

# Alcoholic Drinks in Malaysia

June 2025

**Table of Contents** 

## Alcoholic Drinks in Malaysia

## **EXECUTIVE SUMMARY**

Alcoholic drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retail 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

## TAXATION AND DUTY LEVIES

## 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 2019-2024

# MARKET DATA

Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024

Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2019-2024

Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024

Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024

Table 6 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024

Table 7 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024

Table 8 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024

Table 9 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029

Table 10 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029

Table 11 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029

Table 12 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

# DISCLAIMER

# SOURCES

Summary 1 - Research Sources

## Beer in Malaysia

# KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Rising disposable incomes and tourist rebound drives growth in beer

Marketing campaigns often focus on bringing together music lovers and beer drinkers, with free sampling as the core strategy On-trade settings are popular for beer consumption, while hypermarkets lead the off-trade channel due to their price advantage

#### PROSPECTS AND OPPORTUNITIES

Economy and mid-priced lager to experience positive growth as premium lager loses traction

Craft beer accelerates the premiumisation trend

Low and non-alcoholic beer expected to see high growth from low base

#### CATEGORY BACKGROUND

Lager price band methodology

Summary 2 - Lager by Price Band 2024

#### **CATEGORY DATA**

Table 13 - Sales of Beer by Category: Total Volume 2019-2024

Table 14 - Sales of Beer by Category: Total Value 2019-2024

Table 15 - Sales of Beer by Category: % Total Volume Growth 2019-2024

Table 16 - Sales of Beer by Category: % Total Value Growth 2019-2024

Table 17 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024

Table 18 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024

Table 19 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 20 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024

Table 21 - Sales of Beer by Craft vs Standard 2019-2024

Table 22 - GBO Company Shares of Beer: % Total Volume 2020-2024

Table 23 - NBO Company Shares of Beer: % Total Volume 2020-2024

Table 24 - LBN Brand Shares of Beer: % Total Volume 2021-2024

Table 25 - Forecast Sales of Beer by Category: Total Volume 2024-2029

Table 26 - Forecast Sales of Beer by Category: Total Value 2024-2029

Table 27 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029

Table 28 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

# Cider/Perry in Malaysia

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Cider/perry loses appeal among Millenials and Gen Z

Key players capitalise on brand reputations and ongoing marketing efforts to boost volume share

Off-trade channel remains popular for cider/perry consumption

## PROSPECTS AND OPPORTUNITIES

Non-alcoholic cider is poised to experience strong growth

Immersive pop-ups and strategic collaborations to fuel cider/perry category growth

Influencer marketing drives greater consumer awareness in the cider category

## **CATEGORY DATA**

Table 29 - Sales of Cider/Perry: Total Volume 2019-2024

Table 30 - Sales of Cider/Perry: Total Value 2019-2024

Table 31 - Sales of Cider/Perry: % Total Volume Growth 2019-2024

Table 32 - Sales of Cider/Perry: % Total Value Growth 2019-2024

Table 33 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2024

Table 34 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2024

Table 35 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 36 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024

- Table 37 GBO Company Shares of Cider/Perry: % Total Volume 2020-2024
- Table 38 NBO Company Shares of Cider/Perry: % Total Volume 2020-2024
- Table 39 LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024
- Table 40 Forecast Sales of Cider/Perry: Total Volume 2024-2029
- Table 41 Forecast Sales of Cider/Perry: Total Value 2024-2029
- Table 42 Forecast Sales of Cider/Perry: % Total Volume Growth 2024-2029
- Table 43 Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

## Rtds in Malaysia

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

RTDs faces headwinds amidst shifting consumer preferences and competitive pressures

RTD brands struggle to scale amid stiff competition and low consumer awareness

Hypermarkets remain the leading channel for RTDs due to wider product availability

## PROSPECTS AND OPPORTUNITIES

Makgeolli-based RTD is gaining popularity amid Korean cultural influences and health-conscious trends

