

Alcoholic Drinks in Poland

Market Direction | 2022-07-07 | 77 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 continued to decline in 2021, albeit at a lower rate than in 2020, due to the impact of the ongoing COVID-19 pandemic on the consumption of alcoholic drinks both on-trade and off-trade. During the year, pandemic-related restrictions on foodservice establishments remained in place, while there were also fewer sports and outdoor events compared to normal. This led to a continued decline in alcoholics drinks sales through the on-trade channel. In the off-trade, growing hea...

Euromonitor International's Alcoholic Drinks in Poland 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 Poland

Euromonitor International

July 2022

List Of Contents And Tables

ALCOHOLIC DRINKS IN POLAND

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 POLAND

KEY DATA FINDINGS

2021 DEVELOPMENTS

Unfavourable weather conditions during summer and heightened health awareness negatively affect sales of beer both on-trade and off-trade in 2021

Non-alcoholic beer sales enjoy the fastest growth as consumers become more health consciousness

Premiumisation amidst inflationary pressure

PROSPECTS AND OPPORTUNITIES

Return to growth, but recovery will be protracted

Inflation will further challenge beer brewing companies

Premium lager and non-alcoholic beer set to drive growth

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 Lager by Price Band 2021

Table 18 Number of Breweries 2015-2020

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

WINE IN POLAND

KEY DATA FINDINGS

2021 DEVELOPMENTS

Home consumption of wine becomes more entrenched

Greater knowledge contributes to a move to red wine

Amba extends its lead due to continued strength of sparkling wine

PROSPECTS AND OPPORTUNITIES

On-trade will play only a minor role, while off-trade sales are set to drive total volume sales growth

Players in wine will attempt to create the right conditions for consumption

Potential for growth in non-alcoholic wine

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

Table 111 □NBO Company Shares of Non-grape Wine: % Total Volume 2017-2021

Table 112 □LBN Brand Shares of Non-grape Wine: % Total Volume 2018-2021

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

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

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

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

SPIRITS IN POLAND

KEY DATA FINDINGS

2021 DEVELOPMENTS

Spirits companies rely on premiumisation to retain value amidst soaring inflation

Whisky, rum and gin continue on an upward trajectory

Increasing concentration in spirits

PROSPECTS AND OPPORTUNITIES

On-trade will take time to recover

Premiumisation likely to stall as manufacturers grapple with rising production costs and consumers become increasingly price sensitive

A move to light rather than non-alcoholic products is likely in spirits

CATEGORY BACKGROUND

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

Summary 4 Benchmark Brands 2021

CATEGORY DATA

Table 35 Sales of Spirits by Category: Total Volume 2016-2021

Table 36 Sales of Spirits by Category: Total Value 2016-2021

Table 37 Sales of Spirits by Category: % Total Volume Growth 2016-2021

Table 38 Sales of Spirits by Category: % Total Value Growth 2016-2021

Table 39 Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021

Table 40 Sales of Spirits by Off-trade vs On-trade: Value 2016-2021

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

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

Table 43 Sales of Dark Rum by Price Platform: % Total Volume 2016-2021

Table 44 Sales of White Rum by Price Platform: % Total Volume 2016-2021

Table 45 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2016-2021

Table 46 Sales of English Gin by Price Platform: % Total Volume 2016-2021

Table 47 Sales of Vodka by Price Platform: % Total Volume 2016-2021

Table 48 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2016-2021

Table 49 GBO Company Shares of Spirits: % Total Volume 2017-2021

Table 50 NBO Company Shares of Spirits: % Total Volume 2017-2021

Table 51 LBN Brand Shares of Spirits: % Total Volume 2018-2021

Table 52 Forecast Sales of Spirits by Category: Total Volume 2021-2026

Table 53 Forecast Sales of Spirits by Category: Total Value 2021-2026

Table 54 Forecast Sales of Spirits by Category: % Total Volume Growth 2021-2026

Table 55 Forecast Sales of Spirits by Category: % Total Value Growth 2021-2026

CIDER/PERRY IN POLAND

KEY DATA FINDINGS

2021 DEVELOPMENTS

Strong decline is a continuation of the review period trend

Craft cider launched in the hope of turning around the category's fortunes

Ambra remains the leader thanks to the widespread availability of its Cydr Lubelski brand

PROSPECTS AND OPPORTUNITIES

Changes in taxation and duty levies might benefit cider/perry

Problems likely to continue for players focusing on the on-trade

Craft cider set to benefit from legislative changes that seek to promote the local production of alcoholic drinks

CATEGORY DATA

Table 56 Sales of Cider/Perry: Total Volume 2016-2021

Table 57 Sales of Cider/Perry: Total Value 2016-2021

Table 58 Sales of Cider/Perry: % Total Volume Growth 2016-2021

Table 59 Sales of Cider/Perry: % Total Value Growth 2016-2021

Table 60 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2016-2021

Table 61 Sales of Cider/Perry by Off-trade vs On-trade: Value 2016-2021

Table 62 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 63 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2016-2021

Table 64 GBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 65 NBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 66 □LBN Brand Shares of Cider/Perry: % Total Volume 2018-2021

Table 67 □Forecast Sales of Cider/Perry: Total Volume 2021-2026

Table 68 □Forecast Sales of Cider/Perry: Total Value 2021-2026

Table 69 □Forecast Sales of Cider/Perry: % Total Volume Growth 2021-2026

Table 70 □Forecast Sales of Cider/Perry: % Total Value Growth 2021-2026

RTDS IN POLAND

KEY DATA FINDINGS

2021 DEVELOPMENTS

Off-trade growth offsets some of the on-trade decline

Limited drinking occasions both on-trade and off-trade hamper growth

No changes in the leaders, although Bacardi-Martini moves closer to Marie Brizard

PROSPECTS AND OPPORTUNITIES

RTDs will remain a niche category, but the development of the on-trade channel may support growth

Small possibility that hard seltzers can reshape RTDs

Alcohol-free trend likely to gain traction in RTDs

CATEGORY DATA

Table 71 Sales of RTDs by Category: Total Volume 2016-2021

Table 72 Sales of RTDs by Category: Total Value 2016-2021

Table 73 Sales of RTDs by Category: % Total Volume Growth 2016-2021

Table 74 Sales of RTDs by Category: % Total Value Growth 2016-2021

Table 75 Sales of RTDs by Off-trade vs On-trade: Volume 2016-2021

Table 76 Sales of RTDs by Off-trade vs On-trade: Value 2016-2021

Table 77 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 78 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2016-2021

Table 79 GBO Company Shares of RTDs: % Total Volume 2017-2021

Table 80 □NBO Company Shares of RTDs: % Total Volume 2017-2021

Table 81 □LBN Brand Shares of RTDs: % Total Volume 2018-2021

Table 82 □Forecast Sales of RTDs by Category: Total Volume 2021-2026

Table 83 □Forecast Sales of RTDs by Category: Total Value 2021-2026

Table 84 □Forecast Sales of RTDs by Category: % Total Volume Growth 2021-2026

Table 85 □Forecast Sales of RTDs by Category: % Total Value Growth 2021-2026

Alcoholic Drinks in Poland

Market Direction | 2022-07-07 | 77 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*	Phone*	
First Name*	Last Name*	
Job title*		
Company Name*	EU Vat / Tax ID / NIP number*	
Address*	City*	
Zip Code*	Country*	
	Date	2026-02-20
	Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com