

Global Alcoholic Drinks Consumption

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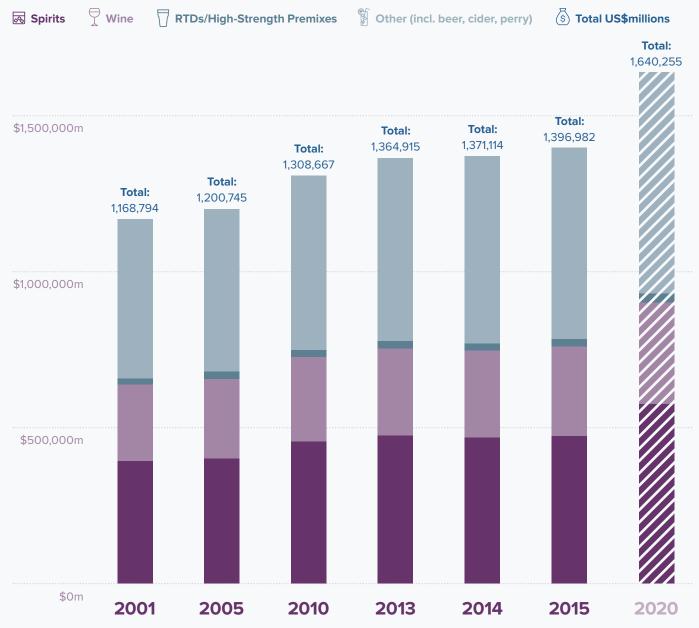


The alcoholic drinks market is undeniably a valuable one. Euromonitor data shows that in 2015 it was valued at US\$1,397 billion (£914 billion) and forecast to grow to US\$1,640 billion (£1,073 billion) by 2020. This is nearly twice the size of the global soft drinks market, which Euromonitor valued at US\$867 billion in 2014. Furthermore, it is more than double the size of the global cosmetics market forecast for 2019, which marketsandmarkets. com estimate will be US\$636 billion.

The value of the market continues to grow.



Size of alcoholic drinks market by value (millions US dollars)

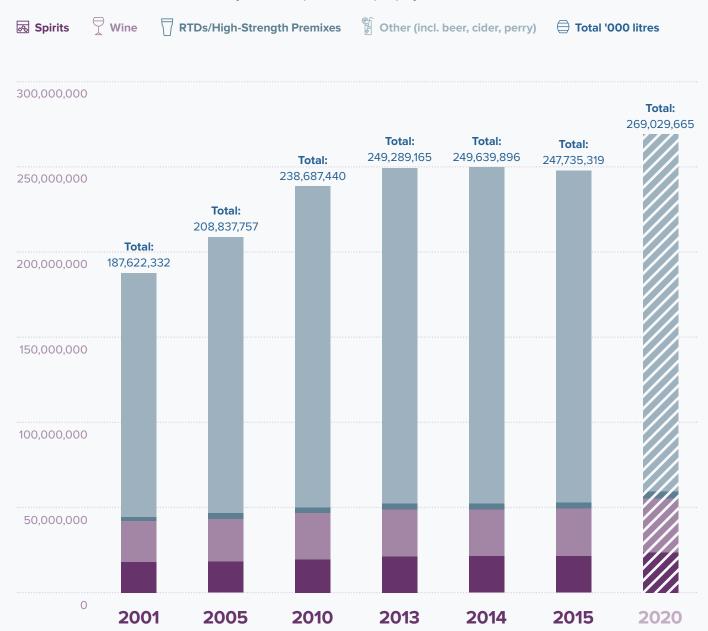


See appendix for: Size of alcoholic drinks market - VALUE - millions (Euro, Sterling, US dollars) fixed 2015 exchange rates. It should be noted that these value data include duty/taxes in destination markets.

The market also continues to grow in volume. The chart below shows that the size of the total alcoholic drinks market increased by 43% between 2001 and 2015 (the latest full year of data). The degree of growth varies by category: for wine and spirits the increase was 31% each. Other alcoholic drinks, of which beer is the largest segment, saw 46% growth in this period.

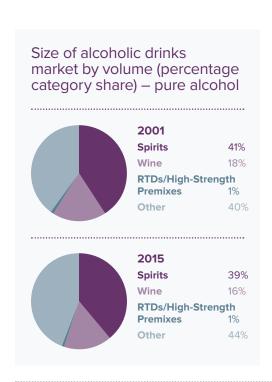


Size of alcoholic drinks market by volume ('000 litres) – physical litres as sold

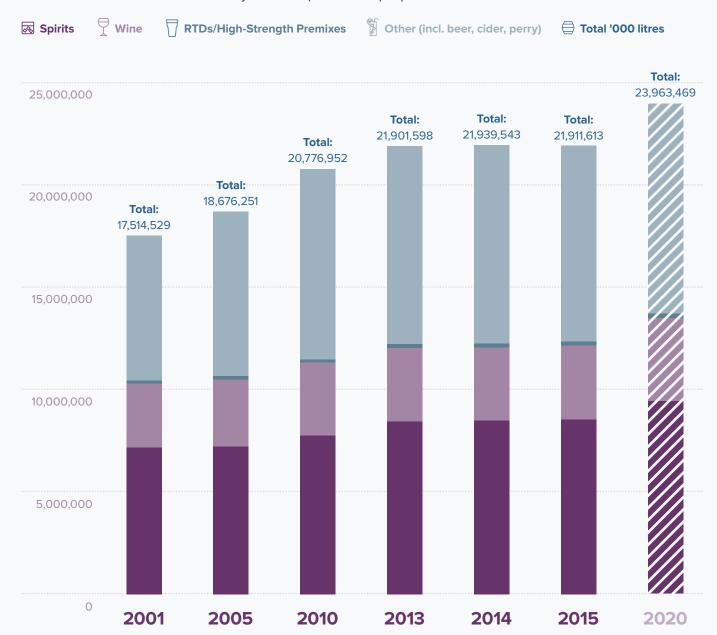


See appendix for: Size of alcoholic drinks market - VOLUME - various units - thousand litres (as sold); converted to litres of pure alcohol, and share of market.