Volume sales set to decline as shift to low-ABV beverages gains traction

New product innovations to drive demand among younger adults

#### **CATEGORY DATA**

- Table 44 Sales of RTDs by Category: Total Volume 2019-2024
- Table 45 Sales of RTDs by Category: Total Value 2019-2024
- Table 46 Sales of RTDs by Category: % Total Volume Growth 2019-2024
- Table 47 Sales of RTDs by Category: % Total Value Growth 2019-2024
- Table 48 Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024
- Table 49 Sales of RTDs by Off-trade vs On-trade: Value 2019-2024
- Table 50 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 51 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 52 GBO Company Shares of RTDs: % Total Volume 2020-2024
- Table 53 NBO Company Shares of RTDs: % Total Volume 2020-2024
- Table 54 LBN Brand Shares of RTDs: % Total Volume 2021-2024
- Table 55 Forecast Sales of RTDs by Category: Total Volume 2024-2029
- Table 56 Forecast Sales of RTDs by Category: Total Value 2024-2029
- Table 57 Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029
- Table 58 Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

# Spirits in Malaysia

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Heightened focus on responsible drinking dampens spirits

International players hold strong position in spirits category

Small local grocers are preferred for quick purchases, while hypermarkets are commonly visited for purchasing spirits intended as gifts

#### PROSPECTS AND OPPORTUNITIES

Whiskies are poised to support spirits through cocktail culture and premiumisation

Immersive and experiential marketing will remain key strategy to drive consumer engagement and build emotional brand connections Cocktail culture in Malaysia is expected to drive future growth of spirits

#### CATEGORY BACKGROUND

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

#### Summary 3 - Benchmark Brands 2024

#### **CATEGORY DATA**

- Table 59 Sales of Spirits by Category: Total Volume 2019-2024
- Table 60 Sales of Spirits by Category: Total Value 2019-2024
- Table 61 Sales of Spirits by Category: % Total Volume Growth 2019-2024
- Table 62 Sales of Spirits by Category: % Total Value Growth 2019-2024
- Table 63 Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024
- Table 64 Sales of Spirits by Off-trade vs On-trade: Value 2019-2024
- Table 65 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 66 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 67 Sales of Dark Rum by Price Platform: % Total Volume 2019-2024
- Table 68 Sales of White Rum by Price Platform: % Total Volume 2019-2024
- Table 69 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024
- Table 70 Sales of English Gin by Price Platform: % Total Volume 2019-2024
- Table 71 Sales of Vodka by Price Platform: % Total Volume 2019-2024
- Table 72 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024
- Table 73 GBO Company Shares of Spirits: % Total Volume 2020-2024
- Table 74 NBO Company Shares of Spirits: % Total Volume 2020-2024
- Table 75 LBN Brand Shares of Spirits: % Total Volume 2021-2024
- Table 76 Forecast Sales of Spirits by Category: Total Volume 2024-2029
- Table 77 Forecast Sales of Spirits by Category: Total Value 2024-2029
- Table 78 Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029
- Table 79 Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

#### Wine in Malaysia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Static volume growth observed due to threat of substitues and lifestyle changes

Australian wine is increasingly popular due to strong publicity, promotions and wide availability

Retail channel exhibits dominance in the wine sector

## PROSPECTS AND OPPORTUNITIES

Cocktail culture to fuel growth of fortified wine and vermouth

Wine subscription and loyalty programmes anticipated to boost recurring wine sales and consumer engagement

Zero-alcohol wine poised for growth amid health and wellness trends

## **CATEGORY DATA**

- Table 80 Sales of Wine by Category: Total Volume 2019-2024
- Table 81 Sales of Wine by Category: Total Value 2019-2024
- Table 82 Sales of Wine by Category: % Total Volume Growth 2019-2024
- Table 83 Sales of Wine by Category: % Total Value Growth 2019-2024
- Table 84 Sales of Wine by Off-trade vs On-trade: Volume 2019-2024
- Table 85 Sales of Wine by Off-trade vs On-trade: Value 2019-2024
- Table 86 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 87 Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 88 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 89 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 90 Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 91 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 92 GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 93 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 94 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024

Table 95 - GBO Company Shares of Champagne: % Total Volume 2020-2024

Table 96 - NBO Company Shares of Champagne: % Total Volume 2020-2024

Table 97 - LBN Brand Shares of Champagne: % Total Volume 2021-2024

Table 98 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 99 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 100 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024

Table 101 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 102 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 103 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024

Table 104 - GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 105 - NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 106 - LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024

Table 107 - Forecast Sales of Wine by Category: Total Volume 2024-2029

Table 108 - Forecast Sales of Wine by Category: Total Value 2024-2029

Table 109 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029

Table 110 - Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

# 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 focusing 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-malaysia/report.