

Alcoholic Drinks in Italy

Market Direction | 2024-06-18 | 81 pages | Euromonitor

AVAILABLE LICENSES:

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

Report description:

Alcoholic drinks saw total volume sales decline in Italy in 2023. Price spikes and pressure on consumer purchasing power had a strongly negative impact on demand for alcoholic drinks during the year. Consumers became more conservative with their spending, driven also by a trend towards healthier lifestyles. However, it should be noted that, despite the fall seen during the year, off-trade volume sales remained higher in 2023 than in 2019 immediately before the outbreak of COVID-19. The most affe...

Euromonitor International's Alcoholic Drinks in Italy 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

www.scotts-international.com

Table of Contents:

Alcoholic Drinks in Italy
Euromonitor International
June 2024

List Of Contents And Tables

ALCOHOLIC DRINKS IN ITALY

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

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 ITALY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for beer declines in both off-trade and on-trade in 2023

High rate of inflation drives trading down in beer

Mindful drinking pushes demand for non/low alcohol beer

PROSPECTS AND OPPORTUNITIES

Positive performance expected for beer in both off-trade and on-trade channels

Premium, craft beers (within lager and ale) to drive growth

Non-alcoholic beer to become more popular, amid innovation and mindful drinking trend

CATEGORY BACKGROUND

Lager price band methodology

Summary 4 Lager by Price Band 2023

Table 17 Number of Breweries 2018-2023

CATEGORY DATA

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

Table 19 Sales of Beer by Category: Total Value 2018-2023

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

Table 21 Sales of Beer by Category: % Total Value Growth 2018-2023

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

Table 23 Sales of Beer by Off-trade vs On-trade: Value 2018-2023

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

Table 25 Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023

Table 26 □Sales of Beer by Craft vs Standard 2018-2023

Table 27 □GBO Company Shares of Beer: % Total Volume 2019-2023

Table 28 □NBO Company Shares of Beer: % Total Volume 2019-2023

Table 29 □LBN Brand Shares of Beer: % Total Volume 2020-2023

Table 30 □Forecast Sales of Beer by Category: Total Volume 2023-2028

Table 31 □Forecast Sales of Beer by Category: Total Value 2023-2028

Table 32 □Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028

Table 33 □Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

WINE IN ITALY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Negative performance for wine in 2023

Generational divide when it comes to wine consumption

Non-alcoholic wine fails to develop

PROSPECTS AND OPPORTUNITIES

Static performance for wine over the forecast period

Channel shift for aperitivo trend, while non-alcoholic wine is set to see growth

Innovation likely to boost demand with focus on more natural, local and sustainable products

CATEGORY DATA

Table 34 Sales of Wine by Category: Total Volume 2018-2023
Table 35 Sales of Wine by Category: Total Value 2018-2023
Table 36 Sales of Wine by Category: % Total Volume Growth 2018-2023
Table 37 Sales of Wine by Category: % Total Value Growth 2018-2023
Table 38 Sales of Wine by Off-trade vs On-trade: Volume 2018-2023
Table 39 Sales of Wine by Off-trade vs On-trade: Value 2018-2023
Table 40 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 41 Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
Table 42 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023
Table 43 □Sales of Still Rose Wine by Price Segment: % Off-trade Volume 2018-2023
Table 44 □Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023
Table 45 □Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2018-2023
Table 46 □GBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 47 □NBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 48 □LBN Brand Shares of Still Light Grape Wine: % Total Volume 2020-2023
Table 49 □GBO Company Shares of Champagne: % Total Volume 2019-2023
Table 50 □NBO Company Shares of Champagne: % Total Volume 2019-2023
Table 51 □LBN Brand Shares of Champagne: % Total Volume 2020-2023
Table 52 □GBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 53 □NBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 54 □LBN Brand Shares of Other Sparkling Wine: % Total Volume 2020-2023
Table 55 □GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 56 □NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 57 □LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2020-2023
Table 58 □GBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 59 □NBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 60 □LBN Brand Shares of Non-grape Wine: % Total Volume 2020-2023
Table 61 □Forecast Sales of Wine by Category: Total Volume 2023-2028
Table 62 □Forecast Sales of Wine by Category: Total Value 2023-2028
Table 63 □Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
Table 64 □Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