In order to compare across drinks categories, which vary significantly in range of alcoholic strength (beers <10% abv; wines 10-20%; spirits >20%), it is typical to convert actual volumes (litres sold) to litres of pure alcohol. Thus, in 2015, the spirits sector sold 21,417 million actual litres, some way short of the wine sector at 27,843 million litres. But in terms of share of 'pure alcohol', spirits are way ahead of wine: 39% of the market versus 16%.

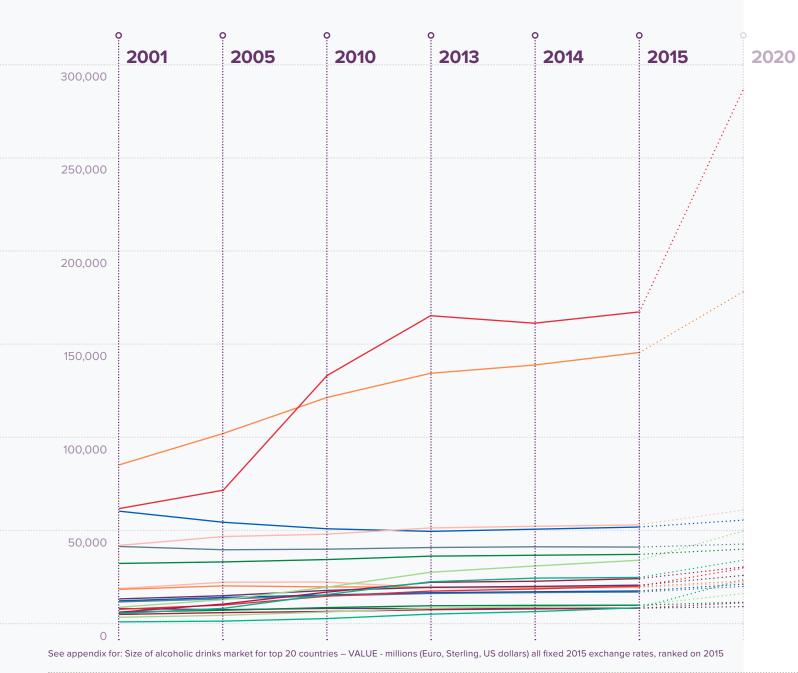


Size of alcoholic drinks market by volume ('000 litres) – pure alcohol



See appendix for: Size of alcoholic drinks market - VOLUME - various units - thousand litres (as sold); converted to litres of pure alcohol, and share of market.

Size of alcoholic drinks market for top 20 countries (ranked on 2015) by value (millions US dollars)



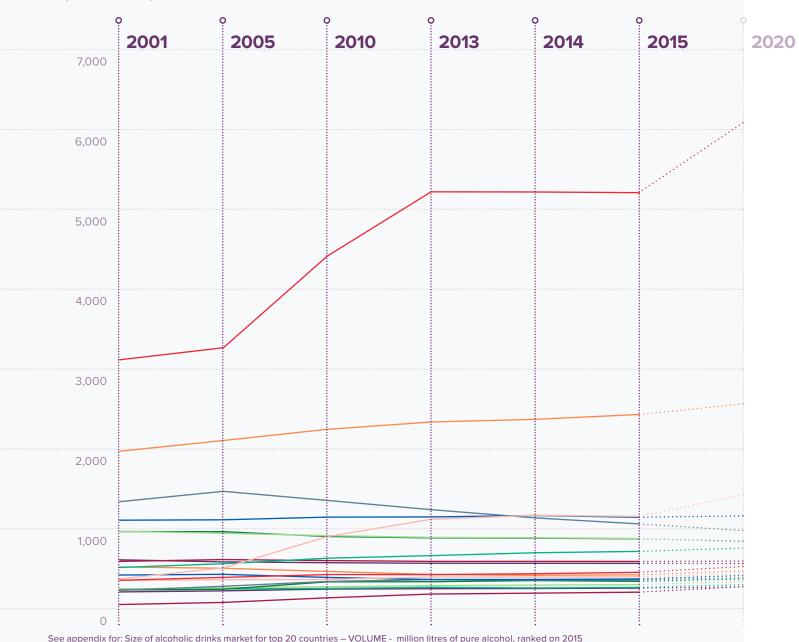
Big countries

On 2015 exchange rates, China had become the most valuable market for alcoholic drinks by 2010, until then the USA had been the most valuable market. However, by volume, China has long had the number one spot. This is not particularly surprising given China's population is 1.4 billion. By comparison, the population of the USA is 320 million; India 1.3 billion; Brazil 200 million; Russian Federation 143 million.

Size of alcoholic drinks market by value for top 20 countries ranked on 2015 (millions US dollars)

1. China	\$255,496
2. USA	\$222,422
3. UK	\$81,081
4. Japan	\$78,804
5. Germany	\$62,722
6. France	\$56,940
7. Brazil	\$52,053
8. India	\$38,064
9. Russia	\$37,171
10. Canada	\$31,639
11. Mexico	\$30,765
12. Italy	\$29,988
13. Spain	\$29,245
14. Australia	\$26,892
15. South Korea	\$26,018
16. Poland	\$15,338
17. South Africa	\$15,197
18. Argentina	\$12,793
19. Thailand	\$12,703
20. Switzerland	\$11,357

Size of alcoholic drinks market for top 20 countries (ranked on 2015) by volume (millions litres of pure alcohol)

