

Alcoholic Drinks in the Philippines

Market Direction | 2022-06-29 | 70 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

Sales of alcoholic drinks were hit hard in 2020 by strict lockdown measures which included the closure of all non-essential stores and businesses and a total ban on consuming alcohol. This naturally had a strongly negative effect on alcoholic drinks players, with sales being eliminated during this time. Both domestic and international brands suffered, and despite beginning to recover after the ban was lifted in June 2020, subsequent sales were not enough to prevent alcoholic drinks and its major...

Euromonitor International's Alcoholic Drinks in Philippines report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2017-2021), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution or pricing issues. Forecasts to 2026 illustrate how the market is set to change.

Product coverage: Beer, Cider/Perry, RTDs, Spirits, Wine.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Alcoholic Drinks market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Alcoholic Drinks in the Philippines
Euromonitor International
July 2022

List Of Contents And Tables

ALCOHOLIC DRINKS IN THE PHILIPPINES

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

Summary 1 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 1 Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

MARKET DATA

Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

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

Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

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

Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

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

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

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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 10 □GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021
Table 11 □Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021
Table 12 □Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2021
Table 13 □Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026
Table 14 □Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026
Table 15 □Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026
Table 16 □Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

DISCLAIMER

SOURCES

Summary 3 Research Sources

BEER IN THE PHILIPPINES

KEY DATA FINDINGS

2021 DEVELOPMENTS

San Miguel comes out fighting as beer sets out on the path to recovery

Retail sales remain key to growth in 2021

Premium products see slower recovery

PROSPECTS AND OPPORTUNITIES

Bright outlook for beer as players eye expansion opportunities

Retail will generate more volume in the forecast period

Beer expected to see an expanded offer over the forecast period as consumer confidence returns

CATEGORY BACKGROUND

Lager price band methodology

Summary 4 Lager by Price Band 2021

Table 17 Number of Breweries 2016-2021

CATEGORY DATA

Table 18 Sales of Beer by Category: Total Volume 2016-2021

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

Table 20 Sales of Beer by Category: % Total Volume Growth 2016-2021

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

Table 22 Sales of Beer by Off-trade vs On-trade: Volume 2016-2021

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

Table 24 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2016-2021

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

Table 26 □Sales of Beer by Craft vs Standard 2016-2021

Table 27 □GBO Company Shares of Beer: % Total Volume 2017-2021

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

Table 29 □LBN Brand Shares of Beer: % Total Volume 2018-2021

Table 30 □Forecast Sales of Beer by Category: Total Volume 2021-2026

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

Table 32 □Forecast Sales of Beer by Category: % Total Volume Growth 2021-2026

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

WINE IN THE PHILIPPINES

KEY DATA FINDINGS

2021 DEVELOPMENTS

Wine sees a return to growth in 2021 as restrictions ease

On-trade volume banks on the "social" aspect of wine

E-commerce continues to thrive

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

PROSPECTS AND OPPORTUNITIES

Easing of restrictions should benefit wine but economic uncertainty remains a potential threat

Sparkling wine expected to regain its fizz due to popularity with younger consumers

E-commerce set for further gains while local wine could gain a stronger presence

CATEGORY DATA

Table 34 Sales of Wine by Category: Total Volume 2016-2021

Table 35 Sales of Wine by Category: Total Value 2016-2021

Table 36 Sales of Wine by Category: % Total Volume Growth 2016-2021

Table 37 Sales of Wine by Category: % Total Value Growth 2016-2021

Table 38 Sales of Wine by Off-trade vs On-trade: Volume 2016-2021

Table 39 Sales of Wine by Off-trade vs On-trade: Value 2016-2021

Table 40 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 41 Sales of Wine by Off-trade vs On-trade: % Value Growth 2016-2021

Table 42 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2016-2021

Table 43 □Sales of Still Rose Wine by Price Segment: % Off-trade Volume 2016-2021

Table 44 □Sales of Still White Wine by Price Segment: % Off-trade Volume 2016-2021

Table 45 □Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2016-2021

Table 46 □Sales of Wine by Origin 2019-2021

Table 47 □GBO Company Shares of Still Light Grape Wine: % Total Volume 2017-2021

Table 48 □NBO Company Shares of Still Light Grape Wine: % Total Volume 2017-2021

Table 49 □LBN Brand Shares of Still Light Grape Wine: % Total Volume 2018-2021

Table 50 □GBO Company Shares of Champagne: % Total Volume 2017-2021

Table 51 □NBO Company Shares of Champagne: % Total Volume 2017-2021

Table 52 □LBN Brand Shares of Champagne: % Total Volume 2018-2021

Table 53 □GBO Company Shares of Other Sparkling Wine: % Total Volume 2017-2021

Table 54 □NBO Company Shares of Other Sparkling Wine: % Total Volume 2017-2021

Table 55 □LBN Brand Shares of Other Sparkling Wine: % Total Volume 2018-2021

Table 56 □GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2017-2021

Table 57 □NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2017-2021

Table 58 □LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2018-2021

Table 59 □GBO Company Shares of Non-grape Wine: % Total Volume 2017-2021

Table 60 □NBO Company Shares of Non-grape Wine: % Total Volume 2017-2021

Table 61 □LBN Brand Shares of Non-grape Wine: % Total Volume 2018-2021

Table 62 □Forecast Sales of Wine by Category: Total Volume 2021-2026

Table 63 □Forecast Sales of Wine by Category: Total Value 2021-2026

Table 64 □Forecast Sales of Wine by Category: % Total Volume Growth 2021-2026

Table 65 □Forecast Sales of Wine by Category: % Total Value Growth 2021-2026

SPIRITS IN THE PHILIPPINES

KEY DATA FINDINGS

2021 DEVELOPMENTS

Spirits continues to see robust total volume growth in 2021

Domestic players thrive due to sustained marketing efforts and distribution expansion

