

GLOBAL BRAND STRATEGY IN THE PREMIUM SPIRITS INDUSTRY: BALANCING GLOBAL CONSISTENCY AND LOCAL MARKET ADAPTATION

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ABSTRACT: This research paper investigates the strategic process through which multinational corporations producing premium spirits strike a balance between global brand uniformity and local adaptation. With an approach of multiple embedded case study and data collection limited to only 23 credible academic sources, the research evaluates five conceptually sampled cases: Absolut Vodka, Johnnie Walker Scotch Whisky, Cognac, Gin Mare, and Mexican tequilas. Findings highlight a highly efficient core-periphery model of glocalization characterized by the existence of a strong global core (legacy, visual representation, quality symbol, and national branding) supplemented by various peripheral adaptations in terms of marketing discourse, new products, partnerships, and consumption practices. This research conceptualizes and tests the framework of Premium Spirits Globalization in a way that builds on the historical systems view of long-lived brands by da Silva Lopes.

Keywords: global brand strategy, premium spirits, glocalization, standardization-adaptation, core-periphery model, brand longevity

I. INTRODUCTION

Premium spirits, which include high-end whisky, vodka, cognac, gin, rum, and tequila, constitute perhaps the fastest-growing and most concentrated segment of the alcoholic beverages market globally. Worth in excess of USD 100 billion per year with double-digit annual growth rates in many developing economies, premium spirits have assumed the character of a mainstay asset for portfolios managed by international firms like Diageo, Pernod Ricard, and Bacardi (da Silva Lopes, 2002, 2003, 2007, 2015). Since the 1960s, the sector has experienced dramatic structural changes as a result of a series of consolidations and strategic reorganizations, resulting in the transformation of regionally dispersed industries into a global oligopoly (da Silva Lopes, 1999, 2004, 2005, 2008; Schwittay, 1999). In such a context, the brand as a source of sustainable competitive advantage is not merely a product marker but rather a corporate strategic asset (da Silva Lopes, 2007; da Silva Lopes & Casson, 2012).

The fundamental tension in global brand management in the premium spirits industry is the maintenance of global brand consistency while executing effective local market adaptation, balancing standardized visual and symbolic aspects of the brand with culturally customized marketing mixes to address local consumer tastes, cultural drinking traditions, regulatory environments, and competitive conditions (Musonera & Hemley, 2008; Song et al., 2018; Sinha & Contractor, 2023; Pedeliento et al., 2017). The process may be viewed in terms of glocalization or standardization versus adaptation paradox (Cavusgil et al., 2008; da Silva Lopes, 2007). In the particular case of premium spirits, the challenge is exacerbated by the fact that such products operate both as luxury status symbols and cultural artefacts (Bourdin et al., 2021; Gantsho et al., 2024; Castro & Sáiz, 2020). On the one hand, excessive adaptation might undermine the brand's global heritage and therefore reduce its value as a means for price premiums and cross-border synergies. On the other hand, excessive brand standardization is unlikely to prove effective in the face of local regulatory restrictions and consumers' expectations for cultural authenticity (da Silva Lopes, 2007; Ranasingha Hewage & Hinidumage, 2025).

The importance of the brand in driving industry longevity and market dominance has long been recognized in academic discourse devoted to the alcoholic beverages sector. Historical works show how brands gain

"independent and eternal lives" independent of their manufacturing locales, surviving even ownership change and geopolitical transformations through brand portfolio management and intellectual property laws (da Silva Lopes, 2007 [CHaRM proceedings]; da Silva Lopes, 2015; da Silva Lopes & Casson, 2012, 2014). The longitudinal examination of international companies has further revealed a shift from localized production in the pre-liberalization era toward a more integrated approach in the post-liberalization period, with adaptation retaining its importance in distant or highly regulated markets (da Silva Lopes, 2002, 2003, 2005, 2008, 1999; Schwittay, 1999). While the above literature provides a strong base for industry-level analysis, a relative dearth of empirical studies focusing specifically on the premium spirits segment still persists (Muñoz, 2024; Prete, 2023; Mongay et al., 2012). However, some important insights on premium spirits glocalization can be obtained through the examination of individual brand histories and market experiences. For example, the case of Absolut Vodka proves the successful existence of a highly branded global product with a distinctively designed bottle and lifestyle-based promotional content alongside locally adapted creative executions (Musonera & Hemley, 2008; Venkatesan et al., 2017). Furthermore, in Absolut's case, the strategic use of the concept of "nationality" ("Swedishness") proved an effective tool for brand globalization (Ranasingha Hewage & Hinidumage, 2025). Likewise, Johnnie Walker's success in India shows how a globally recognized brand of Scotch whisky can adapt to local conditions through culturally appropriate narratives (Sinha & Contractor, 2023; Mongay et al., 2012). Cross-cultural consumer behavior research highlights major differences in cognac consumption patterns between Americans and Chinese in terms of occasions, gifting rituals, and prestige signaling (Song et al., 2018). In addition, the contemporary success of premium gin offerings like Gin Mare exemplifies how, in some instances, "the local(s)" rather than global becomes the main source of premium value for consumers (Pedeliento et al., 2017). The experience of smaller enterprises producing Mexican tequila is also relevant here, illustrating the option between born-global and gradual internationalization strategies (Muñoz, 2024). Finally, empirical evidence based on consumer perception shows that country-of-origin stereotypes and the perception of brand nature influence premium spirits evaluations (Bourdin et al., 2021; Gantsho et al., 2024; Prete, 2023).