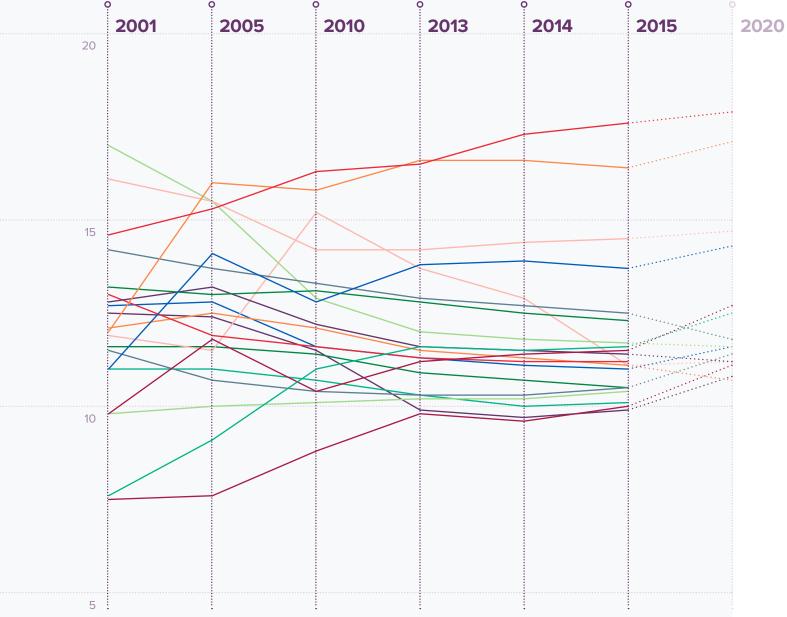


The top 20 countries show a mix of traditional (USA and western Europe) and emerging countries - all the BRIC countries are there (Brazil, Russia, India, China), and of the MINT countries, Mexico is there, with Turkey at no. 21 (the others being Indonesia at 66 and Nigeria at 38). MINT countries are said to be the next tier of emerging countries, after BRIC.

Size of alcoholic drinks market by volume for top 20 countries ranked on 2015 (millions of litres pure alcohol)

1.	China	5,214	11. Mexico	455
2.	USA	2,435	12. Italy	416
3.	India	1,157	13. Thailand	399
4.	Brazil	1,145	14. Spain	365
5.	Russia	1,056	15. Poland	364
6.	Germany	874	16. Philippines	344
7.	Japan	870	17. South Africa	300
8.	South Korea	a 720	18. Argentina	263
9.	UK	583	19. Canada	258
10.	France	559	20. Vietnam	207

Alcoholic drinks per capita consumption (litres of pure alcohol) at legal purchasing age for top 20 countries (ranked on 2015)

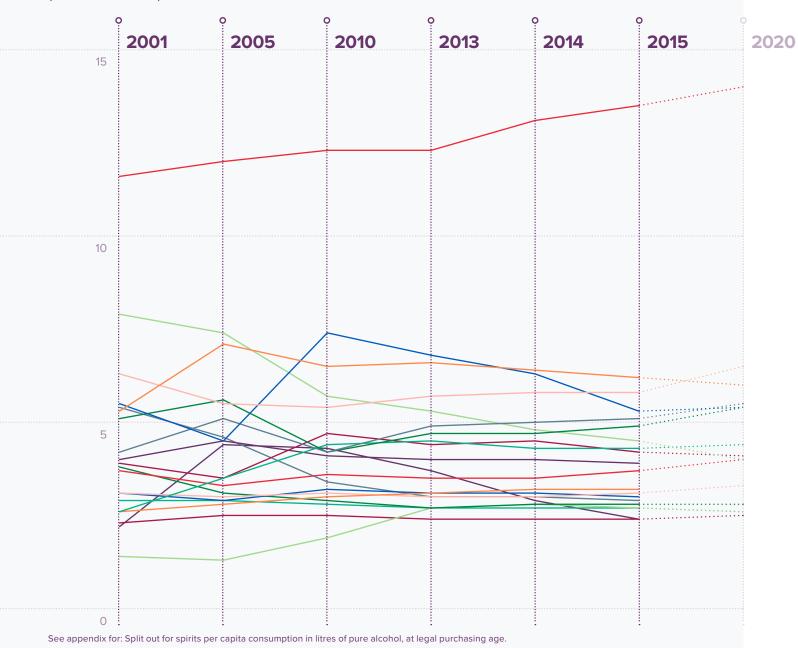


When the absolute size of the market is compared with the per capita size of the market big differences and opportunities start to emerge. For example, China is absolutely the biggest market for alcoholic drinks by volume, it is also the most populous country in the world. But divided up, the amount of alcohol consumed by each person (per capita consumption) over the legal age for drinking alcohol is relatively tiny. China is not listed in any of the per capita charts below. The country's per capita consumption (legal age) ranks 49th for 'all alcohol' with 4.8 litres, 25th for spirits with 2.1 litres and 45th for wine with 0.6 litres, all expressed as pure alcohol. It is therefore no surprise that China is a target for growth for so many producers and brand owners.

