



Passport

Alcoholic Drinks in Spain

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ALCOHOLIC DRINKS IN SPAIN - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Alcoholic drinks in 2021: The big picture

The COVID-19 pandemic continued to have a major impact on alcoholic drinks in Spain in 2021, as measures related to containing the spread of the virus were once again a feature for much of the year. The country entered 2021 under very strong COVID-19 restrictions, as concerns over the spread of the virus remained profound, and many of the country's autonomous regions decided to close hospitality venues in the first months of the year.

By March 2021, hospitality venues had reopened; however, significant restrictions remained for on-trade establishments. These were generally consistent throughout the country, with small differences from region to region. Andalusia had a perimetral lockdown (meaning people from outside the region could not enter), a curfew from 23.00hrs and 06.00hrs, hospitality venues had to close at 22.30hrs, and social meetings were limited to six people, with four being the maximum group inside hospitality venues. The Community of Madrid also had a perimetral lockdown and a 23.00hrs to 06.00hrs curfew. Hospitality venues had to close at 23.00hrs and could not accept new customers after 22.00hrs, and there was also a four-person limit on indoor areas of bars and restaurants. Meanwhile, in the Basque Country, after hospitality venues reopened on 10 February, a perimetral lockdown, a 22.00hrs-6.00hrs curfew, and a four-person maximum on gatherings was in place in March 2021.

As the spring and summer arrived, restrictions continued to lift, and many brands reported a strong summer sales period, as Spanish consumers returned to bars and restaurants, eager to socialise and make up for lost socialising occasions to reconnect with friends and family after several difficult months. However, for a second year, the lack of tourists to Spain (still lower arrivals in 2021 in comparison with the years before the pandemic) affected sales, something that was particularly applicable for the on-trade, given the amount of money travellers spend in these locations. Whilst international tourism remained down, domestic tourism helped drive on-trade sales of alcoholic drinks during these months, and some tourists from other countries were able to travel to Spain when reduced restrictions were in place.

This positivity continued into the autumn, with minimal restrictions imposed on hospitality venues. However, the arrival of the more contagious Omicron variant of COVID-19 towards the end of the year had a negative impact on sales in December, which is normally a time of increased socialisation, with several holidays in Spain during the month. Aside from some consumer hesitancy to socialise, given fears of contracting the new variant of the virus, some autonomous regions reintroduced restrictions. In Catalonia, a curfew between 01.00hrs and 06.00hrs was imposed, along with a 10-person limit on meetings in people's homes, whilst night-time venues such as clubs closed their doors and the capacity in restaurants was limited to 50%. Therefore, although 2021 did bring year-on-year on-trade growth when compared with the dreadful performance in 2020, a recovery to the pre-pandemic level was not seen in Spain in 2021.

In addition to the major impact of COVID-19, which yet again affected the alcoholic drinks industry in 2021, other important factors also had an influence in this year. First, there was a rise in transport costs due to the global supply chain crisis. This meant that the price of resources such as bottles, cardboard, aluminium and the materials needed for alcohol distillation all rose during the year. Not only this, but Brexit regulations came into force at the start of 2021, which

raised concerns over the import of products from the UK, such as whiskies. Meanwhile, domestically there have been increases in the cost of energy in Spain, impacting production costs. However, it is expected that this last point is likely to have more of an impact on prices in 2022. The alcoholic drinks industry also saw changes in drinking habits amongst Spanish consumers. Broadly, this refers to more moderate consumption habits and earlier drinking times. This had an impact on the types of alcohol that were demanded in Spain.

2021 key trends

Several key trends punctuated the alcoholic drinks industry in Spain in 2021. As mentioned above, there was an increased desire to live healthier lifestyles amongst Spanish people. Whilst this focus was growing before the pandemic, and was something that was replicated in other Western European markets, this accelerated because of the onset of COVID-19. Indeed, the main trend in 2021 was the continuation of more moderate alcohol drinking habits amongst Spanish consumers. Connected to this, consumption occasions took place earlier in the day than they had done pre-pandemic, for instance pre-dinner as an aperitif or during lunch. It is important to add that this trend for *tardeo* was also encouraged by the prolonged closure of night-time entertainment establishments, which continued into 2021. Overall, “lighter” products, such as those low in calories or with reduced or no alcohol, were thus in demand, as well as drinks such as vermouth, which could be drunk as an aperitif before a meal. Post-dinner liqueurs were also in higher demand from Spanish consumers. By contrast, those drinks closely associated with night-time socialising – such as tequila – suffered.

Concerns about sustainability remain strong in the minds of Spanish consumers; indeed, it is largely expected that alcoholic drinks brands include sustainability programmes in their production process. For instance, González Byass has its “5+5 Caring for the Planet” initiative, which helps protect the environment, and Zamora implemented its “Conscious Company”, with the aim of achieving a sustainable business model. Meanwhile, sparkling wine brands such as Codorníu, Canals & Munné and Bodegas Trobat all reported that they have increased and will continue to increase their production of organic wines. Overall, reducing the use of water in production, limiting waste and avoiding the use of single-use plastics are all important considerations for alcoholic drinks brands. For example, 25Lolita, a new gin launched in 2021, uses recycled packaging, and it is expected that such programmes will increase and gain even more relevance during the next five years.

Another growing trend is the importance that Spanish consumers attach to traceability, and the focus that is given to the origin of the drink they consume. Initiatives such as using a QR code on the bottle are expected to develop, which consumers can scan to find out information about the origin and production of a product. Whilst applicable to the alcoholic drinks industry as a whole, traceability is particularly relevant for wine. The heritage and certification of a wine remains very important in the minds of Spanish drinkers. Indeed, since the beginning of the pandemic in 2020, wine brands with established heritage, certification or with greater consumer knowledge have performed better. Wine is connected to the countryside and associated with nature in Spain, which was a factor that also contributed to its popularity in 2021, given that consumers increasingly preferred products associated with being natural, local and organic.

Competitive landscape

The rebound in on-trade sales in 2021 benefited larger alcoholic drinks manufacturers such as Diageo in Spain. Their stronger distribution networks and related higher presence in foodservice establishments meant that they could benefit from the return of Spanish consumers to hospitality outlets. However, small producers also benefited from the reopening of bars and restaurants. Small local breweries were also able to benefit from selling their produce in

neighbourhood horeca outlets once again, as they tend to be more reliant on on-trade sales. The return – albeit it limited – of tourists also helped both larger and smaller manufacturers, due to the large amounts of money this group spends in these establishments.

Retailing developments

It is true to say that the proportion of retail sales taking place online grew because of the pandemic, as bars and restaurants were closed, and people were concerned about contracting COVID-19 when visiting grocery stores. This was particularly beneficial for players such as wine clubs. However, the proportion of sales via e-commerce remained very low in 2021 within overall sales of alcohol. Traditionally, consuming alcohol is a social activity in Spain, for example when meeting friends or relaxing following a day at work. This is expected to endure despite the challenges posed by the pandemic, and this was shown by the strong return to hospitality venues when restrictions permitted in 2021. This means that online sales are unlikely to increase significantly in the next five years. However, one way in which online activity has become more important is as a marketing engagement tool. It can be used for advertising and engaging with new consumers, especially younger people of legal drinking age.

Smaller grocery establishments such as convenience stores and traditional grocery retailers remained strong in 2021, due to the rise in proximity retailing brought about by the COVID-19 pandemic. Consumers in Spain limited their exposure to larger indoor spaces, such as hypermarkets, and found that smaller grocery retailers offered a sufficient and convenient product range, whilst also being near their homes. Discounters also continued to experience popularity, due to their generally lower prices and the impact of reduced incomes for many people as a result of the pandemic.

One notable feature is the availability of DOP (Certified Denomination of Origin) wine at a variety of price points. This ranges from premium rioja wines at high prices to a Fino Donceles white wine from the recognised Montilla-Morile region in Andalusia, available in Lidl for under EUR3. It is possible that the availability of DOP wine in establishments such as Mercadona and Lidl will impact the pricing strategies of higher-priced retailers.

On-trade vs off-trade split

Before the pandemic, sales of alcoholic drinks were dominated by the on-trade channel. However, restrictions brought about by the pandemic meant that in 2020 sales of alcoholic drinks in the off-trade outdid those in on-trade establishments. Whilst there was a partial recovery in on-trade sales in 2021, they did not return to the pre-pandemic level, whilst off-trade sales remained stronger than pre-pandemic, as concerns about COVID-19 endured. Also, the number of international tourists, an important group for on-trade spending, remained lower in comparison with the pre-pandemic years. In 2021, the split between on-trade and off-trade was similar, with the on-trade channel just edging ahead, and going forward it is anticipated that the on-trade will remain the largest channel in terms of sales, and will extend its lead.

What next for alcoholic drinks?

It is anticipated that total value and volume sales will return to pre-pandemic levels during the five-year forecast period. It is expected that this will take place for beer in 2022-2023, whereas for spirits this will be later, in 2024-2025. To some extent, the arrival of the Omicron variant at the end of 2021 will slightly delay full recovery. In the immediate future, it is also possible that 2022 will see higher prices for alcoholic drinks, as the impacts of both the 2021 supply chain crisis and the high cost of energy in Spain begin to take effect. Production costs may be higher, and obtaining items such as packaging or glass may become more difficult.

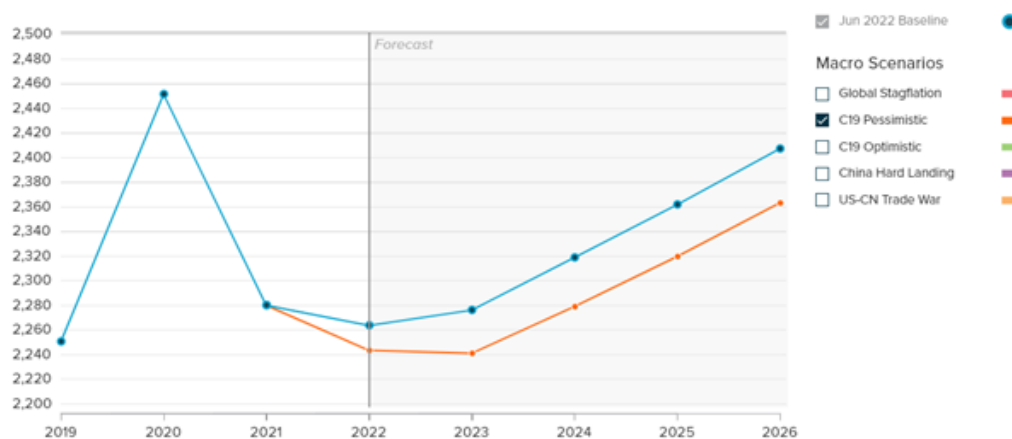
Going forward, as the world emerges from the pandemic, there will be some release of pent-up demand to socialise with family and friends and make up for the time lost socialising. In the next five years, a “Roaring 20s” trend may be seen in Spain – a time of indulgence and extravagance following the bad years of the pandemic – similar to that seen a century ago, something which could give an added impulse to on-trade sales.

The development of premium products is anticipated to grow across all spirits categories in Spain during the forecast period. Spaniards are already very high consumers of premium alcoholic drinks in comparison with their counterparts in the rest of Europe; however, this is still expected to grow, as consumers find themselves prepared to spend more on better-quality products. Similarly, drinks that are perceived as “healthier” are set to be popular in the next five years, as Spanish consumers will continue to seek products containing less alcohol and fewer calories, and as drinking habits becoming more focused on moderate consumption and drinking times move to earlier in the day, such as an aperitif before a meal. Drinks such as post-dinner liqueurs are expected to be popular, and the “healthier” drinks trend may also benefit the development of non-alcoholic spirits.

It is expected that Spanish consumers will remain quite traditional in what they demand from their wines. As such, it is questionable the extent to which new wine product innovations will appear in comparison with the many developments in other alcoholic drinks categories, such as spirits. However, one possible development is an increase in demand for slightly sweeter wines.

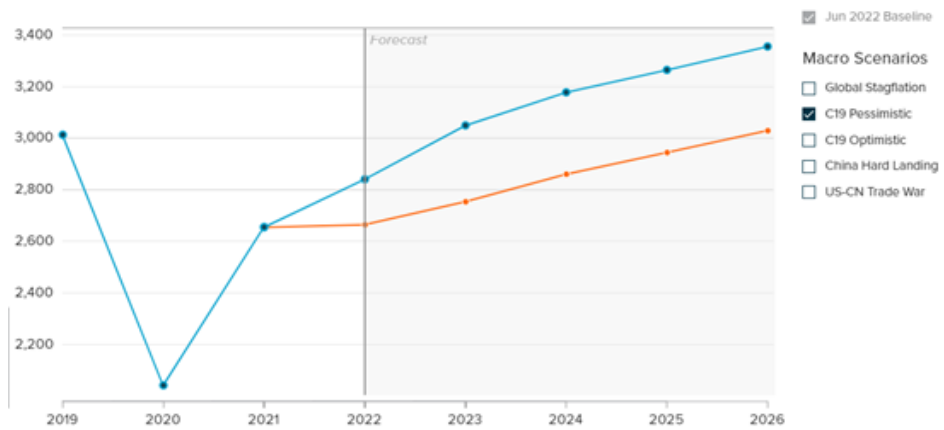
Recovery depends to a significant degree on the sustained return of international tourists to the country, given the amount of money this group spends in on-trade establishments such as bars and restaurants. It is anticipated that some level of travel restrictions and some general travel hesitancy will continue into the first part of 2022, thus 2023 is predicted to be the first full year both without restrictions on travel for tourists and without major restrictions impacting the hospitality industry. Tourism to the country did see a boost in 2021 compared with 2020, but arrivals were still lower than 2019. Smaller breweries will particularly benefit from this return, given their reliance on sales in local hospitality venues.

Chart 1 Alcoholic Drinks Off-Trade Volume Sales Growth Scenarios: 2019-2026



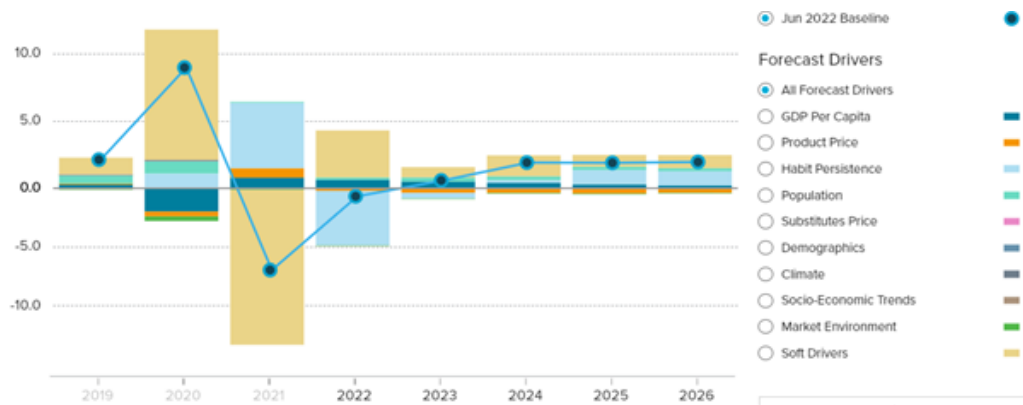
Source: Euromonitor International

Chart 2 Alcoholic Drinks On-Trade Volume Sales Growth Scenarios: 2019-2026



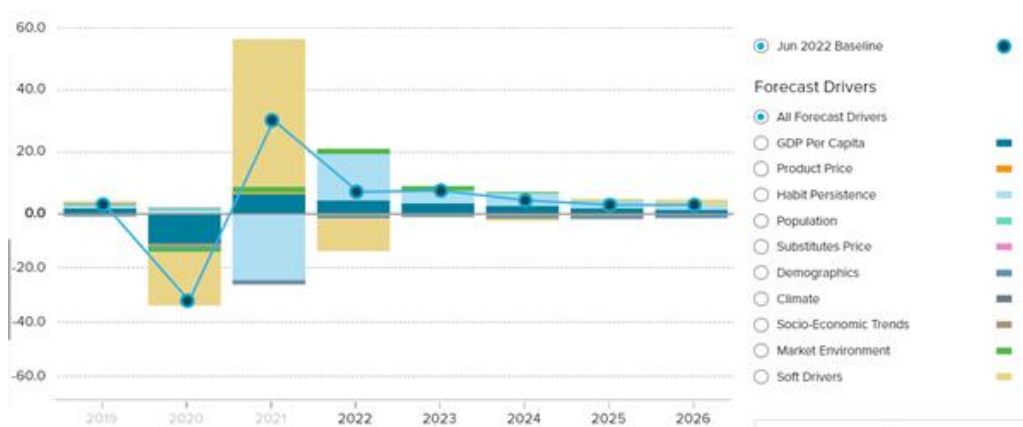
Source: Euromonitor International

Chart 3 Alcoholic Drinks Impact of Soft Drivers on Off-Trade Volume Sales: 2019-2026



Source: Euromonitor International

Chart 4 Alcoholic Drinks Impact of Soft Drivers on On-Trade Volume Sales: 2019-2026



Source: Euromonitor International

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

There were no changes to the legal drinking age or legal purchasing age in Spain in 2021. The minimum age for purchasing and consuming alcoholic drinks is 18 years old. Nevertheless, many Spaniards start drinking before they are 18, and this tends to be generally socially accepted. According to the Alcohol, Tobacco and Illegal Drugs in Spain Report 2021, undertaken by the Health Ministry of the Spanish Government, in 2019 the average age of starting drinking was 16.7 years, a slight rise from the 2017 average, which was 16.6 years.

Drink driving

There were no changes to the drink driving legislation in Spain in 2021. The permitted alcohol limit whilst driving is 0.25mg per litre of breath, or 0.5mg per litre of blood. Exceeding these limits is punishable with fines that range from EUR500 to six months' imprisonment and up to four years' licence suspension. The Spanish driving licence system, which is based on points, has been established since 2006, and is similar to that implemented in other European countries. Spaniards initially hold a driving licence with 12 points, and lose a certain number of points after every infraction. For example, 4-6 points would be deducted from the driving licence of a motorcyclist caught drink driving.

Advertising

There were no changes made to legislation regarding the advertising of alcoholic drinks in Spain in 2021. Since 2007, legislation has prohibited the use of health claims in advertisements for alcoholic drinks with an ABV above 1.3%. The Ley General de Regulación Audiovisual, introduced by the Spanish Senate in 2010, permits the advertising of lower-alcohol drinks and wine only from 20.30hrs to 06.00hrs. Before 2012, there was no common state legislation on alcoholic drinks advertising in Spain. Every region autonomously regulated the advertising of alcoholic drinks.

In December 2012, legislation from Madrid regarding the advertising of alcohol was extended to national level. This legislation prohibits the advertising of alcoholic drinks in places where their sale, distribution or consumption is not allowed. Spain remains a country with high availability of alcoholic drinks for the population, which is reinforced by the high production levels and low cost of alcoholic drinks in the country. The influence and power of the alcoholic drinks industry and the strong cultural roots of alcohol in the country continue to affect the advertising regulation of alcoholic drinks in Spain.

In June 2019, spiritsEUROPE, the association that represents spirits manufacturers in Europe, signed a Memorandum of Understanding undertaking to start showing products' energy values on their labels, as well as the complete list of ingredients. The Memorandum of Understanding is a voluntary agreement promoted by the European Commission.

Smoking ban

Under the Nueva Ley Antitabaco which came into force in January 2011, smoking is forbidden in any enclosed public space or in any place where children could be exposed to tobacco, including parks, recreation areas, etc.

Opening hours

Legal hours for the sale of alcoholic drinks in on-trade and off-trade channels did not change at a national level during the COVID-19 pandemic in 2021. However, businesses selling alcohol were subject to any relevant COVID-19 restrictions in place throughout the year to curb the spread of the virus, something that was particularly relevant for bars and restaurants. For instance, there were night-time curfews imposed in various autonomous communities at various stages of the year, which meant that hospitality venues had to close earlier than they otherwise would have done.

