

Alcoholic Drinks in Guatemala

June 2024

Table of Contents

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

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 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

Summary 2 - Research Sources

Beer in Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Moderate volume growth in 2023
Continued growth of low-alcohol offerings
Significant hikes in packaging costs leads to price rises

PROSPECTS AND OPPORTUNITIES

Craft beer an emerging segment
Imported premium beers gain value share
Small local grocers remain a priority for beer players

CATEGORY BACKGROUND

Lager price band methodology
Summary 3 - 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 - GBO Company Shares of Beer: % Total Volume 2019-2023
Table 27 - NBO Company Shares of Beer: % Total Volume 2019-2023
Table 28 - LBN Brand Shares of Beer: % Total Volume 2019-2023
Table 29 - Forecast Sales of Beer by Category: Total Volume 2023-2028
Table 30 - Forecast Sales of Beer by Category: Total Value 2023-2028
Table 31 - Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028
Table 32 - Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

Cider/Perry in Guatemala

2023 DEVELOPMENTS

Cider/perry remains a negligible presence in Guatemala
Recent launch of Fun Wine, with a “better for you” positioning
Awareness remains low

PROSPECTS AND OPPORTUNITIES

Limited growth projected for cider/perry
Cider/perry faces serious competition from RTDs

Rtds in Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continuing healthy volume growth
Affordability and convenience of RTDs widens consumer base
Marketing targeted at younger consumers

PROSPECTS AND OPPORTUNITIES

Players look to increase volume sales through on-trade
RTDs serve as initial introduction for younger consumers to spirits
Further offerings reflecting local tastes

CATEGORY DATA

Table 33 - Sales of RTDs by Category: Total Volume 2018-2023
Table 34 - Sales of RTDs by Category: Total Value 2018-2023
Table 35 - Sales of RTDs by Category: % Total Volume Growth 2018-2023
Table 36 - Sales of RTDs by Category: % Total Value Growth 2018-2023
Table 37 - Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023
Table 38 - Sales of RTDs by Off-trade vs On-trade: Value 2018-2023
Table 39 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 40 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023
Table 41 - GBO Company Shares of RTDs: % Total Volume 2019-2023
Table 42 - NBO Company Shares of RTDs: % Total Volume 2019-2023
Table 43 - LBN Brand Shares of RTDs: % Total Volume 2019-2023
Table 44 - Forecast Sales of RTDs by Category: Total Volume 2023-2028
Table 45 - Forecast Sales of RTDs by Category: Total Value 2023-2028
Table 46 - Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028
Table 47 - Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

Spirits in Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Moderate volume growth, in spite of price rises
Botrán launches non-alcoholic rum
Tequila on the rise

PROSPECTS AND OPPORTUNITIES

Whiskies continues on positive growth trajectory
Growth slows for e-commerce
Industrias Licoreras de Guatemala continues to dominate

CATEGORY DATA

Table 48 - Sales of Spirits by Category: Total Volume 2018-2023
Table 49 - Sales of Spirits by Category: Total Value 2018-2023
Table 50 - Sales of Spirits by Category: % Total Volume Growth 2018-2023
Table 51 - Sales of Spirits by Category: % Total Value Growth 2018-2023
Table 52 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023
Table 53 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023
Table 54 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 55 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023
Table 56 - GBO Company Shares of Spirits: % Total Volume 2019-2023
Table 57 - NBO Company Shares of Spirits: % Total Volume 2019-2023
Table 58 - LBN Brand Shares of Spirits: % Total Volume 2019-2023
Table 59 - Forecast Sales of Spirits by Category: Total Volume 2023-2028
Table 60 - Forecast Sales of Spirits by Category: Total Value 2023-2028
Table 61 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028
Table 62 - Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

KEY DATA FINDINGS

2023 DEVELOPMENTS

Buoyant volume growth in 2023
Competitive landscape highly fragmented
Specialist wine shops popular, though losing volume share to supermarkets

PROSPECTS AND OPPORTUNITIES

Further modest volume growth over forecast period
Spanish wines make gains and organic emerging segment
Importers look to widen distribution

CATEGORY DATA

Table 63 - Sales of Wine by Category: Total Volume 2018-2023
Table 64 - Sales of Wine by Category: Total Value 2018-2023
Table 65 - Sales of Wine by Category: % Total Volume Growth 2018-2023
Table 66 - Sales of Wine by Category: % Total Value Growth 2018-2023
Table 67 - Sales of Wine by Off-trade vs On-trade: Volume 2018-2023
Table 68 - Sales of Wine by Off-trade vs On-trade: Value 2018-2023
Table 69 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 70 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
Table 71 - Forecast Sales of Wine by Category: Total Volume 2023-2028
Table 72 - Forecast Sales of Wine by Category: Total Value 2023-2028
Table 73 - Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
Table 74 - 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-guatemala/report.