Alcoholic drinks per capita consumption for top 20 countries ranked on 2015 (litres of pure alcohol)

۱.	South Korea	17.6	11. France	11.2
2.	Estonia	16.4	12. Australia	11.1
3.	Czech Republio	: 14.5	13. Belarus	11.1
4.	Lithuania	13.7	14. Slovenia	11.0
5.	Germany	12.5	15. Slovakia	10.5
6.	Austria	12.3	16. Belgium	10.5
7 .	Ireland	11.7	17. USA	10.4
3.	Poland	11.6	18. New Zealand	10.1
9.	Latvia	11.5	19. Bulgaria	10.0
10.	UK	11.4	20. Portugal	9.9

Spirits per capita consumption (litres of pure alcohol) at legal purchasing age for top 20 countries (ranked on 2015)



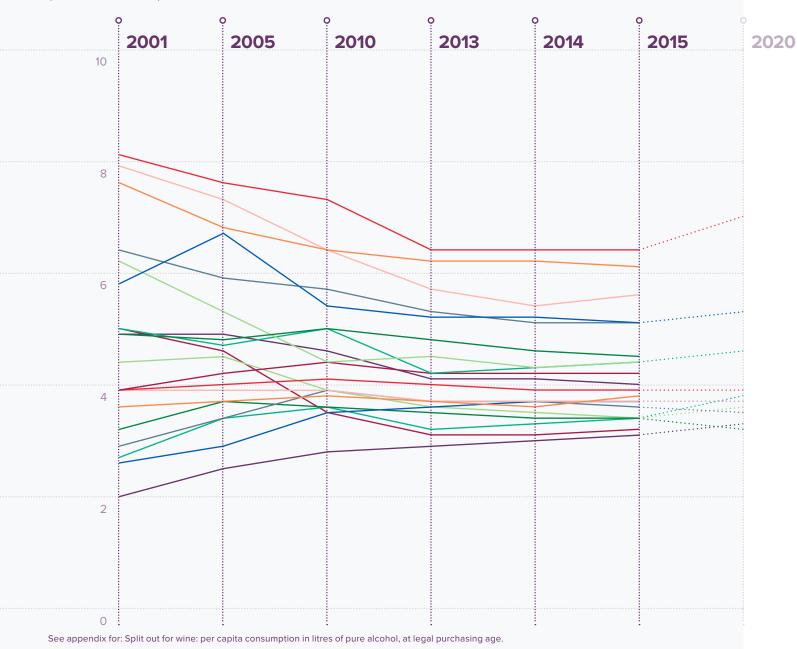
On the other hand, mature markets typically show a largely static, or declining, trend in both absolute (volume/value) and per capita metrics. Consumption in the UK, for example, has been declining since the early 2000s. The value of the UK market has increased, in part due to the duty escalator in place since 2008, but the volume of alcohol consumed peaked in 2003, at 13.3 litres of pure alcohol, and has declined every year since then. Spirits per capita consumption is steady, whilst per capita consumption for wine has slowly dropped since 2005. Europe includes several mature markets, including Germany, Austria, France, Belgium, Netherlands and Finland.

Splitting out spirits and wine reveals notably different patterns of national consumption. In terms of pure alcohol, France drinks twice as much wine as spirit. Belarus drinks nearly twice as much spirit as wine. Only four countries appear in the top 20 for both wines and spirits consumption: Czech Republic, France, Germany and the UK.

Spirits per capita consumption for top 20 countries ranked on 2015 (litres of pure alcohol)

1.	South Korea	13.5	11. Slovakia	3.7
2.	Estonia	6.2	12. USA	3.2
3.	Thailand	5.8	13. Bulgaria	3.1
4.	Belarus	5.3	14. France	3.0
5 .	Lithuania	5.1	15. Brazil	2.9
6.	Latvia	4.9	16. Czech Republic	2.8
7.	Russia	4.5	17. Uzbekistan	2.7
8.	Poland	4.3	18. Germany	2.7
9.	Philippines	4.2	19. UK	2.4
10.	Japan	3.9	20. Ukraine	2.4

Wine per capita consumption (litres of pure alcohol) at legal purchasing age for top 20 countries (ranked on 2015)



Top 3 countries per capita consumption of pure alcohol



All alcoholic drinks

- 1. South Korea
- 2. Estonia
- 3. Czech Republic



Spirits

- 1. South Korea
- 2. Estonia
- 3. Thailand



Wine

- 1. Portugal
- 2. France
- 3. Italy

Wine per capita consumption for top 20 countries ranked on 2015

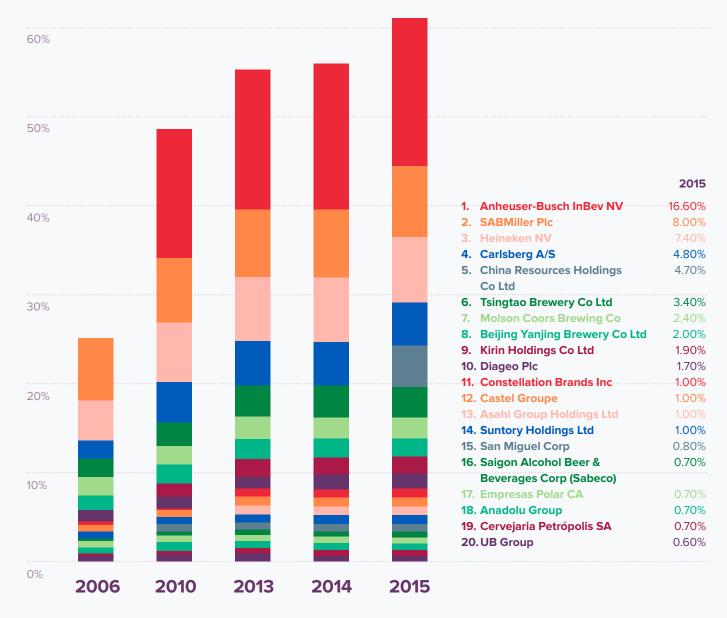
1.	Portugal	6.4	11. Australia	3.9
2.	France	6.1	12. New Zealand	3.8
3.	Italy	5.6	13. Germany	3.7
4.	Slovenia	5.1	14. Sweden	3.7
5.	Switzerland	5.1	15. Netherlands	3.6
6.	Austria	4.5	16. UK	3.4
7.	Argentina	4.4	17. Uruguay	3.4
8.	Denmark	4.4	18. Hungary	3.4
9.	Belgium	4.2	19. Spain	3.2
10.	Greece	4.0	20. Czech Republic	3.1

Big players

Increasing globalisation of business, not just in the alcoholic drinks sector, has been a dominant theme for the last few years. A look at the top 20 companies with the biggest market shares shows a clear beer versus spirits/wine split.