On-trade establishments

In 2021, off-trade sales declined slightly, as people were able to return to hospitality venues, and on-trade sales saw notable increases in both current value and volume terms. However, it is worth remembering the effects of the onset of the pandemic on on-trade and off-trade sales in 2020. In 2020, off-trade sales saw a major boost, as people were forced to transfer their drinking occasions from bars and restaurants to their homes. In particular this led to off-trade growth for certain categories, such as beer and wine, that were better able to transfer to at-home consumption occasions, given their association with mealtimes. However, the on-trade saw sales reduce significantly as bars and restaurants shut. Thus, when looking at the shifts in 2021, it is important to bear in mind the contrasting positions of both channels at the start of the year.

Summary 1 Number of On-trade Establishments by Type 2015-2021

	2015	2016	2017	2018	2019	2020	2021
Cafés/Bars	187,393	185,200	181,288	176,680	173,816	134,226	136,202
Bars/Pubs	150,258	148,117	144,271	141,207	139,498	103,619	104,978
Full-Service Restaurants	71,478	73,538	75,929	77,065	74,659	61,854	61,094
Limited-Service Restaurants	12,946	13,631	14,331	14,878	15,589	15,129	15,490
Self-Service Cafeterias	292	297	298	301	311	305	311
Street Stalls/Kiosks	2,038	2,236	2,395	2,416	2,428	1,680	2,004

Source: Euromonitor International

TAXATION AND DUTY LEVIES

In 2021, the Spanish government imposed an increase in VAT on sugary and sweetened beverages from 10% to 21%. This was largely seen as a measure to tackle childhood obesity and encourage healthy lifestyles. In the alcoholic drinks industry, this change affected spirit-based RTDs and popular drinks such as sangria.

Summary 2 Taxation and Duty Levies on Alcoholic Drinks 2021

Excise Tax	Value	Volume/Value Unit
Beer		
<1.2%ABV	EUR0.00	per litre of pure alcohol
1.2%-2.8% ABV	EUR2.75	per litre of pure alcohol
2.8% ABV-11° Plateau	EUR7.48	per litre of pure alcohol
11-15° Plateau	EUR9.96	per litre of pure alcohol
15-19° Plateau	EUR13.56	per litre of pure alcohol
>19° Plateau	EUR0.91	0.91 per hectolitre
Still wine		
Still wine	EUR0.00	per litre of pure alcohol
Sparkling wine		
Sparkling wine	EUR0.00	per litre of pure alcohol
Spirits		
Spirits	EUR9.59	per litre of pure alcohol
RTDs		
RTDs	EUR9.59	per litre of pure alcohol
Cider/perry		
Cider/perry	EUR0.00	per litre of pure alcohol
Sales tax		
Sales tax	21%	

Source: Euromonitor International

OPERATING ENVIRONMENT

Contraband/parallel trade

There are still no strong incentives for smugglers to introduce contraband alcoholic drinks into Spain. One of the main reasons is that the average unit prices of alcoholic drinks in Spain remain lower than those in neighbouring countries France and Portugal. In addition, for some years there have been stronger operations conducted by the National Security Force, discouraging contraband alcoholic drinks. However, there is a parallel trade within alcoholic drinks in Spain, called *garrafón*, which occurs when bars or small stores sell counterfeit or adulterated alcoholic drinks in branded bottles, sometimes diluting alcoholic drinks with water or mixing them with low-end alcoholic drinks.

Duty free

There were no changes in 2021 with respect to duty free sales. In Spain, duty free shops within airports and ferry terminals sell products at tax-free equivalent prices. As Spain is a member of the EU, there are no duty-free alcoholic drinks or sales of other products for travellers from EU countries. A non-EU national over the age of 17 arriving in Spain from a non-EU country can import one litre of spirits with an ABV above 22% or two litres of alcoholic drinks that do not exceed 22% ABV. They may also bring two litres of wine. EU nationals can bring into Spain up to 1.5 litres of spirits with an ABV above 22%, three litres of alcoholic drinks under 22% ABV and five litres of wine.

Cross-border/private imports

Cross-border activities and private imports continued to impact sales of alcoholic drinks in Spain in 2020, although COVID-19 travel bans affected freedom of movement when they were in place. Notwithstanding travel restrictions, French and Portuguese consumers, for example, cross into Spain in order to find cheaper alcoholic drinks. Sales of some alcoholic drinks, such as spirits, therefore continue to see a boost from purchases by foreign citizens. On the other hand, the private import of alcoholic drinks by Spaniards continues to decrease. The main destination for Spanish consumers when it comes to buying cheaper alcoholic drinks and tobacco is Andorra, which has a taxation system that leads local Spanish consumers to travel to purchase alcoholic drinks.

KEY NEW PRODUCT LAUNCHES

Pernod Ricard developed a range of “light” spirits in 2021. These have fewer calories and a reduced alcohol content when compared with their standard counterparts. It developed Ballantine’s light whisky (a 700ml bottle with 20% alcohol – the regular offer has 40%), and Beefeater light gin (700ml bottle available with 20% alcohol – the regular offer also has 40%). The company also launched Ruavieja Cremosa, a vegan product with less than half the calories of its usual cream liqueur product, made with rice milk (a 700ml bottle available with 17% alcohol). These product developments from Pernod Ricard highlight the existing trend in Spain for customers wanting alcohol with fewer calories and reduced alcohol, and demonstrate the change in consumption habits brought about by the pandemic, such as moderation when drinking and earlier drinking times.

A new entrant in alcoholic drinks was the Galipette Cidre range in Spain by Sibbaris Privée and Cider Supply Co. Galipette Cidre is gluten-free and vegan and available in a Brut variety (4.5% ABV), a sweeter Biologique (4.0% ABV) and a non-alcoholic version. This demonstrates the growth of low alcohol and no alcohol products within the Spanish market.

A significant development in 2021 was the growth of hard seltzers in the Spanish market; that is, carbonated drinks with an alcohol content of around 5%. In the years preceding the pandemic, this segment had seen significant growth in countries such as the US and the UK, and this is now also starting to be seen in Spain. Whilst there were a handful of hard seltzers in Spain before 2020, since the pandemic a great number of brands have entered the market, including from large brands. Notably, Coca-Cola launched its Topo Chico hard seltzer (a 300ml drink) in the Spanish market in 2021, adding to the recent entry of Mahou’s Glowly, BebeFit’s Felina and Eneyeti’s Ener & Mixer. These products are often marketed as a “healthier” option, for example by highlighting that they are gluten-free and contain no additives, or that they are low in calories or in alcohol content.

Outlook

Product developments related to changing consumption habits are expected to be seen during the next five years. These will address new and popular consumption occasions earlier in the day, such as pre-dinner aperitifs, post-dinner liqueurs, after lunch and after work. Low alcohol or non-alcoholic products are thus expected to be developed, along with distinctively flavoured products. Indeed, spirits either with no or reduced alcohol are expected to see significant growth during the forecast period. This is already evidenced by Pernod Ricard's new products in 2021.

The health and wellbeing trends are also expected to continue in Spain. Drinks that are lower in calories and with a reduced alcohol content are predicted to be popular to take advantage of this trend. This may also play into the hands of drinks which are marketed as "healthier", such as gluten-free or vegan. Thus, drinks such as hard seltzers will grow in popularity over the course of the next five years. Growth and trends within the hard seltzers segment are likely to mirror those seen in the UK and the US – namely that the segment will grow at a faster rate than the alcoholic drinks industry as a whole in the forecast period.

In addition, consumers, especially younger consumers of legal drinking age, are expected to continue to be keen to experiment and try new drinks and flavours. Products such as flavoured beer and cider – including raspberry cider – will increase in popularity during the next five years in Spain. Products such as vegan cream liqueurs are also expected to see growing demand.

MARKET INDICATORS

Table 1 Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Total	7,840.0	7,955.0	8,088.3	8,507.0	7,772.8	8,227.4

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

Note: 2021 data is forecast

MARKET DATA

Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

	2016	2017	2018	2019	2020	2021
Beer (million litres)	3,617.9	3,751.0	3,810.1	3,925.1	3,350.9	3,707.2
Cider/Perry ('000 litres)	63,713.5	66,507.0	68,624.5	72,134.9	62,537.5	66,724.5
RTDs ('000 litres)	85,954.8	87,684.6	83,501.9	84,549.2	83,611.1	84,340.6
Spirits ('000 litres)	213,385.2	214,742.8	213,797.9	210,864.5	158,536.6	175,734.2
Wine (million litres)	966.7	972.9	960.0	973.7	839.4	903.4
Alcoholic Drinks (million litres)	4,947.6	5,092.8	5,136.0	5,266.3	4,494.9	4,937.4

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

Table 3 Sales of Alcoholic Drinks by Category: Total Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Beer	13,790.4	14,456.5	14,777.3	15,335.6	11,331.3	14,226.8
Cider/Perry	283.1	303.6	322.1	340.2	268.9	318.7
RTDs	142.5	144.9	145.2	147.4	133.6	150.1
Spirits	8,378.5	8,523.7	8,587.2	8,525.0	5,527.7	6,933.6
Wine	4,801.3	4,995.3	5,194.5	5,412.4	4,384.5	5,158.3
Alcoholic Drinks	27,395.8	28,424.1	29,026.2	29,760.6	21,646.0	26,787.4

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

Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

% total volume growth	2020/21	2016-21 CAGR	2016/21 Total
Beer	10.6	0.5	2.5
Cider/Perry	6.7	0.9	4.7
RTDs	0.9	-0.4	-1.9
Spirits	10.8	-3.8	-17.6
Wine	7.6	-1.3	-6.6
Alcoholic Drinks	9.8	0.0	-0.2

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

Table 5 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	25.6	0.6	3.2
Cider/Perry	18.5	2.4	12.6
RTDs	12.3	1.0	5.3
Spirits	25.4	-3.7	-17.2
Wine	17.6	1.4	7.4
Alcoholic Drinks	23.8	-0.4	-2.2

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

Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

	Off-trade	On-trade	Total
Beer (million litres)	1,668.3	2,038.9	3,707.2
Cider/Perry ('000 litres)	18,660.3	48,064.3	66,724.5
RTDs ('000 litres)	75,051.3	9,289.3	84,340.6
Spirits ('000 litres)	91,729.5	84,004.8	175,734.2
Wine (million litres)	426.8	476.6	903.4
Alcoholic Drinks (million litres)	2,280.5	2,656.9	4,937.4

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

Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

EUR million	Off-trade	On-trade	Total
Beer	2,329.6	11,897.2	14,226.8
Cider/Perry	45.5	273.2	318.7
RTDs	93.5	56.6	150.1
Spirits	1,370.5	5,563.1	6,933.6
Wine	1,626.3	3,532.0	5,158.3
Alcoholic Drinks	5,465.4	21,322.1	26,787.4

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

Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

% volume analysis	Off-trade	On-trade	Total
Beer	45.0	55.0	100.0
Cider/Perry	28.0	72.0	100.0
RTDs	89.0	11.0	100.0
Spirits	52.2	47.8	100.0
Wine	47.2	52.8	100.0
Alcoholic Drinks	46.2	53.8	100.0

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

Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

% value analysis	Off-trade	On-trade	Total
Beer	16.4	83.6	100.0
Cider/Perry	14.3	85.7	100.0
RTDs	62.3	37.7	100.0
Spirits	19.8	80.2	100.0
Wine	31.5	68.5	100.0
Alcoholic Drinks	20.4	79.6	100.0

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

Table 10 GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Grupo Mahou-San Miguel SA	21.1	21.3	21.3	21.4	21.8
Heineken NV	20.0	19.6	19.2	18.8	19.4
Damm SA	9.2	9.4	9.5	9.4	9.5
Hijos de Rivera SA	3.8	4.0	4.3	4.5	4.4
Anheuser-Busch InBev NV	2.9	3.0	3.0	2.9	2.9

J García Carrión SA	2.3	2.3	2.3	2.4	2.4
Agora SA	1.5	1.5	1.5	1.5	1.5
Pernod Ricard Groupe	1.5	1.4	1.4	1.2	1.3
Diageo Plc	1.0	1.0	1.0	0.9	1.0
Mahou SA	1.1	1.1	1.0	1.1	1.0
Private Label	11.2	11.0	10.7	11.2	10.6
Others	24.4	24.5	24.7	24.7	24.2
Total	100.0	100.0	100.0	100.0	100.0

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

Table 11 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

% off-trade	2016	2017	2018	2019	2020	2021
Store-Based Retailing	97.6	97.5	98.2	98.3	97.7	97.8
- Grocery Retailers	96.3	96.2	96.7	96.8	96.4	96.5
-- Modern Grocery Retailers	86.2	86.3	87.1	87.5	87.8	87.8
--- Convenience Stores	3.0	2.9	2.9	2.8	3.0	2.9
--- Discounters	8.3	8.3	8.2	8.2	8.6	8.7
--- Forecourt Retailers	0.1	0.1	0.1	0.0	0.0	0.0
--- Hypermarkets	18.0	17.9	17.7	17.5	16.7	16.6
--- Supermarkets	56.9	57.1	58.1	58.9	59.4	59.6
-- Traditional Grocery Retailers	10.0	9.8	9.6	9.3	8.6	8.6
--- Food/drink/tobacco specialists	4.8	4.7	4.5	4.4	3.8	3.8
--- Independent Small Grocers	4.1	4.1	4.0	3.8	3.8	3.8
--- Other Grocery Retailers	1.1	1.1	1.1	1.1	0.9	1.1
- Non-Grocery Specialists	0.6	0.6	0.6	0.6	0.5	0.5
-- Drugstores/parapharmacies	-	-	-	-	-	-
-- Other Non-Grocery Alcoholic Drinks Specialists	0.6	0.6	0.6	0.6	0.5	0.5
- Mixed Retailers	0.7	0.7	0.9	0.9	0.9	0.8
-- Department Stores	0.7	0.7	0.9	0.9	0.9	0.8
-- Mass Merchandisers	-	-	-	-	-	-
-- Variety Stores	-	-	-	-	-	-
-- Warehouse Clubs	-	-	-	-	-	-
Non-Store Retailing	2.4	2.5	1.8	1.7	2.3	2.2
- Direct Selling	-	-	-	-	-	-
- Homeshopping	1.0	1.0	0.7	0.6	0.5	0.5
- E-Commerce	1.4	1.5	1.1	1.2	1.8	1.8
- Vending	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 12 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2021

% off-trade

	Beer	Cider/Perry	RTDs	Spirits	Wine
Store-Based Retailing	98.1	98.8	99.5	97.8	96.5
- Grocery Retailers	97.5	96.7	99.3	91.8	95.9
-- Modern Grocery Retailers	89.9	82.2	94.5	79.9	86.0
--- Convenience Stores	1.9	1.0	0.4	0.9	2.2
--- Discounters	9.8	7.7	4.9	10.3	4.7
--- Forecourt Retailers	0.0	0.0	0.1	0.1	0.1
--- Hypermarkets	18.1	16.7	21.4	15.2	18.7
--- Supermarkets	60.1	56.8	67.7	53.3	60.3
-- Traditional Grocery Retailers	7.6	14.5	4.7	12.0	9.9
--- Food/drink/tobacco specialists	2.7	7.2	1.5	3.7	5.9
--- Independent Small Grocers	4.7	5.9	2.8	7.1	2.9
--- Other Grocery Retailers	0.2	1.4	0.5	1.1	1.1
- Non-Grocery Specialists	0.3	1.0	0.1	2.7	0.0
-- Drugstores/parapharmacies	0.0	0.0	0.0	0.0	0.0
-- Other Non-Grocery Alcoholic Drinks Specialists	0.3	1.0	0.1	2.7	0.0
- Mixed Retailers	0.4	1.1	0.2	3.3	0.7
-- Department Stores	0.4	1.1	0.2	3.3	0.7
-- Mass Merchandisers	0.0	0.0	0.0	0.0	0.0
-- Variety Stores	0.0	0.0	0.0	0.0	0.0
-- Warehouse Clubs	0.0	0.0	0.0	0.0	0.0
Non-Store Retailing	1.9	1.2	0.5	2.2	3.5
- Direct Selling	0.0	0.0	0.0	0.0	0.0
- Homeshopping	0.0	0.0	0.0	0.0	0.5
- E-Commerce	1.9	1.2	0.5	2.2	3.0
- Vending	0.0	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0

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

Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026

Million litres	2021	2022	2023	2024	2025	2026
Beer	3,707.2	3,832.6	4,015.6	4,151.1	4,254.8	4,368.6
Cider/Perry	66.7	70.0	72.7	75.5	78.0	80.0
RTDs	84.3	85.7	87.4	88.5	89.4	89.8
Spirits	175.7	188.4	198.2	206.8	213.7	219.7
Wine	903.4	929.9	954.3	977.6	993.7	1,007.9
Alcoholic Drinks	4,937.4	5,106.7	5,328.4	5,499.5	5,629.6	5,765.9

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

Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
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Beer	14,226.8	15,152.5	16,411.3	17,263.0	17,966.4	18,660.3
Cider/Perry	318.7	343.0	364.8	384.3	401.8	417.0
RTDs	150.1	157.9	165.6	172.0	177.7	181.9
Spirits	6,933.6	8,217.9	9,042.9	9,694.5	10,223.5	10,638.8
Wine	5,158.3	5,472.4	5,757.2	6,049.4	6,294.7	6,519.0
Alcoholic Drinks	26,787.4	29,343.7	31,741.9	33,563.3	35,064.2	36,417.0

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

Table 15 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Beer	3.4	3.3	17.8
Cider/Perry	4.9	3.7	19.8
RTDs	1.6	1.3	6.4
Spirits	7.2	4.6	25.0
Wine	2.9	2.2	11.6
Alcoholic Drinks	3.4	3.2	16.8

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

Table 16 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	6.5	5.6	31.2
Cider/Perry	7.6	5.5	30.8
RTDs	5.2	3.9	21.2
Spirits	18.5	8.9	53.4
Wine	6.1	4.8	26.4
Alcoholic Drinks	9.5	6.3	35.9

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

DISCLAIMER

Forecast and scenario closing date: 23 May 2022

Report closing date: 29 June 2022

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 3 Research Sources

Official Sources	Consejo Regulador de la Sidra
	Consejo Regulador del Brandy de Jerez
	Instituto de Comercio Exterior (ICEX)
	Instituto Nacional de Estadística (INE)
	Magrama
Trade Associations	Ministerio de Agricultura, Pesca y Alimentación (MAPA)
	Asociacion de Lagareros de Asturias (ALA)
	Asociación Española de Sidra (AESI)
	Asociación Española Empresarial de Bodegas de Vinos de Mesa (Avimes)
	Association of Canadian Distillers
	Brewers of Europe, The
	Bureau National Interprofessionnel du Cognac (BNIC)
	Cámara Nacional de la Industria Tequilera
	Cerveceros de España
	Comité Interprofessionnel du Vin de Champagne (CIVC)
	Consejo Regulador de las Denominaciones de Origen Jerez
	Consejo Regulador de Rioja
	Consejo Regulador del Cava
	Consejo Regulador del Orujo de Galicia
	Consejo Regulador del Tequila
	Consorzio per la Tutela del Vino Marsala DOC
	Denominación de Origen Patxaran de Navarra
	FEBE, Federación Española de Bebidas Espirituosas
	Federacion Española de Bebidas Alcoholicas
Federación Española de Fabricantes de Bebidas Espirituosas (FEFBE)	
Federación Española de Hostelería (FEHR)	

	Federacion Espanola del Vino (FEV)
	Institut del Cava
	Instituto del Champagne
	Instituto do Vinho Bordado e do Artesanato da Madeira
	Instituto dos Vinhos do Douro e Porto
	OEMV-Observatorio Español del Mercado del Vino
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	Emprendedores
	Expansión
	Grupo Agora
	Marketing News
	The Spirits Business
	Vinum
	Wine & Spirits International
	Wines from Spain
	World Drink Trends

Source: Euromonitor International

BEER IN SPAIN - CATEGORY ANALYSIS

KEY DATA FINDINGS

- Total volume sales rise by 11% in 2021 to 3.7 billion litres
- Non/low alcohol beer is the best performing category in 2021, with total volume sales growing by 15% to 596 million litres
- Mahou SA is the leading player in 2021, with a total volume share of 31%
- Total volume sales are set to increase at a CAGR of 3% over the forecast period to 4.4 billion litres

2021 DEVELOPMENTS

Rebound as restrictions ease, but COVID-19-related factors still have A negative impact

2021 saw some rebound in both total volume and current value sales of beer in Spain. This was aided by the lifting of COVID-19 restrictions in the country, which brought about a significant recovery in the on-trade channel, especially during the summer period. In Spain, beer consumption is a social activity, with people drinking beer when they visit a bar or a restaurant and meet friends. This explains the boost to on-trade sales, as this activity was able to resume during the year. However, total volume and value sales in 2021 remained much lower than the pre-pandemic levels, seen in 2019. Indeed, several factors contributed to the fact that nowhere near a full recovery was seen by beer in 2021. Spain spent the first months of the year in lockdown, when bars and restaurants were closed, and at the end of the year on-trade sales were also impacted by concerns over the Omicron variant of COVID-19. These considerations also meant that sales of beer in the off-trade channel were high once again in 2021; albeit seeing a slight reduction from 2020. Given that beer is frequently consumed with a meal, many consumers transferred their beer consumption habits to the home, as they did in the previous year.

