

Alcoholic Drinks in India

October 2023

Table of Contents

Alcoholic Drinks in India

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

Legal drinking age by state is as follows:

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Summary 1 - Number of On-trade Establishments by Type 2016-2022

TAXATION AND DUTY LEVIES

Summary 2 - 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 1 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

- Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
- Table 3 Sales of Alcoholic Drinks by Category: Total Value 2017-2022
- Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
- Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
- Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
- Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
- Table 10 GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022
- Table 11 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
- Table 12 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
- Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027
- Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
- Table 15 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027
- Table 16 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 3 - Research Sources

Beer in India

KEY DATA FINDINGS

2022 DEVELOPMENTS

Unusually warm summer weather and low level of consumption ensure that demand for beer surpasses pre-COVID-19 levels

Companies launch premium products to counter inflation

Beer companies look at forward integration to provide holistic experience

PROSPECTS AND OPPORTUNITIES

High rate of taxation will prove to be most significant impediment during the forecast period

E-commerce remains underdeveloped and has scope for expansion

Craft beer brands will continue to suffer from effects of the pandemic

CATEGORY BACKGROUND

Lager price band methodology

Summary 4 - Lager by Price Band 2022

Table 17 - Number of Breweries 2018-2022

CATEGORY DATA

Table 18 - Sales of Beer by Category: Total Volume 2017-2022

Table 19 - Sales of Beer by Category: Total Value 2017-2022

Table 20 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 21 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 22 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 23 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 24 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 25 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 26 - Sales of Beer by Craft vs Standard 2017-2022

Table 27 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 28 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 29 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 30 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 31 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 32 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 33 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Rtds in India

KEY DATA FINDINGS

2022 DEVELOPMENTS

Health and wellness trend and growing demand for convenience drive sales of RTDs in India Bacardi-Martini retains dominance, assisted by launch of new options

PROSPECTS AND OPPORTUNITIES

Inflation and taxation will remain major impediments to expansion

Spirit-based RTDs will witness increased competition from other RTD product types

CATEGORY DATA

Table 34 - Sales of RTDs by Category: Total Volume 2017-2022

- Table 35 Sales of RTDs by Category: Total Value 2017-2022
- Table 36 Sales of RTDs by Category: % Total Volume Growth 2017-2022
- Table 37 Sales of RTDs by Category: % Total Value Growth 2017-2022
- Table 38 Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
- Table 39 Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
- Table 40 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 41 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 42 GBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 43 NBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 44 LBN Brand Shares of RTDs: % Total Volume 2019-2022
- Table 45 Forecast Sales of RTDs by Category: Total Volume 2022-2027
- Table 46 Forecast Sales of RTDs by Category: Total Value 2022-2027
- Table 47 Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
- Table 48 Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

Spirits in India

KEY DATA FINDINGS

2022 DEVELOPMENTS

United Spirits doubles down on its premiumisation strategy

Homegrown gin brands gain traction on back of rising cocktail culture and premiumisation

Rise in experiential stores drives sales of premium spirits through the off-trade

PROSPECTS AND OPPORTUNITIES

Indian single malt is expected to outpace single malt scotch whisky during the forecast period Foreign manufacturers increasingly adopt a local focus for their premium brands Industry will face ongoing challenges, due to combination of inflation and regulatory factors

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology Summary 5 - Benchmark Brands 2022

CATEGORY DATA

- Table 49 Sales of Spirits by Category: Total Volume 2017-2022
- Table 50 Sales of Spirits by Category: Total Value 2017-2022
- Table 51 Sales of Spirits by Category: % Total Volume Growth 2017-2022
- Table 52 Sales of Spirits by Category: % Total Value Growth 2017-2022
- Table 53 Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022
- Table 54 Sales of Spirits by Off-trade vs On-trade: Value 2017-2022
- Table 55 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 56 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 57 Sales of Dark Rum by Price Platform: % Total Volume 2017-2022
- Table 58 Sales of White Rum by Price Platform: % Total Volume 2017-2022
- Table 59 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022
- Table 60 Sales of English Gin by Price Platform: % Total Volume 2017-2022
- Table 61 Sales of Vodka by Price Platform: % Total Volume 2017-2022
- Table 62 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022
- Table 63 GBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 64 NBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 65 LBN Brand Shares of Spirits: % Total Volume 2019-2022
- Table 66 Forecast Sales of Spirits by Category: Total Volume 2022-2027
- Table 67 Forecast Sales of Spirits by Category: Total Value 2022-2027
- Table 68 Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027

Wine in India

KEY DATA FINDINGS

2022 DEVELOPMENTS

Samant Soma Wines leverages wine tourism and pursues inorganic growth strategy to lead the market

Trade agreement with Australia improves accessibility of imported wines

High taxation and regulatory constraints limit potential of wine in India

PROSPECTS AND OPPORTUNITIES

Manufacturers call for uniform regulations to counter rising costs

Rise of experiential stores that aid decision-making will continue during the forecast period

CATEGORY DATA

- Table 70 Sales of Wine by Category: Total Volume 2017-2022
- Table 71 Sales of Wine by Category: Total Value 2017-2022
- Table 72 Sales of Wine by Category: % Total Volume Growth 2017-2022
- Table 73 Sales of Wine by Category: % Total Value Growth 2017-2022
- Table 74 Sales of Wine by Off-trade vs On-trade: Volume 2017-2022
- Table 75 Sales of Wine by Off-trade vs On-trade: Value 2017-2022
- Table 76 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 77 Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 78 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 79 Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 80 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 81 GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
- Table 82 NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
- Table 83 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022
- Table 84 GBO Company Shares of Champagne: % Total Volume 2018-2022
- Table 85 NBO Company Shares of Champagne: % Total Volume 2018-2022
- Table 86 LBN Brand Shares of Champagne: % Total Volume 2019-2022
- Table 87 GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
- Table 88 NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
- Table 89 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022
- Table 90 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
- Table 91 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
- Table 92 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022
- Table 93 Forecast Sales of Wine by Category: Total Volume 2022-2027
- Table 94 Forecast Sales of Wine by Category: Total Value 2022-2027
- Table 95 Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
- Table 96 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-india/report.