Of the top 20 companies selling alcoholic drinks the top ten are mainly beer companies. Kirin Holdings and Diageo are the first companies with sizeable spirits/wine holdings, although Diageo has recently offloaded most of its wine assets to Treasury Wine Estates. And at the time of writing, a £70 billion merger between the top two brewers, AB-Inbev and SABMiller, is on the cards, which will create a brewing behemoth.

Total Alcoholic drinks market: top 20 companies, showing percentage share of market

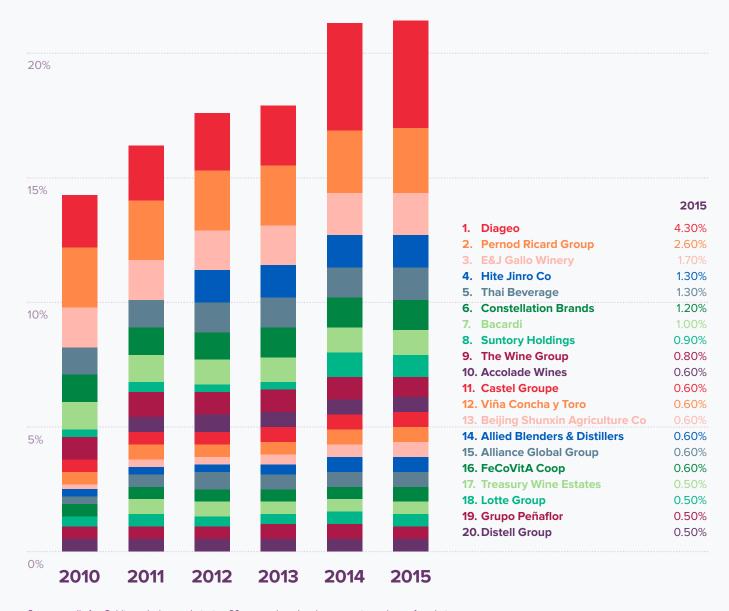


See appendix for: Total Alcoholic drinks market: top 20 companies, showing percentage share of market.

The top 20 wines/spirits companies look very different. It is filled with more familiar names: Diageo, Pernod Ricard, Gallo, Constellation etc. But it is worth noting the greater fragmentation of the wines/spirits business: for all alcoholic drinks, the top 20 companies account for 61% share of the market, but for wines and spirits the top 20 companies account for just 21%.

Diageo, Suntory and Castel Group are the only companies that appear in both lists, showing strong interests in all the alcoholic drinks sectors. Castel have a strong beer presence in Africa.

Spirits and wine markets: top 20 companies, showing percentage share of market



See appendix for: Spirits and wine markets: top 20 companies, showing percentage share of market.

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Size of alcoholic drinks market - VALUE - millions (Euro, Sterling, US dollars) fixed 2015 exchange rates

Categories		2001	2005	2010	2013	2014	2015	2020
Alcoholic	EUR	1,053,853	1,082,662	1,179,971	1,230,688	1,236,277	1,259,601	1,478,950
Drinks	GBP	764,907	785,817	856,446	893,257	897,314	914,243	1,073,451
	USD	1,168,794	1,200,745	1,308,667	1,364,915	1,371,114	1,396,982	1,640,255
Spirits	EUR	353,206	360,566	409,752	427,504	420,932	426,063	518,412
	GBP	256,364	261,706	297,406	310,290	305,521	309,245	376,273
	USD	391,729	399,891	454,442	474,130	466,842	472,532	574,953
Wine	EUR	221,642	230,690	244,986	251,808	252,263	259,223	293,953
	GBP	160,872	167,439	177,816	182,767	183,097	188,149	213,357
	USD	245,815	255,850	271,706	279,272	279,776	287,496	326,013
RTDs/High-Strength	EUR	18,140	21,787	19,848	20,872	21,126	21,683	25,875
Premixes	GBP	13,167	15,814	14,406	15,149	15,334	15,738	18,780
	USD	20,119	24,164	22,012	23,149	23,430	24,047	28,697
Other	EUR	460,866	469,620	505,386	530,504	541,956	552,633	640,711
(incl. beer, cider, perry)	GBP	334,505	340,859	366,819	385,050	393,362	401,112	465,041
	USD	511,131	520,840	560,507	588,365	601,066	612,906	710,591

N.B 2020 statistics are predictions only. RTD's means 'Ready to Drink'

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Size of alcoholic drinks market – VOLUME – various units – thousand litres (as sold); converted to litres of pure alcohol, and share of market.

Categories	2001	2005	2010	2013	2014	2015	2020
Total volumes '000 litres - phys	ical litres as solo	I					
Alcoholic Drinks	187,622,332	208,837,757	238,687,440	249,289,165	249,639,896	247,735,319	269,029,665
Wine	24,007,974	25,208,958	27,225,767	27,648,591	27,395,693	27,843,152	31,446,217
Spirits	18,009,043	18,088,244	19,476,749	21,144,733	21,293,217	21,417,421	23,594,488
RTDs/High-Strength Premixes	2,422,741	3,342,505	3,237,084	3,526,266	3,611,323	3,671,936	4,297,882
Other (incl. beer, cider, perry)	143,182,575	162,198,050	188,747,840	196,969,575	197,339,663	194,802,811	209,691,078
Total volumes '000 litres - pure	alcohol						
Alcoholic Drinks	17,514,529	18,676,251	20,776,952	21,901,598	21,939,543	21,911,613	23,963,469
Spirits	7,178,663	7,205,559	7,761,265	8,429,163	8,488,489	8,538,197	9,408,439
Wine	3,125,764	3,277,400	3,545,144	3,596,700	3,558,656	3,612,918	4,068,022
RTDs/High-Strength Premixes	128,081	175,419	170,405	185,328	189,223	191,968	222,820
Other (incl. beer, cider, perry)	7,082,021	8,017,873	9,300,139	9,690,408	9,703,176	9,568,531	10,264,188
Percentage category share bas	ed on pure alcol	nol					
Alcoholic Drinks	100	100	100	100	100	100	100
Spirits	41%	39%	37%	38%	39%	39%	39%
Wine	18%	18%	17%	16%	16%	16%	17%
RTDs/High-Strength Premixes	1%	1%	1%	1%	1%	1%	1%
Other (incl. beer, cider, perry)	40%	43%	45%	44%	44%	44%	43%

