

Alcoholic Drinks in Australia

Market Direction | 2023-07-05 | 82 pages | Euromonitor

AVAILABLE LICENSES:

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

Report description:

In 2022, alcoholic drinks in Australia saw little movement in total volume sales. However, 2022 was a transitional year for alcoholic drinks in Australia, as the country gradually normalised after all restrictions and border closures were lifted at the beginning of the year, and the overall stasis masked very different performances on-trade and off-trade. On-trade sales saw a dramatic rebound in 2022, as Australians moved to their new post-pandemic routines. However, with the return to consumpt...

Euromonitor International's Alcoholic Drinks in Australia report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2018-2022), 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 2027 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 Australia

Euromonitor International

July 2023

List Of Contents And Tables

ALCOHOLIC DRINKS IN AUSTRALIA

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

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 2016-2022

TAXATION AND DUTY LEVIES

Summary 1 Taxation and Duty Levies on Alcoholic Drinks 2022

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 2017-2022

MARKET DATA

Table 3 Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Table 4 Sales of Alcoholic Drinks by Category: Total Value 2017-2022

Table 5 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

Table 6 Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 10 □Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 11 □GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 12 □Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 13 □Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 14 □Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Table 15 □Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 16 □Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 17 □Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 Research Sources

BEER IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

On-trade rebound tempered by inflationary environment

Polarisation defines the beer category

The craft aesthetic

PROSPECTS AND OPPORTUNITIES

Health-conscious Australians set to transform the beer category

Local flavour innovations will drive growth for beer

Sustainability increasingly expected by consumers, impacting company strategies

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 Lager by Price Band 2022

Table 18 Number of Breweries 2017-2022

CATEGORY DATA

Table 19 Sales of Beer by Category: Total Volume 2017-2022

Table 20 Sales of Beer by Category: Total Value 2017-2022

Table 21 Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 22 Sales of Beer by Category: % Total Value Growth 2017-2022

Table 23 Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 24 Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 25 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 26 Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 27 □Sales of Beer by Craft vs Standard 2017-2022

Table 28 □GBO Company Shares of Beer: % Total Volume 2018-2022

Table 29 □NBO Company Shares of Beer: % Total Volume 2018-2022

Table 30 □LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 31 □Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 32 □Forecast Sales of Beer by Category: Total Value 2022-2027

Table 33 □Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 34 □Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

WINE IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Oversupply of wine for a second year

Rebound for the on-trade impacts off-trade

Changing palates and lighter flavours

PROSPECTS AND OPPORTUNITIES

Continuing premiumisation in wine as consumers seek authentic local luxury

Sustainability targets in wine see innovative packaging and winery energy transition

Alcohol moderation trend set to reshape the wine category

CATEGORY DATA

Table 35 Sales of Wine by Category: Total Volume 2017-2022
Table 36 Sales of Wine by Category: Total Value 2017-2022
Table 37 Sales of Wine by Category: % Total Volume Growth 2017-2022
Table 38 Sales of Wine by Category: % Total Value Growth 2017-2022
Table 39 Sales of Wine by Off-trade vs On-trade: Volume 2017-2022
Table 40 Sales of Wine by Off-trade vs On-trade: Value 2017-2022
Table 41 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 42 Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
Table 43 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022
Table 44 □Sales of Still Rose Wine by Price Segment: % Off-trade Volume 2017-2022
Table 45 □Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022
Table 46 □Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022
Table 47 □GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
Table 48 □NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
Table 49 □LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022
Table 50 □GBO Company Shares of Champagne: % Total Volume 2018-2022
Table 51 □NBO Company Shares of Champagne: % Total Volume 2018-2022
Table 52 □LBN Brand Shares of Champagne: % Total Volume 2019-2022
Table 53 □GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
Table 54 □NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
Table 55 □LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022
Table 56 □GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
Table 57 □NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
Table 58 □LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022
Table 59 □GBO Company Shares of Non-grape Wine: % Total Volume 2018-2022
Table 60 □NBO Company Shares of Non-grape Wine: % Total Volume 2018-2022
Table 61 □LBN Brand Shares of Non-grape Wine: % Total Volume 2019-2022
Table 62 □Forecast Sales of Wine by Category: Total Volume 2022-2027
Table 63 □Forecast Sales of Wine by Category: Total Value 2022-2027
Table 64 □Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
Table 65 □Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

SPIRITS IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Cocktail culture drives on-trade rebound

