

Alcoholic Drinks in Hong Kong, China

June 2023

Table of Contents

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: % Total Volume 2018-2022

Table 12 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 13 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 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 Volume Growth 2022-2027

Table 17 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Beer in Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Recovery in the on-trade combined with a strong off-trade performance leads to improvement in total volume sales

Local drinkers continue to pursue premium local flavours

Low alcohol and non alcoholic beer firmly in the spotlight

PROSPECTS AND OPPORTUNITIES

Beer set to go from strength to strength as the city reopens

Leading players will maintain their positions

Non alcoholic beer set to boom as consumers enjoy an increasing selection

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2022

Table 18 - Number of Breweries 2016-2022

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 Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Cider/perry shows modest growth

Flavour variety increases as more brands are imported

Cider/perry benefits from the shift towards lower alcohol and moderation

PROSPECTS AND OPPORTUNITIES

Cider/perry likely to face competition from non alcoholic drinks

Craft cider has breakthrough potential, as trends strongly resemble those in craft beer

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 Value 2022-2027

Table 48 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027

Table 49 - Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

Rtds in Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Removal of pandemic restrictions drives growth in RTDs

Unique and seasonal flavours of RTDs are most popular with local drinkers

Premiumisation contributes to value growth for RTDs

PROSPECTS AND OPPORTUNITIES

RTDs expected to maintain growth as the market opens up

Products produced by local bars and other premium RTDs to drive forecast growth

RTDs set to see significant innovation in the future

CATEGORY DATA

Table 50 - Sales of RTDs by Category: Total Volume 2017-2022

Table 51 - Sales of RTDs by Category: Total Value 2017-2022

Table 52 - Sales of RTDs by Category: % Total Volume Growth 2017-2022

Table 53 - Sales of RTDs by Category: % Total 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: % Volume Growth 2017-2022

Table 57 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022

Table 58 - GBO Company Shares of RTDs: % Total Volume 2018-2022

Table 59 - NBO Company Shares of RTDs: % Total Volume 2018-2022

Table 60 - LBN Brand Shares of RTDs: % Total Volume 2019-2022

Table 61 - Forecast Sales of RTDs by Category: Total Volume 2022-2027

Table 62 - Forecast Sales of RTDs by Category: Total Value 2022-2027

Table 63 - Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027

Table 64 - Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

Spirits in Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Total volume consumption of spirits exceeds the pre-COVID-19 level

Booming RTDs and cocktail culture drives sales of spirits

Non alcoholic spirits becoming more popular as health trend persists

PROSPECTS AND OPPORTUNITIES

Locally produced spirits will continue to do well
Removal of pandemic restrictions to bolster sales of spirits
Sustainability rapidly becoming a major trend

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 Hong Kong, China](#)

KEY DATA FINDINGS

2022 DEVELOPMENTS

Local consumption continues to rebound as the pandemic situation improves
Sake maintains its growth momentum

PROSPECTS AND OPPORTUNITIES

Alternative/premium wines to take their spot in the limelight
Expansion expected for sustainable wine
Wine subscription services to remain a trend and bolster growth

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 Non-grape Wine: % Total Volume 2018-2022

Table 108 - NBO Company Shares of Non-grape Wine: % Total Volume 2018-2022

Table 109 - LBN Brand Shares of Non-grape Wine: % 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-hong-kong-china/report.