

# Where Consumers Shop for Alcoholic Drinks

July 2024

**Table of Contents** 

#### INTRODUCTION

Scope

Key findings

#### INDUSTRY SNAPSHOT

Has the industry's resilience reached its limit?

The category angle: challenges are widespread, but premiumisation gives cause for optimism

India leads 2023 volume rise as other historic growth markets struggle

#### CHANNEL SHIFTS

Online and offline retail performance weakens

China and Australia drive regional e-commerce rises

E-commerce expansion slows in the post-pandemic era

#### **RETAIL OFFLINE**

Offline sales are split between modern and traditional retailers

The promise of lower prices prompts consumers to rethink shopping habits

Retailers compete to promote their affordability credentials

The economic climate provides fertile ground for discounters

A customer-centric experience offers a valuable point of difference for specialist retailers

The strength of brand names leaves little space for private label

Price is not the whole story: Retailers branch out with their private label products

#### RETAIL E-COMMERCE

China: Online expansion continues in the top e-commerce market

Online category trends mirror those seen offline - wine struggles while RTDs thrive

Despite the slowdown, e-commerce volumes stand markedly above pre-pandemic baseline

Beyond e-commerce: Emerging technology accelerates digitalisation

Navigating TikTok: ByteDance becomes a key contender in e-commerce

#### NON-RETAIL CHANNELS

Latin America defies global trend with on-trade recovery

Consumers prize the on-trade experience, but the challenges are not subsiding

Tough times for pub chains

Innovating for the on-trade: Differentiation through precise positioning

Raising the (digital) bar: potential and pitfalls for AI in the on-trade

### **FUTURE DEVELOPMENTS**

The industry is navigating an environment of uncertainty

Omnichannel strategies will gain ground

Key findings

## 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/where-consumers-shop-for-alcoholic-drinks/report.