



Euromonitor  
International

# Alcoholic Drinks in Pakistan

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

## TAXATION AND DUTY LEVIES

Summary 1 - 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 2 - Research Sources

## Beer in Pakistan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Anti-smuggling measures give support to official sales  
Non-alcoholic beer rises in popularity among younger generations of adult age  
New entrants increase their presence, such as seen with Hui's expansion

#### PROSPECTS AND OPPORTUNITIES

Pricing plays a major role in beer  
Westernisation trends influence alcohol consumption patterns  
Dynamics between local players and imported brands

#### CATEGORY BACKGROUND

Lager price band methodology  
Summary 3 - 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 - 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 2019-2023  
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

## Spirits in Pakistan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Murree Brewery maintains its lead in spirits, thanks to strong distribution and ongoing innovation  
Availability of spirits through "wine shops" and even delivery services helps to boost sales  
Spirits enjoyed during social and celebration occasions, to demonstrate the affluence of the host

#### PROSPECTS AND OPPORTUNITIES

Rising consumption among the middle class, inspired by global trends  
Westernisation trends lead to evolving consumer perceptions  
Spirits set to remain popular in Pakistan

#### CATEGORY DATA

Table 33 - Sales of Spirits by Category: Total Volume 2018-2023  
Table 34 - Sales of Spirits by Category: Total Value 2018-2023  
Table 35 - Sales of Spirits by Category: % Total Volume Growth 2018-2023

Table 36 - Sales of Spirits by Category: % Total Value Growth 2018-2023

Table 37 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023

Table 38 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023

Table 39 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 40 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023

Table 41 - GBO Company Shares of Spirits: % Total Volume 2019-2023

Table 42 - NBO Company Shares of Spirits: % Total Volume 2019-2023

Table 43 - LBN Brand Shares of Spirits: % Total Volume 2019-2023

Table 44 - Forecast Sales of Spirits by Category: Total Volume 2023-2028

Table 45 - Forecast Sales of Spirits by Category: Total Value 2023-2028

Table 46 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028

Table 47 - Forecast Sales of Spirits 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-pakistan/report](http://www.euromonitor.com/alcoholic-drinks-in-pakistan/report).