

Shelftrak audited eleven airports across the UK and Europe. The pattern that emerged wasn't a general problem. It was one airport.

WHAT THE AUDIT FOUND

23%

lower share of Tequila space in Europe than Patrón holds in the UK

72%

below the European average share of space across Frankfurt Airport

67%

below Patrón's own European facings-per-SKU index in Frankfurt

FINDING 01

The UK sets the standard

At a total level, Patrón commands 34% of Tequila linear space in UK stores against 27% across Europe. The UK number proves the brand can hold a third of the category — which makes every location below it a measurable opportunity, not a matter of opinion.

PATRÓN SHARE OF TEQUILA LINEAR SPACE — UK V EUROPE (%)

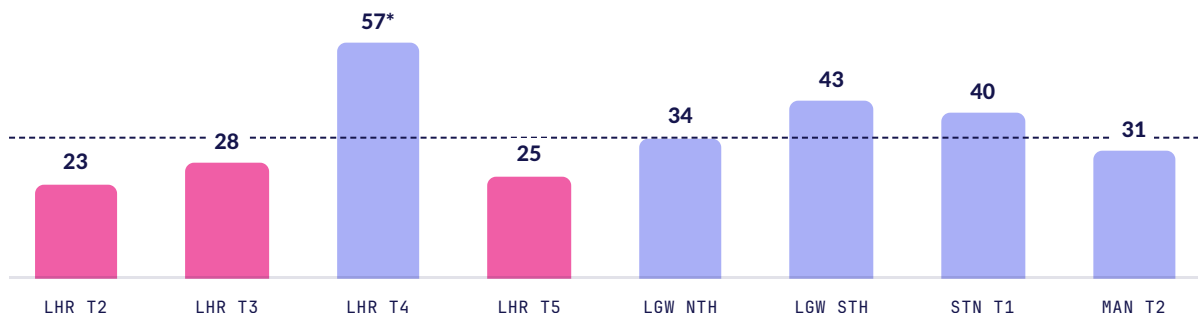
FINDING 02

At home, three Heathrow terminals trail the pack

Most UK stores hold Patrón at or above its national average. LHR T2, T3 and T5 sit below it — specific, addressable opportunities for the account team rather than a market-wide fight.

Patrón share of Tequila linear space by UK store (%)

----- UK average 34%



* LHR T4 SHARE IS OF A 4-LINEAR-METRE TEQUILA FIXTURE · ■ = BELOW UK AVERAGE

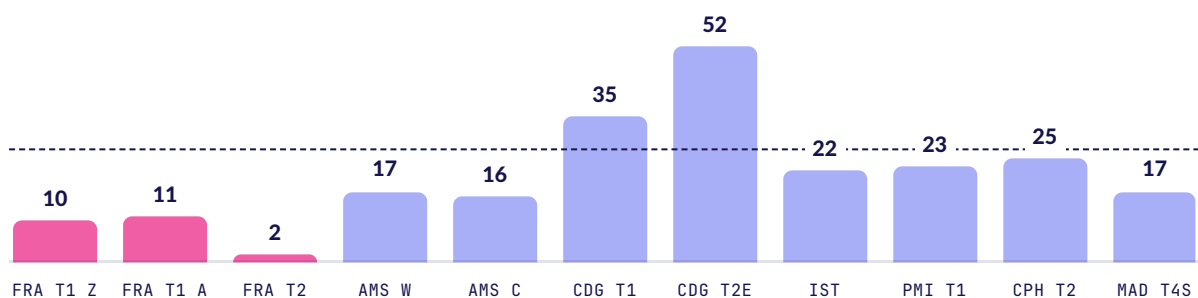
FINDING 03

In Europe, Frankfurt is the outlier — across every terminal

Paris CDG shows what good looks like. Frankfurt shows the opposite: all three stores sit far below the European average, and T2 barely registers at 2%. This is where the audit went deeper.

Patrón share of Tequila linear space by European store (%)

----- European average 27%



■ = FRANKFURT STORES, ALL BELOW THE EUROPEAN AVERAGE

INSIDE THE STORE — FRANKFURT T2

The category leader, reduced to one bottle.

Patrón gets just one SKU and one facing on the bottom shelf. Don Julio, on promotion, holds four listings and owns the fixture. Other competitors average three to four each.

This is the visual and measured evidence Patrón needs to make the case for more space.

SHELFTRAK AUDIT PHOTO — FRANKFURT T2 MAIN STORE



SHARE OF TEQUILA SPACE

PATRÓN	1%
DON JULIO	47%
JOSE CUERVO	13%
CASAMIGOS	7%

FACINGS PER SKU

PATRÓN	1
DON JULIO	8.2
JOSE CUERVO	2.3
CASAMIGOS	2

LISTINGS IN STORE

PATRÓN	1
DON JULIO	4
JOSE CUERVO	4
CASAMIGOS	3

THE RECOMMENDATIONS

What the audit told Bacardi to do next

01 Close the gap to the European average

Patrón holds 27% of tequila space across Europe, but significantly less in its weakest locations.

Closing that gap in key stores represents a fast, targeted opportunity to gain space.

02 Rebuild the position in Frankfurt T2

One listing, one facing, bottom shelf.

The audit gives Bacardi the evidence to reset Patrón's competitive position against Don Julio, Jose Cuervo and Casamigos.

03 Lead the Tequila category review

Tequila is 6.3% of the store's category space and growing.

The data supports Bacardi in advising Heinemann on a full category development plan — with Patrón at the centre.

ABOUT SHELFTRAK



Shelftrak turns a photo of any shelf, fixture or back bar into verified, SKU-level data on space, range, price and promotion — helping brands and retailers across travel retail, multi-sector retail and on-trade & hospitality see what's really happening in store. Through market tracking, bespoke audits and expert-led advisory, that data becomes a clear plan for growth.

More information and case studies can be found at shelftrak.com