N.B 2020 statistics are predictions only. RTD's means 'Ready to Drink'

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Size of alcoholic drinks market for top 20 countries – VALUE - millions (Euro Sterling US dollars) all fixed 2015 exchange rates ranked on 2015.

Ge	ographies		2001	2005	2010	2013	2014	2015	2020	Geographies		2001	2005	2010	2013	2014	2015	2020
1	China	EUR	84,539	98,134	183,185	227,658	222,087	230,370	394,744	11 Mexico	EUR	10,014	13,225	20,063	23,955	25,622	27,739	41,437
		GBP	61,360	71,228	132,959	165,238	161,195	167,207	286,513		GBP	7,268	9,599	14,562	17,387	18,597	20,134	30,075
		USD	93,760	108,838	203,164	252,488	246,309	255,496	437,797		USD	11,106	14,667	22,251	26,568	28,416	30,765	45,956
2	USA	EUR	116,895	140,241	167,076	185,156	191,307	200,549	245,818	12 Italy	EUR	24,748	27,786	26,873	26,775	26,709	27,039	32,104
		GBP	84,844	101,790	121,267	134,390	138,854	145,562	178,419		GBP	17,963	20,167	19,505	19,434	19,386	19,626	23,301
	••••	USD	129,644	155,537	185,298	205,351	212,172	222,422	272,628		USD	27,447	30,816	29,804	29,696	29,622	29,988	35,605
3	UK	EUR	57,279	64,056	65,926	70,737	71,979	73,107	84,482	13 Spain	EUR	25,329	31,103	31,326	26,066	25,876	26,369	30,531
		GBP	41,574	46,493	47,850	51,342	52,244	53,063	61,319		GBP	18,384	22,575	22,737	18,919	18,781	19,139	22,160
	•••••	USD	63,526	71,042	73,116	78,452	79,830	81,081	93,696		USD	28,091	34,495	34,743	28,909	28,698	29,245	33,861
4	Japan	EUR	83,693	74,874	69,685	67,628	69,342	71,055	76,569	14 Australia	EUR	16,241	19,003	21,019	22,855	23,572	24,247	29,673
		GBP	60,746	54,345	50,579	49,086	50,330	51,573	55,575		GBP	11,788	13,793	15,256	16,589	17,109	17,599	21,537
		USD	92,821	83,041	77,285	75,004	76,905	78,804	84,920		USD	18,012	21,076	23,312	25,348	26,143	26,892	32,910
5	Germany	EUR	57,124	54,022	54,562	56,139	56,824	56,554	59,398	15 South Korea	EUR	15,451	17,885	20,332	22,311	23,050	23,459	28,026
		GBP	41,461	39,211	39,602	40,747	41,244	41,048	43,113		GBP	11,215	12,981	14,757	16,194	16,730	17,027	20,342
	•••••	USD	63,354	59,915	60,513	62,262	63,022	62,722	65,877	***************************************	USD	17,136	19,835	22,549	24,744	25,563	26,018	31,083
6	France	EUR	43,906	45,145	47,101	49,894	50,611	51,341	55,601	16 Poland	EUR	7,921	9,490	11,787	13,341	13,709	13,830	16,426
		GBP	31,868	32,767	34,187	36,214	36,734	37,264	40,356		GBP	5,749	6,888	8,555	9,683	9,950	10,038	11,923
	•••••	USD	48,695	50,069	52,238	55,336	56,131	56,940	61,665		USD	8,785	10,525	13,073	14,796	15,205	15,338	18,218
7	Brazil	EUR	11,575	17,163	26,638	37,930	42,636	46,934	68,859	17 South Africa	EUR	4,094	5,660	8,294	11,173	12,486	13,703	22,766
		GBP	8,401	12,457	19,335	27,530	30,946	34,066	49,979		GBP	2,972	4,108	6,020	8,110	9,063	9,946	16,524
		USD	12,837	19,035	29,544	42,067	47,287	52,053	76,369		USD	4,541	6,278	9,199	12,392	13,848	15,197	25,249
8	India	EUR	6,885	10,795	21,320	31,067	33,794	34,320	47,418	18 Argentina	EUR	689	1,258	3,229	6,634	8,535	11,535	33,079
		GBP	4,997	7,835	15,475	22,549	24,529	24,910	34,417		GBP	500	913	2,344	4,815	6,195	8,372	24,010
	•••••	USD	7,635	11,972	23,646	34,456	37,480	38,064	52,590	***************************************	USD	765	1,395	3,581	7,358	9,466	12,793	36,687
9	Russia	EUR	7,872	14,074	23,216	30,691	31,533	33,516	42,388	19 Thailand	EUR	6,194	7,726	8,671	10,182	10,825	11,454	15,979
		GBP	5,713	10,215	16,851	22,276	22,887	24,326	30,766		GBP	4,495	5,607	6,294	7,391	7,857	8,314	11,598
		USD	8,730	15,609	25,749	34,039	34,972	37,171	47,011		USD	6,869	8,568	9,617	11,293	12,005	12,703	17,722
10	Canada	EUR	17,689	20,196	24,387	26,766	27,530	28,528	36,171	20 Switzerland	EUR	10,136	9,765	10,152	10,109	10,154	10,240	10,709
		GBP	12,839	14,659	17,700	19,427	19,981	20,706	26,254		GBP	7,357	7,088	7,369	7,337	7,370	7,433	7,773
		USD	19,618	22,399	27,047	29,686	30,532	31,639	40,116		USD	11,242	10,830	11,260	11,211	11,262	11,357	11,877

