

# Alcoholic Drinks in Western Europe

December 2023

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## REGIONAL OVERVIEW

Slow sales and per capita growth expected for Western Europe over the forecast period

Return to more normal growth rates expected from 2023 in Western Europe

Wine accounts for a third of sales in value terms in Western Europe

Ireland the global leader in per capita consumption of cider/perry and Portugal in wine

RTDs the most dynamic of the main alcoholic drinks categories

On-trade on a strong recovery path since its losses in 2020 due to the pandemic

Major losses in wine in France over 2017-2022

Modern grocery retailers dominate distribution of alcoholic drinks in most countries

Systembolaget means that specialist retailers dominate sales in Sweden

## LEADING COMPANIES AND BRANDS

Competitive landscapes generally less concentrated in Western Europe than elsewhere

Oetker-Gruppe loses some share in 2022 due to its reliance on the off-trade

AB InBev, Heineken and Diageo present across the region

Heineken bolsters its position with the launch of Heineken Silver

## FORECAST PROJECTIONS

Modest off-trade performance expected for alcoholic drinks over the forecast period

Stronger on-trade growth expected, as this channel continues to make up lost ground

## COUNTRY SNAPSHOTS

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Austria: Competitive and Retail Landscape

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