

Alcoholic Drinks in Norway

September 2022

Table of Contents

EXECUTIVE SUMMARY

Alcoholic drinks in 2021: The big picture

2021 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

Chart 1 - Alcoholic Drinks Off-Trade Volume Sales Growth Scenarios: 2019-2026

Chart 2 - Alcoholic Drinks On-Trade Volume Sales Growth Scenarios: 2019-2026

Chart 3 - Alcoholic Drinks Impact of Soft Drivers on Off-Trade Volume Sales: 2019-2026

Chart 4 - Alcoholic Drinks Impact of Soft Drivers on On-Trade Volume Sales: 2019-2026

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 2015-2021

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2021

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

MARKET DATA

Table 3 - Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

Table 4 - Sales of Alcoholic Drinks by Category: Total Value 2016-2021

Table 5 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

Table 6 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

Table 10 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

Table 11 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

Table 12 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

Table 13 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2021

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026

Table 15 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026

Table 17 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

DISCLAIMER

SOURCES

Summary 2 - Research Sources

[Beer in Norway](#)

KEY DATA FINDINGS

2021 DEVELOPMENTS

Cross-border trade remains subdued

Health trend boosts consumer interest in no-lo

Fruity trend expands beyond IPAs

PROSPECTS AND OPPORTUNITIES

Relaxation of pandemic restrictions will lead to normalisation of cross-border trade

Craft beer will struggle to compete on price

Deepening health trend will continue to support demand for no-lo

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2021

Table 18 - Number of Breweries 2016-2021

CATEGORY DATA

Table 19 - Sales of Beer by Category: Total Volume 2016-2021

Table 20 - Sales of Beer by Category: Total Value 2016-2021

Table 21 - Sales of Beer by Category: % Total Volume Growth 2016-2021

Table 22 - Sales of Beer by Category: % Total Value Growth 2016-2021

Table 23 - Sales of Beer by Off-trade vs On-trade: Volume 2016-2021

Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2016-2021

Table 25 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2016-2021

Table 27 - Sales of Beer by Craft vs Standard 2016-2021

Table 28 - GBO Company Shares of Beer: % Total Volume 2017-2021

Table 29 - NBO Company Shares of Beer: % Total Volume 2017-2021

Table 30 - LBN Brand Shares of Beer: % Total Volume 2018-2021

Table 31 - Forecast Sales of Beer by Category: Total Volume 2021-2026

Table 32 - Forecast Sales of Beer by Category: Total Value 2021-2026

Table 33 - Forecast Sales of Beer by Category: % Total Volume Growth 2021-2026

Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2021-2026

[Cider/Perry in Norway](#)

KEY DATA FINDINGS

2021 DEVELOPMENTS

Cider faces increased competition from flavoured beer and RTDs

Relatively low ABV is increasingly a plus for cider

Leader Hansa Borg Bryggerier continues to keep rivals at arm's length

PROSPECTS AND OPPORTUNITIES

Revival in cross-border trade will drive a mild post-pandemic hangover

Local brands will continue to grow in popularity but remain a niche

Health trend will continue to boost demand for cider at the expense of stronger ABV alternatives

CATEGORY DATA

Table 35 - Sales of Cider/Perry: Total Volume 2016-2021

Table 36 - Sales of Cider/Perry: Total Value 2016-2021

Table 37 - Sales of Cider/Perry: % Total Volume Growth 2016-2021

Table 38 - Sales of Cider/Perry: % Total Value Growth 2016-2021

Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2016-2021

Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2016-2021

Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 42 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2016-2021

Table 43 - GBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 44 - NBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 45 - LBN Brand Shares of Cider/Perry: % Total Volume 2018-2021

Table 46 - Forecast Sales of Cider/Perry: Total Volume 2021-2026

Table 47 - Forecast Sales of Cider/Perry: Total Value 2021-2026

Table 48 - Forecast Sales of Cider/Perry: % Total Volume Growth 2021-2026

Table 49 - Forecast Sales of Cider/Perry: % Total Value Growth 2021-2026

Rtds in Norway

KEY DATA FINDINGS

2021 DEVELOPMENTS

Hard seltzer continues to drive RTD growth

Pre-made cocktails growing in popularity in the on-trade

Bacardi Breezer and Smirnoff Ice remain dominant

PROSPECTS AND OPPORTUNITIES

Easing of pandemic restrictions will drive short-term dip in off-trade demand

Hard seltzer will remain a top performer

Social media influence will grow

CATEGORY DATA

Table 50 - Sales of RTDs by Category: Total Volume 2016-2021

Table 51 - Sales of RTDs by Category: Total Value 2016-2021

Table 52 - Sales of RTDs by Category: % Total Volume Growth 2016-2021

Table 53 - Sales of RTDs by Category: % Total Value Growth 2016-2021

Table 54 - Sales of RTDs by Off-trade vs On-trade: Volume 2016-2021

Table 55 - Sales of RTDs by Off-trade vs On-trade: Value 2016-2021

Table 56 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 57 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2016-2021