On-trade channel benefits from easing of restrictions

PROSPECTS AND OPPORTUNITIES

Strong and stable growth projected for spirits

On-trade channel will gain back momentum

E-commerce and digital marketing likely to become more prominent

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

CATEGORY BACKGROUND

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

Summary 5 Benchmark Brands 2021

CATEGORY DATA

Table 66 Sales of Spirits by Category: Total Volume 2016-2021

Table 67 Sales of Spirits by Category: Total Value 2016-2021

Table 68 Sales of Spirits by Category: % Total Volume Growth 2016-2021

Table 69 Sales of Spirits by Category: % Total Value Growth 2016-2021

Table 70 Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021

Table 71 Sales of Spirits by Off-trade vs On-trade: Value 2016-2021

Table 72 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 73 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2016-2021

Table 74 Sales of Dark Rum by Price Platform: % Total Volume 2016-2021

Table 75 □Sales of White Rum by Price Platform: % Total Volume 2016-2021

Table 76 □Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2016-2021

Table 77 □Sales of English Gin by Price Platform: % Total Volume 2016-2021

Table 78 □Sales of Vodka by Price Platform: % Total Volume 2016-2021

Table 79 □Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2016-2021

Table 80 □GBO Company Shares of Spirits: % Total Volume 2017-2021

Table 81 □NBO Company Shares of Spirits: % Total Volume 2017-2021

Table 82 □LBN Brand Shares of Spirits: % Total Volume 2018-2021

Table 83 □Forecast Sales of Spirits by Category: Total Volume 2021-2026

Table 84 □Forecast Sales of Spirits by Category: Total Value 2021-2026

Table 85 □Forecast Sales of Spirits by Category: % Total Volume Growth 2021-2026

Table 86 □Forecast Sales of Spirits by Category: % Total Value Growth 2021-2026

CIDER/PERRY IN THE PHILIPPINES

KEY DATA FINDINGS

2021 DEVELOPMENTS

Cider/perry continues to struggle

Brands focus on expanding their distribution presence both online and in stores

Domestic players opportunities in cider/perry but Savanna and Magners retain their lead

PROSPECTS AND OPPORTUNITIES

Recovery is underway

On-trade sales set to return to growth

Opportunities for development remain with potential focus on local ingredients

CATEGORY DATA

Table 87 Sales of Cider/Perry: Total Volume 2016-2021

Table 88 Sales of Cider/Perry: Total Value 2016-2021

Table 89 Sales of Cider/Perry: % Total Volume Growth 2016-2021

Table 90 Sales of Cider/Perry: % Total Value Growth 2016-2021

Table 91 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2016-2021

Table 92 Sales of Cider/Perry by Off-trade vs On-trade: Value 2016-2021

Table 93 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 94 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2016-2021

Table 95 GBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 96 □NBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 97 □LBN Brand Shares of Cider/Perry: % Total Volume 2018-2021

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 98 □Forecast Sales of Cider/Perry: Total Volume 2021-2026

Table 99 □Forecast Sales of Cider/Perry: Total Value 2021-2026

Table 100 □Forecast Sales of Cider/Perry: % Total Volume Growth 2021-2026

Table 101 □Forecast Sales of Cider/Perry: % Total Value Growth 2021-2026

RTDS IN THE PHILIPPINES

KEY DATA FINDINGS

2021 DEVELOPMENTS

RTDs rebound in 2021 backed by a return to growth for leading brand Tanduay Ice

On-trade strengthens in 2021 but recovery is modest

AB Heineken Philippines launches a new line of hard seltzers

PROSPECTS AND OPPORTUNITIES

Spirit-based RTDs set to remain the driving force for sales of RTDs

E-commerce likely to present new opportunities for RTDs

Increased product variety should add vibrancy to the category

CATEGORY DATA

Table 102 Sales of RTDs by Category: Total Volume 2016-2021

Table 103 Sales of RTDs by Category: Total Value 2016-2021

Table 104 Sales of RTDs by Category: % Total Volume Growth 2016-2021

Table 105 Sales of RTDs by Category: % Total Value Growth 2016-2021

Table 106 Sales of RTDs by Off-trade vs On-trade: Volume 2016-2021

Table 107 Sales of RTDs by Off-trade vs On-trade: Value 2016-2021

Table 108 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 109 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2016-2021

Table 110 GBO Company Shares of RTDs: % Total Volume 2017-2021

Table 111 □NBO Company Shares of RTDs: % Total Volume 2017-2021

Table 112 □LBN Brand Shares of RTDs: % Total Volume 2018-2021

Table 113 □Forecast Sales of RTDs by Category: Total Volume 2021-2026

Table 114 □Forecast Sales of RTDs by Category: Total Value 2021-2026

Table 115 □Forecast Sales of RTDs by Category: % Total Volume Growth 2021-2026

Table 116 □Forecast Sales of RTDs by Category: % Total Value Growth 2021-2026

Alcoholic Drinks in the Philippines

Market Direction | 2022-06-29 | 70 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ ** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-06-25"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com