

Where Consumers Shop for Alcoholic Drinks

August 2023

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INDUSTRY SNAPSHOT

Global volumes have almost returned to pre-pandemic levels

Wine is the only category to see volume decline in 2022

Pandemic impacts weigh heavily on Western Europe

CHANNEL SHIFTS

Slow and steady growth for e-commerce as brick-and-mortar retail remains key

Perceived complexity, legislation and membership clubs support online sales in wine

China holds a significant lead in e-commerce volume sales

RETAIL OFFLINE

Supermarkets step up their emphasis on affordability

Pandemic drives almost across-the-board growth for retail channels

India and South Africa help drive a second year of growth for specialists

Discounters could benefit from macroeconomic headwinds

Top discounters' strategies diverge geographically

Strength of branding constrains private label expansion

Western Europe leads in private label due to extensive modern grocery network

Limited potential for private label despite financial pressures

The pros and cons of promotional pricing

RETAIL E-COMMERCE

E-commerce retains long-term potential despite moderating growth

Retailers and third parties spot the online opportunities in the US

Beer leads e-commerce growth in the latest year, while wine shows decline

Setbacks and casualties are only to be expected as online channels expand

Direct-to-consumer platforms need a point of differentiation

Artificial intelligence will support personalisation and engagement

E-commerce retailers: Pinduoduo climbs the rankings

Hennessy expands web3 engagement

ON-TRADE

Pandemic recovery is still underway in the on-trade

Premium retail alcohol as an affordable alternative to on-trade consumption

"Drinkflation" as challenges persist in the UK

On-trade digital innovation needs to be approached with caution

Other factors shaping the on-trade

A new lease of (night)life? Jägermeister partners with G2 Esports

FUTURE DEVELOPMENTS

Evolving requirements in a changing world

Key takeaways

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