

Alcoholic Drinks in Germany

July 2024

Table of Contents

Alcoholic Drinks in Germany

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 Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Beer volume sales stagnate while price pressures create challenges for brewers Non alcoholic beer remains a bright spot as most other options face decline Largest players launch aggressive pricing strategies

PROSPECTS AND OPPORTUNITIES

Drop in consumption due to moderation trend will fuel growth of non alcohol beer Intense competition from RTDs set to hit flavoured/mixed lager

Small brewers set to be hit by high costs but resilience expected for craft beer

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 Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cider/perry continues to build its consumer base but remains a seasonal product Flavour innovation, natural ingredients and authenticity help establish category International brands remain dominant

PROSPECTS AND OPPORTUNITIES

Growth potential remains solid despite competition from other types of drinks Versatility of cider/perry set to help target a wider audience Premium attributes offer various differentiation strategies

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 Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Steady growth trajectory for spirit-based RTDs, in contrast to wine-based options Abundance of new products with innovative recipes offered by spirit-based RTDs Private label and leading player make gains

PROSPECTS AND OPPORTUNITIES

Co-branding with soft drinks may help RTDs target a broader audience Healthier positioning set to become increasingly prevalent Premiumisation strategies to be increasingly explored by RTD producers

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 Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Resilience and continual premiumisation in the face of deep-seated challenges Contrasting performances across category, often determined by price positioning Diageo claims top spot in spirits, while private label makes gains

PROSPECTS AND OPPORTUNITIES

Innovative fruit-based recipes and premium positioning to maintain consumer base Growing interest in whiskies from emerging countries of origin

Growth opportunities abound in non alcoholic spirits through brand extensions

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 Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Off-trade volume declines across much of wine as consumers return to on-trade

Sparkling wine resilient while non alcoholic wine makes further gains

Private label leads overall wine, while top brand has a low price positioning

PROSPECTS AND OPPORTUNITIES

Challenges to attract young adults to wine but growth opportunities remain

Premium attributes and sustainability give advantage to German producers

Targeting new consumption occasions to broaden target audience

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-germany/report.