



# Passport

## Spirits in Lithuania

Euromonitor International

August 2022

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# SPIRITS IN LITHUANIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2021 DEVELOPMENTS

Re-opening of the on-trade benefits spirits sales

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Consumers remain curious about spirits

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Popularity of mixed drinks benefits bitters

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## PROSPECTS AND OPPORTUNITIES

Pandemic effects on sales to fade by 2023

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Off-trade to decrease overall, but some categories will make gains

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On-trade to provide platform for whiskies to develop further

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## CATEGORY DATA

Table 1 Sales of Spirits by Category: Total Volume 2016-2021

'000 litres	2016	2017	2018	2019	2020	2021
-------------	------	------	------	------	------	------

Brandy and Cognac  
 - Brandy  
 - Cognac  
 Liqueurs  
 - Bitters  
 - Cream-based Liqueurs  
 - Other Liqueurs  
 Non Alcoholic Spirits  
 Rum  
 - Dark Rum  
 - White Rum  
 Tequila (and Mezcal)  
 Whiskies  
 - Bourbon/Other US  
   Whiskey  
 - Canadian Whisky  
 - Irish Whiskey  
 - Japanese Whisky  
 - Blended Scotch Whisky  
 - Single Grain Scotch  
   Whisky  
 - Single Malt Scotch  
   Whisky  
 - Other Whiskies  
 White Spirits  
 - Gin  
 - Vodka  
 Other Spirits  
 - Mead  
 - Samane  
 - Other Distilled  
   Beverages  
 Spirits

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Spirits by Category: Total Value 2016-2021

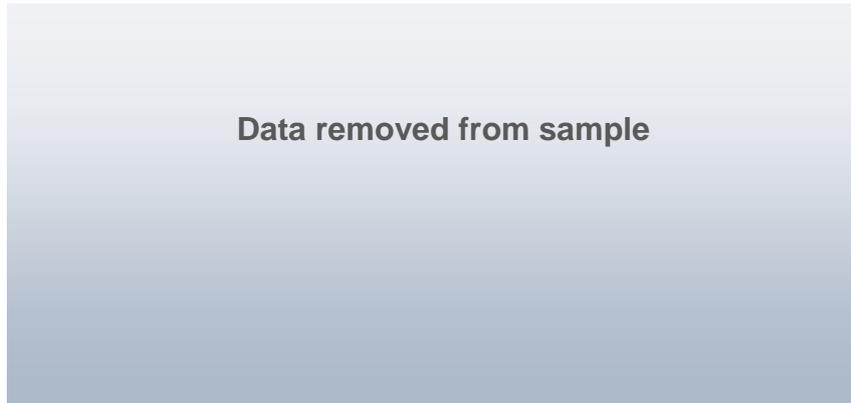
EUR million

2016 2017 2018 2019 2020 2021

Brandy and Cognac  
 - Brandy  
 - Cognac  
 Liqueurs  
 - Bitters  
 - Cream-based Liqueurs  
 - Other Liqueurs  
 Non Alcoholic Spirits  
 Rum  
 - Dark Rum  
 - White Rum  
 Tequila (and Mezcal)  
 Whiskies  
 - Bourbon/Other US  
   Whiskey  
 - Canadian Whisky  
 - Irish Whiskey  
 - Japanese Whisky

Data removed from sample

- Blended Scotch Whisky
- Single Grain Scotch Whisky
- Single Malt Scotch Whisky
- Other Whiskies
- White Spirits
- Gin
- Vodka
- Other Spirits
- Mead
- Samane
- Other Distilled Beverages
- Spirits



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Sales of Spirits by Category: % Total Volume Growth 2016-2021**

