

Alcoholic Drinks in Norway

June 2024

Table of Contents

Alcoholic Drinks in Norway

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

Table 1 - Number of On-trade Establishments by Type 2018-2023

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 2 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

MARKET DATA

- Table 3 Sales of Alcoholic Drinks by Category: Total Volume 2018-2023
- Table 4 Sales of Alcoholic Drinks by Category: Total Value 2018-2023
- Table 5 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023
- Table 6 Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023
- Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023
- Table 10 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023
- Table 11 GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023
- Table 12 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023
- Table 13 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023
- Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028
- Table 15 Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028
- Table 16 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028
- Table 17 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Beer in Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shift to the on-trade channel continues in 2023

A tough year for small-scale breweries

Strong drop in imported lager volume sales while non-alcoholic beer continues to gain category share

PROSPECTS AND OPPORTUNITIES

A more concentrated landscape as larger players are better placed to absorb tough market conditions

Anticipated ongoing increases in prices to cover rising costs

No-lo trend to drive non/low alcohol consumption

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2023

Table 18 - Number of Breweries 2018-2023

CATEGORY DATA

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

Table 20 - Sales of Beer by Category: Total Value 2018-2023

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

Table 22 - Sales of Beer by Category: % Total Value Growth 2018-2023

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

Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2018-2023

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

Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023

Table 27 - Sales of Beer by Craft vs Standard 2018-2023

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

Table 29 - NBO Company Shares of Beer: % Total Volume 2019-2023

Table 30 - LBN Brand Shares of Beer: % Total Volume 2020-2023

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

Table 32 - Forecast Sales of Beer by Category: Total Value 2023-2028

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

Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

Cider/Perry in Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cross-border trade and competition from RTDs hinder the performance of cider/perry

Growing range of local products boosts Vinmonopolet's offer

On-trade stabilisation

PROSPECTS AND OPPORTUNITIES

Positive outlook for cider

Cider enjoys interest from young consumers of legal drinking age

More product variety going forward

CATEGORY DATA

Table 35 - Sales of Cider/Perry: Total Volume 2018-2023

- Table 36 Sales of Cider/Perry: Total Value 2018-2023
- Table 37 Sales of Cider/Perry: % Total Volume Growth 2018-2023
- Table 38 Sales of Cider/Perry: % Total Value Growth 2018-2023
- Table 39 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023
- Table 40 Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023
- Table 41 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 42 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 43 GBO Company Shares of Cider/Perry: % Total Volume 2019-2023
- Table 44 NBO Company Shares of Cider/Perry: % Total Volume 2019-2023
- Table 45 LBN Brand Shares of Cider/Perry: % Total Volume 2020-2023
- Table 46 Forecast Sales of Cider/Perry: Total Volume 2023-2028
- Table 47 Forecast Sales of Cider/Perry: Total Value 2023-2028
- Table 48 Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028
- Table 49 Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

Rtds in Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

RTDs continues to gain momentum

New selections enter the fray

Wine-based RTDs leverage lower prices and a growing offer

PROSPECTS AND OPPORTUNITIES

RTDs to continue on growth trajectory

Use of aquavit in cocktails

New products and new players to enter the fray

CATEGORY DATA

- Table 50 Sales of RTDs by Category: Total Volume 2018-2023
- Table 51 Sales of RTDs by Category: Total Value 2018-2023
- Table 52 Sales of RTDs by Category: % Total Volume Growth 2018-2023
- Table 53 Sales of RTDs by Category: % Total Value Growth 2018-2023
- Table 54 Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023
- Table 55 Sales of RTDs by Off-trade vs On-trade: Value 2018-2023
- Table 56 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 57 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 58 GBO Company Shares of RTDs: % Total Volume 2019-2023
- Table 59 NBO Company Shares of RTDs: % Total Volume 2019-2023
- Table 60 LBN Brand Shares of RTDs: % Total Volume 2020-2023
- Table 61 Forecast Sales of RTDs by Category: Total Volume 2023-2028
- Table 62 Forecast Sales of RTDs by Category: Total Value 2023-2028
- Table 63 Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028
- Table 64 Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

Spirits in Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Spirits experiences stabilisation in demand

More focus on environmentally-friendly packaging

Non-alcoholic spirits enjoys fast-rising demand

PROSPECTS AND OPPORTUNITIES

Cautious consumer spending behaviour to continue amid higher prices

No-lo trend to gain momentum in spirits

Aquavit is gaining an appeal

CATEGORY BACKGROUND

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

Summary 4 - Benchmark Brands 2023

CATEGORY DATA

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

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

Wine in Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wine volume sales continue to stabilise in the post-pandemic period

Shift to lower calorie, "lighter" wines

Vinmonopolet increases call for sustainable packaging

PROSPECTS AND OPPORTUNITIES

Cautious consumer spending and high prices to dampen demand

No-lo trend to develop and grow

Shift away from still red wine to continue

CATEGORY DATA

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

Table 87 - Sales of Wine by Category: Total Value 2018-2023

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

Table 89 - Sales of Wine by Category: % Total Value Growth 2018-2023

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

Table 91 - Sales of Wine by Off-trade vs On-trade: Value 2018-2023

- Table 92 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 93 Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 94 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 95 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 96 Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 97 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 98 GBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
- Table 99 NBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
- Table 100 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2020-2023
- Table 101 GBO Company Shares of Champagne: % Total Volume 2019-2023
- Table 102 NBO Company Shares of Champagne: % Total Volume 2019-2023
- Table 103 LBN Brand Shares of Champagne: % Total Volume 2020-2023
- Table 104 GBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
- Table 105 NBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
- Table 106 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2020-2023
- Table 107 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
- Table 108 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
- Table 109 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2020-2023
- Table 110 GBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
- Table 111 NBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
- Table 112 LBN Brand Shares of Non-grape Wine: % Total Volume 2020-2023
- Table 113 Forecast Sales of Wine by Category: Total Volume 2023-2028
- Table 114 Forecast Sales of Wine by Category: Total Value 2023-2028
- Table 115 Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
- Table 116 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-norway/report.