Low alcohol and non-alcoholic products remain popular

Beer consumption trends reported in 2020 were seen once again in 2021, with non-alcoholic products (such as Mahou 0,0 Tostada or Warsteiner Premium Fresh) and low alcohol products (such as Mahou Sin and Mahou Mixta) once again in demand in 2021. Various factors continued to contribute to the growing demand for these types of products. Consumer consciousness of pursuing a healthy lifestyle, shown, for instance, through moderate alcohol consumption, has only increased because of the pandemic, and this translated into demand for beer with lower alcohol content or with fewer calories. Connected to this is the influence of *tardeo* in Spain, whereby drinking occasions are taking place earlier in the day. In many of these cases, consumers want to drink a beverage that is not too high in alcohol or calories. Overall, beer remained a popular drink to accompany a meal in 2021; indeed, most beer consumption occasions occurred during mealtimes. Overall, non-alcoholic and low alcohol beer are expected to continue to grow in popularity over the next five years, with flavoured beers which are already available in the market, such as Damm Lemon or Desperados Red, expected to see growth.

Supply chain issues not impactful, given that majority of consumption is domestic

One of the major stories in 2021 was the supply chain crisis prompted by the pandemic, which affected shipping routes, production and consumption. However, this phenomenon did not have a major impact on the beer category in Spain, given that the majority of beer consumed in the country comes from domestic producers, something that was also the case before the pandemic. However, there was some small impact on imported lager. Meanwhile, another of the key stories in 2021 was the increasing costs of energy that swept across Spain in 2021, something which increased production costs within the industry. However, it was reported that this did not have much of an impact on value or volume sales of beer in 2021 – although this could raise unit prices in 2022.

PROSPECTS AND OPPORTUNITIES

Pre-pandemic beer consumption habits slowly return, but recovery reliant on return of tourists

It is anticipated that total current value sales will return to the pre-pandemic level in 2022, with volume sales following in 2023. This is partly influenced by concerns over the Omicron variant of COVID-19, which will impact sales at the very start of 2022 and jeopardise hopes of a full volume return in 2022. However, recovery depends to a significant degree on the sustained return of international tourists to the country, given the amount of money this group spends in on-trade establishments. It is anticipated that travel restrictions and travel hesitancy will continue into the first part of 2022, thus 2023 is predicted to be a full year both without restrictions on travel for tourists and without major restrictions impacting the hospitality industry. Smaller breweries will particularly benefit from this return, given their reliance on sales in local hospitality venues. Also, as outlined earlier, the consumption of beer in Spain is a social occasion, when meeting friends or eating at a restaurant. 2021 demonstrated that this custom will endure despite the impact of the pandemic. Thus, it is expected that on-trade volume sales will outperform those in retail during the forecast period.

Competitive landscape will continue to be dominated by domestic players

The major proportion of sales in the beer category will continue to come from domestic producers in Spain during the forecast period. Whilst this was a key feature before the pandemic, the supply chain issues seen in 2021 may affect international players shipping beer to Spain and make it more difficult to source foreign products in the country. This is particularly envisaged to be relevant in 2022. Also, partly as a result of the overall trend towards premiumisation in the category, craft beer is expected to grow, and more domestic players are expected to enter the segment. These new players are expected to focus on factors such as sustainability and the development of distinct flavours. Overall, it is hard to see any player breaking the dominance of the four key players in the Spanish beer category – Mahou, Heineken, Damm and Hijos de Rivera.

Online will be relevant, but not have A significant impact

Year-on-year growth in e-commerce peaked in 2020, given that many breweries had no other option but to develop their online offer to reach customers unable to go to bars during the

pandemic. Going forward, it is expected that the online channel will continue to grow, although not at a strong rate, and with a slower rate of increase than seen in 2020. Buying beer online contrasts with the traditional method of consuming beer, and the current proportion of sales coming from e-commerce is still small within overall sales. One likely deployment of the online channel is as a marketing tool, for instance by using social media to engage with younger consumers of legal drinking age.

CATEGORY BACKGROUND

Lager price band methodology

The premium price range in lager includes imported brands such as Heineken, Corona and Paulaner, and domestic beers such as Mahou Cinco Estrellas, Estrella Galicia and Voll Damm. Mid-priced brands include San Miguel Especial, Estrella Damm, Mahou Clasica and Amstel. Economy brands include private label lines, such as those from Mercadona, Lidl and Carrefour, as well as economy brands from domestic manufacturers, such as Xibeca Damm.

Summary 4 Lager by Price Band 2021

Category	Price range per litre
Premium	Above EUR2.30
Mid-priced	Between EUR1.11 and EUR2.30
Economy	Below EUR1.11

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

Note: Price bands for lager are based primarily on price, but positioning and packaging are other factors that are considered in classification

Table 17 Number of Breweries 2016-2021

	2016	2017	2018	2019	2020	2021
Number of breweries	494	520	538	551	527	520
Number of microbreweries	486	512	530	543	519	512

Source: Euromonitor International

CATEGORY DATA

Table 18 Sales of Beer by Category: Total Volume 2016-2021

million litres	2016	2017	2018	2019	2020	2021
Dark Beer	13.6	14.0	14.3	14.6	12.6	13.3
- Ale	9.2	9.6	9.8	10.1	8.6	9.4
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	4.4	4.5	4.5	4.6	4.0	4.0
Lager	3,032.6	3,154.2	3,205.6	3,294.2	2,814.9	3,089.8

- Flavoured/Mixed Lager	243.9	262.7	276.2	290.9	249.0	285.0
- Standard Lager	2,788.7	2,891.5	2,929.4	3,003.3	2,565.9	2,804.8
-- Premium Lager	743.8	824.0	859.0	913.1	781.7	849.8
--- Domestic Premium Lager	563.8	635.0	666.4	712.3	622.8	677.0
--- Imported Premium Lager	180.0	189.0	192.6	200.8	158.8	172.9
-- Mid-Priced Lager	1,703.0	1,727.8	1,736.8	1,762.6	1,489.7	1,666.0
--- Domestic Mid-Priced Lager	1,636.9	1,662.1	1,671.6	1,697.2	1,421.9	1,608.2
--- Imported Mid-Priced Lager	66.1	65.7	65.2	65.4	67.8	57.9
-- Economy Lager	341.9	339.7	333.6	327.6	294.6	289.0
--- Domestic Economy Lager	329.6	327.5	321.7	315.8	282.7	278.5
--- Imported Economy Lager	12.3	12.2	12.0	11.8	11.9	10.4
Non/Low Alcohol Beer	562.8	573.7	581.0	606.9	516.2	595.8
- Low Alcohol Beer	124.9	127.4	127.5	128.9	109.4	121.8
- Non Alcoholic Beer	437.9	446.3	453.5	478.0	406.8	474.0
Stout	8.9	9.1	9.2	9.3	7.2	8.3
Beer	3,617.9	3,751.0	3,810.1	3,925.1	3,350.9	3,707.2

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

Table 19 Sales of Beer by Category: Total Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Dark Beer	132.3	136.3	138.1	141.8	104.3	128.2
- Ale	86.5	89.7	91.0	94.0	70.8	88.7
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	45.8	46.6	47.2	47.8	33.5	39.5
Lager	11,476.5	12,092.5	12,369.3	12,809.9	9,397.5	11,764.3
- Flavoured/Mixed Lager	1,073.4	1,159.1	1,234.4	1,327.6	1,017.5	1,208.0
- Standard Lager	10,403.1	10,933.4	11,134.9	11,482.3	8,380.0	10,556.3
-- Premium Lager	4,107.5	4,573.2	4,704.5	4,959.3	3,561.1	4,519.9
--- Domestic Premium Lager	2,958.4	3,356.4	3,455.4	3,654.1	2,691.2	3,393.6
--- Imported Premium Lager	1,149.1	1,216.8	1,249.1	1,305.2	869.9	1,126.3
-- Mid-Priced Lager	5,772.5	5,841.7	5,914.0	6,014.9	4,438.1	5,607.5
--- Domestic Mid-Priced Lager	5,642.5	5,712.7	5,785.8	5,886.6	4,314.6	5,491.6
--- Imported Mid-Priced Lager	130.0	129.0	128.2	128.2	123.5	115.9
-- Economy Lager	523.2	518.5	516.4	508.1	380.8	429.0
--- Domestic Economy Lager	510.7	506.2	504.2	496.1	369.8	418.3
--- Imported Economy Lager	12.5	12.3	12.2	12.0	11.0	10.7
Non/Low Alcohol Beer	2,102.1	2,146.3	2,187.1	2,299.3	1,767.7	2,257.8
- Low Alcohol Beer	413.5	424.6	429.7	435.6	330.6	404.6
- Non Alcoholic Beer	1,688.6	1,721.8	1,757.4	1,863.7	1,437.1	1,853.2
Stout	79.5	81.4	82.9	84.7	61.9	76.4
Beer	13,790.4	14,456.5	14,777.3	15,335.6	11,331.3	14,226.8

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

Table 20 Sales of Beer by Category: % Total Volume Growth 2016-2021

% total volume growth	2020/21	2016-21 CAGR	2016/21 Total
Dark Beer	6.0	-0.4	-1.8
- Ale	9.5	0.4	2.0
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	-1.5	-2.1	-9.9
Lager	9.8	0.4	1.9
- Flavoured/Mixed Lager	14.5	3.2	16.8
- Standard Lager	9.3	0.1	0.6
-- Premium Lager	8.7	2.7	14.3
--- Domestic Premium Lager	8.7	3.7	20.1
--- Imported Premium Lager	8.8	-0.8	-4.0
-- Mid-Priced Lager	11.8	-0.4	-2.2
--- Domestic Mid-Priced Lager	13.1	-0.4	-1.8
--- Imported Mid-Priced Lager	-14.6	-2.6	-12.5
-- Economy Lager	-1.9	-3.3	-15.5
--- Domestic Economy Lager	-1.5	-3.3	-15.5
--- Imported Economy Lager	-12.3	-3.2	-15.2
Non/Low Alcohol Beer	15.4	1.1	5.9
- Low Alcohol Beer	11.4	-0.5	-2.5
- Non Alcoholic Beer	16.5	1.6	8.2
Stout	14.4	-1.5	-7.1
Beer	10.6	0.5	2.5

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

Table 21 Sales of Beer by Category: % Total Value Growth 2016-2021

% local currency, current value growth	2020/21	2016-21 CAGR	2016/21 Total
Dark Beer	23.0	-0.6	-3.1
- Ale	25.4	0.5	2.6
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	17.9	-2.9	-13.8
Lager	25.2	0.5	2.5
- Flavoured/Mixed Lager	18.7	2.4	12.5
- Standard Lager	26.0	0.3	1.5
-- Premium Lager	26.9	1.9	10.0
--- Domestic Premium Lager	26.1	2.8	14.7
--- Imported Premium Lager	29.5	-0.4	-2.0
-- Mid-Priced Lager	26.3	-0.6	-2.9
--- Domestic Mid-Priced Lager	27.3	-0.5	-2.7
--- Imported Mid-Priced Lager	-6.2	-2.3	-10.8
-- Economy Lager	12.6	-3.9	-18.0
--- Domestic Economy Lager	13.1	-3.9	-18.1
--- Imported Economy Lager	-3.2	-3.1	-14.4
Non/Low Alcohol Beer	27.7	1.4	7.4
- Low Alcohol Beer	22.4	-0.4	-2.1
- Non Alcoholic Beer	29.0	1.9	9.7

Stout	23.4	-0.8	-3.9
Beer	25.6	0.6	3.2

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

Table 22 Sales of Beer by Off-trade vs On-trade: Volume 2016-2021

million litres	2016	2017	2018	2019	2020	2021
Off-trade	1,515.4	1,562.4	1,584.6	1,628.8	1,788.7	1,668.3
On-trade	2,102.5	2,188.6	2,225.5	2,296.3	1,562.3	2,038.9
Total	3,617.9	3,751.0	3,810.1	3,925.1	3,350.9	3,707.2

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

Table 23 Sales of Beer by Off-trade vs On-trade: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Off-trade	2,065.2	2,143.0	2,166.2	2,234.7	2,470.6	2,329.6
On-trade	11,725.2	12,313.5	12,611.1	13,100.9	8,860.8	11,897.2
Total	13,790.4	14,456.5	14,777.3	15,335.6	11,331.3	14,226.8

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

Table 24 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	-6.7	1.9	10.1
On-trade	30.5	-0.6	-3.0
Total	10.6	0.5	2.5

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

Table 25 Sales of Beer by Off-trade vs On-trade: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	-5.7	2.4	12.8
On-trade	34.3	0.3	1.5
Total	25.6	0.6	3.2

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

Table 26 Sales of Beer by Craft vs Standard 2016-2021

% total volume	2016	2017	2018	2019	2020	2021
Craft	0.3	0.5	0.8	1.0	0.9	0.9
Non-Craft	99.7	99.5	99.2	99.0	99.2	99.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 27 GBO Company Shares of Beer: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Grupo Mahou-San Miguel SA	28.7	28.6	28.6	28.6	29.0
Heineken NV	27.1	26.4	25.7	25.2	25.8
Damm SA	12.5	12.7	12.8	12.6	12.7
Hijos de Rivera SA	5.1	5.4	5.8	6.0	5.9
Anheuser-Busch InBev NV	4.0	4.0	4.1	3.9	3.9
Agora SA	2.0	2.1	2.1	2.0	2.1
Mahou SA	1.5	1.4	1.4	1.4	1.3
Diageo Plc	0.7	0.7	0.7	0.6	0.7
Carlsberg A/S	0.6	0.6	0.6	0.5	0.5
Cervezas Moritz SA	0.4	0.3	0.3	0.3	0.3
Paulaner Brauerei GmbH & Co KG	0.2	0.2	0.2	0.2	0.2
Modelo SA de CV, Grupo	-	-	-	-	-
SABMiller Ltd	-	-	-	-	-
Private Label	9.7	9.4	9.1	9.6	8.9
Others	7.6	8.2	8.8	8.9	8.8
Total	100.0	100.0	100.0	100.0	100.0

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

Table 28 NBO Company Shares of Beer: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Mahou SA	30.3	30.2	30.1	30.6	30.8
Heineken España SA	27.9	27.1	26.4	25.9	26.6
Damm SA	12.5	12.7	12.8	12.6	12.7
Hijos de Rivera SA	5.1	5.5	5.8	6.0	5.9
Centros Comerciales Carrefour SA	5.3	5.2	5.0	5.1	4.8
Cía Cervecera de Canarias SA (Cercasa)	2.7	2.7	2.6	2.5	2.5
La Zaragozana SA	2.0	2.1	2.1	2.0	2.1
Mercadona SA	1.9	1.9	1.8	2.1	1.9
Eroski, Grupo	1.1	1.1	1.1	1.1	1.1
GModelo Europa SA	0.9	1.0	1.1	0.7	0.7
Hipercor SA	0.6	0.6	0.6	0.6	0.5
Grupo Cervezas Alhambra SL	0.5	0.5	0.5	0.5	0.5
Consum S Coop V Ltda	0.5	0.5	0.4	0.4	0.4
Cervezas Moritz SA	0.4	0.3	0.3	0.3	0.3
Frutapac SA	0.4	0.4	0.4	0.3	0.3

Cervezas Universales Sa	0.1	0.1	0.1	0.1	0.1
Other Private Label	0.2	0.2	0.2	0.2	0.2
Others	7.5	8.0	8.7	8.7	8.7
Total	100.0	100.0	100.0	100.0	100.0

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

Table 29 LBN Brand Shares of Beer: % Total Volume 2018-2021

% total volume Brand (Global Brand Owner)	Company	2018	2019	2020	2021
Cruzcampo (Heineken NV)	Heineken España SA	8.2	7.8	7.6	7.7
Estrella Damm	Damm SA	7.8	7.8	7.5	7.7
Mahou Clasica (Grupo Mahou-San Miguel SA)	Mahou SA	7.2	7.1	7.1	7.3
San Miguel Especial (Grupo Mahou-San Miguel SA)	Mahou SA	6.8	6.7	6.6	6.7
Amstel (Heineken NV)	Heineken España SA	6.7	6.4	6.5	6.6
Mahou Cinco Estrellas (Grupo Mahou-San Miguel SA)	Mahou SA	6.0	6.0	6.1	6.0
Estrella Galicia	Hijos de Rivera SA	5.2	5.5	5.7	5.6
Buckler 0,0 (Heineken NV)	Heineken España SA	5.3	5.3	5.3	5.6
Carrefour (Private Label)	Centros Comerciales Carrefour SA	5.2	5.0	5.1	4.8
San Miguel 0,0 (Grupo Mahou-San Miguel SA)	Mahou SA	2.7	2.8	2.9	2.9
Other Private Label (Private Label)	Other Private Label	0.2	0.2	0.2	0.2
Others	Others	38.7	39.3	39.5	38.9
Total	Total	100.0	100.0	100.0	100.0

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

Table 30 Forecast Sales of Beer by Category: Total Volume 2021-2026

million litres	2021	2022	2023	2024	2025	2026
Dark Beer	13.3	13.9	14.5	14.9	15.3	15.7
- Ale	9.4	9.7	10.2	10.5	10.8	11.1
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	4.0	4.2	4.3	4.4	4.6	4.7
Lager	3,089.8	3,186.9	3,345.1	3,459.1	3,545.6	3,642.4
- Flavoured/Mixed Lager	285.0	298.9	317.7	336.4	350.2	362.1
- Standard Lager	2,804.8	2,888.0	3,027.4	3,122.7	3,195.5	3,280.3
-- Premium Lager	849.8	904.7	1,008.4	1,053.0	1,091.7	1,143.9
--- Domestic Premium Lager	677.0	719.1	798.9	832.1	860.8	903.2

--- Imported Premium Lager	172.9	185.6	209.5	220.9	230.9	240.7
-- Mid-Priced Lager	1,666.0	1,704.8	1,741.8	1,793.1	1,828.8	1,862.9
--- Domestic Mid-Priced Lager	1,608.2	1,645.9	1,683.6	1,735.5	1,771.5	1,806.1
--- Imported Mid-Priced Lager	57.9	58.9	58.2	57.6	57.2	56.8
-- Economy Lager	289.0	278.5	277.2	276.6	275.0	273.5
--- Domestic Economy Lager	278.5	268.2	267.0	266.4	264.7	263.3
--- Imported Economy Lager	10.4	10.3	10.3	10.2	10.2	10.2
Non/Low Alcohol Beer	595.8	623.2	647.1	667.8	684.6	701.0
- Low Alcohol Beer	121.8	126.7	128.7	131.5	134.1	136.6
- Non Alcoholic Beer	474.0	496.5	518.3	536.3	550.5	564.5
Stout	8.3	8.7	9.0	9.2	9.3	9.4
Beer	3,707.2	3,832.6	4,015.6	4,151.1	4,254.8	4,368.6