% total volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Brandy and Cognac			
- Brandy			
- Cognac			
Liqueurs			
- Bitters			
- Cream-based Liqueurs			
- Other Liqueurs			
Non Alcoholic Spirits			
Rum			
- Dark Rum			
- White Rum			
Tequila (and Mezcal)			
Whiskies			
- Bourbon/Other US Whiskey			
- Canadian Whisky			
- Irish Whiskey			
- Japanese Whisky			
- Blended Scotch Whisky			
- Single Grain Scotch Whisky			
- Single Malt Scotch Whisky			
- Other Whiskies			
White Spirits			
- Gin			
- Vodka			
Other Spirits			
- Mead			
- Samane			
- Other Distilled Beverages			
Spirits			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Spirits by Category: % Total Value Growth 2016-2021**

% local currency, current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Brandy and Cognac			
- Brandy			
- Cognac			
Liqueurs			
- Bitters			
- Cream-based Liqueurs			
- Other Liqueurs			
Non Alcoholic Spirits			
Rum			
- Dark Rum			
- White Rum			
Tequila (and Mezcal)			
Whiskies			
- Bourbon/Other US Whiskey			
- Canadian Whisky			
- Irish Whiskey			
- Japanese Whisky			
- Blended Scotch Whisky			
- Single Grain Scotch Whisky			
- Single Malt Scotch Whisky			
- Other Whiskies			
White Spirits			
- Gin			
- Vodka			
Other Spirits			
- Mead			
- Samane			
- Other Distilled Beverages			
Spirits			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021

'000 litres	2016	2017	2018	2019	2020	2021
Off-trade						
On-trade						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Spirits by Off-trade vs On-trade: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Off-trade						
On-trade						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			
Total			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			
Total			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 GBO Company Shares of Spirits: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
<b>Data removed from sample</b>					

### Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 NBO Company Shares of Spirits: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
---------------------------	------	------	------	------	------

### Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 LBN Brand Shares of Spirits: % Total Volume 2018-2021

% total volume Brand (Global Brand Owner)	Company	2018	2019	2020	2021
---	---------	------	------	------	------

### Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Forecast Sales of Spirits by Category: Total Volume 2021-2026

'000 litres

	2021	2022	2023	2024	2025	2026
Brandy and Cognac	Data removed from sample					
- Brandy						
- Cognac						
Liqueurs						
- Bitters						
- Cream-based Liqueurs						
- Other Liqueurs						
Non Alcoholic Spirits						
Rum						
- Dark Rum						
- White Rum						
Tequila (and Mezcal)						
Whiskies						
- Bourbon/Other US Whiskey						
- Canadian Whisky						
- Irish Whiskey						
- Japanese Whisky						
- Blended Scotch Whisky						
- Single Grain Scotch Whisky						
- Single Malt Scotch Whisky						
- Other Whiskies						
White Spirits						
- Gin						
- Vodka						
Other Spirits						
- Mead						
- Samane						
- Other Distilled Beverages						
Spirits						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 13 Forecast Sales of Spirits by Category: Total Value 2021-2026**

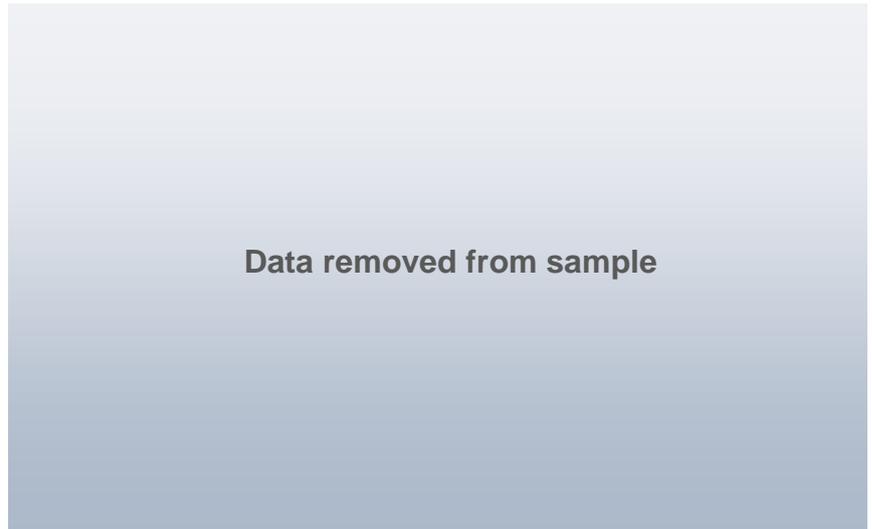
EUR million	2021	2022	2023	2024	2025	2026
Brandy and Cognac	<b>Data removed from sample</b>					
- Brandy						
- Cognac						
Liqueurs						
- Bitters						
- Cream-based Liqueurs						
- Other Liqueurs						
Non Alcoholic Spirits						
Rum						
- Dark Rum						
- White Rum						
Tequila (and Mezcal)						
Whiskies						
- Bourbon/Other US Whiskey						
- Canadian Whisky						
- Irish Whiskey						
- Japanese Whisky						
- Blended Scotch Whisky						
- Single Grain Scotch Whisky						
- Single Malt Scotch Whisky						
- Other Whiskies						
White Spirits						
- Gin						
- Vodka						
Other Spirits						
- Mead						
- Samane						
- Other Distilled Beverages						
Spirits						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 14 Forecast Sales of Spirits by Category: % Total Volume Growth 2021-2026**