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Size of alcoholic drinks market for top 20 countries – VOLUME - million litres of pure alcohol, ranked on 2015

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All alcoholic drinks, per capita consumption in litres of pure alcohol, at legal purchasing age.

ranked on 2015	2001	2005	2010	2013	2014	2015	2020		2001	2005	2010	2013	2014	2015	2020
1 China	3,110	3,262	4,416	5,225	5,223	5,214	6,093	1 South Korea	14.6	15.3	16.3	16.5	17.3	17.6	17.9
2 USA	1,964	2,102	2,245	2,339	2,373	2,435	2,571	2 Estonia	12.0	16.0	15.8	16.6	16.6	16.4	17.1
3 India	365	504	901	1,121	1,172	1,157	1,431	3 Czech Republic	16.1	15.5	14.2	14.2	14.4	14.5	14.7
4 Brazil	1,100	1,106	1,147	1,150	1,172	1,145	1,166	4 Lithuania	11.0	14.1	12.8	13.8	13.9	13.7	14.3
5 Russia	1,342	1,475	1,358	1,239	1,133	1,056	970	5 Germany	14.2	13.7	13.3	12.9	12.7	12.5	11.8
6 Germany	974	947	914	890	885	874	828	6 Austria	13.2	13.0	13.1	12.8	12.5	12.3	-
7 Japan	971	969	902	883	879	870	837	7 Ireland	17.0	15.5	12.9	12.0	11.8	11.7	11.6
8 South Korea	507	557	630	664	702	720	764	8 Poland	7.6	9.1	11.0	11.6	11.5	11.6	12.5
9 UK	584	620	600	584	584	583	591	9 Latvia	9.8	11.8	10.4	11.2	11.4	11.5	12.7
10 France	617	583	570	561	560	559	557	10 UK	12.8	13.2	12.2	11.6	11.5	11.4	11.2
11 Mexico	347	386	424	424	435	455	532	11 France	13.0	11.9	11.6	11.3	11.2	11.2	-
12 Italy	527	509	464	421	409	416	469	12 Australia	12.1	12.5	12.1	11.5	11.3	11.1	10.7
13 Thailand	345	355	360	393	394	399	441	13 Belarus	11.9	11.5	15.2	13.7	12.9	11.1	11.2
14 Spain	424	435	388	356	357	365	417	14 Slovenia	12.7	12.8	11.6	11.3	11.1	11.0	11.6
15 Poland	221	276	342	366	361	364	392	15 Slovakia	11.5	10.7	10.4	10.3	10.3	10.5	11.4
16 Philippines	225	235	337	339	355	344	376	16 Belgium	11.6	11.6	11.4	10.9	10.7	10.5	-
17 South Africa	237	254	271	286	293	300	346	17 USA	9.8	10.0	10.1	10.2	10.2	10.4	-
18 Argentina	238	238	246	264	254	263	305	18 New Zealand	11.0	11.0	10.7	10.3	10.0	10.1	-
19 Canada	201	217	244	250	253	258	277	19 Bulgaria	7.5	7.6	8.8	9.8	9.6	10.0	11.1
20 Vietnam	43	71	132	182	194	207	281	20 Portugal	12.5	12.4	11.5	9.9	9.7	9.9	10.8

NB. Forecasts not yet available for some countries

Page 8
Split out for spirits per capita consumption in litres of pure alcohol, at legal purchasing age.

Page 9
Split out for wine: per capita consumption in litres of pure alcohol, at legal purchasing age.

	2001	2005	2010	2013	2014	2015	2020			2001	2005	2010	2013	2014	2015	2020
1 South Korea	11.6	12.0	12.3	12.3	13.1	13.5	14.0		Portugal	8.1	7.6	7.3	6.4	6.4	6.4	7.0
2 Estonia	5.3	7.1	6.5	6.6	6.4	6.2	6.0	2	France	7.6	6.8	6.4	6.2	6.2	6.1	-
3 Thailand	6.3	5.5	5.4	5.7	5.8	5.8	6.5	3	Italy	7.9	7.3	6.4	5.7	5.4	5.6	-
4 Belarus	5.5	4.5	7.4	6.8	6.3	5.3	5.4	4	Slovenia	5.8	6.7	5.4	5.2	5.2	5.1	5.3
5 Lithuania	4.2	5.1	4.2	4.9	5.0	5.1	5.5	5	Switzerland	6.4	5.9	5.7	5.3	5.1	5.1	-
6 Latvia	5.1	5.6	4.2	4.7	4.7	4.9	5.4	6	Austria	4.9	4.8	5.0	4.8	4.6	4.5	-
7 Russia	7.9	7.4	5.7	5.3	4.8	4.5	4.0	7	Argentina	6.2	5.3	4.4	4.5	4.3	4.4	-
8 Poland	2.6	3.5	4.4	4.5	4.3	4.3	4.4	8	Denmark	5.0	4.7	5.0	4.2	4.3	4.4	4.6
9 Philippines	3.9	3.5	4.7	4.4	4.5	4.2	4.1	9	Belgium	3.9	4.2	4.4	4.2	4.2	4.2	-
10 Japan	4.0	4.5	4.1	4.0	4.0	3.9	-	10	0 Greece	4.9	4.9	4.6	4.1	4.1	4.0	-
11 Slovakia	3.7	3.3	3.6	3.5	3.5	3.7	4.0	11	1 Australia	3.9	4.0	4.1	4.0	3.9	3.9	3.9
12 USA	2.6	2.8	3.0	3.1	3.2	3.2	-	12	2 New Zealand	3.6	3.7	3.8	3.7	3.6	3.8	-
13 Bulgaria	3.1	3.0	3.1	3.0	3.0	3.1	3.3	13	3 Germany	3.9	3.9	3.9	3.7	3.7	3.7	3.7
14 France	3.1	2.9	3.2	3.1	3.1	3.0	-	14	4 Sweden	2.6	2.9	3.5	3.6	3.7	3.7	3.7
15 Brazil	5.4	4.6	3.4	3.0	3.0	2.9	-	15	5 Netherlands	2.9	3.4	3.9	3.7	3.7	3.6	3.5
16 Czech Republic	3.8	3.1	2.9	2.7	2.8	2.8	2.8	16	6 UK	3.2	3.7	3.6	3.5	3.4	3.4	3.2
17 Uzbekistan	1.4	1.3	1.9	2.7	2.8	2.7	2.6	17	7 Uruguay	4.4	4.5	3.9	3.6	3.5	3.4	3.6
18 Germany	2.9	2.9	2.8	2.7	2.7	2.7	2.6	18	8 Hungary	2.7	3.4	3.6	3.2	3.3	3.4	3.8
19 UK	2.3	2.5	2.5	2.4	2.4	2.4	2.5	19	9 Spain	5.0	4.6	3.5	3.1	3.1	3.2	-
20 Ukraine	2.2	4.4	4.3	3.7	2.9	2.4	-	2	O Czech Republic	2.0	2.5	2.8	2.9	3.0	3.1	3.3

