Alcoholic Drinks in Poland

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

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DISCLAIMER

SOURCES
KEY DATA FINDINGS

2022 DEVELOPMENTS
Rising operational costs plague breweries
Economy beers see comparatively mild decline
Consumers continue to shift towards non-alcoholic beer

PROSPECTS AND OPPORTUNITIES
On-trade sales set to see slow recovery, while off-trade sales will fall further
Potential in premiumisation may support value growth
Non-alcoholic beer/s to rise fastest, as preference for healthier alternatives grows

CATEGORY BACKGROUND
Lager price band methodology

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Cider/Perry in Poland

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Diminishing investment by major companies
Legislation supports small cider/perry producers

PROSPECTS AND OPPORTUNITIES
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Flavoured beer poses significant competitive threat
On-trade sales may struggle to bounce back

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RTD players attempt to align products with consumer trends
New product launches invigorate landscape

PROSPECTS AND OPPORTUNITIES

RTDs set to remain niche in Poland
Cocktail craze may offer some growth opportunities
Wine-based RTDs poised for growth

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Spirits in Poland

KEY DATA FINDINGS

2022 DEVELOPMENTS

Emergence of Instagrammable cocktails bolsters overall sales
Spirits sees noteworthy acquisitions in 2022
Pure vodkas fall out of favour as flavoured variants gain ground
PROSPECTS AND OPPORTUNITIES
Spirits to be seen as an affordable luxury
Non alcoholic spirits and mocktails will continue to rise
Illegal alcohol trade set to strengthen

CATEGORY BACKGROUND
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Wine in Poland

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Sales structure evolves and sparkling wine outperforms
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