



Alcoholic Drinks in Bolivia

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 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2024

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024

Table 10 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024

Table 11 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024

Table 12 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024

Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029

Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Beer in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Beer sales in Bolivia show robust performance
CBN strengthens leadership through innovation and strategic expansion
Traditional channels gain ground amid decline in contraband

PROSPECTS AND OPPORTUNITIES

Imported lager to lead growth as contraband declines
Affordable beers to gain popularity as consumers shift from wine and spirits
Cerveceria Boliviana Nacional will seek to strengthen market leadership

CATEGORY BACKGROUND

Lager price band methodology
Summary 2 - Lager by Price Band 2024

CATEGORY DATA

- Table 17 - Sales of Beer by Category: Total Volume 2019-2024
- Table 18 - Sales of Beer by Category: Total Value 2019-2024
- Table 19 - Sales of Beer by Category: % Total Volume Growth 2019-2024
- Table 20 - Sales of Beer by Category: % Total Value Growth 2019-2024
- Table 21 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024
- Table 22 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024
- Table 23 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 24 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 25 - Sales of Beer by Craft vs Standard 2019-2024
- Table 26 - GBO Company Shares of Beer: % Total Volume 2020-2024
- Table 27 - NBO Company Shares of Beer: % Total Volume 2020-2024
- Table 28 - LBN Brand Shares of Beer: % Total Volume 2021-2024
- Table 29 - Forecast Sales of Beer by Category: Total Volume 2024-2029
- Table 30 - Forecast Sales of Beer by Category: Total Value 2024-2029
- Table 31 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029
- Table 32 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

Cider/Perry in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Holiday traditions and affordability fuel seasonal cider sales in Bolivia, with growing demand for non-alcoholic options
Dicon's Cereser brand leads Bolivia's cider market in 2024
Traditional retail drives cider sales amid lower contraband activity

PROSPECTS AND OPPORTUNITIES

Potential to expand cider consumption beyond festive toasting occasions
Non-alcoholic ciders are expected to continue their growth trajectory
Likely introduction of low-priced ciders, thanks to new trade agreements

CATEGORY DATA

- Table 33 - Sales of Cider/Perry: Total Volume 2019-2024
- Table 34 - Sales of Cider/Perry: Total Value 2019-2024
- Table 35 - Sales of Cider/Perry: % Total Volume Growth 2019-2024

Table 36 - Sales of Cider/Perry: % Total Value Growth 2019-2024

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

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

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

Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024

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

Table 42 - NBO Company Shares of Cider/Perry: % Total Volume 2020-2024

Table 43 - LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024

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

Table 45 - Forecast Sales of Cider/Perry: Total Value 2024-2029

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

Table 47 - Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

Rtds in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Local innovation powers strong growth

Opal's Cuba Libre maintains its broad appeal

Traditional channels dominate RTD sales amid rise of e-commerce

PROSPECTS AND OPPORTUNITIES

Rising youth population and emergence of new consumption occasions will push RTD sales

Emergence of new players will expand RTD consumption

Imported RTDs, led by 51 ICE, to drive growth

CATEGORY DATA

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

Table 49 - Sales of RTDs by Category: Total Value 2019-2024

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

Table 51 - Sales of RTDs by Category: % Total Value Growth 2019-2024

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

Table 53 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024

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

Table 55 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024

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

Table 57 - NBO Company Shares of RTDs: % Total Volume 2020-2024

Table 58 - LBN Brand Shares of RTDs: % Total Volume 2021-2024

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

Table 60 - Forecast Sales of RTDs by Category: Total Value 2024-2029

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

Table 62 - Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

Spirits in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price increases prompt shift towards more affordable alcoholic drinks

D&M Bolivia strengthens its lead, driven by Fernet-Branca brand

Distribution channels expand amid e-commerce growth and reduction in contraband

PROSPECTS AND OPPORTUNITIES

Spirits sales set to grow, driven by traditional favourites and reduced contraband
Illegal trade will continue to undermine legitimate premium spirits sales
Local players will drive innovation

CATEGORY BACKGROUND

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

CATEGORY DATA

- Table 63 - Sales of Spirits by Category: Total Volume 2019-2024
- Table 64 - Sales of Spirits by Category: Total Value 2019-2024
- Table 65 - Sales of Spirits by Category: % Total Volume Growth 2019-2024
- Table 66 - Sales of Spirits by Category: % Total Value Growth 2019-2024
- Table 67 - Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024
- Table 68 - Sales of Spirits by Off-trade vs On-trade: Value 2019-2024
- Table 69 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 70 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 71 - Sales of Dark Rum by Price Platform: % Total Volume 2019-2024
- Table 72 - Sales of White Rum by Price Platform: % Total Volume 2019-2024
- Table 73 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024
- Table 74 - Sales of English Gin by Price Platform: % Total Volume 2019-2024
- Table 75 - Sales of Vodka by Price Platform: % Total Volume 2019-2024
- Table 76 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024
- Table 77 - GBO Company Shares of Spirits: % Total Volume 2020-2024
- Table 78 - NBO Company Shares of Spirits: % Total Volume 2020-2024
- Table 79 - LBN Brand Shares of Spirits: % Total Volume 2021-2024
- Table 80 - Forecast Sales of Spirits by Category: Total Volume 2024-2029
- Table 81 - Forecast Sales of Spirits by Category: Total Value 2024-2029
- Table 82 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029
- Table 83 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

Wine in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Wine market sees positive growth, driven by reduced contraband and rising local production
Local players invest in innovation
Wine distribution shifts towards traditional channels amid decline in contraband

PROSPECTS AND OPPORTUNITIES

Positive outlook for wine sales, supported by declining illegal market and growing demand for vermouth
Tannat grape to shape future of Bolivian wine.
Local wineries will drive sales through premium innovations.

CATEGORY DATA

- Table 84 - Sales of Wine by Category: Total Volume 2019-2024
- Table 85 - Sales of Wine by Category: Total Value 2019-2024
- Table 86 - Sales of Wine by Category: % Total Volume Growth 2019-2024
- Table 87 - Sales of Wine by Category: % Total Value Growth 2019-2024
- Table 88 - Sales of Wine by Off-trade vs On-trade: Volume 2019-2024
- Table 89 - Sales of Wine by Off-trade vs On-trade: Value 2019-2024
- Table 90 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 91 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024

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

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

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

Table 95 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024

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

Table 97 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 98 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024

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

Table 100 - NBO Company Shares of Champagne: % Total Volume 2020-2024

Table 101 - LBN Brand Shares of Champagne: % Total Volume 2021-2024

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

Table 103 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 104 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024

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

Table 106 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 107 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024

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

Table 109 - NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 110 - LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024

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

Table 112 - Forecast Sales of Wine by Category: Total Value 2024-2029

Table 113 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029

Table 114 - 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-bolivia/report.