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Brandy and Cognac	<b>Data removed from sample</b>		
- Brandy			
- Cognac			
Liqueurs			
- Bitters			
- Cream-based Liqueurs			
- Other Liqueurs			
Non Alcoholic Spirits			

- Rum
  - Dark Rum
  - White Rum
- Tequila (and Mezcal)
- Whiskies
  - Bourbon/Other US Whiskey
  - Canadian Whisky
  - Irish Whiskey
  - Japanese Whisky
  - Blended Scotch Whisky
  - Single Grain Scotch Whisky
  - Single Malt Scotch Whisky
  - Other Whiskies
- White Spirits
  - Gin
  - Vodka
- Other Spirits
  - Mead
  - Samane
  - Other Distilled Beverages
- Spirits

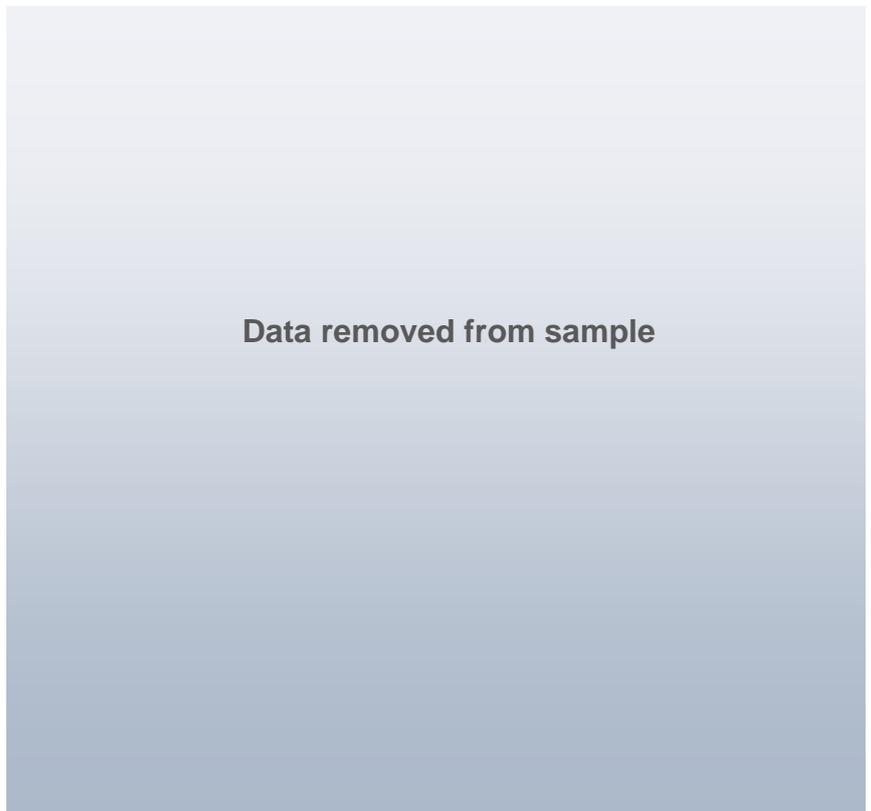


Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 15** Forecast Sales of Spirits by Category: % Total Value Growth 2021-2026

