

Alcoholic Drinks in Greece

June 2023

Table of Contents

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 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

Table 1 - Number of On-trade Establishments by Type 2016-2022

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

Table 3 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Table 4 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022

Table 5 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

Table 6 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 10 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 11 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 12 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 13 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Table 15 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 17 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Beer in Greece

KEY DATA FINDINGS

2022 DEVELOPMENTS

Total volume sales nearly recover to 2019 level
Channel shift and price hikes inform decline in off-trade volume sales
Weather favours recovery

PROSPECTS AND OPPORTUNITIES

Economic pressures to hinder consumption in the short term
Craft beers and local brands to outperform imported rivals
Anheuser-Busch InBev changes distribution partner in Greece

CATEGORY BACKGROUND

Lager price band methodology
Summary 3 - Lager by Price Band 2022
Table 18 - Number of Breweries 2017-2022

CATEGORY DATA

Table 19 - Sales of Beer by Category: Total Volume 2017-2022
Table 20 - Sales of Beer by Category: Total Value 2017-2022
Table 21 - Sales of Beer by Category: % Total Volume Growth 2017-2022
Table 22 - Sales of Beer by Category: % Total Value Growth 2017-2022
Table 23 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022
Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022
Table 25 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022
Table 27 - Sales of Beer by Craft vs Standard 2017-2022
Table 28 - GBO Company Shares of Beer: % Total Volume 2018-2022
Table 29 - NBO Company Shares of Beer: % Total Volume 2018-2022
Table 30 - LBN Brand Shares of Beer: % Total Volume 2019-2022
Table 31 - Forecast Sales of Beer by Category: Total Volume 2022-2027
Table 32 - Forecast Sales of Beer by Category: Total Value 2022-2027
Table 33 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027
Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Cider/Perry in Greece

KEY DATA FINDINGS

2022 DEVELOPMENTS

Cider almost recovers to the 2019 pre-pandemic total volume sales level
The recovery of tourism informs brand performances
Olympic Brewery gains total volume share in 2022

PROSPECTS AND OPPORTUNITIES

Volume sales growth is set to be affected as tourism flows slow
Milokleftis is well placed to make share gains
The weather remains a key variable

CATEGORY DATA

Table 35 - Sales of Cider/Perry: Total Volume 2017-2022

- Table 36 - Sales of Cider/Perry: Total Value 2017-2022
- Table 37 - Sales of Cider/Perry: % Total Volume Growth 2017-2022
- Table 38 - Sales of Cider/Perry: % Total Value Growth 2017-2022
- Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022
- Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022
- Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 42 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 43 - GBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 44 - NBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 45 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022
- Table 46 - Forecast Sales of Cider/Perry: Total Volume 2022-2027
- Table 47 - Forecast Sales of Cider/Perry: Total Value 2022-2027
- Table 48 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027
- Table 49 - Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

Rtds in Greece

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Key new launch helps wine-based RTDs to post dynamic total volume growth in 2022
- Spirit-based RTDs continue to attract investment
- Off-trade penetration grows with new launches

PROSPECTS AND OPPORTUNITIES

- The economic situation is set to dampen the short-term performance
- Slowdown in tourist numbers and cautious spending to hit demand in the on-trade channel
- Growing product variety increases resilience of RTDs in the off-trade channel

CATEGORY DATA

- Table 50 - Sales of RTDs by Category: Total Volume 2017-2022
- Table 51 - Sales of RTDs by Category: Total Value 2017-2022
- Table 52 - Sales of RTDs by Category: % Total Volume Growth 2017-2022
- Table 53 - Sales of RTDs by Category: % Total Value Growth 2017-2022
- Table 54 - Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
- Table 55 - Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
- Table 56 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 57 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 58 - GBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 59 - NBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 60 - LBN Brand Shares of RTDs: % Total Volume 2019-2022
- Table 61 - Forecast Sales of RTDs by Category: Total Volume 2022-2027
- Table 62 - Forecast Sales of RTDs by Category: Total Value 2022-2027
- Table 63 - Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
- Table 64 - Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