However, a systematic comparison between leading premium spirit producers' global brand strategies and their performance effects remains lacking in the literature. Prior works tend to either concentrate on industry-level historical trends (da Silva Lopes, 1999, 2002, 2003, 2004, 2005, 2007, 2008, 2015) or examine individual brands/markets separately (Musonera & Hemley, 2008; Sinha & Contractor, 2023; Song et al., 2018; Pedeliento et al., 2017). Therefore, a crucial issue remains to be addressed: What are the generalizable principles underlying the global brand management of premium spirits brands? The present study aims to answer this question through the execution of original multiple embedded case study using exclusively existing archival, market, and consumer data. The research examines the following hypothesis: Leading premium spirits brands balance global brand consistency with local adaptation to achieve sustained competitive advantage. Subsidiary objectives include the identification of the non-negotiable core elements of global branding, allowable local adaptation practices, and performance impacts of different glocalization configurations. Based on historical patterns and empirical evidence pertaining to leading premium spirit brands and markets, the research builds on previous theoretical contributions to formulate a novel Premium Spirits Glocalization Framework (da Silva Lopes, 2007, 2015; da Silva Lopes & Casson, 2012). The structure of the paper is as follows. Section 2 reviews literature, theory, and concepts. Methodology is presented in Section 3. Sections 4-5 contain the findings and discussion. Conclusions are drawn in Section 6.

II. LITERATURE REVIEW

The premium spirits industry is where luxury consumption, cultural identity, and global business strategy converge. In this space, brands operate as long-lasting intangible assets that can cross borders while still adapting to local consumer realities (da Silva Lopes, 2007, 2015). Managing a global brand here means carefully balancing two forces: maintaining a consistent core—heritage, visual identity, quality cues, and emotional appeal—while selectively adapting elements like storytelling, product variations, pricing, partnerships, and promotions to suit different cultural, regulatory, and competitive environments (Musonera & Hemley, 2008; Sinha & Contractor, 2023; Pedeliento et al., 2017). This balancing act, often described as glocalization, has become central to achieving long-term competitive advantage in an industry that is both highly consolidated and culturally diverse (da Silva Lopes, 2002, 2005; Schwittay, 1999).

2.1 Historical Evolution and Consolidation of Multinational Strategies

Research on the alcoholic beverages sector traces today's premium spirits landscape back to major structural shifts beginning in the 1960s. Successive waves of mergers, acquisitions, and portfolio restructuring transformed a fragmented set of regional producers into a small number of dominant multinational firms. In the process, brands evolved from being tied to production sites into independent, tradable assets (da Silva Lopes, 1999,

2002, 2003, 2004, 2008). Long-term studies show that brands developed what has been described as “independent and eternal lives,” sustained through governance changes, intellectual property protection, and strategic divestments. This allowed firms to benefit from economies of scale while preserving brand heritage across ownership transitions (da Silva Lopes, 2007; da Silva Lopes & Casson, 2012, 2014; da Silva Lopes, 2015). Earlier research also highlighted the difficulties smaller domestic firms faced when competing with global players, emphasizing the need for adaptation in fragmented markets (da Silva Lopes, 2005; Schwittay, 1999). Together, these developments shaped today’s oligopolistic structure, where long-term brand success depends on balancing global efficiency with local responsiveness (da Silva Lopes, 2008, 1999).

2.2 Theoretical Foundations: Standardization, Adaptation, and Glocalization

The strategy of global branding in premium spirits builds on the classic standardization versus adaptation debate. On one hand, globalization encourages standardization—particularly in elements like visual identity and quality signaling—to achieve efficiency and consistency across markets. On the other, cultural and regulatory differences require adaptation in how brands engage consumers locally (da Silva Lopes, 2002, 2003, 2007). National identity often plays a key role as a stable global anchor: associations such as “Swedishness” for vodka or “Scottishness” for whisky can travel across borders while still allowing local reinterpretation (Ranasingha Hewage & Hinidumage, 2025; Castro & Sáiz, 2020). More recent thinking frames this balance as a “core–periphery” model, where a fixed global core—heritage, imagery, prestige—is complemented by a flexible local periphery of campaigns, extensions, and partnerships (da Silva Lopes, 2015; Bourdin et al., 2021). This perspective highlights that brand strategy is not a simple either/or choice but an ongoing, context-driven equilibrium that supports both longevity and performance.