Page 10
Total Alcoholic drinks market: top 20 companies, showing percentage share of market.

Page 11
Spirits and wine markets: top 20 companies, showing percentage share of market.

	2006	2010	2013	2014	2015			2010	2011	2012	2013	2014	2015
1 Anheuser-Busch InBev NV	-	14.50	15.70	16.40	16.60	1 Diageo		2.10	2.20	2.30	2.40	4.30	4.30
2 SABMiller Plc	7.00	7.20	7.60	7.70	8.00	2 Pernod	Ricard Group	2.40	2.40	2.40	2.40	2.50	2.60
3 Heineken NV	4.50	6.70	7.20	7.20	7.40	3 E&J Ga	llo Winery	1.60	1.60	1.60	1.60	1.70	1.70
4 Carlsberg A/S	2.00	4.60	5.00	4.90	4.80	4 Hite Jir	nro Co	-	-	1.30	1.30	1.30	1.30
5 China Resources Holdings Co Ltd	-	-	-	-	4.70	5 Thai Be	everage	1.10	1.10	1.20	1.20	1.20	1.30
6 Tsingtao Brewery Co Ltd	2.10	2.60	3.50	3.60	3.40	6 Conste	llation Brands	1.10	1.10	1.10	1.20	1.20	1.20
7 Molson Coors Brewing Co	2.10	2.10	2.50	2.40	2.40	7 Bacard	i	1.10	1.10	1.00	1.00	1.00	1.00
8 Beijing Yanjing Brewery Co Ltd	1.60	2.10	2.30	2.10	2.00	8 Suntory	y Holdings	0.30	0.40	0.30	0.30	1.00	0.90
9 Kirin Holdings Co Ltd	-	1.50	2.00	1.90	1.90	9 The Wi	ne Group	0.90	1.00	0.90	0.90	0.90	0.80
10 Diageo Plc	1.30	1.30	1.30	1.70	1.70	10 Accola	de Wines	0.00	0.60	0.70	0.60	0.60	0.60
11 Constellation Brands Inc	0.40	0.20	0.90	0.90	1.00	11 Castel	Groupe	0.50	0.50	0.50	0.60	0.60	0.60
12 Castel Groupe	0.70	0.80	1.00	1.00	1.00	12 Viña Co	oncha y Toro	0.50	0.60	0.50	0.50	0.60	0.60
13 Asahi Group Holdings Ltd	-	-	1.00	1.00	1.00	13 Beijing	Shunxin Agriculture Co	0.20	0.30	0.30	0.40	0.50	0.60
14 Suntory Holdings Ltd	0.80	0.80	0.90	1.00	1.00	14 Allied E	Blenders & Distillers	0.30	0.30	0.30	0.40	0.60	0.60
15 San Miguel Corp	-	0.80	0.80	0.80	0.80	15 Alliance	e Global Group	0.30	0.50	0.70	0.60	0.60	0.60
16 Saigon Alcohol Beer & Beverages Corp (Sabeco)	0.30	0.50	0.60	0.60	0.70	16 FeCoV	itA Coop	0.50	0.50	0.50	0.50	0.50	0.60
17 Empresas Polar CA	0.70	0.70	0.70	0.70	0.70	17 Treasu	ry Wine Estates	-	0.60	0.60	0.50	0.50	0.50
18 Anadolu Group	0.70	1.00	0.80	0.80	0.70	18 Lotte G	roup	0.40	0.50	0.40	0.40	0.50	0.50
19 Cervejaria Petrópolis SA	0.30	0.40	0.60	0.70	0.70	19 Grupo	Peñaflor	0.50	0.50	0.50	0.60	0.60	0.50
20 UB Group	0.60	0.80	0.90	0.60	0.60	20 Distell	Group	0.50	0.50	0.50	0.50	0.50	0.50

Statistical sources and notes for this report:

- Data for all the charts are taken from Euromonitor
- Euromonitor 'wine' category includes still, sparkling and fortified wines
- Euromonitor 'other' category includes beer, cider, perry. (RTDs are a separate category)
- Population data are from www.who.int