Consumers trade across categories as inflation drives polarisation

Continuing premiumisation drives strong value growth for spirits

PROSPECTS AND OPPORTUNITIES

Beginning of the end of gin dominating growth in spirits

Localised spirits set to drive growth

Non alcoholic spirits set to drive innovation

CATEGORY BACKGROUND

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

Summary 4 Benchmark Brands 2022

CATEGORY DATA

Table 66 Sales of Spirits by Category: Total Volume 2017-2022

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Table 67 Sales of Spirits by Category: Total Value 2017-2022
Table 68 Sales of Spirits by Category: % Total Volume Growth 2017-2022
Table 69 Sales of Spirits by Category: % Total Value Growth 2017-2022
Table 70 Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022
Table 71 Sales of Spirits by Off-trade vs On-trade: Value 2017-2022
Table 72 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 73 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022
Table 74 Sales of Dark Rum by Price Platform: % Total Volume 2017-2022
Table 75 □Sales of White Rum by Price Platform: % Total Volume 2017-2022
Table 76 □Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022
Table 77 □Sales of English Gin by Price Platform: % Total Volume 2017-2022
Table 78 □Sales of Vodka by Price Platform: % Total Volume 2017-2022
Table 79 □Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022
Table 80 □GBO Company Shares of Spirits: % Total Volume 2018-2022
Table 81 □NBO Company Shares of Spirits: % Total Volume 2018-2022
Table 82 □LBN Brand Shares of Spirits: % Total Volume 2019-2022
Table 83 □Forecast Sales of Spirits by Category: Total Volume 2022-2027
Table 84 □Forecast Sales of Spirits by Category: Total Value 2022-2027
Table 85 □Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027
Table 86 □Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

CIDER/PERRY IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

On-trade rebound tempered by economic pressures

Total volume growth, as cider benefits from the easy drinking trend

Provenance and local trends driving growth opportunities

PROSPECTS AND OPPORTUNITIES

Better-for-you trend expected to drive innovation

Cider to face increasing competition from RTDs

Cider undergoing packaging shifts

CATEGORY DATA

Table 87 Sales of Cider/Perry: Total Volume 2017-2022

Table 88 Sales of Cider/Perry: Total Value 2017-2022

Table 89 Sales of Cider/Perry: % Total Volume Growth 2017-2022

Table 90 Sales of Cider/Perry: % Total Value Growth 2017-2022

Table 91 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022

Table 92 Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022

Table 93 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 94 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022

Table 95 GBO Company Shares of Cider/Perry: % Total Volume 2018-2022

Table 96 □NBO Company Shares of Cider/Perry: % Total Volume 2018-2022

Table 97 □LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022

Table 98 □Forecast Sales of Cider/Perry: Total Volume 2022-2027

Table 99 □Forecast Sales of Cider/Perry: Total Value 2022-2027

Table 100 □Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027

Table 101 □Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

RTDS IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

RTDs is the fastest growing category in alcoholic drinks in total volume terms in 2022

Health and wellness trends drive growth

Cocktail in a can offerings expand in the Australian market

PROSPECTS AND OPPORTUNITIES

Growth in hard seltzers to normalise as offerings grow

Growing premiumisation in RTDs, driven by new product launches

Non alcoholic RTDs to drive innovation in the category

CATEGORY DATA

Table 102 Sales of RTDs by Category: Total Volume 2017-2022

Table 103 Sales of RTDs by Category: Total Value 2017-2022

Table 104 Sales of RTDs by Category: % Total Volume Growth 2017-2022

Table 105 Sales of RTDs by Category: % Total Value Growth 2017-2022

Table 106 Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022

Table 107 Sales of RTDs by Off-trade vs On-trade: Value 2017-2022

Table 108 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 109 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022

Table 110 GBO Company Shares of RTDs: % Total Volume 2018-2022

Table 111 □NBO Company Shares of RTDs: % Total Volume 2018-2022

Table 112 □LBN Brand Shares of RTDs: % Total Volume 2019-2022

Table 113 □Forecast Sales of RTDs by Category: Total Volume 2022-2027

Table 114 □Forecast Sales of RTDs by Category: Total Value 2022-2027

Table 115 □Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027

Table 116 □Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

Alcoholic Drinks in Australia

Market Direction | 2023-07-05 | 82 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="2026-02-12"/> |
| | | 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