



# Alcoholic Drinks in Western Europe

December 2024

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## REGIONAL OVERVIEW

Weak performances for Western Europe in the review and forecast periods

Sales expected to be stagnating in Western Europe in the coming years

The UK alone accounts for a third of global cider/perry sales

New products to try and pep up the mature UK cider/perry market

RTDs the most dynamic of the main alcoholic drinks categories

On-trade recovery stalls in 2023 after strong growth post-pandemic

RTDs the only category with a positive CAGR over 2018-2023

Dynamic growth for non-alcoholic spirits in Germany

Alcohol consumption being negatively impacted by rising health consciousness in the UK

Modern grocery retailers dominate distribution of alcoholic drinks in most countries

Systembolaget means that specialist retailers dominate sales in Sweden

## LEADING COMPANIES AND BRANDS

Turkey has the most concentrated competitive landscape in Western Europe

The Madri Excepcional success story continues in UK premium lager

Diageo cements its leading position in Germany

Heineken and Tuborg continue to lead the brand rankings

## FORECAST PROJECTIONS

Stagnation expected for alcoholic drinks in Western Europe over the forecast period

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

## COUNTRY SNAPSHOTS

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