

Alcoholic Drinks in China

June 2024

Table of Contents

Alcoholic Drinks in China

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

Summary 2 - 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 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

Beer in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slight rebound of volume sales, and a trend towards high quality beer

Standard lager sees high concentration, while wheat beer faces increasing competition due to more players

Emerging online channels benefit off-trade sales

PROSPECTS AND OPPORTUNITIES

On-trade sales have further potential, supported by the rise of beer bars/pubs

Craft beer standards set to elevate product quality and drive growth

Drinking scenarios for non alcoholic beer need to be further explored to drive demand

CATEGORY BACKGROUND

Lager price band methodology

Summary 4 - Lager by Price Band 2023

Table 17 - Number of Breweries 2018-2023

CATEGORY DATA

Table 18 - Sales of Beer by Category: Total Volume 2018-2023

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

Table 20 - Sales of Beer by Category: % Total Volume Growth 2018-2023

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

Table 22 - Sales of Beer by Off-trade vs On-trade: Volume 2018-2023

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

Table 24 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023

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

Table 26 - Sales of Beer by Craft vs Standard 2018-2023

Table 27 - GBO Company Shares of Beer: % Total Volume 2019-2023

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

Table 29 - LBN Brand Shares of Beer: % Total Volume 2020-2023

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

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

Table 32 - Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028

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

Cider/Perry in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cider/perry maintains high growth in 2023, benefiting from the popularity of low alcohol beverages

Somersby experiences rapid growth and takes the leading position in cider/perry

PROSPECTS AND OPPORTUNITIES

Cider/perry is expected to maintain its high growth rates, although the category faces significant competitive pressure Female drinkers are a high-potential demographic for cider/perry

CATEGORY DATA

Table 34 - Sales of Cider/Perry: Total Volume 2018-2023

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

Table 36 - Sales of Cider/Perry: % Total Volume Growth 2018-2023

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

Rtds in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Driven by younger consumers of legal purchasing age, RTDs in China maintains robust growth More active marketing campaigns bring major brands closer to consumers

PROSPECTS AND OPPORTUNITIES

RTDs expected to maintain growth in the forecast period, with product innovation being a key growth driver Live-streaming e-commerce has become an important channel of focus for brands in RTDs

CATEGORY DATA

- Table 49 Sales of RTDs by Category: Total Volume 2018-2023
- Table 50 Sales of RTDs by Category: Total Value 2018-2023
- Table 51 Sales of RTDs by Category: % Total Volume Growth 2018-2023
- Table 52 Sales of RTDs by Category: % Total Value Growth 2018-2023
- Table 53 Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023
- Table 54 Sales of RTDs by Off-trade vs On-trade: Value 2018-2023
- Table 55 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 56 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 57 GBO Company Shares of RTDs: % Total Volume 2019-2023
- Table 58 NBO Company Shares of RTDs: % Total Volume 2019-2023
- Table 59 LBN Brand Shares of RTDs: % Total Volume 2020-2023
- Table 60 Forecast Sales of RTDs by Category: Total Volume 2023-2028
- Table 61 Forecast Sales of RTDs by Category: Total Value 2023-2028
- Table 62 Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028
- Table 63 Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

Spirits in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increases in unit prices of spirits drive up total value sales, but total volumes see continued decline

The sales performance of Chinese spirits is poor, with the main pressure coming from significant inventory build-up amongst distributors Growth of Japanese whisky begins to slow in China, with the previously enthusiastic market gradually cooling off

PROSPECTS AND OPPORTUNITIES

Chinese whisky distilleries are beginning to emerge, with an increasing number of locally produced brands set to make their debut Premiumisation may become a more common phenomenon in spirits in the future Sales of international spirits in the on-trade channel resume growth, and this channel will remain significant for international spirits

CATEGORY BACKGROUND

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

Summary 5 - Benchmark Brands 2023

CATEGORY DATA

- Table 64 Sales of Spirits by Category: Total Volume 2018-2023
- Table 65 Sales of Spirits by Category: Total Value 2018-2023
- Table 66 Sales of Spirits by Category: % Total Volume Growth 2018-2023
- Table 67 Sales of Spirits by Category: % Total Value Growth 2018-2023
- Table 68 Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023
- Table 69 Sales of Spirits by Off-trade vs On-trade: Value 2018-2023
- Table 70 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 71 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 72 Sales of Dark Rum by Price Platform: % Total Volume 2018-2023
- Table 73 Sales of White Rum by Price Platform: % Total Volume 2018-2023
- Table 74 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023
- Table 75 Sales of English Gin by Price Platform: % Total Volume 2018-2023
- Table 76 Sales of Vodka by Price Platform: % Total Volume 2018-2023
- Table 77 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023
- Table 78 GBO Company Shares of Spirits: % Total Volume 2019-2023
- Table 79 NBO Company Shares of Spirits: % Total Volume 2019-2023
- Table 80 LBN Brand Shares of Spirits: % Total Volume 2020-2023
- Table 81 Forecast Sales of Spirits by Category: Total Volume 2023-2028
- Table 82 Forecast Sales of Spirits by Category: Total Value 2023-2028
- Table 83 Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028
- Table 84 Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

Wine in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

In 2023, wine continues to decline in both total volume and current value terms, primarily due to limited consumption occasions Sparkling wine bucks the overall trend, with strong growth in both total volume and current value terms in 2023 Sake faces a downturn, with total volume sales experiencing a slight decline

PROSPECTS AND OPPORTUNITIES

Traditional Chinese rice wine set to continue declining, but premium Chinese rice wine likely to gain more favour from consumers In the future, high-quality domestic wines expected to emerge in the market

CATEGORY DATA

- Table 85 Sales of Wine by Category: Total Volume 2018-2023
- Table 86 Sales of Wine by Category: Total Value 2018-2023
- Table 87 Sales of Wine by Category: % Total Volume Growth 2018-2023
- Table 88 Sales of Wine by Category: % Total Value Growth 2018-2023
- Table 89 Sales of Wine by Off-trade vs On-trade: Volume 2018-2023
- Table 90 Sales of Wine by Off-trade vs On-trade: Value 2018-2023
- Table 91 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 92 Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 93 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 94 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 95 Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023

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