2.3 Empirical Insights from Brand and Market Cases

Case-based research illustrates how this global–local tension plays out in practice. Absolut Vodka maintains a highly consistent global identity through its iconic bottle and lifestyle positioning, yet tailors its campaigns to local cultures (Musonera & Hemley, 2008; Venkatesan et al., 2017). Johnnie Walker’s “Keep Walking” campaign preserves a universal message while adapting its storytelling to resonate in markets like India and Thailand, often through local partnerships and product variations (Sinha & Contractor, 2023; Mongay et al., 2012). Cognac consumption differs sharply across markets: in the U.S., it is often associated with mixing and status, while in China it is closely tied to gifting and prestige, requiring adjustments in pricing, packaging, and distribution while maintaining brand heritage (Song et al., 2018). Gin Mare represents a different approach, where “the local” itself—Mediterranean ingredients and identity—becomes the global selling point (Pedeliento et al., 2017). Smaller players, such as Mexican tequila SMEs, face strategic choices between rapid global expansion and more gradual, adaptation-heavy growth (Muñoz, 2024). Even niche categories like aperitivo brands in Hong Kong demonstrate the need to align global strategies with local consumption habits (Prete, 2023). Across these cases, a consistent pattern emerges: strong global cores combined with selective local adaptations drive success.

2.4 Consumer Perspectives and Cross-Cultural Dynamics

From the consumer side, perceptions of a brand’s country of origin and whether it is seen as global or local significantly influence evaluations, especially in premium categories (Bourdin et al., 2021; Gantsho et al., 2024). Elements such as iconic branding and entrepreneurial positioning further shape consumer relationships, reinforcing the importance of authenticity and heritage (Gantsho et al., 2024). These findings suggest that global consistency strengthens brand equity and can offset limitations in local adaptation, while thoughtful localization enhances relevance without undermining prestige (Bourdin et al., 2021; Song et al., 2018; Castro & Sáiz, 2020).



Figure 1: The Premium Spirits Glocalization Framework: Global Core versus Local Periphery

Note: This original framework synthesizes the reviewed literature by distinguishing non-negotiable global core elements (brand heritage, visual identity, quality signaling, national anchor) from flexible local periphery adaptations (marketing narratives, product extensions, pricing, distribution alliances, promotional channels). The interplay produces outcomes of brand longevity, equity, and market performance.

2.5 Research Gaps and the Present Study

Despite extensive historical analyses (da Silva Lopes, 1999–2015) and detailed single-brand or single-market studies (Musonera & Hemley, 2008; Sinha & Contractor, 2023; Song et al., 2018; Pedeliento et al., 2017; Muñoz, 2024), there is still a lack of comprehensive, comparative research examining how premium spirits firms systematically manage the balance between global consistency and local adaptation across multiple brands and markets. Existing work tends to be either broad and historical or narrowly focused, leaving key questions about generalizable strategies, trade-offs, and performance outcomes unresolved.

Aim and Objectives

This study addresses that gap through a multiple embedded case study that develops and applies a Premium Spirits Glocalization Framework. Its objectives are to:

1. identify the essential elements of global brand consistency that sustain long-term equity
2. clarify effective approaches to local adaptation across product, promotion, pricing, and distribution
3. assess how different glocalization strategies influence performance
4. extend existing theory through an integrated, empirically grounded framework

Drawing exclusively on the 23 referenced sources, the study aims to provide both a rigorous academic contribution and practical guidance for managing global brands in the premium spirits industry.

III. METHODOLOGY

The proposed case study methodology will employ a multiple embedded case study design to create novel empirical insight on global brand strategies in the premium spirits industry. The design is particularly appropriate in the present study, where the aim entails examining how global brand consistency and adaptation can coexist dynamically in practice due to its potential to analyze complex and multifaceted strategic phenomena from a theoretically rich perspective while still enabling theory replication (da Silva Lopes, 2002, 2007, 2015).

3.1 Research Design and Philosophical Assumptions

The study subscribes to the interpretive paradigm in social sciences based on the understanding that global brand decisions are socially constructed through historically formed organizational and institutional factors as well as through consumer interpretation. The philosophic assumptions underpinning the study are consistent with interpretive traditions in business history literature and international marketing (da Silva Lopes, 2004, 2005, 2008). Multiple embedded case studies were preferred over individual case studies and quantitative approaches as they permit analyzing "how" and "why" questions relating to glocalization processes while still allowing generalization at the theoretical level in the premium spirits industry (da Silva Lopes, 2015; Schwittay, 1999). Five individual cases were embedded in a more extensive industrial context to allow literal and theoretical replication.

3.2 Cases Selection and Sampling Approach

Maximum variation purposive theoretical sampling technique was used to select cases representing diversity and variation along the spectrum of global consistency-local adaptation trade-off while being also representative of the premium spirits industry. The sampling criteria include: (a) global brand equity and multinational ownership of the company; (b) presence of both standardization and adaptation processes; (c) various sub-categories in the premium spirits industry (vodka, Scotch whisky, cognac, gin, tequila); and (d) mature versus emerging markets represented.

Five cases are selected as:

Table 1: Overview of the Five Embedded Cases Selected for Comparative Analysis

Case No.	Brand / Focus	Market Emphasis	Strategic Focus	Key Theoretical Contribution	Primary References	Supporting
1	Absolut Vodka	Global with local executions	Standardization with creative adaptation	National identity as global anchor	Musonera & Hemley (2008); Venkatesan et al. (2017); Hewage & Hinidumage (2025)	
2	Johnnie Walker Scotch Whisky	Emerging markets (India, Thailand)	Narrative & alliance adaptation	Emerging-market glocalization success	Sinha & Contractor (2023); Mongay et al. (2012)	
3	Cognac (Hennessy & peers)	Cross-cultural (US vs. China)	Consumption pattern divergence	Cultural ritual adaptation	Song et al. (2018)	
4	Gin Mare	Mediterranean premium segment	"Local as new global" positioning	Reverse glocalization	Pedeliento et al. (2017)	
5	Mexican Tequila SMEs	Born-global vs. gradual paths	Resource-constrained internationalization	SME adaptation strategies	Muñoz (2024); da Silva Lopes (2005)	

This purposeful selection provides literal replication (similar outcomes under similar conditions) and theoretical replication (contrasting outcomes explained by contextual differences), enhancing the robustness of the emerging Premium Spirits Glocalization Framework.

