

Alcoholic Drinks in Uzbekistan

June 2024

Table of Contents

Alcoholic Drinks in Uzbekistan

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

KEYNEW 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 Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Production growth amidst consumption decline Economy priced beers and PET bottles dominate Domestic producers and international contenders

PROSPECTS AND OPPORTUNITIES

Gradual transition to positive dynamics Limited growth of flavoured lagers Advancements in beer labelling initiatives

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - 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 - GBO Company Shares of Beer: % Total Volume 2019-2023

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

Table 27 - LBN Brand Shares of Beer: % Total Volume 2019-2023

Table 28 - Forecast Sales of Beer by Category: Total Volume 2023-2028

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

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

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

Spirits in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Vodka faces decline amidst growing grey market Whiskey gains popularity through cocktail culture Local players dominate with innovations

PROSPECTS AND OPPORTUNITIES

Rise of modern spirits in the on-trade channel Innovation in flavoured vodkas Emergence of gin and new spirits

CATEGORY DATA

Table 32 - Sales of Spirits by Category: Total Volume 2018-2023

Table 33 - Sales of Spirits by Category: Total Value 2018-2023

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

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

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

Wine in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Steady growth and evolving consumer preferences

Expansion in the foodservice channel and experiential marketing

Growth of sparkling wine and competition

PROSPECTS AND OPPORTUNITIES

Continued growth in still and sparkling wines Innovations and new product developments Improved regulatory environment and growth

CATEGORY DATA

- Table 47 Sales of Wine by Category: Total Volume 2018-2023
- Table 48 Sales of Wine by Category: Total Value 2018-2023
- Table 49 Sales of Wine by Category: % Total Volume Growth 2018-2023
- Table 50 Sales of Wine by Category: % Total Value Growth 2018-2023
- Table 51 Sales of Wine by Off-trade vs On-trade: Volume 2018-2023
- Table 52 Sales of Wine by Off-trade vs On-trade: Value 2018-2023
- Table 53 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 54 Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 55 Forecast Sales of Wine by Category: Total Volume 2023-2028
- Table 56 Forecast Sales of Wine by Category: Total Value 2023-2028
- Table 57 Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
- Table 58 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-uzbekistan/report.