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

Table 31 Forecast Sales of Beer by Category: Total Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Dark Beer	128.2	136.0	143.4	149.6	155.5	161.5
- Ale	88.7	94.0	99.9	104.3	108.2	112.1
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	39.5	42.0	43.6	45.3	47.3	49.4
Lager	11,764.3	12,567.7	13,704.9	14,457.4	15,079.9	15,693.0
- Flavoured/Mixed Lager	1,208.0	1,282.3	1,368.3	1,445.1	1,503.2	1,559.3
- Standard Lager	10,556.3	11,285.4	12,336.5	13,012.3	13,576.7	14,133.7
-- Premium Lager	4,519.9	4,947.0	5,656.8	5,988.6	6,264.4	6,533.1
--- Domestic Premium Lager	3,393.6	3,697.5	4,248.2	4,485.7	4,681.2	4,868.5
--- Imported Premium Lager	1,126.3	1,249.5	1,408.6	1,502.9	1,583.2	1,664.6
-- Mid-Priced Lager	5,607.5	5,899.7	6,231.3	6,566.5	6,849.4	7,132.9
--- Domestic Mid-Priced Lager	5,491.6	5,782.2	6,113.8	6,449.2	6,731.9	7,015.1
--- Imported Mid-Priced Lager	115.9	117.5	117.5	117.3	117.5	117.8
-- Economy Lager	429.0	438.6	448.4	457.2	462.8	467.8
--- Domestic Economy Lager	418.3	427.9	437.7	446.4	451.9	456.7
--- Imported Economy Lager	10.7	10.7	10.8	10.8	10.9	11.1
Non/Low Alcohol Beer	2,257.8	2,368.0	2,477.6	2,567.8	2,641.3	2,714.7
- Low Alcohol Beer	404.6	429.6	443.3	454.7	462.6	470.2
- Non Alcoholic Beer	1,853.2	1,938.4	2,034.3	2,113.0	2,178.7	2,244.5
Stout	76.4	80.9	85.4	88.2	89.7	91.1
Beer	14,226.8	15,152.5	16,411.3	17,263.0	17,966.4	18,660.3

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

Table 32 Forecast Sales of Beer by Category: % Total Volume Growth 2021-2026

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Dark Beer	4.2	3.4	17.9
- Ale	3.9	3.4	17.9
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	4.8	3.3	17.9
Lager	3.1	3.3	17.9
- Flavoured/Mixed Lager	4.9	4.9	27.1
- Standard Lager	3.0	3.2	17.0
-- Premium Lager	6.5	6.1	34.6
--- Domestic Premium Lager	6.2	5.9	33.4
--- Imported Premium Lager	7.4	6.8	39.2
-- Mid-Priced Lager	2.3	2.3	11.8
--- Domestic Mid-Priced Lager	2.3	2.3	12.3
--- Imported Mid-Priced Lager	1.7	-0.4	-1.8
-- Economy Lager	-3.6	-1.1	-5.3
--- Domestic Economy Lager	-3.7	-1.1	-5.5
--- Imported Economy Lager	-0.9	-0.4	-2.0
Non/Low Alcohol Beer	4.6	3.3	17.7
- Low Alcohol Beer	4.0	2.3	12.1
- Non Alcoholic Beer	4.7	3.6	19.1
Stout	4.8	2.6	13.9
Beer	3.4	3.3	17.8

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

Table 33 Forecast Sales of Beer by Category: % Total Value Growth 2021-2026

% local currency, constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Dark Beer	6.1	4.7	26.0
- Ale	6.0	4.8	26.3
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	6.3	4.6	25.2
Lager	6.8	5.9	33.4
- Flavoured/Mixed Lager	6.2	5.2	29.1
- Standard Lager	6.9	6.0	33.9
-- Premium Lager	9.4	7.6	44.5
--- Domestic Premium Lager	9.0	7.5	43.5
--- Imported Premium Lager	10.9	8.1	47.8
-- Mid-Priced Lager	5.2	4.9	27.2
--- Domestic Mid-Priced Lager	5.3	5.0	27.7
--- Imported Mid-Priced Lager	1.4	0.3	1.6
-- Economy Lager	2.3	1.7	9.1
--- Domestic Economy Lager	2.3	1.8	9.2
--- Imported Economy Lager	0.5	0.8	4.1
Non/Low Alcohol Beer	4.9	3.8	20.2
- Low Alcohol Beer	6.2	3.1	16.2
- Non Alcoholic Beer	4.6	3.9	21.1
Stout	5.8	3.6	19.3
Beer	6.5	5.6	31.2

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

CIDER/PERRY IN SPAIN - CATEGORY ANALYSIS

KEY DATA FINDINGS

- Total volume sales rise by 7% in 2021 to 67 million litres
- Valle, Ballina & Fernández SA is the leading player in 2021, with a total volume share of 33%
- Total volume sales are set to increase at a CAGR of 4% over the forecast period to 80 million litres

2021 DEVELOPMENTS

Rebound for cider as hospitality venues reopen

The cider/perry category in Spain experienced a rebound in total volume and current value sales in 2021. This was largely due to the significant recovery of sales in the on-trade, as restrictions lifted, and customers returned to bars and restaurants. Drinking cider is closely associated with social occasions, and there was evidence of pre-pandemic consumption habits returning when restrictions allowed during 2021. Indeed, sales were particularly encouraging during the summer months, for instance, due to the impact of tourism. Although sales were still hampered by the lower level of international tourism, which continued into 2021, domestic tourism made a higher contribution. Overall in 2021, on-trade sales remained lower than in 2019. It was certainly the case that the year remained very challenging for hospitality establishments, given that Spain began the year in lockdown, and then ended the year with consumer hesitancy over the emergence of the Omicron COVID-19 variant. Meanwhile, off-trade current value and volume sales fell in 2021, given the lifting of restrictions and return of Spaniards to bars and restaurants described above. Overall however, off-trade sales remained at a high level – above the figures seen pre-pandemic. Cider, along with beer, is often consumed at mealtimes, and this was transferred reasonably successfully by Spanish consumers to meals at home during lockdown periods.

New operators enter cider

New players have entered cider/perry in Spain since the beginning of the pandemic in 2020. For instance, Gallinal Drinks launched Exner Cider, a craft apple cider, which was sold in El Corte Inglés's Gourmet stores, as well as in hospitality locations and via online channels such as Amazon. A second development was from Sibbaris Privée, which signed a distribution agreement with Cider Supply Co to sell the Galipette Cidre range in Spain. Galipette Cidre is gluten-free and vegan, and is available in a Brut variety (4.5% ABV), a sweeter Biologique (4.0% ABV), and a non-alcoholic version. The entry of new cider brands in Spain demonstrates the potential growth for the category, and the variety of different cider products that could enter the market. The launch of a craft cider represented the demand amongst some consumers for premium cider, whereas the non-alcoholic Galipette Cidre demonstrated the increasing popularity of non-alcoholic drinks in the country.

Product developments surrounding sustainable products

2021 also brought some product developments that reflected changing consumer preferences surrounding sustainability. Sidra Menendez and Llagar Castañón worked with the Consejo Regulador de la DOP (Protected Designation of Origin), Sidra de Asturias and the CTIC Technology Centre to develop a public traceability system for DOP Asturian Cider. Here, consumers can discover information about the origin and production process by visiting a website or scanning a QR code. Concern about packaging and recycling are also rising amongst Spanish consumers. Meanwhile, Sidra Trabanco developed its Pecado del Paraiso brand, a natural cider which also has a reduced alcohol content and fewer calories than traditional ciders. Sidra Trabanco also developed the Alicia premium range, a cider designed to be drunk in a wine glass, which comes in a bottle shaped like a wine bottle. These developments reflect several of the key current trends in the alcoholic drinks industry in Spain. For instance, there is demand for reduced alcohol and lower calorie drinks amongst more health-conscious consumers, along with a trend towards premiumisation within the Spanish market. Similarly, the development of traceability programmes answers the concerns of many customers over sustainable and ethical production of the products they consume.

PROSPECTS AND OPPORTUNITIES

Asturian cider up for UNESCO recognition

Asturian cider is to be presented to UNESCO in March 2022 as a candidate to obtain UNESCO Intangible Cultural Heritage status. Recognition would take roughly a year to become officially confirmed, and would serve to distinguish Asturian cider from other cider-producing regions both domestically and internationally. Achieving such recognition would be a first for cider in any part of the world, and would undoubtedly provide a boost to Asturian cider and the Spanish cider category, making it better-known internationally, but also giving a boost to its domestic sales. Indeed, this would fit in with the importance given to heritage and provenance in the minds of many consumers in Spain. It may also prompt tourism to Spanish orchards in a similar fashion to that of wineries, which could also boost sales of Spanish cider. Overall, it is expected that total current value sales of cider will return to pre-pandemic levels in 2022, with total volume sales following a year later. Off-trade sales are set to decline in 2022 and 2023, as Spanish consumers return to hospitality venues and as sales fall from the high level seen during the lockdowns in 2020 and 2021, when consumers had no option but to buy their alcohol in supermarkets. Conversely, 2022 and 2023 will see strong recovery in the on-trade channel. It is also worth adding that whilst sales via e-commerce did grow in 2020, this channel is not expected to see huge growth during the forecast period, and only accounts for a very small proportion of total sales.

Non-alcoholic and natural cider predicted to grow

It is anticipated that a greater variety of cider products will appear in the market during the next five years. For instance, non-alcoholic cider and natural cider will increase in popularity during the forecast period. Non-alcoholic cider, such as that offered by El Gaitero, fits into the growing trend of consumers wanting to reduce their alcohol intake, but also still wanting to go out and socialise with drinks. This comes as a result of the growing consciousness of healthy living, which has only heightened as a result of the pandemic. Low alcohol products also fit into this trend. Whilst sales of low alcohol products did increase in 2021, the proportion of total sales of cider remains low – thus, it is expected that this proportion will increase. Connected to this, natural cider, once again such as that from El Gaitero, is forecast to become more popular.

Natural cider – where the product is manufactured with low intervention and avoids the use of additives such as sugar – is perceived as superior and “healthier” in the minds of many Spanish consumers. Natural cider is largely reliant on the on-trade channel; therefore, it must be highlighted that the development of this segment will be connected to the recovery of bars and restaurants. It is also possible that growth in flavoured ciders may also be seen, such as that offered by Ladron de Manzanas with strawberry and raspberry.

Recovery associated with continued opening of hospitality, but challenges remain

A significant proportion of sales of cider in Spain take place in hospitality venues, with the on-trade accounting for nearly three quarters of sales even in 2021, when sales had not fully recovered from the impact of COVID-19. Thus, recovery will be reliant on the performance of hospitality venues, given that cider consumption occasions are usually in social settings outside of the home. This is particularly relevant for both high-quality cider products such as Euskal Sagardoa, and small local breweries, which rely on local bars and eateries to sell their products. There is a fair bit of concern amongst producers over the Omicron variant of COVID-19, and this may mean that the return to pre-pandemic levels is delayed. However, if no more major issues arise because of the pandemic, growth in cider is expected to continue throughout the forecast period. It is certainly the case that consumers will be keen to go out and socialise following the missed opportunities in 2020 and 2021. Meanwhile, problems in the supply chain (for instance, the supply of glass) and the high price of energy may have the short-term impact of raising the prices of cider in Spain in 2022.

CATEGORY DATA

Table 34 Sales of Cider/Perry: Total Volume 2016-2021

'000 litres	2016	2017	2018	2019	2020	2021
Cider/Perry	63,713.5	66,507.0	68,624.5	72,134.9	62,537.5	66,724.5

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

Table 35 Sales of Cider/Perry: Total Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Cider/Perry	283.1	303.6	322.1	340.2	268.9	318.7

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

Table 36 Sales of Cider/Perry: % Total Volume Growth 2016-2021

% total volume growth	2020/21	2016-21 CAGR	2016/21 Total
Cider/Perry	6.7	0.9	4.7

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

Table 37 Sales of Cider/Perry: % Total Value Growth 2016-2021

% local currency, current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Cider/Perry	18.5	2.4	12.6

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

Table 38 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2016-2021

'000 litres

	2016	2017	2018	2019	2020	2021
Off-trade	15,134.0	15,774.1	16,256.4	17,321.2	24,107.6	18,660.3
On-trade	48,579.6	50,732.9	52,368.1	54,813.7	38,429.9	48,064.3
Total	63,713.5	66,507.0	68,624.5	72,134.9	62,537.5	66,724.5

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

Table 39 Sales of Cider/Perry by Off-trade vs On-trade: Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
Off-trade	32.8	35.1	37.2	40.3	56.8	45.5
On-trade	250.3	268.5	284.9	299.9	212.1	273.2
Total	283.1	303.6	322.1	340.2	268.9	318.7

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

Table 40 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	-22.6	4.3	23.3
On-trade	25.1	-0.2	-1.1
Total	6.7	0.9	4.7

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

Table 41 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	-19.9	6.7	38.5

On-trade	28.8	1.8	9.2
Total	18.5	2.4	12.6

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

Table 42 GBO Company Shares of Cider/Perry: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Valle, Ballina & Fernández SA	32.3	31.8	31.3	32.9	33.2
Manuel Busto Amandi SA	8.3	8.2	7.9	8.4	8.4
Sidra Menéndez SL	4.8	4.7	4.7	5.2	5.2
Grupo Trabanco	5.4	5.1	4.8	5.0	5.0
Envasados Eva SA	3.9	3.8	3.8	3.9	3.9
Sidra Angelon SL	4.1	3.8	3.7	3.8	3.8
Custom Drinks SLU	2.9	2.9	3.0	3.1	3.1
Heineken NV	0.9	2.6	3.5	3.0	2.9
Kopparbergs Bryggeri AB	6.7	6.6	6.9	2.8	2.7
Sidra Cortina Coro SL	2.4	2.3	2.2	2.2	2.1
Martínez Sopeña Hermanos SL	2.3	2.2	2.0	2.0	2.0
Zapiain SAT	2.3	2.2	2.0	2.0	2.0
Ábro Bryggeri AB	1.3	1.3	1.3	1.4	1.4
C&C Group Plc	0.5	0.5	0.5	0.5	0.4
Grusifas SA	-	-	-	-	-
Sidra Escanciador SA	-	-	-	-	-
Bodegas de Villaviciosa SA	-	-	-	-	-
Private Label	2.3	2.2	2.2	3.0	3.0
Others	19.6	19.7	20.2	20.8	20.8
Total	100.0	100.0	100.0	100.0	100.0

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

Table 43 NBO Company Shares of Cider/Perry: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Valle, Ballina & Fernández SA	32.3	31.8	31.3	32.9	33.2
Manuel Busto Amandi SA	8.3	8.2	7.9	8.4	8.4
Sidra Menéndez SL	4.8	4.7	4.7	5.2	5.2
Sidra Trabanco SA	5.4	5.1	4.8	5.0	5.0
Envasados Eva SA	3.9	3.8	3.8	3.9	3.9
Sidra Angelon SL	4.1	3.8	3.7	3.8	3.8
Custom Drinks SLU	2.9	2.9	3.0	3.1	3.1
Heineken España SA	0.9	2.6	3.5	3.0	2.9
Sidras Kopparberg SA	6.7	6.6	6.9	2.8	2.7
Sidra Cortina Coro SL	2.4	2.3	2.2	2.2	2.1
Mercadona SA	1.3	1.3	1.3	2.1	2.0
Martínez Sopeña Hermanos SL	2.3	2.2	2.0	2.0	2.0
Zapiain SAT	2.3	2.2	2.0	2.0	2.0
Damm SA	1.3	1.3	1.3	1.4	1.4

C&C Group Plc	0.5	0.5	0.5	0.5	0.4
Centros Comerciales Carrefour SA	0.4	0.4	0.3	0.3	0.3
Eroski, Grupo	0.0	0.0	0.0	0.0	0.0
Grusifas SA	-	-	-	-	-
Sidra Escanciador SA	-	-	-	-	-
Bodegas de Villaviciosa SA	-	-	-	-	-
Other Private Label	0.6	0.5	0.5	0.6	0.5
Others	19.6	19.7	20.2	20.8	20.8
Total	100.0	100.0	100.0	100.0	100.0

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

Table 44 LBN Brand Shares of Cider/Perry: % Total Volume 2018-2021

% total volume Brand (Global Brand Owner)	Company	2018	2019	2020	2021
El Gaitero	Valle, Ballina & Fernández SA	27.1	26.7	28.2	28.6
El Mayu	Manuel Busto Amandi SA	5.2	5.0	5.3	5.3
Menéndez	Sidra Menéndez SL	4.7	4.7	5.2	5.2
Sidra Trabanco (Grupo Trabanco)	Sidra Trabanco SA	5.1	4.8	5.0	5.0
Jai Alai	Envasados Eva SA	3.8	3.8	3.9	3.9
Pomar	Sidra Angelon SL	3.8	3.7	3.8	3.8
Maeloc	Custom Drinks SLU	2.9	3.0	3.1	3.1
Ladrón de Manzanas (Heineken NV)	Heineken España SA	2.6	3.5	3.0	2.9
Kopparberg (Kopparbergs Bryggeri AB)	Sidras Kopparberg SA	6.6	6.9	2.8	2.7
Cortina	Sidra Cortina Coro SL	2.3	2.2	2.2	2.1
Other Private Label (Private Label)	Other Private Label	0.5	0.5	0.6	0.5
Others	Others	35.2	35.2	37.0	36.7
Total	Total	100.0	100.0	100.0	100.0

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

Table 45 Forecast Sales of Cider/Perry: Total Volume 2021-2026

'000 litres	2021	2022	2023	2024	2025	2026
Cider/Perry	66,724.5	69,989.8	72,714.4	75,525.1	78,004.5	79,950.7

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

Table 46 Forecast Sales of Cider/Perry: Total Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
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Cider/Perry	318.7	343.0	364.8	384.3	401.8	417.0
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 47 Forecast Sales of Cider/Perry: % Total Volume Growth 2021-2026

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Cider/Perry	4.9	3.7	19.8

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

Table 48 Forecast Sales of Cider/Perry: % Total Value Growth 2021-2026

% local currency, constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Cider/Perry	7.6	5.5	30.8

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

RTDS IN SPAIN - CATEGORY ANALYSIS

KEY DATA FINDINGS

- Total volume sales increase by 1% in 2021 to 84 million litres
- Spirit-based RTDs is the best performing category in 2021, with total volume sales increasing by 13% to 5.2 million litres
- J García Carrión SA is the leading player in 2021, with a total volume share of 25%
- Total volume sales are set to increase at a CAGR of 1% over the forecast period to 90 million litres

2021 DEVELOPMENTS

Lifting of restrictions brings strong rebound for volume and value sales of RTDs

2021 brought about growth in RTDs in Spain, with total current value and volume sales recovering to near the pre-pandemic levels seen in 2019. This was prompted by the rebound in on-trade sales, whilst off-trade sales also remained strong, albeit slightly lower than in 2020. Restrictions related to COVID-19 were lifted in Spain during 2021, which meant that sales of RTDs in bars and restaurants recovered in 2021, especially during the summer. However, on-trade sales were still affected by the lockdown restrictions that were present in Spain in the first months of 2021, and were also impacted in December due to concerns over the emergence of the Omicron variant of the virus. Other categories, such as beer and wine, beverages which commonly accompany meals, were able to transfer reasonably successfully to consumption in homes, and this was not seen to the same extent by RTDs. However, it must be added that RTD volume sales were already largely dominated by the off-trade channel, and sales were not impacted by the pandemic in the same way as other alcoholic drinks categories in this channel, which generally saw huge increases in 2020 before declines in 2021.