% local currency, constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Brandy and Cognac			
- Brandy			
- Cognac			
Liqueurs			
- Bitters			
- Cream-based Liqueurs			
- Other Liqueurs			
Non Alcoholic Spirits			
Rum			
- Dark Rum			
- White Rum			
Tequila (and Mezcal)			
Whiskies			
- Bourbon/Other US Whiskey			
- Canadian Whisky			
- Irish Whiskey			
- Japanese Whisky			
- Blended Scotch Whisky			
- Single Grain Scotch Whisky			
- Single Malt Scotch Whisky			
- Other Whiskies			
White Spirits			
- Gin			
- Vodka			
Other Spirits			
- Mead			
- Samane			
- Other Distilled Beverages			
Spirits			



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# ALCOHOLIC DRINKS IN LITHUANIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Alcoholic drinks in 2021: The big picture

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### 2021 key trends

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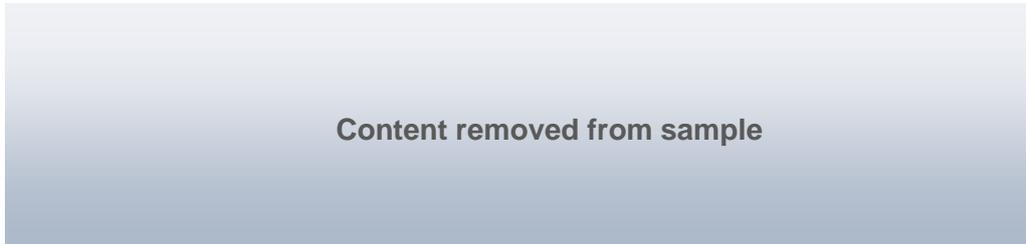
### Competitive landscape

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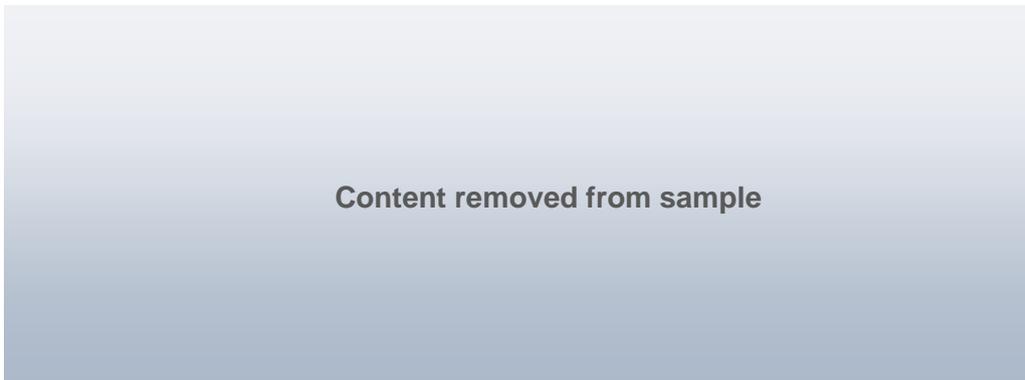
### Retailing developments

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### On-trade vs off-trade split

