



Alcoholic Drinks in Paraguay

July 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

Taxation and Duty Levies

Operating Environment

Contraband/parallel trade

Duty free

Cross-border/private imports

Key New Product Launches

Outlook

MARKET DATA

Table 1 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024

Table 2 - Sales of Alcoholic Drinks by Category: Total Value 2019-2024

Table 3 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024

Table 4 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024

Table 5 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 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 Volume 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

BEER

Key Data Findings

2024 Developments

Positive growth of beer volume sales aligned with an improving economic scenario, while the health trend stimulates the popularity of non/low alcoholic beer

Cerveceria Paraguaya holds a dominant position although it loses ground to Compañía Cervecera Asuncion

Small local grocers remains the leading channel while supermarkets achieves the fastest growth

Prospects and Opportunities

Beer sales continue growing despite the category's increasing maturity

Non-alcoholic beer gains further momentum driven by increasing concerns over alcohol intake

New product development invigorates new premium beer options

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

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

Table 26 - LBN Brand Shares of Beer: % Total Volume 2021-2024

Table 27 - Forecast Sales of Beer by Category: Total Volume 2024-2029

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

Table 29 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029

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

WINE

Key Data Findings

2024 Developments

Upbeat growth of wine sales fostered by economic stability and rising incomes

Low import taxes present an opportunity for importers

Supermarkets leads in wine sales while the on-trade gains ground in 2024

Prospects and Opportunities

Forecast period sales growth of wine as the category increasingly competes with beer alternatives

The popularity of still white wine ramps up fuelled by warm weather and the presence of more imports

Non-alcoholic wine unlikely to increase in popularity due to its taste profile

Category Data

Table 31 - Sales of Wine by Category: Total Volume 2019-2024

Table 32 - Sales of Wine by Category: Total Value 2019-2024

Table 33 - Sales of Wine by Category: % Total Volume Growth 2019-2024

Table 34 - Sales of Wine by Category: % Total Value Growth 2019-2024

Table 35 - Sales of Wine by Off-trade vs On-trade: % Volume Breakdown 2019-2024

Table 36 - Sales of Wine by Off-trade vs On-trade: % Value Breakdown 2019-2024

Table 37 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 38 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024

Table 39 - Forecast Sales of Wine by Category: Total Volume 2024-2029

Table 40 - Forecast Sales of Wine by Category: Total Value 2024-2029

Table 41 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029

Table 42 - Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

SPIRITS

Key Data Findings

2024 Developments

Spirits sales decrease in the main due to a strong reduction in caña with a mature profile

Grupo AJ Vierci solidifies its presence through a joint venture with Compañía Cervecerías Unidas (CCU)

Further gains for modern grocery retailers aligned with a decrease in caña (other spirits) sales, which mostly take place via small local grocers

Prospects and Opportunities

Stagnation for spirits sales as the large caña category continues to lose popularity and more niche premium offerings gather momentum

Bitters plays a more important role in spirits over the forecast period

Contraband decreases as the Argentine peso appreciates and prices in Argentina rise

Category Data

Table 43 - Sales of Spirits by Category: Total Volume 2019-2024

Table 44 - Sales of Spirits by Category: Total Value 2019-2024

Table 45 - Sales of Spirits by Category: % Total Volume Growth 2019-2024

Table 46 - Sales of Spirits by Category: % Total Value Growth 2019-2024

Table 47 - Sales of Spirits by Off-trade vs On-trade: % Volume Breakdown 2019-2024

Table 48 - Sales of Spirits by Off-trade vs On-trade: % Value Breakdown 2019-2024

Table 49 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 50 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024

Table 51 - GBO Company Shares of Spirits: % Total Volume 2020-2024

Table 52 - NBO Company Shares of Spirits: % Total Volume 2020-2024

Table 53 - LBN Brand Shares of Spirits: % Total Volume 2021-2024

Table 54 - Forecast Sales of Spirits by Category: Total Volume 2024-2029

Table 55 - Forecast Sales of Spirits by Category: Total Value 2024-2029

Table 56 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029

Table 57 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

CIDER/PERRY

Key Data Findings

2024 Developments

Double-digit growth of cider as surplus stock in Argentina is sold in Paraguay at heavily discounted prices

Cider is led by Grupo AJ Vierci and its popular Preferida brand

Small local grocers accounts for the majority of cider sales

Prospects and Opportunities

Moderate growth of cider/perry sales over the forecast period

Cider suffers competition from the growing popularity of other sparkling wine

Industry players focus on premiumisation through new product development and extension of consumption occasions

Category Data

Table 58 - Sales of Cider/Perry: Total Volume 2019-2024

Table 59 - Sales of Cider/Perry: Total Value 2019-2024

Table 60 - Sales of Cider/Perry: % Total Volume Growth 2019-2024

Table 61 - Sales of Cider/Perry: % Total Value Growth 2019-2024

Table 62 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2024

Table 63 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2024

Table 64 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 65 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024

Table 66 - GBO Company Shares of Cider/Perry: % Total Volume 2020-2024

Table 67 - NBO Company Shares of Cider/Perry: % Total Volume 2020-2024

Table 68 - LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024

Table 69 - Forecast Sales of Cider/Perry: Total Volume 2024-2029

Table 70 - Forecast Sales of Cider/Perry: Total Value 2024-2029

Table 71 - Forecast Sales of Cider/Perry: % Total Volume Growth 2024-2029

Table 72 - Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

RTDS

Key Data Findings

2024 Developments

Strong growth of RTDs sales driven by growing consumption among young adults

Smirnoff Ice retains its outright lead, though the Dr Lemon brand gains momentum

Supermarkets and small local grocers lead, while retail e-commerce generates strong growth from a low base

Prospects and Opportunities

Upbeat growth projected for RTDs driven by intense product innovation aimed at widening the consumer base

Hard seltzers enters Paraguay driven by the health and wellness trend

Beer has the potential to lose share to RTDs over the forecast period

Category Data

Table 73 - Sales of RTDs by Category: Total Volume 2019-2024

Table 74 - Sales of RTDs by Category: Total Value 2019-2024

Table 75 - Sales of RTDs by Category: % Total Volume Growth 2019-2024

Table 76 - Sales of RTDs by Category: % Total Value Growth 2019-2024

Table 77 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024

Table 78 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024

Table 79 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 80 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024

Table 81 - GBO Company Shares of RTDS: % Total Volume 2020-2024

Table 82 - NBO Company Shares of RTDS: % Total Volume 2020-2024

Table 83 - LBN Brand Shares of RTDS: % Total Volume 2021-2024

Table 84 - Forecast Sales of RTDs by Category: Total Volume 2024-2029

Table 85 - Forecast Sales of RTDs by Category: Total Value 2024-2029

Table 86 - Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029

Table 87 - Forecast Sales of RTDs 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-paraguay/report.