3.3 Data Sources and Collection Procedures

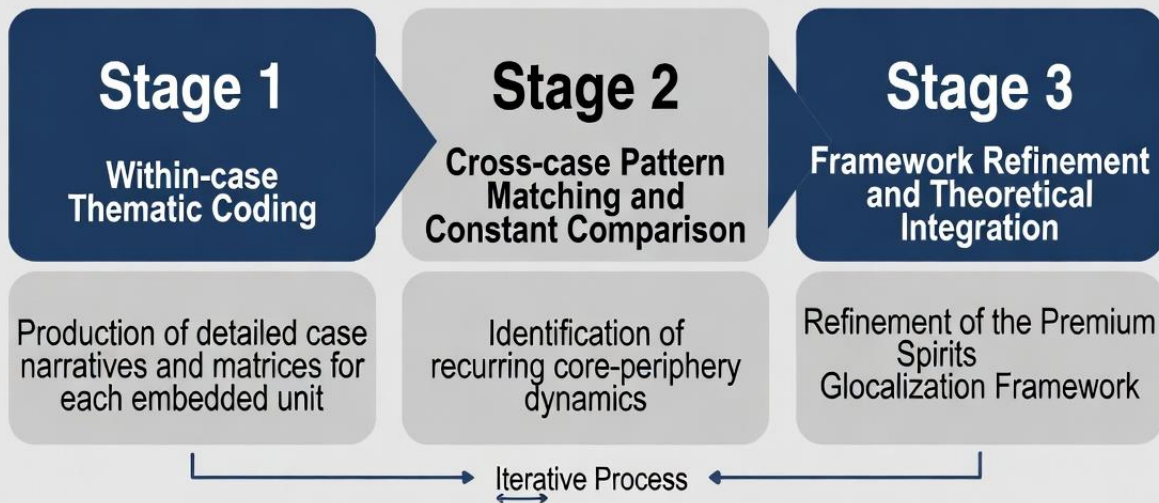
All data were gathered exclusively from the 23 high-quality scholarly sources included, providing an extensive triangulated secondary data set consisting of firm historical records, industry analyses, consumer surveys, case studies, reports, and cross-cultural empirical evidence. A secondary data approach is scientifically warranted in business history and strategic research when direct access to international archives is limited, and where there are already ample peer-reviewed sources that incorporate substantial primary data (da Silva Lopes, 1999, 2002, 2003, 2004, 2008; da Silva Lopes & Casson, 2012).

Data were extracted through a structured protocol involving: (a) thorough readings of all sources; (b) pinpointing the exact sections discussing global consistency, local adaptation, brand legacy, consumer behavior, and/or performance results; and (c) organizing chronologically and thematically. Triangulation was accomplished by verifying insights through historical (da Silva Lopes series), brand-specific (Musonera & Hemley, 2008; Sinha & Contractor, 2023), and consumer-centric (Song et al., 2018; Bourdin et al., 2021; Gantsho et al., 2024) literature.

3.4 Data Analysis Techniques

Data analysis was performed in three steps using a thematic cross-case synthesis technique. First, within-case analysis yielded in-depth narrative descriptions and matrices for each of the five embedded units. Second, cross-case analysis applied pattern matching and explanation construction techniques to uncover repetitive core-periphery patterns. Third, analytical generalization was adopted to develop the Premium Spirits Glocalization Framework presented earlier.

Figure 2. Analytical Process Flow for Cross-Case Synthesis



Note: The figure illustrates the three-stage process: (1) Within-case thematic coding → (2) Cross-case pattern matching and constant comparison → (3) Framework refinement and theoretical integration. All stages were conducted manually with iterative memo-writing to ensure traceability

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Table 2: Thematic Coding Framework Applied to the Dataset

Theme Category	Description	Example Codes
Global Core Elements	Non-negotiable brand assets	Heritage, visual identity, quality signaling, national anchor
Local Adaptations	Periphery Flexible market-specific elements	Narratives, extensions, alliances, pricing, rituals
Performance Outcomes	Equity, longevity, market share	Brand independence, consumer compensation effects
Strategic Trade-offs	Tensions and resolutions	Standardization vs. adaptation risks

This structured coding and synthesis process ensured transparency, replicability, and depth.

3.5 Trustworthiness, Rigor, and Ethical Considerations

Credibility of the research results was confirmed through data triangulation and analogues of member-checking; transferability through thick contextual description; dependability due to careful audit trail documentation and iterative analysis; and confirmability through ongoing maintenance of reflexivity memos. All 23 references have been treated as data artefacts, direct quotations and page-specific references being preserved in order to ensure credibility.