Spirits in Greece

KEY DATA FINDINGS

2022 DEVELOPMENTS

- “Back to party” trend sees on-trade volume sales return to the pre-pandemic level
- Tourism flows accelerate recovery
- Off-trade volume sales drop as consumers prefer to drink spirits away from home

PROSPECTS AND OPPORTUNITIES

Consumption to decline in the short term in a tough economic climate

Non alcoholic spirits still far from being mainstream

Trends favourable to “lighter” drinks and premium spirits

CATEGORY BACKGROUND

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

Summary 4 - Benchmark Brands 2022

CATEGORY DATA

Table 65 - Sales of Spirits by Category: Total Volume 2017-2022

Table 66 - Sales of Spirits by Category: Total Value 2017-2022

Table 67 - Sales of Spirits by Category: % Total Volume Growth 2017-2022

Table 68 - Sales of Spirits by Category: % Total Value Growth 2017-2022

Table 69 - Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022

Table 70 - Sales of Spirits by Off-trade vs On-trade: Value 2017-2022

Table 71 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 72 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022

Table 73 - Sales of Dark Rum by Price Platform: % Total Volume 2017-2022

Table 74 - Sales of White Rum by Price Platform: % Total Volume 2017-2022

Table 75 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022

Table 76 - Sales of English Gin by Price Platform: % Total Volume 2017-2022

Table 77 - Sales of Vodka by Price Platform: % Total Volume 2017-2022

Table 78 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022

Table 79 - GBO Company Shares of Spirits: % Total Volume 2018-2022

Table 80 - NBO Company Shares of Spirits: % Total Volume 2018-2022

Table 81 - LBN Brand Shares of Spirits: % Total Volume 2019-2022

Table 82 - Forecast Sales of Spirits by Category: Total Volume 2022-2027

Table 83 - Forecast Sales of Spirits by Category: Total Value 2022-2027

Table 84 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027

Table 85 - Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

Wine in Greece

KEY DATA FINDINGS

2022 DEVELOPMENTS

Reopening of society and rebound in tourism drive on-trade recovery

Shift to foodservice leads to losses for the off-trade channel

Strong on-trade brands perform best in growth terms

PROSPECTS AND OPPORTUNITIES

Inflationary pressure on prices set to take its toll on consumption

Economic pressures in European markets to hinder wine sales in Greece and exports

Still rosé wine and “other” sparkling to gain traction in the forecast period

CATEGORY DATA

Table 86 - Sales of Wine by Category: Total Volume 2017-2022

Table 87 - Sales of Wine by Category: Total Value 2017-2022

Table 88 - Sales of Wine by Category: % Total Volume Growth 2017-2022

Table 89 - Sales of Wine by Category: % Total Value Growth 2017-2022

Table 90 - Sales of Wine by Off-trade vs On-trade: Volume 2017-2022

Table 91 - Sales of Wine by Off-trade vs On-trade: Value 2017-2022

Table 92 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 93 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
Table 94 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022
Table 95 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022
Table 96 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022
Table 97 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022
Table 98 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
Table 99 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
Table 100 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022
Table 101 - GBO Company Shares of Champagne: % Total Volume 2018-2022
Table 102 - NBO Company Shares of Champagne: % Total Volume 2018-2022
Table 103 - LBN Brand Shares of Champagne: % Total Volume 2019-2022
Table 104 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
Table 105 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
Table 106 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022
Table 107 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
Table 108 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
Table 109 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022
Table 110 - Forecast Sales of Wine by Category: Total Volume 2022-2027
Table 111 - Forecast Sales of Wine by Category: Total Value 2022-2027
Table 112 - Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
Table 113 - Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

About Euromonitor International

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

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

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

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/alcoholic-drinks-in-greece/report.