

# **Alcoholic Drinks in Mexico**

June 2024

**Table of Contents** 

## Alcoholic Drinks in Mexico

## 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 Summary 1 - Number of On-trade Establishments by Type 2017-2023

#### TAXATION AND DUTY LEVIES

Table 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 by Format: % Off-trade Value 2018-2023
Table 12 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023
Table 13 - Distribution 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 Volume Growth 2023-2028
Table 17 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

#### DISCLAIMER

SOURCES

#### Summary 2 - Research Sources

## Beer in Mexico

**KEY DATA FINDINGS** 

#### 2023 DEVELOPMENTS

Sales of beer decrease as consumption sees normalisation Huge investments in production capacity benefit domestic premium lager, to the detriment of imported premium lager Sales of non alcoholic beer rise, capturing young adults and female consumers

#### PROSPECTS AND OPPORTUNITIES

Sales of beer expected return to growth, but will be challenged by water scarcity Flavoured/mixed lager may grow further due to products with a Mexican flavour Non alcoholic beer set to expand due to consumers' pursuit of a healthier lifestyle

#### 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 Mexico

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Cider shows low growth, partly driven by affordability Consumption is concentrated in the Christmas season and New Year's Eve Healthier lifestyles drive further growth for non alcoholic cider, from a low base

#### PROSPECTS AND OPPORTUNITIES

Strongbow, Sidra Posdata, and artisanal cider might offer an opportunity for on-trade development Concentration, and focus on other categories may restrain the further development of cider/perry Still and sparkling wine may also threaten the further growth of cider/perry

## 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 Volume Growth 2023-2028 Table 48 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028 Table 49 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028 Table 49 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028 Table 49 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028 Table 49 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028

#### Rtds in Mexico

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Sales of RTDs continue escalating, driven by innovation and high advertising budgets Sales of hard seltzers, which are perceived by consumers to be "healthier", continue growing Caribe Cooler and Topo Chico lead sales of hard seltzers

#### PROSPECTS AND OPPORTUNITIES

Sales of RTDs projected to grow through convenience stores which provide cold storage Retail e-commerce expected to gain share in key urban areas Cannabis RTDs enter the market with the aim of widening the consumer base

## 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 Volume Growth 2023-2028 Table 63 - Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028 Table 64 - Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028

#### Spirits in Mexico

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Sales of spirits decline, following a reduction in celebrations and social gatherings Premium higher-quality options continue driving value growth Casa Cuervo leads spirits, with a focus on Mexican spirits

## PROSPECTS AND OPPORTUNITIES

Maturity of tequila (and mezcal) may leave space for the development of whiskies, vodka, and English gin Premium offerings will play a major role in the coming years Non alcoholic spirits yet to be explored by consumers

## 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 Mexico

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Wine consumption posts a third consecutive year of growth, fuelled by local production Climate change hampers sales of imported wines in Mexico Vermouth sees good results as it captures wine and beer consumers

## PROSPECTS AND OPPORTUNITIES

Wine production's vulnerability to the effects of climate change may contribute to a slowdown in growth in the coming years Water shortages may be an obstacle to the development of local wines Online sales set to gain ground in premium wine offerings

### 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-mexico/report.