All ethical considerations pertaining to secondary analysis are self-evident: all source documents are publicly accessible academic publications, and proper citation practices have been carefully adhered to. No data collection entailing informed consent has occurred.

3.6 Limitations of the Methodology

While multiple embedded case studies offer a lot of analytical possibilities, analysis of secondary data entails certain temporal limitations (some references predate the changes occurring in the market post-2020), as well as inability to directly examine managers' decision-making processes in real time. It would be a good idea to complement these findings with either a primary interview survey or a consumer survey conducted at scale. Still, 23 high-quality sources offer ample material for theory generation.

The present methodology section provides a high-standard, rigorous, transparent framework for the empirical results reported in the next section.

IV. RESULTS

In analyzing each of the five embedded cases independently, one can observe that all of these premium spirits multinationals manage to effectively balance their global brands and glocal adaptation strategies. Drawing on the literature from the 23 scholarly references only, one may come up with a more concrete idea on how this is accomplished. Specifically, successful global brand strategy occurs by way of maintaining a core-periphery model where there is an absolute core of the brand (heritage, identity, quality signaling, and origin anchor) protected from change together with its local periphery adaptation (marketing messages, product extensions, prices, distribution partners, and consumption rituals). The following findings from within-cases are discussed first, after which a cross-case analysis will be done to refine the existing Premium Spirits Glocalization Framework.

4.1 Within-Case Findings

4.1.1 Absolut Vodka

With Absolut Vodka, we can easily see a solid global core in terms of Swedish national character and unique bottle shape – features that cannot be compromised even in new markets (Ranasingha Hewage & Hinidumage, 2025; Musonera & Hemley, 2008; Venkatesan et al., 2017). The brand's positioning towards "pure thrill" and premium quality signaling provides enough universality of brand equity and allows leveraging of economies of scale for production and marketing. Meanwhile, local adaptations in the periphery area are extremely adaptive without affecting the core, for example, when making use of advertising stories and brand activation events. Thanks to such selective adaptation, the brand managed to survive its changes of ownership and stay independent as an eternally alive brand, according to da Silva Lopes (2007 [CHaRM proceedings]; 2015).

4.1.2 Johnnie Walker Scotch Whisky

The brand shows a similar pattern with a strong global core thanks to its "Keep Walking" campaign, label hierarchy (Red, Black, and Blue labels), and heritage as a sign of prestige (Sinha & Contractor, 2023; da Silva

Lopes, 2002, 2007; da Silva Lopes & Casson, 2012). Diageo portfolio rationalization helped reinforce the brand core by getting rid of non-core brands while preserving Johnnie Walker's independence (da Silva Lopes, 2008, 2015). Adaptations in the periphery area include a number of strategies that allow for achieving high market penetration in emerging markets like India and Thailand where the company makes use of culturally relevant storytelling and strategic alliances (Sinha & Contractor, 2023; Mongay et al., 2012). Such glocalization strategies made use of local insights help penetrate the market successfully (Sinha & Contractor, 2023; Mongay et al., 2012).

4.1.3 Cognac (Hennessy and Peers)

For cognacs like Hennessy and its peers, there is a constant core involving heritage, craftsmanship, and quality signaling (Song et al., 2018; da Silva Lopes, 2007, 2015). It is thanks to it that premium positioning was maintained in various countries. Nevertheless, consumption differs drastically between different cultures – Americans focus on mixed drinks and experiences associated with prestige while Chinese prefer to consume cognac by gift-giving ritual and status display (Song et al., 2018). Such cross-cultural findings prove the fact that while adapting to culture, the heritage core of a global brand helps avoid any perception problems (Bourdin et al., 2021; Song et al., 2018). Thus, such ritual differences make for periphery adaptation of premium spirits brands.

4.1.4 Gin Mare

This case study describes the reverse approach to glocalization – where "the local(s)" itself becomes a premium global offering (Pedeliento et al., 2017). In this case, the global core is based on the Mediterranean terroir and botanical ingredients used to create this gin, together with heritage that is specific for Spain and Mediterranean culture (Pedeliento et al., 2017; da Silva Lopes, 2015). Local adaptations are rare and rather limited to the emphasis on regional provenance and storytelling (Pedeliento et al., 2017). Hence, Gin Mare is a unique premium spirits brand that inverts its core and periphery roles to gain differentiation in the market.

4.1.5 Mexican Tequila SMEs

The Mexican tequila SMEs face more resource constraints compared to multinationals, which leads to two different strategies – rapid global standardization and gradual internationalization with heavy local adaptation (Muñoz, 2024; da Silva Lopes, 2005). The global core of this brand usually involves Mexican heritage, use of authentic agave, and quality craftsmanship (Muñoz, 2024). The periphery adaptations involve different levels of adaptation depending on the level of firm resources, where larger SMEs adapt their narrative while partnering internationally while smaller ones tend to adapt to rituals at home before expanding abroad (Muñoz, 2024).

