



# Alcoholic Drinks in Ecuador

June 2025

Table of Contents

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Social and economic challenges lead to fall in volume sales of beer

Cervecería Nacional continues to dominate

Small local grocers continue to drive sales

## PROSPECTS AND OPPORTUNITIES

An improving picture over the forecast period

Low alcohol beer loses relevance

A shift towards higher margins

## 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

## Rtds in Ecuador

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Decline in volume sales, due to several factors

Cubata gains significant traction over review period

E-commerce gains most volume share

## PROSPECTS AND OPPORTUNITIES

Healthy volume growth over forecast period

Variety in terms of size and packaging formats ensures wide consumer base

Constant launches keep consumers engaged

## CATEGORY DATA

Table 29 - Sales of RTDs by Category: Total Volume 2019-2024

Table 30 - Sales of RTDs by Category: Total Value 2019-2024

Table 31 - Sales of RTDs by Category: % Total Volume Growth 2019-2024

Table 32 - Sales of RTDs by Category: % Total Value Growth 2019-2024

Table 33 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024

Table 34 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024

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

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

Table 37 - GBO Company Shares of RTDs: % Total Volume 2020-2024

Table 38 - NBO Company Shares of RTDs: % Total Volume 2020-2024

Table 39 - LBN Brand Shares of RTDs: % Total Volume 2021-2024

Table 40 - Forecast Sales of RTDs by Category: Total Volume 2024-2029

Table 41 - Forecast Sales of RTDs by Category: Total Value 2024-2029

Table 42 - Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029

Table 43 - Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

Spirits in Ecuador

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Socio-economic challenges see volume sales fall
- Zhumir brand continues to lead spirits
- Discounters gain most volume share

PROSPECTS AND OPPORTUNITIES

- Positive outlook over forecast period
- Adding flavours and reducing alcohol content key areas of focus
- Affordable premium key driver of sales

CATEGORY BACKGROUND

- Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology
- Summary 3 - Benchmark Brands 2024

CATEGORY DATA

Table 44 - Sales of Spirits by Category: Total Volume 2019-2024

Table 45 - Sales of Spirits by Category: Total Value 2019-2024

Table 46 - Sales of Spirits by Category: % Total Volume Growth 2019-2024

Table 47 - Sales of Spirits by Category: % Total Value Growth 2019-2024

Table 48 - Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024

Table 49 - Sales of Spirits by Off-trade vs On-trade: Value 2019-2024

Table 50 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 51 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024

Table 52 - Sales of Dark Rum by Price Platform: % Total Volume 2019-2024

Table 53 - Sales of White Rum by Price Platform: % Total Volume 2019-2024

Table 54 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024

Table 55 - Sales of English Gin by Price Platform: % Total Volume 2019-2024

Table 56 - Sales of Vodka by Price Platform: % Total Volume 2019-2024

Table 57 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024

Table 58 - GBO Company Shares of Spirits: % Total Volume 2020-2024

Table 59 - NBO Company Shares of Spirits: % Total Volume 2020-2024

Table 60 - LBN Brand Shares of Spirits: % Total Volume 2021-2024

Table 61 - Forecast Sales of Spirits by Category: Total Volume 2024-2029

Table 62 - Forecast Sales of Spirits by Category: Total Value 2024-2029

Table 63 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029

Table 64 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

Wine in Ecuador

KEY DATA FINDINGS

2024 DEVELOPMENTS

Volume sales fall by a quarter  
Packaging used as key marketing tool  
Small local grocers lose most volume share

## PROSPECTS AND OPPORTUNITIES

More positive picture over forecast period  
Opportunity for smaller distributors to make a mark  
Need to attract younger generations

## CATEGORY DATA

Table 65 - Sales of Wine by Category: Total Volume 2019-2024  
Table 66 - Sales of Wine by Category: Total Value 2019-2024  
Table 67 - Sales of Wine by Category: % Total Volume Growth 2019-2024  
Table 68 - Sales of Wine by Category: % Total Value Growth 2019-2024  
Table 69 - Sales of Wine by Off-trade vs On-trade: Volume 2019-2024  
Table 70 - Sales of Wine by Off-trade vs On-trade: Value 2019-2024  
Table 71 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024  
Table 72 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024  
Table 73 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024  
Table 74 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024  
Table 75 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024  
Table 76 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024  
Table 77 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024  
Table 78 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024  
Table 79 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024  
Table 80 - GBO Company Shares of Champagne: % Total Volume 2020-2024  
Table 81 - NBO Company Shares of Champagne: % Total Volume 2020-2024  
Table 82 - LBN Brand Shares of Champagne: % Total Volume 2021-2024  
Table 83 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024  
Table 84 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024  
Table 85 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024  
Table 86 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024  
Table 87 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024  
Table 88 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024  
Table 89 - GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024  
Table 90 - NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024  
Table 91 - LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024  
Table 92 - Forecast Sales of Wine by Category: Total Volume 2024-2029  
Table 93 - Forecast Sales of Wine by Category: Total Value 2024-2029  
Table 94 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029  
Table 95 - 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 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-ecuador/report](http://www.euromonitor.com/alcoholic-drinks-in-ecuador/report).