



Spirits in the United Arab Emirates

July 2022

Table of Contents

Spirits in the United Arab Emirates - Category analysis

KEY DATA FINDINGS

2021 DEVELOPMENTS

Premiumisation within spirits

Consumer knowledge of whiskies is increasing

Pricing still a factor in purchasing trends for consumers of whiskies

PROSPECTS AND OPPORTUNITIES

On-trade to lose share to off-trade despite rising inbound tourism

Share of direct-to-consumer sales expected to gain growth momentum

Focus on healthier lifestyles will have an impact on category sales

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 1 - Benchmark Brands 2021

CATEGORY DATA

Table 1 - Sales of Spirits by Category: Total Volume 2016-2021

Table 2 - Sales of Spirits by Category: Total Value 2016-2021

Table 3 - Sales of Spirits by Category: % Total Volume Growth 2016-2021

Table 4 - Sales of Spirits by Category: % Total Value Growth 2016-2021

Table 5 - Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021

Table 6 - Sales of Spirits by Off-trade vs On-trade: Value 2016-2021

Table 7 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 8 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2016-2021

Table 9 - Sales of Dark Rum by Price Platform: % Total Volume 2016-2021

Table 10 - Sales of White Rum by Price Platform: % Total Volume 2016-2021

Table 11 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2016-2021

Table 12 - Sales of English Gin by Price Platform: % Total Volume 2016-2021

Table 13 - Sales of Vodka by Price Platform: % Total Volume 2016-2021

Table 14 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2016-2021

Table 15 - GBO Company Shares of Spirits: % Total Volume 2017-2021

Table 16 - NBO Company Shares of Spirits: % Total Volume 2017-2021

Table 17 - LBN Brand Shares of Spirits: % Total Volume 2018-2021

Table 18 - Forecast Sales of Spirits by Category: Total Volume 2021-2026

Table 19 - Forecast Sales of Spirits by Category: Total Value 2021-2026

Table 20 - Forecast Sales of Spirits by Category: % Total Volume Growth 2021-2026

Table 21 - Forecast Sales of Spirits by Category: % Total Value Growth 2021-2026

Alcoholic Drinks in the United Arab Emirates - Industry Overview

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 22 - Number of On-trade Establishments by Type 2015-2021

TAXATION AND DUTY LEVIES

Summary 2 - 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 23 - Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

MARKET DATA

Table 24 - Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

Table 25 - Sales of Alcoholic Drinks by Category: Total Value 2016-2021

Table 26 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

Table 27 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021

Table 28 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

Table 29 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

Table 30 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

Table 31 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

Table 32 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

Table 33 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

Table 34 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2021

Table 35 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026

Table 36 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026

Table 37 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026

Table 38 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

DISCLAIMER

SOURCES

Summary 3 - 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/spirits-in-the-united-arab-emirates/report.