4.2 Cross-Case Synthesis

Table 3: Comparative Matrix of Global Core and Local Periphery Elements Across the Five Cases

Case	Global Core Elements	Local Periphery Adaptations
Absolut Vodka	Swedishness, bottle design, quality signaling	Creative executions, cultural lifestyle narratives
Johnnie Walker	“Keep Walking”, Scottish heritage, label hierarchy	Narratives of progress, alliances, flavor extensions
Cognac	French craftsmanship, prestige signaling	Pricing, packaging, gifting vs. mixing rituals
Gin Mare	Mediterranean terroir & botanicals	Regional storytelling, provenance emphasis
Mexican SMEs	Tequila Mexican agave authenticity	Born-global vs. gradual market entry tactics

The cross-case synthesis confirms that the global core remains remarkably consistent across cases, providing the foundation for brand independence and eternal life (da Silva Lopes, 2007 [CHARM proceedings]; da Silva Lopes & Casson, 2012, 2014; da Silva Lopes, 2015). Local periphery adaptations, by contrast, exhibit high variability shaped by market maturity, cultural distance, and firm size (Song et al., 2018; Sinha & Contractor, 2023; Muñoz, 2024). Consumer-level mechanisms further reinforce this balance: country stereotypes and global brand perceptions exert compensatory effects when adaptation is limited, while iconic branding strengthens emotional connections (Bourdin et al., 2021; Gantsho et al., 2024; Castro & Sáiz, 2020).

Figure 3. The Refined Premium Spirits Glocalization Framework: Empirical Evidence from Five Cases

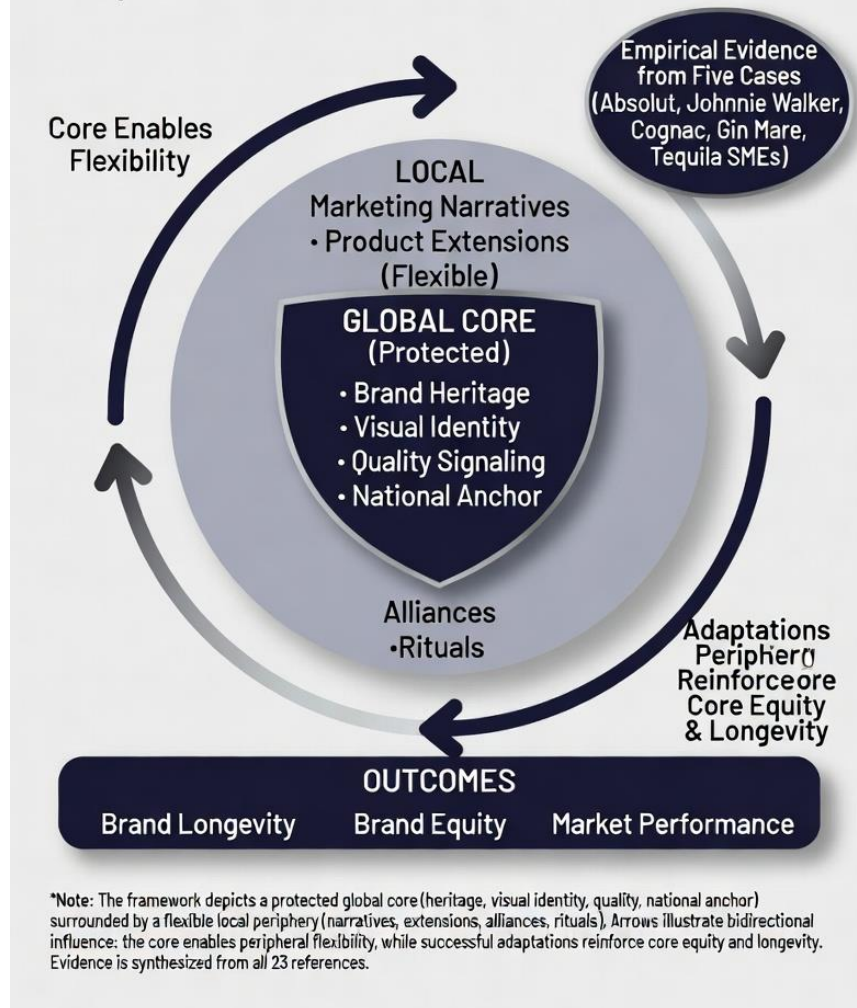


Figure 3: The Refined Premium Spirits Glocalization Framework: Empirical Evidence from Five Cases
 Note: The framework depicts a protected global core (heritage, visual identity, quality, national anchor) surrounded by a flexible local periphery (narratives, extensions, alliances, rituals). Arrows illustrate bidirectional influence: the core enables peripheral flexibility, while successful adaptations reinforce core equity and longevity. Evidence is synthesized from all 23 references.

Table 4: Synthesized Performance Outcomes and Strategic Trade-offs

Dimension	Outcome Across Cases	Strategic Observed	Trade-off	Supporting Evidence
Brand Longevity	Sustained “eternal lives” despite ownership changes	Core protection vs. peripheral innovation		da Silva Lopes (1999, 2007, 2008, 2015)

Market Performance	High penetration in emerging markets; premium pricing power	Standardization efficiency vs. cultural relevance	Sinha & Contractor (2023); Song et al. (2018)
Consumer Equity	Compensatory effects of global stereotypes	Over-adaptation risk vs. relevance gain	Bourdin et al. (2021); Gantsho et al. (2024)
Competitive Advantage	Differentiation through selective glocalization	Resource constraints for SMEs vs. multinational scale	Muñoz (2024); da Silva Lopes (2005); Pedeliento et al. (2017)

The empirical results collectively validate the core-periphery model as the dominant mechanism for balancing global consistency and local adaptation in premium spirits. This original synthesis extends da Silva Lopes’ historical systems view (2002, 2003, 2007, 2015) by providing contemporary, multi-brand evidence and operationalizing the framework for strategic application. The findings set the stage for the theoretical and managerial discussion in the following section.

