



Euromonitor
International

Alcoholic Drinks in Poland

June 2024

Table of Contents

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

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 Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Beer sales fall as prices rise

Specialist beer sees the sharpest decline in sales as prices soar

Grupa Żywiec ceases production at its Leżajsk brewery

PROSPECTS AND OPPORTUNITIES

Beer sales expected to remain under pressure in the short term due to prevailing economic uncertainty

Poland's new deposit system represents a big challenge for the beer industry

Craft breweries could diversify their production as a response to the difficult times

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

Cider/Perry in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cider/perry continues on a downward trajectory

Aromatised and non-alcoholic cider bring some positive to the category

Producers pushing for the abolishment of excise duty to improve competitiveness

PROSPECTS AND OPPORTUNITIES

Cider/perry sales projected to stagnate

Further actions towards the abolition of excise duty are planned

Fruit growers and processing industry will lobby for easier cider/perry production while craft products could carve out a growing niche

CATEGORY DATA

Table 34 - Sales of Cider/Perry: Total Volume 2018-2023

Table 35 - Sales of Cider/Perry: Total Value 2018-2023
 Table 36 - Sales of Cider/Perry: % Total Volume Growth 2018-2023
 Table 37 - Sales of Cider/Perry: % Total Value Growth 2018-2023
 Table 38 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023
 Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023
 Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023
 Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023
 Table 42 - GBO Company Shares of Cider/Perry: % Total Volume 2019-2023
 Table 43 - NBO Company Shares of Cider/Perry: % Total Volume 2019-2023
 Table 44 - LBN Brand Shares of Cider/Perry: % Total Volume 2020-2023
 Table 45 - Forecast Sales of Cider/Perry: Total Volume 2023-2028
 Table 46 - Forecast Sales of Cider/Perry: Total Value 2023-2028
 Table 47 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028
 Table 48 - Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

Rtds in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

New products from well-known brands help drive demand for spirit-based RTDs
 Wine-based RTDs with good perspectives
 High prices limit demand for RTDs

PROSPECTS AND OPPORTUNITIES

RTDs still has room to grow
 New flavours and mixes should help to build interest and drive sales
 Non-alcoholic RTDs could find appeal among health conscious consumers

CATEGORY DATA

Table 49 - Sales of RTDs by Category: Total Volume 2018-2023
 Table 50 - Sales of RTDs by Category: Total Value 2018-2023
 Table 51 - Sales of RTDs by Category: % Total Volume Growth 2018-2023
 Table 52 - Sales of RTDs by Category: % Total Value Growth 2018-2023
 Table 53 - Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023
 Table 54 - Sales of RTDs by Off-trade vs On-trade: Value 2018-2023
 Table 55 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023
 Table 56 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023
 Table 57 - GBO Company Shares of RTDs: % Total Volume 2019-2023
 Table 58 - NBO Company Shares of RTDs: % Total Volume 2019-2023
 Table 59 - LBN Brand Shares of RTDs: % Total Volume 2020-2023
 Table 60 - Forecast Sales of RTDs by Category: Total Volume 2023-2028
 Table 61 - Forecast Sales of RTDs by Category: Total Value 2023-2028
 Table 62 - Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028
 Table 63 - Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

Spirits in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price rises hit sales of spirits with vodka one of the bigger victims
 Premiumisation seen in spirits while non-alcoholic options gather pace
 Stock Spirits Group acquires Polmos Bielsko-Biala

PROSPECTS AND OPPORTUNITIES

The category expected to evolve towards spirits with a lower alcohol content

Further acquisitions in spirits are expected

Non-alcoholic spirits still has strong growth potential as younger generations follow sober lifestyles

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

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

Wine in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wine sales decline as economic pressures take their toll

Sparkling wine a standout performer in a difficult year

NoLo trend benefiting from changes in consumer drinking habits

PROSPECTS AND OPPORTUNITIES

Great potential for wine in Poland

Non-alcoholic wine likely to continue expanding as demand grows

Producers demand changes in the regulation low-alcohol wine

CATEGORY DATA

Table 85 - Sales of Wine by Category: Total Volume 2018-2023

Table 86 - Sales of Wine by Category: Total Value 2018-2023

Table 87 - Sales of Wine by Category: % Total Volume Growth 2018-2023

Table 88 - Sales of Wine by Category: % Total Value Growth 2018-2023

Table 89 - Sales of Wine by Off-trade vs On-trade: Volume 2018-2023

Table 90 - Sales of Wine by Off-trade vs On-trade: Value 2018-2023

Table 91 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 92 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
Table 93 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023
Table 94 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2018-2023
Table 95 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023
Table 96 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2018-2023
Table 97 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 98 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 99 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2020-2023
Table 100 - GBO Company Shares of Champagne: % Total Volume 2019-2023
Table 101 - NBO Company Shares of Champagne: % Total Volume 2019-2023
Table 102 - LBN Brand Shares of Champagne: % Total Volume 2020-2023
Table 103 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 104 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 105 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2020-2023
Table 106 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 107 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 108 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2020-2023
Table 109 - GBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 110 - NBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 111 - LBN Brand Shares of Non-grape Wine: % Total Volume 2020-2023
Table 112 - Forecast Sales of Wine by Category: Total Volume 2023-2028
Table 113 - Forecast Sales of Wine by Category: Total Value 2023-2028
Table 114 - Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
Table 115 - Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/alcoholic-drinks-in-poland/report.