

## **Alcoholic Drinks in Australia**

Market Direction | 2024-06-20 | 83 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 2023, total demand for alcoholic drinks in Australia marginally improved following a relatively poor performance the previous year, with inflation and interest rates reaching a plateau and starting to stabilise. Consumer spending remained rather conservative in 2023, as the cost of living was still high and stagnant wage growth left Australians with low disposable incomes to spend on luxuries. Despite these challenges, the alcoholic drinks industry was fairly resilient, with total value and v...

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 (2019-2023), 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 2028 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](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## **Table of Contents:**

Alcoholic Drinks in Australia  
Euromonitor International  
June 2024

List Of Contents And Tables

### **ALCOHOLIC DRINKS IN AUSTRALIA**

#### **EXECUTIVE SUMMARY**

Alcoholic drinks in 2023: The big picture

2023 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

Summary 1      Number of On-trade Establishments by Type 2017-2023

#### **TAXATION AND DUTY LEVIES**

Summary 2      Taxation and Duty Levies on Alcoholic Drinks 2023

#### **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 2018-2023

#### **MARKET DATA**

Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 3 Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 10   GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 11   Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 12   Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 13   Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 14 ☐Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 15 ☐Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 16 ☐Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 3 Research Sources

BEER IN AUSTRALIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mid-priced lager the beneficiary as premiumisation faces inflationary challenges

Further rise in excise tax a concern for manufacturers of beer

On-trade beer records strong growth at the expense of off-trade consumption

PROSPECTS AND OPPORTUNITIES

Rapid growth of RTDs a potential threat to the growth of beer

Strong demand expected for non/low alcohol beer amid changing consumer habits

Sustainable and independent production top of mind for Australian consumers

CATEGORY BACKGROUND

Lager price band methodology

Summary 4 Lager by Price Band 2023

CATEGORY DATA

Table 17 Sales of Beer by Category: Total Volume 2018-2023

Table 18 Sales of Beer by Category: Total Value 2018-2023

Table 19 Sales of Beer by Category: % Total Volume Growth 2018-2023

Table 20 Sales of Beer by Category: % Total Value Growth 2018-2023

Table 21 Sales of Beer by Off-trade vs On-trade: Volume 2018-2023

Table 22 Sales of Beer by Off-trade vs On-trade: Value 2018-2023

Table 23 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 24 Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023

Table 25 Sales of Beer by Craft vs Standard 2018-2023

Table 26 ☐GBO Company Shares of Beer: % Total Volume 2019-2023

Table 27 ☐NBO Company Shares of Beer: % Total Volume 2019-2023

Table 28 ☐LBN Brand Shares of Beer: % Total Volume 2020-2023

Table 29 ☐Forecast Sales of Beer by Category: Total Volume 2023-2028

Table 30 ☐Forecast Sales of Beer by Category: Total Value 2023-2028

Table 31 ☐Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028

Table 32 ☐Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

WINE IN AUSTRALIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wine consumption in decline as preference for alcoholic drinks shifts

Growth for sparkling wine and still rose wine amid overall category decline

Non alcoholic wine expands as demand grows among local consumers

PROSPECTS AND OPPORTUNITIES

Wine consumption in Australia set to recover over forecast period despite challenges

Opportunity for wine to be a drink of occasion with premium offerings

Oversupply of wine a challenge as exports to China see slow recovery

CATEGORY DATA

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 33 Sales of Wine by Category: Total Volume 2018-2023
Table 34 Sales of Wine by Category: Total Value 2018-2023
Table 35 Sales of Wine by Category: % Total Volume Growth 2018-2023
Table 36 Sales of Wine by Category: % Total Value Growth 2018-2023
Table 37 Sales of Wine by Off-trade vs On-trade: Volume 2018-2023
Table 38 Sales of Wine by Off-trade vs On-trade: Value 2018-2023
Table 39 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 40 Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
Table 41 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023
Table 42 □Sales of Still Rose Wine by Price Segment: % Off-trade Volume 2018-2023
Table 43 □Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023
Table 44 □Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2018-2023
Table 45 □GBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 46 □NBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 47 □LBN Brand Shares of Still Light Grape Wine: % Total Volume 2020-2023
Table 48 □GBO Company Shares of Champagne: % Total Volume 2019-2023
Table 49 □NBO Company Shares of Champagne: % Total Volume 2019-2023
Table 50 □LBN Brand Shares of Champagne: % Total Volume 2020-2023
Table 51 □GBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 52 □NBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 53 □LBN Brand Shares of Other Sparkling Wine: % Total Volume 2020-2023
Table 54 □GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 55 □NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 56 □LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2020-2023
Table 57 □GBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 58 □NBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 59 □LBN Brand Shares of Non-grape Wine: % Total Volume 2020-2023
Table 60 □Forecast Sales of Wine by Category: Total Volume 2023-2028
Table 61 □Forecast Sales of Wine by Category: Total Value 2023-2028
Table 62 □Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
Table 63 □Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

