

Alcoholic Drinks in Malaysia

June 2023

Table of Contents

Alcoholic Drinks in Malaysia

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture 2022 key trends Competitive landscape Retailing developments On-trade vs off-trade split What next for alcoholic drinks?

MARKET BACKGROUND

Legislation Legal purchasing age and legal drinking age Drink driving Advertising Smoking ban Opening hours On-trade establishments Table 1 - Number of On-trade Establishments by Type 2016-2022

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade Duty free Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

Table 3 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
Table 4 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022
Table 5 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
Table 6 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022
Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
Table 10 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
Table 11 - GBO Company Shares of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
Table 12 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
Table 13 - Distribution of Alcoholic Drinks by Category: Total Value 2022-2027
Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Value 2022-2027
Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Value 2022-2027
Table 17 - Forecast Sales of Alcoholic Drinks by Category: % Total Value 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Beer in Malaysia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Domestic mid-priced lager flourishes in 2022

Heineken and Carlsberg cement their dominance through new product development and revamped packaging in 2022 Aggressive marketing campaigns introduced to stimulate demand in 2022

PROSPECTS AND OPPORTUNITIES

Beer is expected to see strong total volume growth over the forecast period Players are predicted to expand product portfolio over the forecast period Active marketing campaigns likely to remain a key feature of beer

CATEGORY BACKGROUND

Lager price band methodology Summary 3 - Lager by Price Band 2022 Table 18 - Number of Breweries 2017-2022

CATEGORY DATA

Table 19 - Sales of Beer by Category: Total Volume 2017-2022 Table 20 - Sales of Beer by Category: Total Value 2017-2022 Table 21 - Sales of Beer by Category: % Total Volume Growth 2017-2022 Table 22 - Sales of Beer by Category: % Total Value Growth 2017-2022 Table 23 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022 Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022 Table 25 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022 Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022 Table 27 - Sales of Beer by Craft vs Standard 2017-2022 Table 28 - GBO Company Shares of Beer: % Total Volume 2018-2022 Table 29 - NBO Company Shares of Beer: % Total Volume 2018-2022 Table 30 - LBN Brand Shares of Beer: % Total Volume 2019-2022 Table 31 - Forecast Sales of Beer by Category: Total Volume 2022-2027 Table 32 - Forecast Sales of Beer by Category: Total Value 2022-2027 Table 33 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027 Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Cider/Perry in Malaysia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Regular cider/perry sees modest growth in 2022 as consumers lose interest in these products Carlsberg sees significant gains thanks to investment in new products and marketing campaigns in 2022 Stringent rules discourage investment in non alcoholic cider/perry in 2022

PROSPECTS AND OPPORTUNITIES

Regular cider/perry is anticipated to see moderate growth over the forecast period Existing players are likely to invest in marketing campaigns to attract the attention of consumers Non alcoholic cider/perry may emerge slowly over the forecast period

CATEGORY DATA

Table 35 - Sales of Cider/Perry: Total Volume 2017-2022

Table 36 - Sales of Cider/Perry: Total Value 2017-2022 Table 37 - Sales of Cider/Perry: % Total Volume Growth 2017-2022 Table 38 - Sales of Cider/Perry: % Total Value Growth 2017-2022 Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022 Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022 Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022 Table 42 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022 Table 43 - GBO Company Shares of Cider/Perry: % Total Volume 2018-2022 Table 44 - NBO Company Shares of Cider/Perry: % Total Volume 2018-2022 Table 45 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022 Table 46 - Forecast Sales of Cider/Perry: Total Volume 2022-2027 Table 47 - Forecast Sales of Cider/Perry: % Total Volume 2022-2027 Table 48 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027 Table 49 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027 Table 49 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027 Table 49 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027 Table 49 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027 Table 49 - Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

Rtds in Malaysia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Wine-based RTDs enjoy strongest total volume growth in 2022 Spirit-based RTDs struggles to take off in 2022 International brand enters RTDs to compete with locally produced brand in 2022

PROSPECTS AND OPPORTUNITIES

Wine-based RTDs is predicted to rebound over the forecast period Spirit-based RTDs is expected to see total volume to grow slowly over the forecast period Newly opened foodservice outlets could push demand for RTDs over the forecast period

