



# Beer in Malaysia

July 2024

Table of Contents

## Beer in Malaysia - Category analysis

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Beer sales come under pressure in 2023 as consumers face mounting economic pressures  
Heineken and Carlsberg go head to head with bold new marketing campaigns focused on local pride  
Craft beer emerges in the on-trade channel in 2023 with local breweries looking to get a foothold in the market

#### PROSPECTS AND OPPORTUNITIES

Local players expected to benefit from the government's commitment to tougher enforcement of smuggling activities  
More bars and pubs likely to open as players look to drive beer sales through the on-trade channel  
Unit prices could rise but Heineken and Carlsberg likely to retain their dominant position in beer

#### CATEGORY BACKGROUND

Lager price band methodology  
Summary 1 - Lager by Price Band 2023  
Table 1 - Number of Breweries 2018-2023

#### CATEGORY DATA

Table 2 - Sales of Beer by Category: Total Volume 2018-2023  
Table 3 - Sales of Beer by Category: Total Value 2018-2023  
Table 4 - Sales of Beer by Category: % Total Volume Growth 2018-2023  
Table 5 - Sales of Beer by Category: % Total Value Growth 2018-2023  
Table 6 - Sales of Beer by Off-trade vs On-trade: Volume 2018-2023  
Table 7 - Sales of Beer by Off-trade vs On-trade: Value 2018-2023  
Table 8 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023  
Table 9 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023  
Table 10 - Sales of Beer by Craft vs Standard 2018-2023  
Table 11 - GBO Company Shares of Beer: % Total Volume 2019-2023  
Table 12 - NBO Company Shares of Beer: % Total Volume 2019-2023  
Table 13 - LBN Brand Shares of Beer: % Total Volume 2020-2023  
Table 14 - Forecast Sales of Beer by Category: Total Volume 2023-2028  
Table 15 - Forecast Sales of Beer by Category: Total Value 2023-2028  
Table 16 - Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028  
Table 17 - Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

## Alcoholic Drinks in Malaysia - Industry Overview

### EXECUTIVE SUMMARY

Alcoholic drinks in 2023: The big picture  
2023 key trends  
Competitive landscape  
Retailing developments  
On-trade vs off-trade split  
What next for alcoholic drinks?

### MARKET BACKGROUND

Legislation  
Legal purchasing age and legal drinking age  
Drink driving  
Advertising  
Smoking ban  
Opening hours

On-trade establishments

Summary 2 - Number of On-trade Establishments by Type 2017-2023

## TAXATION AND DUTY LEVIES

Summary 3 - Taxation and Duty Levies on Alcoholic Drinks 2023

## OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

## KEY NEW PRODUCT LAUNCHES

Outlook

## MARKET INDICATORS

Table 18 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

## MARKET DATA

Table 19 - Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 20 - Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 21 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 22 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 23 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 24 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 25 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 26 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 27 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 28 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 29 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 30 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Table 31 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 32 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 33 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

## DISCLAIMER

## SOURCES

Summary 4 - Research Sources

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

---

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/beer-in-malaysia/report](http://www.euromonitor.com/beer-in-malaysia/report).