Various new products enter RTDs after the pandemic begins

A wide range of new products entered the Spanish market in 2021, building on those that entered the market in 2020. This both demonstrates the ongoing innovation in this category, and highlights the possibility for future growth. Martini launched its Fiero RTD – a mixture of botanicals and white wine with 14.9% alcohol – in Spain in April 2021, available, for instance, from El Corte Inglés in a 75cl bottle. Furthermore, Rosa Maria Torres's La Petarda range launched a tropical sangria with passion fruit and pineapple (a 75cl bottle with 7% alcohol), Diageo launched Tanqueray gin and tonic with both London Dry and Flor de Sevilla gins (70cl bottles with 41.3% alcohol content), and Zamora launched Lolea sparkling sangria (a 75cl bottle with 7% alcohol). Overall, a variety of RTDs entered the market after the onset of the pandemic at a variety of price ranges and with diversity in terms of alcoholic content.

Hard seltzers is A segment to watch following various new entrants in 2021

Within RTDs, one of the major drinks to watch is hard seltzers. That is, flavoured carbonated water with an alcohol content of around 5%. In the years preceding the pandemic, this segment saw significant growth in countries such as the US and the UK, and this is now also starting to be seen in Spain. Whilst there were a handful of hard seltzers in Spain before 2020, since the pandemic a great number of brands have entered the market, including large brands. Notably, Coca-Cola launched its Topo Chico hard seltzer (300ml) in the Spanish market in 2021, adding to the recent entry of Mahou's Glow, BebeFit's Felina and Eneyeti's Ener & Mixer. The popularity of hard seltzers is because these fit with many of the key trends seen in the Spanish alcoholic drinks industry in 2021 – mainly the desire amongst consumers for products that are perceived as “healthier”, which are lower in both calories and alcohol content. These products are often also marketed as a “healthier” option, for example by highlighting that they are gluten-free and contain no additives.

PROSPECTS AND OPPORTUNITIES

Growth throughout the forecast period as RTDs fit with several key consumer trends

RTDs is expected to see growth during the forecast period, as key aspects of these products align with many consumer preferences in Spain. For instance, the trend towards products with lower alcohol content and fewer calories is set to continue, as consumers are focused on health and wellbeing and are more thoughtful about the types of products they consume. This thoughtfulness may also lead to heightened demand for products with different and sophisticated flavours, and may particularly suit products such as hard seltzers. Moreover, going forward, and as the world emerges from the pandemic, there is a degree of pent-up demand to socialise with family and friends. In the next five years, a so-called “Roaring 20s” may be seen in Spain – a time of indulgence and extravagance following the bad years of the pandemic – similar to that seen a century ago, and something which could give an added impulse to on-trade sales.

Spirit-based drinks expected to be particularly popular

Spirit-based RTDs is forecast to see higher total volume and current value growth than wine-based RTDs during the next five years. Indeed, growth in RTDs is expected to be predominantly driven by spirit-based RTDs and cocktails. It has been predicted that rum canned cocktails (Bacardi Sunset Punch, Mojito and Rum Punch), Plume and Petal's vodka RTDs (Peach Spritz, Cucumber Spritz, Lemon Spritz) and Cazadores 100% agave tequila RTD will be particularly popular during the coming years. All owned by Bacardi, this demonstrates the types of products that this major player in RTDs in Spain (accounting for nearly a third of sales in spirit-based RTDs in 2021) believes will be popular in the future. Spirit-based RTDs should be well-placed to take advantage of the willingness of consumers to go out and enjoy themselves once concerns over the pandemic recede.

Further diversification expected within RTDs

It is predicted that more players will enter RTDs in Spain during the forecast period, and a greater variety of products will be available to consumers. There are three key aspects that new products are likely to include. Those that incorporate local ingredients or that work with local

suppliers will be well-received, given the importance of provenance and the origin of products in the minds of Spanish consumers. Furthermore, those products that include sustainability innovations will also be in demand. For instance, those with sustainable packaging or that minimise waste in production will be important. Similarly, the emphasis on low sugar, low calorie and low alcohol characteristics is expected to endure.

CATEGORY DATA

Table 49 Sales of RTDs by Category: Total Volume 2016-2021

'000 litres	2016	2017	2018	2019	2020	2021
Malt-based RTDs	-	-	-	-	-	-
Spirit-based RTDs	5,513.4	5,525.5	5,467.8	5,486.1	4,568.2	5,152.2
Wine-based RTDs	80,441.4	82,159.1	78,034.1	79,063.1	79,042.9	79,188.4
Other RTDs	-	-	-	-	-	-
RTDs	85,954.8	87,684.6	83,501.9	84,549.2	83,611.1	84,340.6

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

Table 50 Sales of RTDs by Category: Total Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Malt-based RTDs	-	-	-	-	-	-
Spirit-based RTDs	61.0	61.7	61.8	61.4	50.6	60.1
Wine-based RTDs	81.6	83.3	83.4	86.0	83.1	90.0
Other RTDs	-	-	-	-	-	-
RTDs	142.5	144.9	145.2	147.4	133.6	150.1

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

Table 51 Sales of RTDs by Category: % Total Volume Growth 2016-2021

% total volume growth	2020/21	2016-21 CAGR	2016/21 Total
Malt-based RTDs	-	-	-
Spirit-based RTDs	12.8	-1.3	-6.6
Wine-based RTDs	0.2	-0.3	-1.6
Other RTDs	-	-	-
RTDs	0.9	-0.4	-1.9

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

Table 52 Sales of RTDs by Category: % Total Value Growth 2016-2021

% local currency, current value growth	2020/21	2016-21 CAGR	2016/21 Total
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Malt-based RTDs	-	-	-
Spirit-based RTDs	18.8	-0.3	-1.4
Wine-based RTDs	8.3	2.0	10.3
Other RTDs	-	-	-
RTDs	12.3	1.0	5.3

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

Table 53 Sales of RTDs by Off-trade vs On-trade: Volume 2016-2021

'000 litres	2016	2017	2018	2019	2020	2021
Off-trade	75,940.3	77,464.1	73,372.4	74,451.1	76,460.6	75,051.3
On-trade	10,014.5	10,220.5	10,129.6	10,098.0	7,150.5	9,289.3
Total	85,954.8	87,684.6	83,501.9	84,549.2	83,611.1	84,340.6

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

Table 54 Sales of RTDs by Off-trade vs On-trade: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Off-trade	83.5	84.9	84.6	87.1	91.5	93.5
On-trade	59.0	60.1	60.6	60.3	42.1	56.6
Total	142.5	144.9	145.2	147.4	133.6	150.1

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

Table 55 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	-1.8	-0.2	-1.2
On-trade	29.9	-1.5	-7.2
Total	0.9	-0.4	-1.9

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

Table 56 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	2.2	2.3	11.9
On-trade	34.3	-0.8	-4.1
Total	12.3	1.0	5.3

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

Table 57 GBO Company Shares of RTDs: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
J García Carrión SA	24.4	24.3	24.3	24.8	24.6
Suntory Holdings Ltd	20.3	20.3	20.5	20.1	19.9
Productos de Viticultura SA	12.1	12.1	12.1	12.3	12.2
Bacardi & Co Ltd	1.9	2.0	2.0	1.7	2.0
Diageo Plc	1.7	1.7	1.7	1.3	1.5
Félix Solís Avantis SA	0.9	0.9	0.9	0.9	0.9
Diego Zamora SA	-	0.2	0.2	0.2	0.2
Rives-Pitman SA	0.1	0.1	0.1	0.1	0.1
Grupo Agora SA	0.2	-	-	-	-
Campari Milano SpA, Davide	-	-	-	-	-
Private Label	36.3	36.2	35.4	35.7	35.5
Others	2.1	2.2	2.9	2.9	3.3
Total	100.0	100.0	100.0	100.0	100.0

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

Table 58 NBO Company Shares of RTDs: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
J García Carrión SA	24.4	24.3	24.3	24.8	24.6
Orangina Schweppes España	20.3	20.3	20.5	20.1	19.9
Mercadona SA	17.2	17.2	17.0	17.1	17.1
Productos de Viticultura SA	12.1	12.1	12.1	12.3	12.2
Centros Comerciales Carrefour SA	10.6	10.6	10.2	10.3	10.3
Eroski, Grupo	3.3	3.2	3.1	3.1	3.1
Bacardi España SA	1.9	2.0	2.0	1.7	2.0
Diageo España SA	1.6	1.6	1.7	1.3	1.5
Félix Solís Avantis SA	0.9	0.9	0.9	0.9	0.9
Zamora Co SA	-	0.2	0.2	0.2	0.2
Rives-Pitman SA	0.1	0.1	0.1	0.1	0.1
Diageo Canarias SA	0.0	0.0	0.0	0.0	0.0
Concesiones y Bebidas Carbónicas SA	0.2	-	-	-	-
Zadibe SL	-	-	-	-	-
Other Private Label	5.2	5.2	5.1	5.1	5.0
Others	2.1	2.2	2.9	2.9	3.3
Total	100.0	100.0	100.0	100.0	100.0

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

Table 59 LBN Brand Shares of RTDs: % Total Volume 2018-2021

% total volume Brand (Global Brand	Company	2018	2019	2020	2021
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Owner)					
Tinto de La Casera (Suntory Holdings Ltd)	Orangina Schweppes España	20.3	20.4	20.1	19.8
Mercadona (Private Label)	Mercadona SA	16.1	15.9	16.2	16.0
Tinto de Verano Don Simon	J García Carrión SA	15.5	15.6	15.9	15.7
Carrefour (Private Label)	Centros Comerciales Carrefour SA	10.6	10.2	10.3	10.3
Tinto de Verano Sandevid	Productos de Viticultura SA	9.3	9.4	9.6	9.5
Don Simón	J García Carrión SA	7.6	7.6	7.9	7.8
Eroski (Private Label)	Eroski, Grupo	3.2	3.1	3.1	3.1
Sangría Sandevid	Productos de Viticultura SA	2.0	1.8	1.9	1.9
Bacardi Breezer (Bacardi & Co Ltd)	Bacardi España SA	1.6	1.6	1.4	1.6
Smirnoff Ice (Diageo Plc)	Diageo España SA	1.4	1.4	1.2	1.4
Other Private Label (Private Label)	Other Private Label	5.2	5.1	5.1	5.0
Others	Others	7.2	7.8	7.4	7.9
Total	Total	100.0	100.0	100.0	100.0

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

Table 60 Forecast Sales of RTDs by Category: Total Volume 2021-2026

'000 litres	2021	2022	2023	2024	2025	2026
Malt-based RTDs	-	-	-	-	-	-
Spirit-based RTDs	5,152.2	5,482.4	5,771.3	6,019.6	6,226.1	6,343.1
Wine-based RTDs	79,188.4	80,201.3	81,666.8	82,508.2	83,141.7	83,419.7
Other RTDs	-	-	-	-	-	-
RTDs	84,340.6	85,683.7	87,438.1	88,527.8	89,367.8	89,762.8

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

Table 61 Forecast Sales of RTDs by Category: Total Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Malt-based RTDs	-	-	-	-	-	-
Spirit-based RTDs	60.1	65.3	69.7	73.5	76.9	79.2
Wine-based RTDs	90.0	92.6	95.9	98.4	100.8	102.7
Other RTDs	-	-	-	-	-	-
RTDs	150.1	157.9	165.6	172.0	177.7	181.9

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

Table 62 Forecast Sales of RTDs by Category: % Total Volume Growth 2021-2026

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Malt-based RTDs	-	-	-
Spirit-based RTDs	6.4	4.2	23.1
Wine-based RTDs	1.3	1.0	5.3
Other RTDs	-	-	-
RTDs	1.6	1.3	6.4

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

Table 63 Forecast Sales of RTDs by Category: % Total Value Growth 2021-2026

% local currency, constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Malt-based RTDs	-	-	-
Spirit-based RTDs	8.7	5.7	31.8
Wine-based RTDs	2.9	2.7	14.1
Other RTDs	-	-	-
RTDs	5.2	3.9	21.2

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

SPIRITS IN SPAIN - CATEGORY ANALYSIS

KEY DATA FINDINGS

- Total volume sales rise by 11% in 2021 to 176 million litres
- Non alcoholic spirits is the best performing category in 2021, with total volume sales rising by 21% to 744,000 litres
- Pernod Ricard España SA is the leading player in 2021, with a total volume share of 22%
- Total volume sales are set to increase at a CAGR of 5% over the forecast period to 220 million litres

2021 DEVELOPMENTS

Rebound in 2021, in particular for on-trade sales

There was a rebound in both total current value and volume sales of spirits in 2021, thanks mainly to significant year-on-year growth in on-trade sales in Spain, as consumers returned to bars and restaurants in 2021, especially during the summer months. However, total volume and value sales still remained notably lower than the pre-pandemic levels seen in 2019, after the strong negative impact to on-trade sales in 2020. In 2021, off-trade volume sales remained higher than those seen in the on-trade for a second year, a shift that was brought about by the onset of the pandemic in 2020, with the closure of hospitality venues and concern amongst consumers about contracting COVID-19. However, despite the rebound, 2021 remained a very challenging year for spirits. Spain spent the first months of the year in lockdown, when bars and restaurants were shut. This particularly impacted spirits, given their close connection with socialising and visiting bars and restaurants. Indeed, night clubs in particular were closed for a significant proportion of the year. Then, at the end of the year sales were hit by concerns over the emergence of the Omicron variant of COVID-19, with some autonomous communities in Spain reintroducing measures such as curfews. Spanish consumers found it less easy to transfer the consumption of spirits to the home, as was seen with other alcoholic drinks, such as beer and wine, given their association with bars and restaurants, and the frequency with which drinks such as wine are consumed with a meal.

Pernod Ricard and others launch “light” products

Pernod developed a range of “light” spirits products in 2021. These products have fewer calories and a reduced alcohol content when compared with their standard counterparts, and have a similar price. This was notably seen in Pernod’s Ballantine’s whisky (700ml bottle for EUR11.05 with 20% alcohol – the regular offer has 40%), and Beefeater gin (700ml bottle available for EUR12.25 with 20% alcohol – the regular offer also has 40%). Pernod also launched Ruavieja Cremosa, a vegan product with less than half the calories of its standard cream liqueur product (700ml bottle available for EUR11.29 with 17% alcohol), made with rice milk. This product development highlights the trend in Spain of consumers wanting alcoholic drinks with fewer calories and reduced alcohol content, and demonstrates the change in consumption habits brought on by the pandemic, such as more moderation when drinking and earlier drinking during the day. Further to the new Pernod Ricard “light” products that entered

the market in early 2021, a wealth of other new spirits products entered the market in 2021. Galician Urban Drinks launched its 25Lolita low alcohol gin in July 2021 (available online in a 700ml bottle for EUR19.30 with 25% alcohol). This demonstrates the high degree of innovation currently seen in spirits in the Spanish market.

A wide variety of factors make 2021 an extremely challenging year

Aside from the huge influence of COVID-19 on spirits in Spain, other factors also impacted the category in 2021. There was a rise in transportation costs because of the supply chain crisis. This meant that the prices of bottles, cardboard, aluminium, and the materials needed for alcohol distillation all rose during the year. Not only this, but Brexit regulations came into force at the start of 2021, which raised concerns over the import of products from the UK, such as whiskies. Meanwhile, domestically there was an increase in the cost of energy in Spain, although it is likely that this will have more of an impact on prices in 2022. Overall, whilst there was a rebound in sales in 2021, there was a variety of factors aside from COVID-19 that made the year very challenging once again for spirits in Spain.

PROSPECTS AND OPPORTUNITIES

Recovery to pre-pandemic levels will be seen towards the end of the forecast period

There is expected to be a return to the pre-pandemic levels sales of spirits in Spain by the end of the forecast period, with this anticipated in current value terms in 2023, and in volume terms in 2025. There had been some hopes that a full recovery may be seen before this; however, the impact of the Omicron variant of COVID-19 at the start of 2022 is likely to delay the return to pre-pandemic levels. There is also the short-term impact of high energy prices in Spain, meaning that the costs of spirits are likely to rise in the immediate future. Much of the recovery, however, will be reliant on the return of tourists to the country, given the amount of money travellers spend in on-trade establishments in the country. It is hoped that this will increase into 2022 and throughout the coming years. There is some optimism moving forward, given the expected strong return to hospitality venues when concerns about contracting COVID-19 recede, and the desire amongst consumers for indulgence and reconnection grows. A so-called “Roaring 20s” trend – like that seen in the 1920s – may provide a significant boost to sales of spirits.

Premium products and drinks with A “healthier” perception set to be popular

The development of premium products is anticipated to grow across all spirits categories in Spain during the forecast period. Spaniards are already very high consumers of premium spirits in comparison with their counterparts in the rest of Europe; however, this trend is expected to continue to grow as consumers are increasingly prepared to spend more on better-quality products. Similarly, drinks which are perceived as “healthier” are set to become more popular in the next five years, as Spanish consumers will continue to seek products with less alcohol and fewer calories, and as drinking habits becoming more focused on moderate consumption, and with drinking times becoming earlier in the day, such as an aperitif before a meal. Drinks such as post-dinner liqueurs are also expected to be popular, and this may also benefit the development of non-alcoholic spirits.

Sustainability and traceability will also be important

Concerns over sustainability are expected to become ever more important in the minds of Spanish consumers, including in spirits. In fact, this is already largely expected of alcoholic drinks companies in Spain, especially in terms of issues such as packaging and traceability, along with sustainable production methods, such as those that reduce water consumption or avoid the use of single-use plastics. For instance, 25Lolita, the new low alcohol gin mentioned above, uses recycled packaging, and Zamora has implemented its “Conscious Company” programme, which seeks to achieve a sustainable business model. Regarding traceability, the use of QR codes is one way to help consumers find information about the product they are considering purchasing. It is certainly true that the use of local ingredients is well-received by Spaniards. Moving forward, spirits producers will need an offer that distinguishes them from other companies, requiring innovation in terms of product development, such as different flavours of drinks, in order to attract consumers. It is certainly the case that younger consumers of legal drinking age are willing to experiment with new drinks and new flavours.

CATEGORY BACKGROUND

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

Classification for these spirits products is based purely on pricing, taking a typical brand, usually the leading brand by volume, as the benchmark price, which is indexed as 100%. The benchmark brand will be a mid-priced brand.