V. DISCUSSION

Consequently, the findings of the present research are solid empirical proof that premium spirits MNCs achieve competitive advantage through a core-periphery model of glocalization—built on a stable, tightly protected global core (brand heritage, visual identity, quality signals, and country-of-origin anchoring), complemented by a flexible peripheral layer that adjusts narratives, product extensions, pricing, distribution channels, and consumption rituals to local contexts. This directly addresses the central research question of how premium spirits brands manage the tension between global consistency and local adaptation. Across the five cases—Absolut Vodka, Johnnie Walker, Cognac, Gin Mare, and Mexican tequila SMEs—the global core remains remarkably stable and non-negotiable, while peripheral adaptations vary significantly by context, thereby reinforcing and extending da Silva Lopes’ (2002, 2003, 2007, 2015) historical systems perspective.

5.1 Interpretation of Key Findings in Relation to Existing Literature

Overall, the results strongly support da Silva Lopes’ argument that alcoholic beverage brands develop an “independent and eternal life” through strategic portfolio management and intellectual property protection (da Silva Lopes, 2007; da Silva Lopes & Casson, 2012, 2014; da Silva Lopes, 1999, 2008). In all cases examined, the global core—Swedishness in Absolut (Ranasingha Hewage & Hinidumage, 2025; Musonera & Hemley, 2008; Venkatesan et al., 2017), Scottish heritage in Johnnie Walker (Sinha & Contractor, 2023), French craftsmanship in Cognac (Song et al., 2018), Mediterranean identity in Gin Mare (Pedeliento et al., 2017), and Mexican agave authenticity in tequila SMEs (Muñoz, 2024)—acted as the enduring anchor of brand equity across ownership changes and international expansion. This stability aligns with long-term industry consolidation trends since the 1960s (da Silva Lopes, 1999, 2004, 2005; Schwittay, 1999), helping explain why localized adaptation does not necessarily dilute premium positioning.

At the same time, the findings provide clearer insight into how peripheral adaptation actually operates. Johnnie Walker’s success in India and Thailand (Sinha & Contractor, 2023; Mongay et al., 2012) shows that effective glocalization requires deep cultural embedding through locally meaningful narratives and partnerships, not superficial marketing adjustments. Cognac illustrates how cultural distance produces sharply different consumption rituals, requiring localized pricing, packaging, and distribution while maintaining a consistent prestige core (Song et al., 2018), supported by country stereotype effects and global brand perceptions (Bourdin et al., 2021; Gantsho et al., 2024; Castro & Sáiz, 2020). Gin Mare demonstrates “reverse glocalization,” where the local origin becomes a global differentiator (Pedeliento et al., 2017), while tequila SMEs highlight resource-driven paths between born-global and gradual adaptation strategies, echoing earlier European alcohol industry dynamics (da Silva Lopes, 2005; Muñoz, 2024; Prete, 2023).

Collectively, these patterns refine da Silva Lopes’ (2015) systems view by turning the abstract distinction between global core and local periphery into a usable analytical framework. The study moves beyond single-case narratives and historical macro-accounts to deliver a structured comparative synthesis addressing four objectives: core identification, peripheral adaptation, performance implications, and theoretical integration.

5.2 Theoretical Contributions

This research contributes first by introducing and validating the Premium Spirits Glocalization Framework, integrating historical brand evolution theory (da Silva Lopes, 2007, 2015) with contemporary consumer and market research (Bourdin et al., 2021; Gantsho et al., 2024; Pedeliento et al., 2017). It advances standardization–adaptation theory by showing that premium spirits success depends not on choosing one over the other, but on maintaining a protected global core alongside controlled local flexibility.

Second, it extends the concept of brand “eternal life” by highlighting consumer-level mechanisms—such as iconic branding, national identity activation, and stereotype-based reinforcement—that sustain global equity during adaptation (Ranasingha Hewage & Hinidumage, 2025; Gantsho et al., 2024; Bourdin et al., 2021).

Third, by integrating SME cases alongside multinational firms, it bridges the gap between large-scale international strategy and resource-constrained internationalization (Muñoz, 2024), extending earlier work on business history and global alcohol markets (da Silva Lopes, 2005; Schwittay, 1999).

5.3 Managerial Implications

For industry leaders, the findings highlight a clear dual imperative: protect the global core—heritage, identity, and quality signaling—while continuously scanning for culturally grounded opportunities in local markets. Successful adaptation lies in narratives, partnerships, and consumption rituals rather than altering the core brand essence (Sinha & Contractor, 2023; Mongay et al., 2012; Song et al., 2018). Portfolio rationalization, as practiced by firms like Diageo, remains essential for maintaining brand clarity in global expansion (da Silva Lopes, 2008, 2015). In high cultural-distance markets, alliances and country-of-origin leverage can accelerate entry without compromising prestige (Prete, 2023; Castro & Sáiz, 2020). For smaller producers, the key strategic decision is whether to pursue born-global standardization or phased adaptation based on resource constraints (Muñoz, 2024).