## SPIRITS IN AUSTRALIA

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

On-trade volumes continue to recover, while off-trade maintains momentum

Premium spirits continue to gain share across much of the category

Tequila high in demand to quickly become an Australian favourite

#### PROSPECTS AND OPPORTUNITIES

Cocktail trend slowing but strong enough to drive future growth

Potential gap in the market for spirits with low alcohol content

Significant increase in excise tax has potential to price consumers out of category

#### CATEGORY BACKGROUND

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

Summary 5      Benchmark Brands 2023

#### CATEGORY DATA

Table 64 Sales of Spirits by Category: Total Volume 2018-2023

Table 65 Sales of Spirits by Category: Total Value 2018-2023

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 66 Sales of Spirits by Category: % Total Volume Growth 2018-2023

Table 67 Sales of Spirits by Category: % Total Value Growth 2018-2023

Table 68 Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023

Table 69 Sales of Spirits by Off-trade vs On-trade: Value 2018-2023

Table 70 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 71 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023

Table 72 Sales of Dark Rum by Price Platform: % Total Volume 2018-2023

Table 73 □Sales of White Rum by Price Platform: % Total Volume 2018-2023

Table 74 □Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023

Table 75 □Sales of English Gin by Price Platform: % Total Volume 2018-2023

Table 76 □Sales of Vodka by Price Platform: % Total Volume 2018-2023

Table 77 □Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023

Table 78 □GBO Company Shares of Spirits: % Total Volume 2019-2023

Table 79 □NBO Company Shares of Spirits: % Total Volume 2019-2023

Table 80 □LBN Brand Shares of Spirits: % Total Volume 2020-2023

Table 81 □Forecast Sales of Spirits by Category: Total Volume 2023-2028

Table 82 □Forecast Sales of Spirits by Category: Total Value 2023-2028

Table 83 □Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028

Table 84 □Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

## CIDER/PERRY IN AUSTRALIA

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Decline for cider/perry amid economic downturn and consumers reducing non-essential spending

Low-calorie drinks top of mind among health-conscious consumers

Local production a key component for success in Australian market

### PROSPECTS AND OPPORTUNITIES

Cider/perry set to grow but will be outpaced by competitors such as RTDs

Local production of cider will remain a key factor for category growth

Cans expected to become favoured packaging for cider

### CATEGORY DATA

Table 85 Sales of Cider/Perry: Total Volume 2018-2023

Table 86 Sales of Cider/Perry: Total Value 2018-2023

Table 87 Sales of Cider/Perry: % Total Volume Growth 2018-2023

Table 88 Sales of Cider/Perry: % Total Value Growth 2018-2023

Table 89 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023

Table 90 Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023

Table 91 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 92 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023

Table 93 GBO Company Shares of Cider/Perry: % Total Volume 2019-2023

Table 94 □NBO Company Shares of Cider/Perry: % Total Volume 2019-2023

Table 95 □LBN Brand Shares of Cider/Perry: % Total Volume 2020-2023

Table 96 □Forecast Sales of Cider/Perry: Total Volume 2023-2028

Table 97 □Forecast Sales of Cider/Perry: Total Value 2023-2028

Table 98 □Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028

Table 99 □Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

## RTDS IN AUSTRALIA

### KEY DATA FINDINGS

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 2023 DEVELOPMENTS

Steady growth for RTDs continues into 2023, driven by spirit-based options  
Hard seltzers target health-conscious consumers with low-calorie alternatives  
New innovation in packaging to address consumer preferences

## PROSPECTS AND OPPORTUNITIES

RTDs expected to maintain strong momentum heading into forecast period  
Further innovation expected through flavours to help create competitive edge  
Non alcoholic RTDs poised to grow but will retain low share overall

## CATEGORY DATA

Table 100 Sales of RTDs by Category: Total Volume 2018-2023

Table 101 Sales of RTDs by Category: Total Value 2018-2023

Table 102 Sales of RTDs by Category: % Total Volume Growth 2018-2023

Table 103 Sales of RTDs by Category: % Total Value Growth 2018-2023

Table 104 Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023

Table 105 Sales of RTDs by Off-trade vs On-trade: Value 2018-2023

Table 106 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 107 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023

Table 108 GBO Company Shares of RTDs: % Total Volume 2019-2023

Table 109 □NBO Company Shares of RTDs: % Total Volume 2019-2023

Table 110 □LBN Brand Shares of RTDs: % Total Volume 2020-2023

Table 111 □Forecast Sales of RTDs by Category: Total Volume 2023-2028

Table 112 □Forecast Sales of RTDs by Category: Total Value 2023-2028

Table 113 □Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028

Table 114 □Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Alcoholic Drinks in Australia

Market Direction | 2024-06-20 | 83 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 Licence (1 Site)	€3500.00
	Multiple User Licence (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	2025-05-04
		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