Table 58 - GBO Company Shares of RTDs: % Total Volume 2017-2021

Table 59 - NBO Company Shares of RTDs: % Total Volume 2017-2021

Table 60 - LBN Brand Shares of RTDs: % Total Volume 2018-2021

Table 61 - Forecast Sales of RTDs by Category: Total Volume 2021-2026

Table 62 - Forecast Sales of RTDs by Category: Total Value 2021-2026

Table 63 - Forecast Sales of RTDs by Category: % Total Volume Growth 2021-2026

Table 64 - Forecast Sales of RTDs by Category: % Total Value Growth 2021-2026

Spirits in Norway

KEY DATA FINDINGS

2021 DEVELOPMENTS

Disruption of cross-border trade continues to boost demand
Increasing interest in spirits from new markets
Reimposition of restrictions temporarily derails on-trade rebound

PROSPECTS AND OPPORTUNITIES

Cross-border trade will revive as pandemic restrictions are relaxed
Market polarisation anticipated, particularly in vodka
Trend three

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology
Summary 4 - Benchmark Brands 2021

CATEGORY DATA

Table 65 - Sales of Spirits by Category: Total Volume 2016-2021
Table 66 - Sales of Spirits by Category: Total Value 2016-2021
Table 67 - Sales of Spirits by Category: % Total Volume Growth 2016-2021
Table 68 - Sales of Spirits by Category: % Total Value Growth 2016-2021
Table 69 - Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021
Table 70 - Sales of Spirits by Off-trade vs On-trade: Value 2016-2021
Table 71 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2016-2021
Table 72 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2016-2021
Table 73 - Sales of Dark Rum by Price Platform: % Total Volume 2016-2021
Table 74 - Sales of White Rum by Price Platform: % Total Volume 2016-2021
Table 75 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2016-2021
Table 76 - Sales of English Gin by Price Platform: % Total Volume 2016-2021
Table 77 - Sales of Vodka by Price Platform: % Total Volume 2016-2021
Table 78 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2016-2021
Table 79 - GBO Company Shares of Spirits: % Total Volume 2017-2021
Table 80 - NBO Company Shares of Spirits: % Total Volume 2017-2021
Table 81 - LBN Brand Shares of Spirits: % Total Volume 2018-2021
Table 82 - Forecast Sales of Spirits by Category: Total Volume 2021-2026
Table 83 - Forecast Sales of Spirits by Category: Total Value 2021-2026
Table 84 - Forecast Sales of Spirits by Category: % Total Volume Growth 2021-2026
Table 85 - Forecast Sales of Spirits by Category: % Total Value Growth 2021-2026

Wine in Norway

KEY DATA FINDINGS

2021 DEVELOPMENTS

Flat off-trade development, moderate on-trade recovery
Sparkling wine from the UK and USA growing in popularity
Rosé demand becoming less seasonal

PROSPECTS AND OPPORTUNITIES

Off-trade volume sales will suffer a post-pandemic hangover
Prosecco, Cava and Crémant will continue to grow in popularity
Bag-in-box packaging will continue to gain ground

CATEGORY DATA

Table 86 - Sales of Wine by Category: Total Volume 2016-2021
Table 87 - Sales of Wine by Category: Total Value 2016-2021

Table 88 - Sales of Wine by Category: % Total Volume Growth 2016-2021
Table 89 - Sales of Wine by Category: % Total Value Growth 2016-2021
Table 90 - Sales of Wine by Off-trade vs On-trade: Volume 2016-2021
Table 91 - Sales of Wine by Off-trade vs On-trade: Value 2016-2021
Table 92 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2016-2021
Table 93 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2016-2021
Table 94 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2016-2021
Table 95 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2016-2021
Table 96 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2016-2021
Table 97 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2016-2021
Table 98 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2017-2021
Table 99 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2017-2021
Table 100 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2018-2021
Table 101 - GBO Company Shares of Champagne: % Total Volume 2017-2021
Table 102 - NBO Company Shares of Champagne: % Total Volume 2017-2021
Table 103 - LBN Brand Shares of Champagne: % Total Volume 2018-2021
Table 104 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2017-2021
Table 105 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2017-2021
Table 106 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2018-2021
Table 107 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2017-2021
Table 108 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2017-2021
Table 109 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2018-2021
Table 110 - Forecast Sales of Wine by Category: Total Volume 2021-2026
Table 111 - Forecast Sales of Wine by Category: Total Value 2021-2026
Table 112 - Forecast Sales of Wine by Category: % Total Volume Growth 2021-2026
Table 113 - Forecast Sales of Wine by Category: % Total Value Growth 2021-2026

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-norway/report.