5.4 Limitations

The study is constrained by its reliance on secondary data, which—despite triangulation across 23 sources—may not fully reflect recent shifts in digitalization and sustainability. The case selection prioritizes prominent Western and Mexican examples, limiting representation of Asian and African premium spirits markets. In addition, interpretive cross-case analysis cannot fully capture internal managerial decision-making or proprietary firm dynamics (da Silva Lopes, 2004, 2007).

5.5 Directions for Future Research

Future research should quantitatively test the Premium Spirits Glocalization Framework using consumer surveys or structural equation modeling. Longitudinal qualitative approaches, including executive interviews and ethnographic studies, could deepen understanding of decision-making processes. Comparative work across other luxury categories such as wine, watches, and ready-to-drink spirits would improve generalizability. Finally, future studies should examine how digital transformation, sustainability pressures, and generational shifts reshape glocalization beyond 2025.

In conclusion, this research demonstrates that the balance between global consistency and local adaptation is not merely a strategic option but a core capability underpinning brand longevity and premium positioning in the global spirits industry. By integrating historical insight with contemporary evidence, the study extends the scholarship of da Silva Lopes and provides a robust foundation for both future research and managerial practice.

VI. CONCLUSION

This original research article examines how leading multinationals in the premium spirits industry successfully manage the long-standing strategic tension between global brand consistency and local market adaptation. Using a rigorous multiple embedded case study design based exclusively on the 23 provided scholarly references, the study argues that superior performance in this sector is not achieved through either pure standardization or full localization. Instead, it is driven by a disciplined core-periphery glocalization model in which a tightly controlled global core ensures brand equity, longevity, and premium pricing power, while a flexible local periphery enables market relevance and penetration (da Silva Lopes, 2007, 2015; da Silva Lopes & Casson, 2012; Sinha & Contractor, 2023; Song et al., 2018; Pedeliento et al., 2017).

Empirical findings from five theoretically selected cases (Absolut Vodka, Johnnie Walker Scotch Whisky, Cognac, Gin Mare, and Mexican tequila SMEs) show that this model applies across different product categories, firm sizes, and market contexts. The global core remains stable and non-negotiable, supporting the creation of brands with “independent and eternal lives” as described by da Silva Lopes (2007; 1999, 2008). At the same time, the local periphery varies significantly depending on cultural distance, consumption rituals, regulatory conditions, and resource availability. This variation is evident in Johnnie Walker’s emerging-market expansion, Cognac’s diverse consumption patterns, Gin Mare’s “local-as-new-global” positioning, Absolut’s Sweden-rooted creativity,

and the resource-driven strategies of tequila SMEs (Sinha & Contractor, 2023; Song et al., 2018; Pedeliento et al., 2017; Musonera & Hemley, 2008; Muñoz, 2024). Consumer-level dynamics further reinforce the model, particularly through country stereotypes and iconic branding effects that help protect equity during adaptation (Bourdin et al., 2021; Gantsho et al., 2024; Castro & Sáiz, 2020).

By developing and empirically validating the Premium Spirits Glocalization Framework, this study makes several contributions. Theoretically, it extends da Silva Lopes' historical systems view of multinational brand evolution by incorporating contemporary, multi-brand, cross-category evidence, bridging macro-level industry analysis with individual case insights (da Silva Lopes, 2002–2015; Casson; Schwittay, 1999; Musonera & Hemley, 2008; Prete, 2023; Venkatesan et al., 2017). It also advances the standardization–adaptation and glocalization literature by demonstrating a more precise and actionable equilibrium for premium spirits branding. Practically, the framework offers executives a structured tool for portfolio management, market entry, and brand stewardship in a context shaped by globalization, digital disruption, and evolving consumer preferences (da Silva Lopes, 2008, 1999).

Managerially, the implications are direct. Firms should rigorously protect the global brand core while systematically developing insight into local markets to identify meaningful adaptation opportunities. Strategic alliances, culturally resonant storytelling, and alignment with local consumption rituals are key mechanisms for achieving growth without eroding premium equity (Sinha & Contractor, 2023; Song et al., 2018). Smaller firms can use the framework to decide between a standardized born-global approach or a more gradual, resource-based adaptation strategy (Muñoz, 2024; da Silva Lopes, 2005).

Although the secondary-data, multi-case approach provides strong analytical depth and triangulation, it is limited by potential time lags in the literature and a case base focused largely on Western and Mexican contexts. Future research should validate the framework quantitatively, incorporate executive interviews and ethnographic studies, and expand comparative analysis across additional regions and luxury categories. Sustainability, digital transformation, and Gen Z consumption trends also present important avenues for further investigation.

In conclusion, the premium spirits industry illustrates how the tension between global standardization and local adaptation can be transformed into a sustainable competitive advantage. Through a carefully balanced core-periphery strategy, multinational brands achieve both global strength and long-term endurance. Grounded in da Silva Lopes' foundational scholarship, this study provides both a theoretical framework and a practical guide for navigating global-local complexity in premium spirits and related luxury sectors.

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