SPIRITS IN ITALY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for spirits declines amid strong price rises
Niche offering broadens with super premium spirits
Amid big brands entering the category, non-alcoholic spirits keep developing

PROSPECTS AND OPPORTUNITIES

Slight volume growth for spirits
Premiumisation pushes demand for niche products
Mocktail and mindful drinking to drive growth for non-alcoholic spirits

CATEGORY BACKGROUND

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

Summary 5 Benchmark Brands 2023

CATEGORY DATA

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

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Table 66 Sales of Spirits by Category: Total Value 2018-2023
Table 67 Sales of Spirits by Category: % Total Volume Growth 2018-2023
Table 68 Sales of Spirits by Category: % Total Value Growth 2018-2023
Table 69 Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023
Table 70 Sales of Spirits by Off-trade vs On-trade: Value 2018-2023
Table 71 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 72 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023
Table 73 Sales of Dark Rum by Price Platform: % Total Volume 2018-2023
Table 74 □Sales of White Rum by Price Platform: % Total Volume 2018-2023
Table 75 □Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023
Table 76 □Sales of English Gin by Price Platform: % Total Volume 2018-2023
Table 77 □Sales of Vodka by Price Platform: % Total Volume 2018-2023
Table 78 □Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023
Table 79 □GBO Company Shares of Spirits: % Total Volume 2019-2023
Table 80 □NBO Company Shares of Spirits: % Total Volume 2019-2023
Table 81 □LBN Brand Shares of Spirits: % Total Volume 2020-2023
Table 82 □Forecast Sales of Spirits by Category: Total Volume 2023-2028
Table 83 □Forecast Sales of Spirits by Category: Total Value 2023-2028
Table 84 □Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028
Table 85 □Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

CIDER/PERRY IN ITALY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cider registers positive performance in 2023

Innovation drives sales

Local brand retains lead, while e-commerce proves dynamic

PROSPECTS AND OPPORTUNITIES

Cider to continue its development over the forecast period

Premiumisation to boost sales of niche ciders

Domestic offering to face changes

CATEGORY DATA

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

Table 87 Sales of Cider/Perry: Total Value 2018-2023

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

Table 89 Sales of Cider/Perry: % Total Value Growth 2018-2023

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

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

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

Table 93 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023

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

Table 95 □NBO Company Shares of Cider/Perry: % Total Volume 2019-2023

Table 96 □LBN Brand Shares of Cider/Perry: % Total Volume 2020-2023

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

Table 98 □Forecast Sales of Cider/Perry: Total Value 2023-2028

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

Table 100 □Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

RTDS IN ITALY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for RTDs registers decline in both off-trade and on-trade

Aperitivo trend shapes demand in RTDs

First non-alcoholic RTD enters the market in 2023

PROSPECTS AND OPPORTUNITIES

Moderate growth for RTDs over the forecast period

Premiumisation to bring contrasting effects, while e-commerce offers opportunities

Mocktails to become more popular amongst Gen Z

CATEGORY DATA

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

Table 102 Sales of RTDs by Category: Total Value 2018-2023

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

Table 104 Sales of RTDs by Category: % Total Value Growth 2018-2023

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

Table 106 Sales of RTDs by Off-trade vs On-trade: Value 2018-2023

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

Table 108 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023

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

Table 110 □NBO Company Shares of RTDs: % Total Volume 2019-2023

Table 111 □LBN Brand Shares of RTDs: % Total Volume 2020-2023

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

Table 113 □Forecast Sales of RTDs by Category: Total Value 2023-2028

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

Table 115 □Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

Alcoholic Drinks in Italy

Market Direction | 2024-06-18 | 81 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	2026-02-10
	Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com