Summary 5 Benchmark Brands 2021

Category	Brand name	Positioning
Vodka	Smirnoff	Standard
Gin	Beefeater	Standard
Other blended Scotch whisky	Ballentine's	Standard
Dark rum	Brujal Añejo	Standard
White rum	Bacardi	Standard

Source: Euromonitor International from trade interviews, store checks

CATEGORY DATA

Table 64 Sales of Spirits by Category: Total Volume 2016-2021

'000 litres	2016	2017	2018	2019	2020	2021
Brandy and Cognac	20,322.2	19,748.7	19,444.0	18,833.1	14,786.1	15,609.2
- Brandy	20,151.0	19,581.5	19,280.0	18,674.8	14,658.9	15,475.9
- Cognac	171.2	167.2	164.0	158.3	127.1	133.2
Liqueurs	20,628.6	21,784.7	22,980.3	24,039.8	18,356.2	20,691.9
- Bitters	4,284.8	4,528.5	4,773.6	5,004.9	3,356.9	4,114.3
- Cream-based Liqueurs	8,026.5	8,606.9	9,267.3	9,813.2	7,485.6	8,444.2

- Other Liqueurs	8,317.2	8,649.3	8,939.5	9,221.6	7,513.8	8,133.3
Non Alcoholic Spirits	-	-	478.5	630.4	613.9	743.5
Rum	29,785.0	29,155.3	28,127.5	28,007.2	19,828.7	22,852.4
- Dark Rum	23,999.9	23,507.7	22,697.7	22,711.2	16,595.9	18,816.1
- White Rum	5,785.2	5,647.6	5,429.9	5,296.0	3,232.8	4,036.3
Tequila (and Mezcal)	1,653.7	1,631.8	1,623.7	1,686.8	1,046.4	1,173.5
Whiskies	54,426.8	53,667.8	52,674.6	51,241.7	39,887.7	43,172.4
- Bourbon/Other US Whiskey	2,487.1	2,553.6	2,600.2	2,628.6	1,981.8	2,251.2
- Canadian Whisky	86.6	85.9	84.1	86.0	72.7	78.6
- Irish Whiskey	573.9	582.0	586.6	576.4	469.7	516.7
- Japanese Whisky	0.1	1.5	6.1	14.8	17.1	30.1
- Blended Scotch Whisky	41,319.8	40,345.1	39,217.5	37,761.7	29,052.0	31,331.5
- Single Grain Scotch Whisky	22.7	16.5	14.4	14.2	9.5	11.5
- Single Malt Scotch Whisky	1,406.9	1,457.2	1,516.4	1,573.1	1,339.6	1,521.5
- Other Whiskies	8,529.8	8,626.1	8,649.3	8,586.9	6,945.4	7,431.4
White Spirits	54,577.7	55,774.9	54,341.1	52,565.7	38,672.2	42,725.3
- Gin	45,103.1	46,590.2	45,520.3	44,040.8	32,830.8	36,241.6
- Vodka	9,474.6	9,184.8	8,820.9	8,524.9	5,841.3	6,483.8
Other Spirits	31,991.2	32,979.6	34,128.0	33,859.8	25,345.5	28,765.9
- Aguardente/Aguardiente	6,671.4	6,809.3	6,978.9	7,131.5	5,095.3	5,899.9
- Aniseed-Flavoured Spirits	19,114.9	19,847.9	20,714.2	20,328.3	16,169.5	17,887.1
- Pacharán	5,908.3	6,021.9	6,130.8	6,093.9	3,845.3	4,711.2
- Other Distilled Beverages	296.6	300.6	304.1	306.0	235.4	267.6
Spirits	213,385.2	214,742.8	213,797.9	210,864.5	158,536.6	175,734.2

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

Table 65 Sales of Spirits by Category: Total Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Brandy and Cognac	552.9	545.0	539.8	527.6	344.0	405.5
- Brandy	540.9	533.1	528.1	516.2	335.2	395.8
- Cognac	11.9	11.8	11.7	11.4	8.7	9.7
Liqueurs	712.3	755.6	801.2	799.8	565.5	744.5
- Bitters	145.7	154.9	164.2	174.3	134.3	164.3
- Cream-based Liqueurs	291.9	315.8	342.7	319.6	233.3	311.7
- Other Liqueurs	274.7	284.9	294.4	305.9	198.0	268.5
Non Alcoholic Spirits	-	-	17.7	24.2	23.2	30.2
Rum	1,389.8	1,380.0	1,347.8	1,354.8	856.8	1,056.4
- Dark Rum	1,117.7	1,111.5	1,087.4	1,098.5	693.6	839.8
- White Rum	272.1	268.5	260.4	256.3	163.3	216.6
Tequila (and Mezcal)	113.2	112.9	112.7	121.2	67.7	84.2
Whiskies	2,296.0	2,299.0	2,310.9	2,272.0	1,492.1	1,913.9
- Bourbon/Other US Whiskey	115.7	120.0	123.4	126.8	97.6	118.4
- Canadian Whisky	3.4	3.3	3.3	3.4	2.6	3.2
- Irish Whiskey	21.9	22.1	22.4	22.1	15.6	19.4
- Japanese Whisky	0.0	0.1	0.5	1.4	1.6	3.1
- Blended Scotch Whisky	1,745.2	1,735.3	1,735.6	1,686.1	1,065.5	1,394.8
- Single Grain Scotch Whisky	4.7	3.6	3.3	3.2	2.0	2.6
- Single Malt Scotch Whisky	79.8	84.4	89.6	95.3	75.8	93.4

Whisky						
- Other Whiskies	325.3	330.1	332.8	333.7	231.4	278.9
White Spirits	2,454.1	2,539.5	2,533.2	2,507.2	1,542.1	1,932.4
- Gin	2,060.9	2,151.6	2,159.2	2,144.2	1,318.3	1,658.8
- Vodka	393.2	387.9	374.0	363.0	223.8	273.6
Other Spirits	860.2	891.8	923.8	918.1	636.4	766.6
- Aguardente/Aguardiente	221.2	229.1	236.8	244.2	162.3	205.5
- Aniseed-Flavoured Spirits	400.5	418.1	437.3	426.6	307.3	342.5
- Pacharán	227.6	233.5	238.4	235.9	158.8	208.4
- Other Distilled Beverages	10.9	11.1	11.3	11.5	8.0	10.2
Spirits	8,378.5	8,523.7	8,587.2	8,525.0	5,527.7	6,933.6

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

Table 66 Sales of Spirits by Category: % Total Volume Growth 2016-2021

% total volume growth	2020/21	2016-21 CAGR	2016/21 Total
Brandy and Cognac	5.6	-5.1	-23.2
- Brandy	5.6	-5.1	-23.2
- Cognac	4.8	-4.9	-22.2
Liqueurs	12.7	0.1	0.3
- Bitters	22.6	-0.8	-4.0
- Cream-based Liqueurs	12.8	1.0	5.2
- Other Liqueurs	8.2	-0.4	-2.2
Non Alcoholic Spirits	21.1	-	-
Rum	15.2	-5.2	-23.3
- Dark Rum	13.4	-4.8	-21.6
- White Rum	24.9	-6.9	-30.2
Tequila (and Mezcal)	12.1	-6.6	-29.0
Whiskies	8.2	-4.5	-20.7
- Bourbon/Other US Whiskey	13.6	-2.0	-9.5
- Canadian Whisky	8.1	-1.9	-9.3
- Irish Whiskey	10.0	-2.1	-10.0
- Japanese Whisky	76.8	202.0	25,016.7
- Blended Scotch Whisky	7.8	-5.4	-24.2
- Single Grain Scotch Whisky	20.6	-12.7	-49.4
- Single Malt Scotch Whisky	13.6	1.6	8.1
- Other Whiskies	7.0	-2.7	-12.9
White Spirits	10.5	-4.8	-21.7
- Gin	10.4	-4.3	-19.6
- Vodka	11.0	-7.3	-31.6
Other Spirits	13.5	-2.1	-10.1
- Aguardente/Aguardiente	15.8	-2.4	-11.6
- Aniseed-Flavoured Spirits	10.6	-1.3	-6.4
- Pacharán	22.5	-4.4	-20.3
- Other Distilled Beverages	13.7	-2.0	-9.8
Spirits	10.8	-3.8	-17.6

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

Table 67 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	17.9	-6.0	-26.7
- Brandy	18.1	-6.1	-26.8
- Cognac	11.6	-4.0	-18.5
Liqueurs	31.6	0.9	4.5
- Bitters	22.4	2.4	12.7
- Cream-based Liqueurs	33.6	1.3	6.8
- Other Liqueurs	35.6	-0.5	-2.2
Non Alcoholic Spirits	30.3	-	-
Rum	23.3	-5.3	-24.0
- Dark Rum	21.1	-5.6	-24.9
- White Rum	32.7	-4.5	-20.4
Tequila (and Mezcal)	24.5	-5.7	-25.6
Whiskies	28.3	-3.6	-16.6
- Bourbon/Other US Whiskey	21.4	0.5	2.3
- Canadian Whisky	20.5	-1.2	-5.9
- Irish Whiskey	24.3	-2.3	-11.1
- Japanese Whisky	90.2	215.4	31,100.0
- Blended Scotch Whisky	30.9	-4.4	-20.1
- Single Grain Scotch Whisky	29.5	-11.1	-44.6
- Single Malt Scotch Whisky	23.2	3.2	17.1
- Other Whiskies	20.5	-3.0	-14.3
White Spirits	25.3	-4.7	-21.3
- Gin	25.8	-4.2	-19.5
- Vodka	22.3	-7.0	-30.4
Other Spirits	20.5	-2.3	-10.9
- Aguardente/Aguardiente	26.6	-1.5	-7.1
- Aniseed-Flavoured Spirits	11.5	-3.1	-14.5
- Pacharán	31.3	-1.7	-8.4
- Other Distilled Beverages	28.2	-1.3	-6.5
Spirits	25.4	-3.7	-17.2

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

Table 68 Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021

'000 litres	2016	2017	2018	2019	2020	2021
Off-trade	93,384.3	93,895.9	93,510.1	92,456.5	93,760.5	91,729.5
On-trade	120,000.8	120,846.9	120,287.8	118,408.0	64,776.1	84,004.8
Total	213,385.2	214,742.8	213,797.9	210,864.5	158,536.6	175,734.2

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

Table 69 Sales of Spirits by Off-trade vs On-trade: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Off-trade	1,335.7	1,351.7	1,359.8	1,360.0	1,425.9	1,370.5
On-trade	7,042.8	7,172.0	7,227.3	7,165.0	4,101.7	5,563.1
Total	8,378.5	8,523.7	8,587.2	8,525.0	5,527.7	6,933.6

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

Table 70 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	-2.2	-0.4	-1.8
On-trade	29.7	-6.9	-30.0
Total	10.8	-3.8	-17.6

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

Table 71 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	-3.9	0.5	2.6
On-trade	35.6	-4.6	-21.0
Total	25.4	-3.7	-17.2

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

Table 72 Sales of Dark Rum by Price Platform: % Total Volume 2016-2021

% total volume	2016	2017	2018	2019	2020	2021
Super Premium	2.1	2.3	2.4	2.5	2.4	2.5
Premium	27.9	29.1	29.0	28.8	28.7	29.3
Standard	38.7	37.6	37.4	37.9	38.1	37.5
Economy	31.2	31.0	31.1	30.8	30.8	30.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Note: '-' indicates data not available

Table 73 Sales of White Rum by Price Platform: % Total Volume 2016-2021

% total volume	2016	2017	2018	2019	2020	2021
Super Premium	0.1	0.1	0.2	0.2	0.2	0.2
Premium	6.7	7.0	7.2	7.3	7.3	7.4
Standard	83.3	83.3	83.1	83.0	82.9	82.8
Economy	9.8	9.6	9.5	9.5	9.5	9.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Note: '-' indicates data not available

Table 74 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2016-2021

% total volume	2016	2017	2018	2019	2020	2021
Prestige	0.7	0.7	0.8	0.9	1.0	1.0
Ultra Premium	0.7	0.8	0.9	0.9	1.0	1.0
Super Premium	0.4	0.4	0.5	0.5	0.5	0.5
Premium	10.0	10.1	10.2	10.4	10.5	10.7
Standard	66.5	66.2	66.0	65.9	65.8	65.7
Economy	21.7	21.7	21.6	21.4	21.1	21.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Note: '-' indicates data not available

Table 75 Sales of English Gin by Price Platform: % Total Volume 2016-2021

% total volume	2016	2017	2018	2019	2020	2021
Super Premium	0.9	0.9	0.9	0.9	0.9	0.9
Premium	13.3	13.4	13.4	13.4	13.5	13.6
Standard	46.5	46.7	47.7	48.6	47.6	47.4
Economy	39.3	39.1	38.0	37.1	38.1	38.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Note: '-' indicates data not available

Table 76 Sales of Vodka by Price Platform: % Total Volume 2016-2021

% total volume	2016	2017	2018	2019	2020	2021
Super Premium	1.4	1.9	2.1	2.2	2.3	2.4
Premium	4.3	4.4	4.6	4.6	4.7	4.8
Standard	83.4	82.9	82.7	82.7	82.7	82.6
Economy	11.0	10.8	10.6	10.5	10.4	10.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Note: '-' indicates data not available

Table 77 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2016-2021

% total volume	2016	2017	2018	2019	2020	2021
Flavoured Vodka	4.8	4.9	5.0	5.7	6.1	6.8
Non-Flavoured Vodka	95.2	95.1	95.0	94.3	93.9	93.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 78 GBO Company Shares of Spirits: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Pernod Ricard Groupe	22.2	22.2	22.0	21.4	22.1
Suntory Holdings Ltd	12.2	12.1	12.1	12.0	12.2
Diageo Plc	11.9	12.0	12.0	11.0	11.6
Bacardi & Co Ltd	5.9	5.7	5.5	5.1	5.4
Grupo Osborne SA	4.0	4.0	4.0	4.4	4.3
La Martiniquaise SVS	1.6	1.6	3.7	3.5	3.7
Barceló International SA	3.2	3.2	3.2	3.0	3.3
Diego Zamora SA	2.0	2.5	2.5	2.5	2.6
Edrington Group	3.2	3.1	1.8	1.6	1.7
Mast-Jägermeister SE	1.2	1.2	1.3	1.5	1.6
González Byass SA	1.5	1.4	1.4	1.5	1.5
Luis Caballero SA (Grupo)	1.1	1.1	1.2	1.3	1.4
Karmo Spirit SL	1.2	1.2	1.3	1.2	1.3
Brown-Forman Corp	0.8	0.8	0.9	0.9	0.9
Destilerías Campeny SA	0.5	0.5	0.5	0.7	0.8
Campari Milano SpA, Davide	0.9	1.0	1.0	0.7	0.7
Destilerías La Navarra SA	0.7	0.7	0.7	0.6	0.7
William Grant & Sons Ltd	0.8	0.7	0.7	0.7	0.7
Destilerías Arehucas SA	0.6	0.6	0.6	0.6	0.6
Miguel Torres SA	0.5	0.5	0.5	0.5	0.5
Rives-Pitman SA	0.5	0.5	0.4	0.5	0.5
Illva Saronno SpA	0.4	0.4	0.4	0.5	0.5
Empresa de Bebidas & Refrescos	0.4	0.4	0.4	0.4	0.4
Marie Brizard & Roger International SAS	1.0	1.0	0.3	0.3	0.3
Destilerías MG SA	0.3	0.3	0.3	0.3	0.3
Becle SAB de CV	0.3	0.3	0.3	0.3	0.3
Licores Artemi SA	0.3	0.3	0.3	0.3	0.3
SPI Group	0.3	0.3	0.3	0.2	0.3
Kirin Holdings Co Ltd	0.2	0.2	0.2	0.2	0.2
Hijos de Francisco Serrano SA	0.2	0.2	0.2	0.2	0.2
Private Label	8.6	8.6	8.5	9.4	9.6
Others	11.8	11.6	11.6	12.9	9.6
Total	100.0	100.0	100.0	100.0	100.0

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

Table 79 NBO Company Shares of Spirits: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Pernod Ricard España SA	22.0	22.0	21.8	21.1	21.9
Maxxium España SL	15.4	13.8	13.8	13.6	13.9
Diageo España SA	11.9	12.0	12.0	11.0	11.5
Bacardi España SA	6.1	5.8	5.6	5.2	5.5
Grupo Osborne SA	4.3	4.4	4.4	5.2	5.2
Varma SA (Grupo)	5.7	4.8	4.9	4.2	4.5

Bardinet SAS	1.6	3.1	3.1	2.9	3.0
Mercadona SA	2.7	2.7	2.8	3.0	3.0
Centros Comerciales Carrefour SA	2.3	2.3	2.2	2.5	2.6
González Byass SA	1.5	1.4	1.4	1.5	1.5
Luis Caballero SA (Grupo)	1.1	1.1	1.2	1.3	1.4
Bodegas Marqués de Puerto SA	0.9	0.9	0.9	1.0	1.0
Brown-Forman Corp	0.1	0.8	0.9	0.8	0.9
Destilerías Campeny SA	0.5	0.5	0.5	0.7	0.8
Destilerías La Navarra SA	0.7	0.7	0.7	0.6	0.7
Destilerías Arehucas SA	0.6	0.6	0.6	0.6	0.6
Miguel Torres SA	0.5	0.5	0.5	0.5	0.5
Rives-Pitman SA	0.5	0.5	0.4	0.5	0.5
Destilerías MG SA	0.3	0.3	0.3	0.3	0.3
Licores Artemi SA	0.3	0.3	0.3	0.3	0.3
Hijos de Francisco Serrano SA	0.2	0.2	0.2	0.2	0.2
Destilerías del Penedés SA	0.2	0.2	0.2	0.2	0.2
Coop Agri i Caixa Agraria de L'Arboç	0.1	0.1	0.1	0.1	0.2
Licores Baines SL	0.1	0.1	0.1	0.1	0.1
Aguardientes de Galicia SA	0.1	0.1	0.1	0.1	0.1
Comercial Masoliver SA	0.1	0.1	0.1	0.1	0.1
Eroski, Grupo	0.1	0.1	0.1	0.1	0.1
Antonio Nadal SA	0.1	0.1	0.1	0.1	0.1
SA de Orujo Gallego -El Afilador-	0.4	-	-	-	-
Diego Zamora SA	-	-	-	-	-
Other Private Label	3.6	3.5	3.4	3.8	3.9
Others	16.2	16.9	17.3	18.3	15.3
Total	100.0	100.0	100.0	100.0	100.0

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

Table 80 LBN Brand Shares of Spirits: % Total Volume 2018-2021

% total volume Brand (Global Brand Owner)	Company	2018	2019	2020	2021
Larios (Suntory Holdings Ltd)	Maxxium España SL	4.8	4.7	4.4	4.6
Beefeater (Pernod Ricard Groupe)	Pernod Ricard España SA	4.8	4.8	4.4	4.5
Dyc (Suntory Holdings Ltd)	Maxxium España SL	3.5	3.5	3.6	3.6
Ruavieja (Pernod Ricard Groupe)	Pernod Ricard España SA	3.2	3.4	3.3	3.5
Ballantine's Finest (Pernod Ricard Groupe)	Pernod Ricard España SA	3.3	3.1	3.1	3.2
Mercadona (Private Label)	Mercadona SA	2.7	2.7	2.9	3.0
Ricard (Pernod Ricard Groupe)	Pernod Ricard España SA	2.7	2.7	2.8	2.9
Barceló Añejo	Varma SA (Grupo)	2.7	2.7	2.5	2.7

(Barceló International SA)					
J&B (Diageo Plc)	Diageo España SA	2.9	2.7	2.5	2.6
Seagram's Gin (Pernod Ricard Groupe)	Pernod Ricard España SA	2.4	2.3	2.2	2.2
Other Private Label (Private Label)	Other Private Label	3.5	3.4	3.8	3.9
Others	Others	63.4	63.8	64.6	63.3
Total	Total	100.0	100.0	100.0	100.0

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

Table 81 Forecast Sales of Spirits by Category: Total Volume 2021-2026

'000 litres	2021	2022	2023	2024	2025	2026
Brandy and Cognac	15,609.2	16,407.2	16,984.9	17,541.3	18,047.9	18,348.4
- Brandy	15,475.9	16,273.2	16,849.6	17,403.4	17,907.4	18,205.9
- Cognac	133.2	134.1	135.3	137.8	140.6	142.4
Liqueurs	20,691.9	22,417.7	24,208.6	25,646.5	26,951.6	28,035.5
- Bitters	4,114.3	4,465.8	4,823.0	5,088.2	5,368.5	5,573.0
- Cream-based Liqueurs	8,444.2	9,265.5	9,935.9	10,531.3	11,209.6	11,885.5
- Other Liqueurs	8,133.3	8,686.4	9,449.7	10,027.0	10,373.5	10,576.9
Non Alcoholic Spirits	743.5	946.5	1,251.1	1,691.0	2,391.9	3,438.6
Rum	22,852.4	25,312.6	26,657.1	27,856.7	28,594.3	29,235.1
- Dark Rum	18,816.1	20,744.8	21,929.0	22,917.1	23,542.7	24,107.4
- White Rum	4,036.3	4,567.8	4,728.1	4,939.6	5,051.6	5,127.7
Tequila (and Mezcal)	1,173.5	1,324.8	1,429.3	1,530.3	1,626.4	1,711.8
Whiskies	43,172.4	45,230.6	47,117.7	48,710.4	49,897.0	50,895.6
- Bourbon/Other US Whiskey	2,251.2	2,463.1	2,610.1	2,718.1	2,790.3	2,852.0
- Canadian Whisky	78.6	79.6	80.3	80.9	81.7	82.2
- Irish Whiskey	516.7	536.5	555.7	574.0	589.8	604.3
- Japanese Whisky	30.1	42.5	54.3	62.9	69.7	74.4
- Blended Scotch Whisky	31,331.5	32,653.4	33,900.1	34,971.9	35,707.3	36,296.7
- Single Grain Scotch Whisky	11.5	12.3	13.0	13.8	14.3	14.7
- Single Malt Scotch Whisky	1,521.5	1,605.9	1,696.6	1,766.6	1,835.7	1,881.9
- Other Whiskies	7,431.4	7,837.3	8,207.6	8,522.3	8,808.1	9,089.3
White Spirits	42,725.3	46,049.7	48,616.0	50,822.0	52,402.5	53,549.4
- Gin	36,241.6	38,784.2	40,925.0	42,647.6	43,869.5	44,697.6
- Vodka	6,483.8	7,265.5	7,690.9	8,174.3	8,533.0	8,851.9
Other Spirits	28,765.9	30,744.9	31,981.4	32,977.7	33,794.7	34,520.2
- Aguardente/Aguardiente	5,899.9	6,371.1	6,745.4	7,028.2	7,273.3	7,502.4
- Aniseed-Flavoured Spirits	17,887.1	18,935.4	19,431.0	19,901.9	20,326.8	20,744.3
- Pacharán	4,711.2	5,159.3	5,518.7	5,757.5	5,901.7	5,977.7
- Other Distilled Beverages	267.6	279.1	286.3	290.2	293.0	295.8
Spirits	175,734.2	188,434.0	198,246.0	206,775.7	213,706.2	219,734.6