CATEGORY DATA

Table 50 - Sales of RTDs by Category: Total Volume 2017-2022 Table 51 - Sales of RTDs by Category: Notal Value 2017-2022 Table 52 - Sales of RTDs by Category: Notal Value Growth 2017-2022 Table 53 - Sales of RTDs by Category: Notal Value Growth 2017-2022 Table 54 - Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022 Table 55 - Sales of RTDs by Off-trade vs On-trade: Value 2017-2022 Table 56 - Sales of RTDs by Off-trade vs On-trade: Nolume Growth 2017-2022 Table 57 - Sales of RTDs by Off-trade vs On-trade: Nolume Growth 2017-2022 Table 58 - GBO Company Shares of RTDs: Notal Volume 2018-2022 Table 59 - NBO Company Shares of RTDs: Notal Volume 2018-2022 Table 60 - LBN Brand Shares of RTDs: Notal Volume 2019-2022 Table 61 - Forecast Sales of RTDs by Category: Total Volume 2022-2027 Table 62 - Forecast Sales of RTDs by Category: Notal Volume Growth 2022-2027 Table 63 - Forecast Sales of RTDs by Category: Notal Volume Growth 2022-2027 Table 64 - Forecast Sales of RTDs by Category: Notal Volume Growth 2022-2027

Spirits in Malaysia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Cognac, whiskies and white spirits enjoy healthy growth in total volume terms in 2022 The mushrooming of Japanese, Korean restaurants and bars boost demand in 2022 Other liqueurs and ad-mix products see declining volume sales in 2022

PROSPECTS AND OPPORTUNITIES

Mixed fortunes predicted for spirits but with an overall positive outlook Existing players are likely to organise seasonal marketing campaigns to stimulate demand over the forecast period Existing players are expected to expand brand varieties over the forecast period

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology Summary 4 - Benchmark Brands 2022

CATEGORY DATA

Table 65 - Sales of Spirits by Category: Total Volume 2017-2022 Table 66 - Sales of Spirits by Category: Total Value 2017-2022 Table 67 - Sales of Spirits by Category: % Total Volume Growth 2017-2022 Table 68 - Sales of Spirits by Category: % Total Value Growth 2017-2022 Table 69 - Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022 Table 70 - Sales of Spirits by Off-trade vs On-trade: Value 2017-2022 Table 71 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022 Table 72 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022 Table 73 - Sales of Dark Rum by Price Platform: % Total Volume 2017-2022 Table 74 - Sales of White Rum by Price Platform: % Total Volume 2017-2022 Table 75 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022 Table 76 - Sales of English Gin by Price Platform: % Total Volume 2017-2022 Table 77 - Sales of Vodka by Price Platform: % Total Volume 2017-2022 Table 78 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022 Table 79 - GBO Company Shares of Spirits: % Total Volume 2018-2022 Table 80 - NBO Company Shares of Spirits: % Total Volume 2018-2022 Table 81 - LBN Brand Shares of Spirits: % Total Volume 2019-2022 Table 82 - Forecast Sales of Spirits by Category: Total Volume 2022-2027 Table 83 - Forecast Sales of Spirits by Category: Total Value 2022-2027 Table 84 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027

Table 85 - Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

Wine in Malaysia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Still light grape wine prospers in 2022 driven by Australian varieties Fortified wine and vermouth and champagne total volume growth improve in 2022 compared to 2021 Players compete for shelf space, price point positioning and promotion in 2022

PROSPECTS AND OPPORTUNITIES

International tourism and foodservice recovery are expected to accelerate volume growth over the forecast period Domestic importers expected to expand their offer over the forecast period Players likely to organise frequent marketing campaigns to boost volume sales over the forecast period while e-commerce is set for further gains

CATEGORY DATA

- Table 86 Sales of Wine by Category: Total Volume 2017-2022
- Table 87 Sales of Wine by Category: Total Value 2017-2022
- Table 88 Sales of Wine by Category: % Total Volume Growth 2017-2022
- Table 89 Sales of Wine by Category: % Total Value Growth 2017-2022
- Table 90 Sales of Wine by Off-trade vs On-trade: Volume 2017-2022
- Table 91 Sales of Wine by Off-trade vs On-trade: Value 2017-2022

Table 92 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022 Table 93 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022 Table 94 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022 Table 95 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022 Table 96 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022 Table 97 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022 Table 98 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022 Table 99 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022 Table 100 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022 Table 101 - GBO Company Shares of Champagne: % Total Volume 2018-2022 Table 102 - NBO Company Shares of Champagne: % Total Volume 2018-2022 Table 103 - LBN Brand Shares of Champagne: % Total Volume 2019-2022 Table 104 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022 Table 105 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022 Table 106 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022 Table 107 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022 Table 108 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022 Table 109 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022 Table 110 - Forecast Sales of Wine by Category: Total Volume 2022-2027 Table 111 - Forecast Sales of Wine by Category: Total Value 2022-2027 Table 112 - Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027 Table 113 - Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/alcoholic-drinks-in-malaysia/report.