Global Trends - Beverages

Global: Decline of local spirits leads to global decline; imported sales continue to grow.

IWSR

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The global spirits market declined -0.1% in 2014, a loss of 3.1m nine-litre cases, according to the IWSR Database 2015 released last week. Local spirits declined -7.4m cases globally. Imported spirits grew 4.3m cases, though not enough to offset the global decline.

The Americas, CIS and Europe posted declines in consumption of local spirits; the decline of cachaça in Brazil and vodka in Ukraine contributed highly to this. Imported spirits continued to grow in the Americas and Europe, albeit it at a slower pace than in 2013. Whisk(e)y and flavoured spirits are driving growth in the Americas. Whisk(e)y and gin are performing well in Europe, while flavoured spirits and vodka are falling out of favour.

Consumption of local spirits in Asia-Pacific and Africa & the Middle East remained in growth. Africa & the Middle East saw the largest growth in percentage terms of total spirits consumption; the region gained 1.2m of local spirits and 1.5m of imported spirits, asserting itself as a key region for growth and investment.

Cross-category switching and economic influences are key factors in the decline of some local spirits markets.

Whisk(e)y was the largest-growing category globally, adding 10m cases and growing in its domestic and export markets. India, the US and Angola were the top three largest-growth markets.

Imported wine consumption remained flat, while local wines declined -1.5%. The CIS saw the largest decline in wine consumption as the region struggles with the effects of conflict and economic instability. The global wine market fell -1.1% in 2014, a loss of 39.5m cases.

Global consumption of beer also declined in 2014 versus 2013, while cider and mixed drinks
reported growth.

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