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

Table 82 Forecast Sales of Spirits by Category: Total Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Brandy and Cognac	405.5	467.9	498.7	544.7	573.1	591.6
- Brandy	395.8	457.5	487.6	533.1	561.0	579.2
- Cognac	9.7	10.4	11.1	11.6	12.1	12.4
Liqueurs	744.5	854.1	929.0	1,037.8	1,114.0	1,164.2
- Bitters	164.3	193.4	217.5	234.6	250.9	262.9
- Cream-based Liqueurs	311.7	353.0	371.4	415.6	444.8	467.9
- Other Liqueurs	268.5	307.7	340.1	387.6	418.3	433.4
Non Alcoholic Spirits	30.2	40.4	56.3	80.0	119.2	179.8
Rum	1,056.4	1,273.6	1,440.5	1,520.4	1,588.1	1,641.5
- Dark Rum	839.8	1,013.5	1,154.2	1,216.0	1,267.1	1,311.3
- White Rum	216.6	260.1	286.3	304.4	321.0	330.2
Tequila (and Mezcal)	84.2	102.5	122.6	139.0	151.0	161.4
Whiskies	1,913.9	2,199.6	2,410.2	2,552.4	2,678.1	2,771.6
- Bourbon/Other US Whiskey	118.4	137.4	150.7	160.0	167.5	172.0
- Canadian Whisky	3.2	3.4	3.5	3.6	3.7	3.8
- Irish Whiskey	19.4	21.4	23.0	24.2	25.1	25.8
- Japanese Whisky	3.1	4.5	5.8	6.8	7.6	8.2
- Blended Scotch Whisky	1,394.8	1,593.0	1,750.3	1,850.4	1,939.5	2,005.1
- Single Grain Scotch Whisky	2.6	2.9	3.2	3.4	3.5	3.7
- Single Malt Scotch Whisky	93.4	102.4	110.4	116.7	122.8	126.7
- Other Whiskies	278.9	334.7	363.4	387.4	408.4	426.4
White Spirits	1,932.4	2,349.8	2,556.5	2,717.6	2,845.8	2,947.3
- Gin	1,658.8	2,022.4	2,199.6	2,325.5	2,435.3	2,521.4
- Vodka	273.6	327.3	357.0	392.1	410.4	425.9
Other Spirits	766.6	930.0	1,029.0	1,102.5	1,154.4	1,181.3
- Aguardente/Aguardiente	205.5	244.9	274.3	293.6	307.7	319.5
- Aniseed-Flavoured Spirits	342.5	421.7	462.4	496.5	520.8	543.4
- Pacharán	208.4	252.3	280.6	300.3	313.5	305.8
- Other Distilled Beverages	10.2	11.1	11.7	12.1	12.4	12.6
Spirits	6,933.6	8,217.9	9,042.9	9,694.5	10,223.5	10,638.8

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

Table 83 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	5.1	3.3	17.5
- Brandy	5.2	3.3	17.6
- Cognac	0.6	1.3	6.9
Liqueurs	8.3	6.3	35.5
- Bitters	8.5	6.3	35.5
- Cream-based Liqueurs	9.7	7.1	40.8
- Other Liqueurs	6.8	5.4	30.0
Non Alcoholic Spirits	27.3	35.8	362.5
Rum	10.8	5.0	27.9
- Dark Rum	10.3	5.1	28.1
- White Rum	13.2	4.9	27.0
Tequila (and Mezcal)	12.9	7.8	45.9

Whiskies	4.8	3.3	17.9
- Bourbon/Other US Whiskey	9.4	4.8	26.7
- Canadian Whisky	1.3	0.9	4.7
- Irish Whiskey	3.8	3.2	17.0
- Japanese Whisky	41.1	19.8	146.7
- Blended Scotch Whisky	4.2	3.0	15.8
- Single Grain Scotch Whisky	7.6	5.1	28.2
- Single Malt Scotch Whisky	5.5	4.3	23.7
- Other Whiskies	5.5	4.1	22.3
White Spirits	7.8	4.6	25.3
- Gin	7.0	4.3	23.3
- Vodka	12.1	6.4	36.5
Other Spirits	6.9	3.7	20.0
- Aguardente/Aguardiente	8.0	4.9	27.2
- Aniseed-Flavoured Spirits	5.9	3.0	16.0
- Pacharán	9.5	4.9	26.9
- Other Distilled Beverages	4.3	2.0	10.5
Spirits	7.2	4.6	25.0

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

Table 84 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	15.4	7.8	45.9
- Brandy	15.6	7.9	46.4
- Cognac	7.2	5.0	27.9
Liqueurs	14.7	9.4	56.4
- Bitters	17.7	9.9	60.0
- Cream-based Liqueurs	13.3	8.5	50.1
- Other Liqueurs	14.6	10.0	61.4
Non Alcoholic Spirits	33.8	42.9	495.9
Rum	20.6	9.2	55.4
- Dark Rum	20.7	9.3	56.2
- White Rum	20.1	8.8	52.4
Tequila (and Mezcal)	21.7	13.9	91.6
Whiskies	14.9	7.7	44.8
- Bourbon/Other US Whiskey	16.0	7.7	45.2
- Canadian Whisky	5.3	3.4	18.4
- Irish Whiskey	9.9	5.9	32.9
- Japanese Whisky	44.9	21.4	163.5
- Blended Scotch Whisky	14.2	7.5	43.8
- Single Grain Scotch Whisky	12.3	7.3	42.0
- Single Malt Scotch Whisky	9.7	6.3	35.7
- Other Whiskies	20.0	8.9	52.9
White Spirits	21.6	8.8	52.5
- Gin	21.9	8.7	52.0
- Vodka	19.6	9.3	55.7
Other Spirits	21.3	9.0	54.1
- Aguardente/Aguardiente	19.2	9.2	55.5
- Aniseed-Flavoured Spirits	23.1	9.7	58.7
- Pacharán	21.0	8.0	46.7
- Other Distilled Beverages	9.4	4.3	23.6
Spirits	18.5	8.9	53.4

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

WINE IN SPAIN - CATEGORY ANALYSIS

KEY DATA FINDINGS

- Total volume sales grow by 8% in 2021 to 903 million litres
- Fortified wine and vermouth is the best performing category in 2021, with total volume sales rising by 11% to 56 million litres
- Total volume sales are set to increase at a CAGR of 2% over the forecast period to 1.0 billion litres

2021 DEVELOPMENTS

Solid total volume rebound across all categories in 2021

Total volume and current value sales of wine saw a rebound in Spain in 2021, moving back towards the pre-pandemic level, with growth seen across all categories. This was largely due to the strong growth of sales in on-trade channels, as bars and restaurants reopened, and customers were able to return to these locations. Sales of wine in Spain are in part connected to the tourism industry, which saw some recovery in 2021 when compared with 2020. Even though international tourism remained down on pre-pandemic levels, domestic tourism was able to make some contribution to sales of wine. However, total current value and volume sales did not return to the pre-pandemic levels in 2021. Whilst wine consumption was able to transfer to the home fairly well, given its connection with mealtimes, the number of possible on-trade consumption occasions remained lower than in 2019, given that many people continued to work from home and were also forced to cut down on the number of social occasions. In addition, Spain spent the first months of the year in lockdown, and sales in December 2021 were impacted by concerns over the Omicron variant of COVID-19. Meanwhile, in terms of retail distribution, whilst e-commerce saw growth in sales from the onset of the pandemic, in particular for institutions such as wine clubs, these value sales still accounted for a low percentage of overall sales within wine in Spain.

Boom for vermouth due to 2021 consumption trends

The strong rise in the popularity of vermouth during the last few years was not significantly impacted by the pandemic. Whilst sales did decline in 2020, thanks to the close association the drink has with consumption in hospitality venues, this reduction was far less marked than those seen in beer and other wine categories. Vermouth was able to transfer effectively to at-home consumption. For instance, drinking an aperitif such as vermouth before a meal has become increasingly popular in Spain. Also, alcohol consumption times are becoming earlier – for instance, people are going out to dinner or to parties earlier – which also suits vermouth. It is also worth noting how the drink has become more popular amongst younger consumers of legal drinking age, who are willing to experiment with new drinks.

Certification and provenance of drinks remain important to Spanish consumers

Considerations such as the heritage and certification of wine remain important in the minds of Spanish wine drinkers. Indeed, since the beginning of the pandemic in 2020, those brands with established heritage, certification or greater consumer knowledge have performed better. These recognised wines are deemed as offering better quality in the minds of Spanish consumers. Indeed, in 2021 Certified Denomination of Origin Rioja was included in the list of 100 brands which instilled the most confidence in consumers in Spain. Wine is connected to the countryside and associated with nature in Spain, which was a factor that also contributed to its popularity in 2021, given that consumers increasingly preferred products associated with features such as natural, local and organic. Certified wines were available in Spain at a variety of price ranges in 2021, from premium rioja wines to a Fino Donceles white wine from the recognised Montilla-Morile region in Andalusia, which was available in Lidl for under EUR3.

PROSPECTS AND OPPORTUNITIES

Consumers will continue to favour traditional products

Spanish consumers are quite traditional in what they demand from their wines. As such, it is questionable the extent to which new product innovations will appear in wine in comparison with the many developments in other alcoholic drinks categories, such as RTDs. However, one possible development is an increase in the demand for slightly sweeter wines. Whilst in general there is a growing preference for alcoholic drinks with reduced alcohol content, it is unknown to what extent this will be seen in the wine category. Furthermore, it is not anticipated that e-commerce will continue to grow significantly, as consumers will still hugely favour buying wine in on-trade and physical off-trade channels. However, online channels could be deployed as a marketing tool, for example to reach younger consumers of legal drinking age via social media. Within different wine types, while still red wine is expected to see growth in the forecast period and will remain the largest category within wine in Spain in terms of volume sales, it is set to be outperformed by white and sparkling wine in terms of growth. White and sparkling wine generally contain lower alcohol and fewer calories than red wine, and a move towards wine products with a lower level of alcohol has been reported in Spain. Overall expectations for sales of wine are positive for the next five years, given the pent-up demand for socialisation because of the pandemic. Indeed, a “Roaring 20s” trend – like that seen in the 1920s – may emerge, whereby consumers desire indulgence and extravagance following difficult years.

Premiumisation will continue, despite some challenges

The premiumisation of the wine category in Spain is set to continue during the next five years. Within sparkling wine, the preference for organic and natural products is anticipated to continue, as consumers are prepared to support wines with these qualities. Also, encouraged by the impact of COVID-19 restrictions, the trend for home indulgence looks set to continue, especially in 2022, as people aim to treat themselves in their own homes. This means that people are likely to be more willing to spend more money on better-quality products in off-trade establishments such as supermarkets. However, two factors will impact the premiumisation trend. First is the availability of wines with designation of origin certification in outlets such as Mercadona and Lidl. This allows customers to buy high-quality wines for a low price, something which may impact the pricing strategies of premium wineries. Also, it is possible that in 2022, the impact of the 2021 supply chain crisis and the high cost of energy in Spain will have an

impact on wine prices in the country, as production costs rise and obtaining items such as packaging or glass may become more difficult.

Sustainability initiatives will remain vital

The priority given to sustainability in the minds of Spanish consumers is anticipated to continue during the next five years; with this trend only accelerating as a result of the pandemic. Indeed, sustainable practices are already largely expected by Spanish people. Sustainable production – such as minimising water use and avoiding the use of single-use plastics – will be increasingly important to customers. Demand for organic wines is also set to grow during the forecast period. Indeed, within sparkling wine, brands such as Codorníu, Canals & Munné and Bodegas Trobat all report that they have increased and will continue to increase their production of organic wines. Connected to the focus on provenance and heritage, traceability is also set to become more relevant in the next five years, as consumers become more focused on where their wines come from. Initiatives such as using a QR code on the bottle are expected to develop. Some companies have already developed sustainable programmes, such as González Byass with its “5+5 Caring for the Planet” initiative, which will help protect the natural environment, and Zamora implemented its “Conscious Company” with the aim of achieving a sustainable business model. It is expected that even more players will develop sustainability initiatives in the forecast period.

CATEGORY DATA

Table 85 Sales of Wine by Category: Total Volume 2016-2021

million litres	2016	2017	2018	2019	2020	2021
Fortified Wine and Vermouth	50.4	52.7	54.8	57.1	50.6	55.9
- Port	-	-	-	-	-	-
- Sherry	11.7	11.5	11.4	11.3	9.1	10.2
- Vermouth	36.3	38.7	41.0	43.4	39.4	43.6
- Other Fortified Wine	2.5	2.4	2.4	2.4	2.1	2.2
Non-Grape Wine	-	-	-	-	-	-
Sparkling Wine	39.9	41.8	42.2	43.4	40.6	42.1
- Champagne	3.1	3.2	3.2	3.3	2.4	3.0
- Other Sparkling Wine	36.8	38.6	38.9	40.1	38.1	39.1
Still Light Grape Wine	876.4	878.5	863.0	873.2	748.2	805.4
- Still Red Wine	473.7	470.4	458.9	464.1	401.9	423.2
- Still Rosé Wine	125.0	120.7	113.3	109.2	84.4	93.4
- Still White Wine	277.7	287.4	290.8	299.8	262.0	288.8
Wine	966.7	972.9	960.0	973.7	839.4	903.4

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

Table 86 Sales of Wine by Category: Total Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Fortified Wine and Vermouth	842.3	886.2	931.2	980.5	784.2	955.8

- Port	-	-	-	-	-	-
- Sherry	168.8	166.8	166.1	164.5	123.2	147.8
- Vermouth	640.8	687.1	733.2	784.4	635.4	779.6
- Other Fortified Wine	32.6	32.3	31.9	31.6	25.6	28.4
Non-Grape Wine	-	-	-	-	-	-
Sparkling Wine	517.2	557.4	583.7	616.2	508.0	600.3
- Champagne	181.5	201.0	215.7	229.6	170.3	214.0
- Other Sparkling Wine	335.7	356.4	368.0	386.6	337.8	386.2
Still Light Grape Wine	3,441.9	3,551.7	3,679.6	3,815.7	3,092.3	3,602.2
- Still Red Wine	1,948.1	2,005.2	2,060.9	2,133.2	1,731.9	1,987.2
- Still Rosé Wine	432.6	423.1	422.7	422.2	317.9	364.0
- Still White Wine	1,061.2	1,123.4	1,195.9	1,260.3	1,042.5	1,251.0
Wine	4,801.3	4,995.3	5,194.5	5,412.4	4,384.5	5,158.3

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

Table 87 Sales of Wine by Category: % Total Volume Growth 2016-2021

% total volume growth	2020/21	2016-21 CAGR	2016/21 Total
Fortified Wine and Vermouth	10.5	2.1	10.9
- Port	-	-	-
- Sherry	11.7	-2.7	-12.9
- Vermouth	10.5	3.7	20.1
- Other Fortified Wine	5.3	-2.3	-10.9
Non-Grape Wine	-	-	-
Sparkling Wine	3.7	1.1	5.4
- Champagne	21.0	-1.0	-5.0
- Other Sparkling Wine	2.6	1.2	6.3
Still Light Grape Wine	7.6	-1.7	-8.1
- Still Red Wine	5.3	-2.2	-10.7
- Still Rosé Wine	10.7	-5.7	-25.3
- Still White Wine	10.2	0.8	4.0
Wine	7.6	-1.3	-6.6

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

Table 88 Sales of Wine by Category: % Total Value Growth 2016-2021

% local currency, current value growth	2020/21	2016-21 CAGR	2016/21 Total
Fortified Wine and Vermouth	21.9	2.6	13.5
- Port	-	-	-
- Sherry	20.0	-2.6	-12.4
- Vermouth	22.7	4.0	21.7
- Other Fortified Wine	11.0	-2.7	-12.9
Non-Grape Wine	-	-	-
Sparkling Wine	18.2	3.0	16.1
- Champagne	25.7	3.4	17.9
- Other Sparkling Wine	14.3	2.8	15.1
Still Light Grape Wine	16.5	0.9	4.7
- Still Red Wine	14.7	0.4	2.0
- Still Rosé Wine	14.5	-3.4	-15.8
- Still White Wine	20.0	3.3	17.9

Wine 17.6 1.4 7.4

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

Table 89 Sales of Wine by Off-trade vs On-trade: Volume 2016-2021

million litres	2016	2017	2018	2019	2020	2021
Off-trade	461.7	455.1	437.1	438.0	469.2	426.8
On-trade	505.0	517.8	522.9	535.7	370.1	476.6
Total	966.7	972.9	960.0	973.7	839.4	903.4

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

Table 90 Sales of Wine by Off-trade vs On-trade: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Off-trade	1,458.3	1,480.0	1,548.2	1,596.0	1,734.3	1,626.3
On-trade	3,343.0	3,515.3	3,646.3	3,816.4	2,650.3	3,532.0
Total	4,801.3	4,995.3	5,194.5	5,412.4	4,384.5	5,158.3

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

Table 91 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	-9.0	-1.6	-7.6
On-trade	28.8	-1.2	-5.6
Total	7.6	-1.3	-6.6

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

Table 92 Sales of Wine by Off-trade vs On-trade: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	-6.2	2.2	11.5
On-trade	33.3	1.1	5.7
Total	17.6	1.4	7.4

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

Table 93 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2016-2021

% off-trade

	2016	2017	2018	2019	2020	2021
Under EUR1.5	20.9	20.8	20.7	20.6	20.5	20.4
EUR1.51 to EUR3	26.0	25.9	26.0	26.0	25.9	25.9
EUR3.01 to EUR4.2	22.6	22.5	22.4	22.4	22.5	22.5
EUR4.21 to EUR7.2	17.5	17.5	17.5	17.5	17.5	17.5
EUR7.21 to EUR12	7.8	8.1	8.2	8.3	8.3	8.3
EUR12.01 and above	5.2	5.2	5.3	5.3	5.3	5.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 94 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2016-2021

% off-trade	2016	2017	2018	2019	2020	2021
Under EUR1.45	24.3	24.2	24.2	23.9	22.8	22.7
EUR1.46 to EUR2	22.5	22.5	22.5	22.5	22.5	22.5
EUR2.01 to EUR4.1	21.9	21.8	21.6	21.6	22.7	22.7
EUR4.11 to EUR7	20.9	20.9	21.0	21.3	21.3	21.3
EUR7.01 to EUR11.5	7.2	7.3	7.4	7.5	7.5	7.5
EUR11.51 and above	3.2	3.3	3.3	3.3	3.3	3.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 95 Sales of Still White Wine by Price Segment: % Off-trade Volume 2016-2021

