

Alcoholic Drinks in Greece

June 2025

Table of Contents

Alcoholic Drinks in Greece

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: 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

Beer in Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Beer benefits from a shift away from more expensive spirits Athenian Brewery remains the undisputed leader Strain on disposable incomes boosts the off-trade channel

PROSPECTS AND OPPORTUNITIES

Beer to continue to experience seasonality

Tourism flows to continue to impact beer's performance

Craft beers to drive innovation

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cider has low appeal in Greece, although the non alcoholic category emerges The competitive landscape is concentrated on a handful of brands

Convenience remains a key factor in distribution

PROSPECTS AND OPPORTUNITIES

Dependence on tourism flows from the UK and Scandinavia

Seasonality remains an obstacle to growth

Little innovation is expected during the forecast period

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

RTDs attracts new investment

Diageo leverages a wide portfolio to lead RTDs

Wider penetration in supermarkets to cater to increasing demand

PROSPECTS AND OPPORTUNITIES

Robust growth to be driven by spirit-based RTDs

Low ABV and a wide range of flavours to push RTDs

Non alcoholic RTDs to benefit from mindful drinking and out-of-home consumption occasions

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Economic pressure on household budgets negatively affects spirits

Campari Group establishes a subsidiary in Greece

Price promotions boost sales

PROSPECTS AND OPPORTUNITIES

Mindful drinking favours drinks with lower alcohol content

Domestic spirits are set to perform well over the forecast period

Innovation comes with flavour

CATEGORY BACKGROUND

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

Summary 3 - Benchmark Brands 2024

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Wine benefits from the shift to off-trade consumption

Limited innovation in wine

More shelf space for wine in large modern grocery retailers

PROSPECTS AND OPPORTUNITIES

The category is set to benefit from the development of the local wine culture

Premiumisation and value for money to be key shapers of on-trade demand

Wider availability of non alcoholic wine

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 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-greece/report.