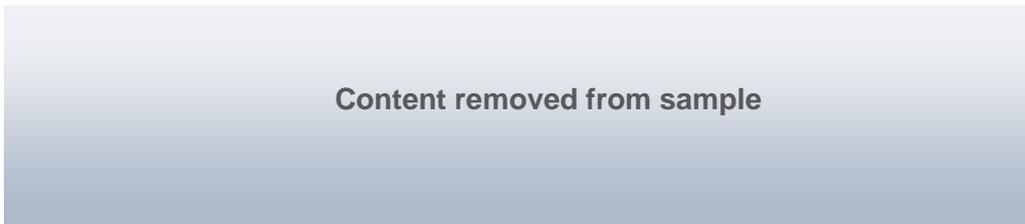


### What next for alcoholic drinks?

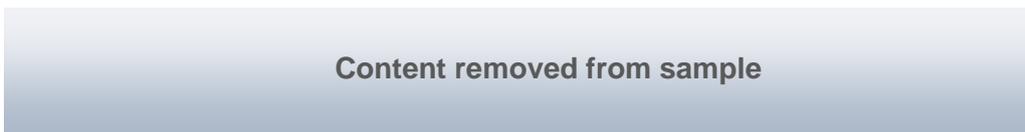


## MARKET BACKGROUND

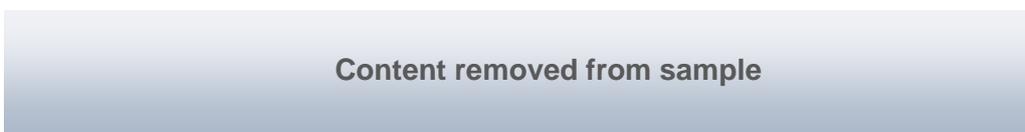
### Legislation



### Legal purchasing age and legal drinking age



### Drink driving



Advertising

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Smoking ban

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Opening hours

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On-trade establishments

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**TAXATION AND DUTY LEVIES**

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Summary 1 Taxation and Duty Levies on Alcoholic Drinks 2021

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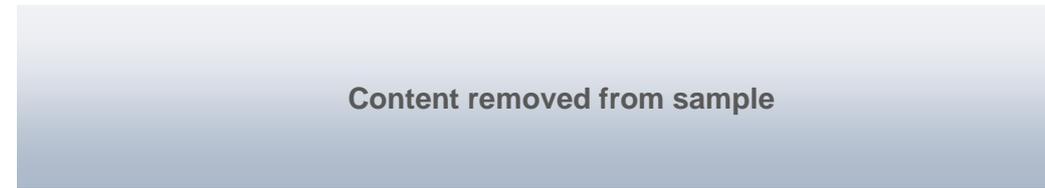
Source: Euromonitor International