% off-trade	2016	2017	2018	2019	2020	2021
Under EUR1.5	21.9	21.8	21.8	21.7	21.5	21.5
EUR1.51 to EUR2	15.1	15.0	14.8	14.8	14.9	14.8
EUR2.01 to EUR2.9	20.5	20.4	20.3	20.2	20.2	20.3
EUR2.91 to EUR4.2	16.1	16.2	16.4	16.4	16.4	16.5
EUR4.21 to EUR7.2	16.2	16.3	16.4	16.4	16.4	16.5
EUR7.21 and above	10.3	10.4	10.4	10.5	10.5	10.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 96 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2016-2021

% off-trade	2016	2017	2018	2019	2020	2021
Under EUR2.9	21.6	21.5	21.3	21.1	21.0	20.9
EUR2.91 to EUR4.7	25.6	24.7	24.5	24.5	24.4	24.4
EUR4.71 to EUR6.5	25.9	26.5	26.4	26.4	26.7	26.8
EUR6.51 to EUR8.2	14.9	15.2	15.3	15.3	15.3	15.3
EUR8.21 to EUR10	7.0	7.1	7.2	7.4	7.3	7.4
EUR10.01 and above	5.0	5.1	5.2	5.3	5.3	5.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 97 Sales of Wine by Origin 2019-2021

2019 2020 2021

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

Table 98 GBO Company Shares of Still Light Grape Wine: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
J García Carrión SA	10.6	10.8	10.8	11.1	11.7
Félix Solís Avantis SA	3.9	4.0	4.0	4.0	4.0
Pernod Ricard Groupe	3.0	2.9	2.9	3.0	2.9
Miguel Torres SA	1.8	1.9	1.9	1.9	1.8
Bodegas Martín Códax SA	1.4	1.5	1.5	1.5	1.5
Arco Bodegas Unidas SA	1.3	1.3	1.3	1.3	1.3
Acciona SA	1.2	1.2	1.2	1.2	1.2
Barón de Ley SA (Grupo)	0.9	0.9	1.0	1.1	1.1
Carlyle Group, The	-	0.9	0.9	0.9	0.8
Reserva de la Tierra SL	0.8	0.8	0.8	0.8	0.7
Oetker-Gruppe	-	0.8	0.7	0.7	0.7
Cía Vinícola del Norte de España SA (CVNE)	0.6	0.7	0.7	0.7	0.7
Cavas del Ampurdán SA	0.6	0.6	0.6	0.6	0.6
Unión Vitivinícola Viñedos de Cenicero SA	0.5	0.5	0.5	0.5	0.4
Antonio Barbadillo SA	0.4	0.4	0.4	0.4	0.4
Manzanos Enterprises	-	0.2	0.2	0.2	0.2
Codorníu SA	0.9	-	-	-	-
Freixenet SA	0.9	-	-	-	-
Private Label	15.7	15.9	15.9	16.0	16.1
Others	55.7	54.8	54.6	54.2	53.8
Total	100.0	100.0	100.0	100.0	100.0

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

Table 99 NBO Company Shares of Still Light Grape Wine: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
J García Carrión SA	10.6	10.8	10.8	11.1	11.7
Mercadona SA	5.7	5.9	5.9	6.1	6.1
Félix Solís Avantis SA	3.9	4.0	4.0	4.0	4.0
Centros Comerciales Carrefour SA	3.1	3.2	3.1	3.2	3.2
Domecq Wines España SA (Grupo Domecq Bodegas SA)	3.0	2.9	2.9	3.0	2.9
Miguel Torres SA	1.8	1.9	1.9	1.9	1.8
Bodegas Martín Códax SA	1.4	1.5	1.5	1.5	1.5
Arco Bodegas Unidas SA	1.3	1.3	1.3	1.3	1.3

Grupo Bodegas Palacio 1894 SA	1.2	1.2	1.2	1.2	1.2
Barón de Ley SA (Grupo)	0.9	0.9	1.0	1.1	1.1
Codorníu SA	0.9	0.9	0.9	0.9	0.8
Reserva de la Tierra SL	0.8	0.8	0.8	0.8	0.7
Freixenet SA	0.9	0.8	0.7	0.7	0.7
Cía Vinícola del Norte de España SA (CVNE)	0.6	0.7	0.7	0.7	0.7
Cavas del Ampurdán SA	0.6	0.6	0.6	0.6	0.6
Unión Vitivinícola Viñedos de Cenicero SA	0.5	0.5	0.5	0.5	0.4
Bodegas Barbadillo SL	0.4	0.4	0.4	0.4	0.4
Bodegas Manzanos	-	0.2	0.2	0.2	0.2
Hijos de Antonio Barceló SA	-	-	-	-	-
Other Private Label	6.8	6.9	6.9	6.8	6.8
Others	55.7	54.8	54.6	54.2	53.8
Total	100.0	100.0	100.0	100.0	100.0

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

Table 100 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2018-2021

% total volume Brand (Global Brand Owner)	Company	2018	2019	2020	2021
Casón Histórico (Private Label)	Mercadona SA	5.9	5.9	6.1	6.1
Don Simón	J García Carrión SA	3.5	3.5	3.7	3.8
Carrefour (Private Label)	Centros Comerciales Carrefour SA	3.2	3.1	3.2	3.2
Cumbres de Gredos	J García Carrión SA	2.5	2.5	2.5	2.9
Martín Códax	Bodegas Martín Códax SA	1.3	1.4	1.4	1.4
Los Molinos	Félix Solís Avantis SA	0.8	0.8	0.8	0.8
Don García	J García Carrión SA	0.8	0.8	0.8	0.8
Elegido	Reserva de la Tierra SL	0.8	0.8	0.8	0.7
El Coto	Barón de Ley SA (Grupo)	0.7	0.7	0.7	0.7
Sangre de Toro	Miguel Torres SA	0.7	0.7	0.7	0.7
Other Private Label (Private Label)	Other Private Label	6.9	6.9	6.8	6.8
Others	Others	72.9	72.8	72.6	71.9
Total	Total	100.0	100.0	100.0	100.0

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

Table 101 GBO Company Shares of Champagne: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
LVMH Moët Hennessy Louis Vuitton SA	72.1	72.0	71.8	72.1	70.6
Pernod Ricard Groupe	3.7	4.0	4.4	4.8	4.9
Vranken-Pommery Monopole SA	2.5	2.5	2.5	2.5	2.7
Champagne Taittinger	1.6	1.5	1.5	1.6	1.7

Others	20.1	20.0	19.8	19.0	20.0
Total	100.0	100.0	100.0	100.0	100.0

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

Table 102 NBO Company Shares of Champagne: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Moët Hennessy España SA	72.1	72.0	71.8	72.1	70.6
Pernod Ricard España SA	3.1	3.1	3.2	3.5	3.7
Zamora Co SA	-	-	2.5	2.5	2.7
Julian Chivite Marco SA	1.6	1.5	1.5	1.6	1.7
Domecq Wines España SA (Grupo Domecq Bodegas SA)	0.6	0.9	1.2	1.3	1.2
Varma SA (Grupo)	2.5	2.5	-	-	-
Others	20.1	20.0	19.8	19.0	20.0
Total	100.0	100.0	100.0	100.0	100.0

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

Table 103 LBN Brand Shares of Champagne: % Total Volume 2018-2021

% total volume Brand (Global Brand Owner)	Company	2018	2019	2020	2021
Moët & Chandon Premier Cru (LVMH Moët Hennessy Louis Vuitton SA)	Moët Hennessy España SA	29.2	29.2	28.9	29.3
Moët & Chandon Millesime (LVMH Moët Hennessy Louis Vuitton SA)	Moët Hennessy España SA	20.0	19.9	19.8	18.9
Moët & Chandon Brut Imperial (LVMH Moët Hennessy Louis Vuitton SA)	Moët Hennessy España SA	16.6	16.7	17.2	16.5
Veuve Cliquot Brut (LVMH Moët Hennessy Louis Vuitton SA)	Moët Hennessy España SA	4.0	3.9	3.9	3.7
Mumm (Pernod Ricard Groupe)	Pernod Ricard España SA	3.1	3.2	3.5	3.7
Heidsieck & Co Monopole (Vranken- Pommery Monopole SA)	Zamora Co SA	-	2.5	2.5	2.7
Dom Pérignon (LVMH Moët Hennessy Louis Vuitton SA)	Moët Hennessy España SA	2.2	2.2	2.3	2.3
Taittinger (Champagne Taittinger)	Julian Chivite Marco SA	1.5	1.5	1.6	1.7
Perrier-Jouët (Pernod Ricard Groupe)	Domecq Wines España SA (Grupo Domecq Bodegas SA)	0.9	1.2	1.3	1.2

Heidsieck & Co Monopole (Vranken- Pommery Monopole SA)	Varma SA (Grupo)	2.5	-	-	-
Others	Others	20.0	19.8	19.0	20.0
Total	Total	100.0	100.0	100.0	100.0

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

Table 104 GBO Company Shares of Other Sparkling Wine: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Oetker-Gruppe	-	24.4	22.0	21.9	21.9
Carlyle Group, The	-	18.3	17.6	17.1	17.1
J García Carrión SA	7.9	7.6	8.9	8.9	9.0
Arco Bodegas Unidas SA	2.8	2.9	2.9	2.9	2.9
Henkell & Co Sektellerei KG	-	2.8	2.6	2.8	2.7
Juvé & Camps SA	2.3	2.4	2.4	2.7	2.7
Cavas del Ampurdán SA	2.4	2.2	2.0	2.0	2.0
Freixenet SA	30.2	-	-	-	-
Codorníu SA	19.0	-	-	-	-
Private Label	25.0	23.9	22.5	23.0	23.0
Others	10.3	15.5	19.2	18.8	18.7
Total	100.0	100.0	100.0	100.0	100.0

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

Table 105 NBO Company Shares of Other Sparkling Wine: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Freixenet SA	30.2	27.2	24.6	24.6	24.7
Codorníu SA	19.0	18.3	17.6	17.1	17.1
J García Carrión SA	7.9	7.6	8.9	8.9	9.0
Arco Bodegas Unidas SA	2.8	2.9	2.9	2.9	2.9
Juvé & Camps SA	2.3	2.4	2.4	2.7	2.7
Cavas del Ampurdán SA	2.4	2.2	2.0	2.0	2.0
Centros Comerciales Carrefour SA	0.8	-	-	-	-
Other Private Label	24.3	23.9	22.5	23.0	23.0
Others	10.3	15.5	19.2	18.8	18.7
Total	100.0	100.0	100.0	100.0	100.0

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

Table 106 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2018-2021

% total volume Brand (Global Brand Owner)	Company	2018	2019	2020	2021
Freixenet (Oetker-	Freixenet SA	19.3	17.3	17.4	17.4

Gruppe)					
Codorníu (Carlyle Group, The)	Codorníu SA	11.9	11.5	11.2	11.1
Jaume Serra	J García Carrión SA	7.2	7.1	7.2	7.2
Marqués de Monistrol	Arco Bodegas Unidas SA	2.9	2.9	2.9	2.9
Castellblanch (Henkell & Co Sektellerei KG)	Freixenet SA	2.8	2.6	2.8	2.7
Juvé & Camps	Juvé & Camps SA	2.4	2.4	2.7	2.7
Delapierre (Carlyle Group, The)	Codorníu SA	2.4	2.2	2.2	2.2
Bach (Carlyle Group, The)	Codorníu SA	2.3	2.2	2.1	2.1
Castillo Perelada	Cavas del Ampurdán SA	2.2	2.0	2.0	2.0
Canals & Nubiola (Oetker-Gruppe)	Freixenet SA	2.1	1.9	1.9	1.9
Other Private Label (Private Label)	Other Private Label	23.9	22.5	23.0	23.0
Others	Others	20.7	25.4	24.8	24.8
Total	Total	100.0	100.0	100.0	100.0

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

Table 107 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Bacardi & Co Ltd	39.7	40.6	41.5	42.5	42.5
Bodegas Yzaguirre SL	4.7	4.9	5.4	5.6	5.7
Bodegas Valdepablo SL	3.3	3.2	3.1	3.5	3.4
Hijos de Rainera Pérez Marín SA	3.6	3.6	3.5	3.2	3.2
Bodegas Sanviver SL	2.2	2.3	2.3	2.7	2.7
Bodegas Barbadillo SL	3.2	3.0	2.9	2.7	2.7
Emilio Miro Salvat SA	2.5	2.4	2.3	2.5	2.5
Bodegas Hidalgo-La Gitana SA	2.8	2.7	2.6	2.3	2.4
Grupo Osborne SA	2.0	2.2	2.2	2.0	2.0
Diageo Plc	-	1.1	2.1	1.9	1.9
González Byass SA	2.0	1.9	1.9	1.7	1.7
Emperador Distillers Inc	1.5	1.5	1.4	1.3	1.3
Campari Milano SpA, Davide	1.3	1.3	1.4	1.1	1.1
Justino's Madeira Wines SA	0.3	0.3	0.3	0.3	0.3
Madeira Wine Co SA, The	0.3	0.3	0.3	0.3	0.3
Bodegas Mendoza	0.2	0.2	0.2	0.2	0.2
Private Label	15.6	15.0	13.7	13.2	13.2
Others	14.8	13.4	13.0	13.2	13.0
Total	100.0	100.0	100.0	100.0	100.0

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

Table 108 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Bacardi España SA	39.7	40.6	41.5	42.5	42.5
Mercadona SA	8.9	8.8	8.1	7.7	7.7
Bodegas Yzaguirre SL	4.7	4.9	5.4	5.6	5.7
Bodegas Valdepablo SL	3.3	3.2	3.1	3.5	3.4
Hijos de Rainera Pérez Marín SA	3.6	3.6	3.5	3.2	3.2
Bodegas Sanviver SL	2.2	2.3	2.3	2.7	2.7
Bodegas Barbadillo SL	3.2	3.0	2.9	2.7	2.7
Emilio Miro Salvat SA	2.5	2.4	2.3	2.5	2.5
Bodegas Hidalgo-La Gitana SA	2.8	2.7	2.6	2.3	2.4
Diageo España SA	-	1.1	2.1	1.9	1.9
González Byass SA	2.0	1.9	1.9	1.7	1.7
Grupo Osborne SA	1.3	1.6	1.6	1.5	1.5
Bardinet SAS	-	1.5	1.4	1.3	1.3
Campari España SL	1.3	1.3	1.4	1.1	1.1
Luis Caballero SA (Grupo)	0.7	0.7	0.6	0.5	0.5
Justino's Madeira Wines SA	0.3	0.3	0.3	0.3	0.3
Madeira Wine Co SA, The	0.3	0.3	0.3	0.3	0.3
Bodegas Mendoza	0.2	0.2	0.2	0.2	0.2
Maxxium España SL	1.5	-	-	-	-
Other Private Label	6.7	6.2	5.6	5.5	5.5
Others	14.8	13.4	13.0	13.2	13.0
Total	100.0	100.0	100.0	100.0	100.0

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

Table 109 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2018-2021

% total volume Brand (Global Brand Owner)	Company	2018	2019	2020	2021
Martini Rosso (Bacardi & Co Ltd)	Bacardi España SA	28.1	28.5	29.2	29.1
Martini Bianco (Bacardi & Co Ltd)	Bacardi España SA	12.6	12.8	13.0	13.1
Maronti (Private Label)	Mercadona SA	8.8	8.1	7.7	7.7
Yzaguirre	Bodegas Yzaguirre SL	4.9	5.4	5.6	5.7
Valdepablo	Bodegas Valdepablo SL	3.2	3.1	3.5	3.4
La Guita	Hijos de Rainera Pérez Marín SA	3.6	3.5	3.2	3.2
Zarro	Bodegas Sanviver SL	2.3	2.3	2.7	2.7
Miro	Emilio Miro Salvat SA	2.4	2.3	2.5	2.5
La Gitana	Bodegas Hidalgo-La Gitana SA	2.7	2.6	2.3	2.4
Belsazar (Diageo Plc)	Diageo España SA	1.1	2.1	1.9	1.9
Other Private Label (Private Label)	Other Private Label	6.2	5.6	5.5	5.5
Others	Others	24.2	23.8	23.0	22.8
Total	Total	100.0	100.0	100.0	100.0

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

Table 110 Forecast Sales of Wine by Category: Total Volume 2021-2026

million litres	2021	2022	2023	2024	2025	2026
Fortified Wine and Vermouth	55.9	59.9	63.1	65.7	67.7	69.6
- Port	-	-	-	-	-	-
- Sherry	10.2	10.5	10.8	11.0	11.2	11.5
- Vermouth	43.6	47.3	50.2	52.5	54.4	56.1
- Other Fortified Wine	2.2	2.2	2.2	2.1	2.1	2.1
Non-Grape Wine	-	-	-	-	-	-
Sparkling Wine	42.1	44.9	47.2	49.0	50.4	51.2
- Champagne	3.0	3.0	3.1	3.3	3.4	3.4
- Other Sparkling Wine	39.1	41.8	44.1	45.7	47.0	47.7
Still Light Grape Wine	805.4	825.2	844.0	863.0	875.6	887.1
- Still Red Wine	423.2	424.1	425.8	426.4	426.5	426.4
- Still Rosé Wine	93.4	97.5	99.9	101.9	103.6	105.0
- Still White Wine	288.8	303.6	318.4	334.7	345.4	355.6
Wine	903.4	929.9	954.3	977.6	993.7	1,007.9

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

Table 111 Forecast Sales of Wine by Category: Total Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Fortified Wine and Vermouth	955.8	1,054.6	1,127.5	1,191.6	1,242.6	1,293.9
- Port	-	-	-	-	-	-
- Sherry	147.8	155.1	161.3	166.7	171.8	177.0
- Vermouth	779.6	870.5	937.0	996.0	1,042.0	1,088.2
- Other Fortified Wine	28.4	29.1	29.2	29.0	28.8	28.7
Non-Grape Wine	-	-	-	-	-	-
Sparkling Wine	600.3	645.9	688.8	730.3	766.5	791.5
- Champagne	214.0	225.4	238.2	253.1	263.5	269.6
- Other Sparkling Wine	386.2	420.5	450.5	477.2	502.9	521.9
Still Light Grape Wine	3,602.2	3,771.9	3,940.9	4,127.5	4,285.7	4,433.7
- Still Red Wine	1,987.2	2,035.8	2,090.9	2,151.7	2,212.2	2,269.9
- Still Rosé Wine	364.0	383.7	396.7	409.8	422.4	433.7
- Still White Wine	1,251.0	1,352.4	1,453.3	1,565.9	1,651.0	1,730.1
Wine	5,158.3	5,472.4	5,757.2	6,049.4	6,294.7	6,519.0

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

Table 112 Forecast Sales of Wine by Category: % Total Volume Growth 2021-2026

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Fortified Wine and Vermouth	7.2	4.5	24.5
- Port	-	-	-

- Sherry	3.2	2.5	12.9
- Vermouth	8.5	5.2	28.8
- Other Fortified Wine	-0.5	-1.3	-6.4
Non-Grape Wine	-	-	-
Sparkling Wine	6.6	4.0	21.7
- Champagne	1.9	3.2	16.9
- Other Sparkling Wine	7.0	4.1	22.0
Still Light Grape Wine	2.5	2.0	10.1
- Still Red Wine	0.2	0.2	0.8
- Still Rosé Wine	4.3	2.4	12.4
- Still White Wine	5.1	4.3	23.2
Wine	2.9	2.2	11.6

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

Table 113 Forecast Sales of Wine by Category: % Total Value Growth 2021-2026

% local currency, constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Fortified Wine and Vermouth	10.3	6.2	35.4
- Port	-	-	-
- Sherry	5.0	3.7	19.8
- Vermouth	11.7	6.9	39.6
- Other Fortified Wine	2.2	0.2	0.9
Non-Grape Wine	-	-	-
Sparkling Wine	7.6	5.7	31.9
- Champagne	5.3	4.7	25.9
- Other Sparkling Wine	8.9	6.2	35.1
Still Light Grape Wine	4.7	4.2	23.1
- Still Red Wine	2.4	2.7	14.2
- Still Rosé Wine	5.4	3.6	19.1
- Still White Wine	8.1	6.7	38.3
Wine	6.1	4.8	26.4

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