

Spirits in Latin America

July 2021

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Scope Key findings

REGIONAL OVERVIEW

Latin America records the worst regional performance in 2020 Recovery expected to get underway immediately in 2021 Brazil sees a major loss of sales in the 2015-2020 period Decline in cachaça sales in Brazil shapes the overall performance Colombian aguardiente suffers in part from a lack of innovation Pandemic sends spirits sales into a tailspin in 2020 Traditional grocery retailers still dominate sales of spirits... ...but e-commerce makes great strides in 2020 Off-trade makes major share gains during the pandemic

LEADING COMPANIES AND BRANDS

Concentrated competitive landscapes at a national level Diageo cements its lead in 2020 Brazil the main market for more than half the top 10 players Cachaça brands head up the regional rankings

FORECAST PROJECTIONS

Positive growth expected from 2021... ...but sales will not return to pre-pandemic levels in 2020-2025 Soft drivers will provide the main growth impetus in spirits

COUNTRY SNAPSHOTS

Argentina: Market Context Argentina: Competitive and Retail Landscape Bolivia: Market Context Bolivia: Competitive and Retail Landscape Brazil: Market Context Brazil: Competitive and Retail Landscape Chile: Market Context Chile: Competitive and Retail Landscape Colombia: Market Context Colombia: Competitive and Retail Landscape Costa Rica: Market Context Costa Rica: Competitive and Retail Landscape Dominican Republic: Market Context Dominican Republic: Competitive and Retail Landscape Ecuador: Market Context Ecuador: Competitive and Retail Landscape Guatemala: Market Context Guatemala: Competitive and Retail Landscape Mexico: Market Context Mexico: Competitive and Retail Landscape Peru: Market Context Peru: Competitive and Retail Landscape Uruguay: Market Context Uruguay: Competitive and Retail Landscape

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