## OPERATING ENVIRONMENT

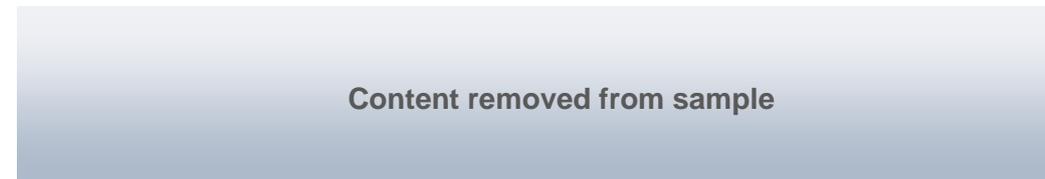
### Contraband/parallel trade



### Duty free



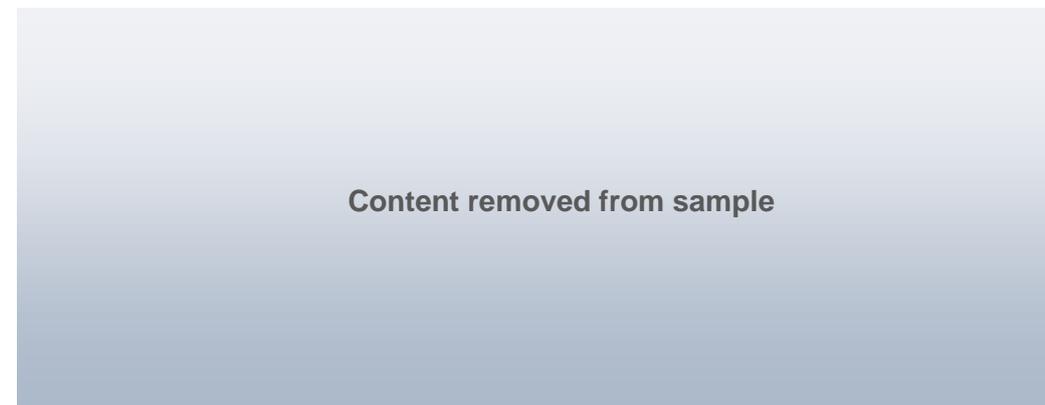
### Cross-border/private imports



## KEY NEW PRODUCT LAUNCHES



### Outlook



## MARKET INDICATORS

Table 16 Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
Total	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is forecast

## MARKET DATA

Table 17 Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

	2016	2017	2018	2019	2020	2021
Beer (million litres)	Data removed from sample					
Cider/Perry ('000 litres)	Data removed from sample					
RTDs ('000 litres)	Data removed from sample					
Spirits ('000 litres)	Data removed from sample					
Wine (million litres)	Data removed from sample					
Alcoholic Drinks (million litres)	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Sales of Alcoholic Drinks by Category: Total Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
Beer	Data removed from sample					
Cider/Perry	Data removed from sample					
RTDs	Data removed from sample					
Spirits	Data removed from sample					
Wine	Data removed from sample					
Alcoholic Drinks	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

% total volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Beer	Data removed from sample		
Cider/Perry	Data removed from sample		
RTDs	Data removed from sample		
Spirits	Data removed from sample		
Wine	Data removed from sample		
Alcoholic Drinks	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 20 Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021**

% local currency, current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 21 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021**

	Off-trade	On-trade	Total
Beer (million litres)	<b>Data removed from sample</b>		
Cider/Perry ('000 litres)			
RTDs ('000 litres)			
Spirits ('000 litres)			
Wine (million litres)			
Alcoholic Drinks (million litres)			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 22 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021**

EUR million

	Off-trade	On-trade	Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 23 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021**

% volume analysis

	Off-trade	On-trade	Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			

Wine  
Alcoholic Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

% value analysis

Off-trade

On-trade

Total

Beer  
Cider/Perry  
RTDs  
Spirits  
Wine  
Alcoholic Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

% total volume

Company

2017

2018

2019

2020

2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

% off-trade

2016

2017

2018

2019

2020

2021

Store-Based Retailing  
- Grocery Retailers  
-- Modern Grocery  
Retailers  
--- Convenience Stores  
--- Discounters

Data removed from sample

- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Drugstores/parapharmacies
- Other Non-Grocery Alcoholic Drinks Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 27**      **Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2020**

% off-trade

	Beer	Cider/Perry	RTDs	Spirits	Wine
Store-Based Retailing					
- Grocery Retailers					
-- Modern Grocery Retailers					
--- Convenience Stores					
--- Discounters					
--- Forecourt Retailers					
--- Hypermarkets					
--- Supermarkets					
-- Traditional Grocery Retailers					
--- Food/drink/tobacco specialists					
--- Independent Small Grocers					
--- Other Grocery Retailers					
- Non-Grocery Specialists					
-- Drugstores/parapharmacies					
-- Other Non-Grocery Alcoholic Drinks					

**Data removed from sample**

- Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 28 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026**

	2021	2022	2023	2024	2025	2026
Beer (million litres)	<b>Data removed from sample</b>					
Cider/Perry ('000 litres)						
RTDs ('000 litres)						
Spirits ('000 litres)						
Wine (million litres)						
Alcoholic Drinks (million litres)						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 29 Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026**

EUR million	2021	2022	2023	2024	2025	2026
Beer	<b>Data removed from sample</b>					
Cider/Perry						
RTDs						
Spirits						
Wine						
Alcoholic Drinks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 30 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026**

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 31** Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

% local currency, constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## DISCLAIMER

**Content removed from sample**

## SOURCES

Sources used during the research included the following:

Summary 2 Research Sources

**Content removed from sample**



Source: Euromonitor International