



Alcoholic Drinks in Australia

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

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 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024
- Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024
- Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024
- Table 9 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024
- Table 10 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024
- Table 11 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024
- Table 12 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029
- Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029
- Table 14 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029
- Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Craft beer facing hardship due to inflationary pressures

Asahi's Carlton & United Breweries continues to evolve their offerings to remain the largest brand in Beer

On-trade sales of beer is showing signs of recovery

PROSPECTS AND OPPORTUNITIES

Non alcoholic beer set to gain ground as Australian drinking habits evolve

AI is set to be a pivotal tool for Australian breweries

Health and wellness trends likely to shape innovation in beer

CATEGORY BACKGROUND

Lager price band methodology

Summary 2 - Lager by Price Band 2024

CATEGORY DATA

Table 16 - Sales of Beer by Category: Total Volume 2019-2024

Table 17 - Sales of Beer by Category: Total Value 2019-2024

Table 18 - Sales of Beer by Category: % Total Volume Growth 2019-2024

Table 19 - Sales of Beer by Category: % Total Value Growth 2019-2024

Table 20 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024

Table 21 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024

Table 22 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 23 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024

Table 24 - Sales of Beer by Craft vs Standard 2019-2024

Table 25 - GBO Company Shares of Beer: % Total Volume 2020-2024

Table 26 - NBO Company Shares of Beer: % Total Volume 2020-2024

Table 27 - LBN Brand Shares of Beer: % Total Volume 2021-2024

Table 28 - Forecast Sales of Beer by Category: Total Volume 2024-2029

Table 29 - Forecast Sales of Beer by Category: Total Value 2024-2029

Table 30 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029

Table 31 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

Cider/Perry in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cider/perry shows modest growth despite competition from RTDs increases

CUB holds the majority market share in Australian Cider and Perry

Physical stores are undergoing

PROSPECTS AND OPPORTUNITIES

A brighter outlook for cider/perry as players respond to changing market demands

Locally produced cider presents potential growth opportunities

Growth expected in craft cider/perry and new non-alcoholic options

CATEGORY DATA

Table 32 - Sales of Cider/Perry: Total Volume 2019-2024

Table 33 - Sales of Cider/Perry: Total Value 2019-2024

Table 34 - Sales of Cider/Perry: % Total Volume Growth 2019-2024

Table 35 - Sales of Cider/Perry: % Total Value Growth 2019-2024

Table 36 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2024

Table 37 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2024

Table 38 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024

Table 40 - GBO Company Shares of Cider/Perry: % Total Volume 2020-2024

Table 41 - NBO Company Shares of Cider/Perry: % Total Volume 2020-2024

Table 42 - LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024

Table 43 - Forecast Sales of Cider/Perry: Total Volume 2024-2029

Table 44 - Forecast Sales of Cider/Perry: Total Value 2024-2029

Table 45 - Forecast Sales of Cider/Perry: % Total Volume Growth 2024-2029

Table 46 - Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

Rtds in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales of RTDs lose momentum as consumers face mounting financial pressures

Suntory strengthens its leadership with Asahi hot on its heels

Retail landscape evolving in line with shifting trends

PROSPECTS AND OPPORTUNITIES

Bright outlook for RTDs as players tap into evolving trends

Non alcoholic RTDs expected to gain momentum

Sustaining growth through inclusive and functional offerings

CATEGORY DATA

Table 47 - Sales of RTDs by Category: Total Volume 2019-2024

Table 48 - Sales of RTDs by Category: Total Value 2019-2024

Table 49 - Sales of RTDs by Category: % Total Volume Growth 2019-2024

Table 50 - Sales of RTDs by Category: % Total Value Growth 2019-2024

Table 51 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024

Table 52 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024

Table 53 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 54 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024

Table 55 - GBO Company Shares of RTDs: % Total Volume 2020-2024

Table 56 - NBO Company Shares of RTDs: % Total Volume 2020-2024

Table 57 - LBN Brand Shares of RTDs: % Total Volume 2021-2024

Table 58 - Forecast Sales of RTDs by Category: Total Volume 2024-2029

Table 59 - Forecast Sales of RTDs by Category: Total Value 2024-2029

Table 60 - Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029

Table 61 - Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

Spirits in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Tequila (and mezcal) thriving

Diageo continues to lead but faces increasing competition

Food/drink/tobacco specialists continue to dominate sales of spirits

PROSPECTS AND OPPORTUNITIES

Increase in excise could put a dent in sales of spirits

Opportunities exist for low alcohol and non alcoholic spirits

Players expected to explore new ways to attract drinkers

CATEGORY BACKGROUND

CATEGORY DATA

Table 62 - Sales of Spirits by Category: Total Volume 2019-2024

Table 63 - Sales of Spirits by Category: Total Value 2019-2024

Table 64 - Sales of Spirits by Category: % Total Volume Growth 2019-2024

Table 65 - Sales of Spirits by Category: % Total Value Growth 2019-2024

Table 66 - Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024

Table 67 - Sales of Spirits by Off-trade vs On-trade: Value 2019-2024

Table 68 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 69 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024

Table 70 - Sales of Dark Rum by Price Platform: % Total Volume 2019-2024

Table 71 - Sales of White Rum by Price Platform: % Total Volume 2019-2024

Table 72 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024

Table 73 - Sales of English Gin by Price Platform: % Total Volume 2019-2024

Table 74 - Sales of Vodka by Price Platform: % Total Volume 2019-2024

Table 75 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024

Table 76 - GBO Company Shares of Spirits: % Total Volume 2020-2024

Table 77 - NBO Company Shares of Spirits: % Total Volume 2020-2024

Table 78 - LBN Brand Shares of Spirits: % Total Volume 2021-2024

Table 79 - Forecast Sales of Spirits by Category: Total Volume 2024-2029

Table 80 - Forecast Sales of Spirits by Category: Total Value 2024-2029

Table 81 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029

Table 82 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

Wine in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Adapting to the health and wellness trend is key if wine is to thrive

Surge in demand for spritz cocktails behind innovation in sparkling wine

Food/drink/tobacco specialists dominate sales but e-commerce picks up share

PROSPECTS AND OPPORTUNITIES

Innovation could be key to maintaining demand for wine

Opportunity for wine to be a drink of occasion with premium offerings

Technological advancements look to shape how wine is manufactured

CATEGORY DATA

Table 83 - Sales of Wine by Category: Total Volume 2019-2024

Table 84 - Sales of Wine by Category: Total Value 2019-2024

Table 85 - Sales of Wine by Category: % Total Volume Growth 2019-2024

Table 86 - Sales of Wine by Category: % Total Value Growth 2019-2024

Table 87 - Sales of Wine by Off-trade vs On-trade: Volume 2019-2024

Table 88 - Sales of Wine by Off-trade vs On-trade: Value 2019-2024

Table 89 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 90 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024

Table 91 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024

Table 92 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024

Table 93 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024

Table 94 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024

Table 95 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 96 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 97 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024

Table 98 - GBO Company Shares of Champagne: % Total Volume 2020-2024

Table 99 - NBO Company Shares of Champagne: % Total Volume 2020-2024

Table 100 - LBN Brand Shares of Champagne: % Total Volume 2021-2024

Table 101 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 102 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 103 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024

Table 104 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 105 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 106 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024

Table 107 - GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 108 - NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 109 - LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024

Table 110 - Forecast Sales of Wine by Category: Total Volume 2024-2029

Table 111 - Forecast Sales of Wine by Category: Total Value 2024-2029

Table 112 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029

Table 113 - 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-australia/report.