

Rtds in Germany

June 2023

Table of Contents

KEY DATA FINDINGS

2022 DEVELOPMENTS

No end in sight to the boom in sales of spirit-based RTDs

Wine-based RTDs and other RTDs continue to face challenges

Private label and global brands lead RTDs, although some niche brands make gains

PROSPECTS AND OPPORTUNITIES

Launch of Coca-Cola brand in RTDs set to bring new impetus to cola-based RTDs

New product attributes to target more diverse consumption occasions

Tea-based RTDs combine low sugar recipes with a refreshing taste

CATEGORY DATA

Table 1 - Sales of RTDs by Category: Total Volume 2017-2022

Table 2 - Sales of RTDs by Category: Total Value 2017-2022

Table 3 - Sales of RTDs by Category: % Total Volume Growth 2017-2022

Table 4 - Sales of RTDs by Category: % Total Value Growth 2017-2022

Table 5 - Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022

Table 6 - Sales of RTDs by Off-trade vs On-trade: Value 2017-2022

Table 7 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 8 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022

Table 9 - GBO Company Shares of RTDs: % Total Volume 2018-2022

Table 10 - NBO Company Shares of RTDs: % Total Volume 2018-2022

Table 11 - LBN Brand Shares of RTDs: % Total Volume 2019-2022

Table 12 - Forecast Sales of RTDs by Category: Total Volume 2022-2027

Table 13 - Forecast Sales of RTDs by Category: Total Value 2022-2027

Table 14 - Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027

Table 15 - Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

Alcoholic Drinks in Germany - Industry Overview

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 16 - Number of On-trade Establishments by Type 2017-2022

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

Table 17 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

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

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

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

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

Table 22 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 23 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 24 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 25 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 26 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 27 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 28 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 29 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Table 30 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 31 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 32 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

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/rtds-in-germany/report.