



Alcoholic Drinks in India

January 2026

Table of Contents

EXECUTIVE SUMMARY

Alcoholic drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retail 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

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2024

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

MARKET DATA

Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024

Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2019-2024

Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024

Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024

Table 6 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2024

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024

Table 10 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024

Table 11 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024

Table 12 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024

Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029

Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Beer in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Beer continues to grow at a steady pace in 2024
UB Group leads the oligopoly in beer in India
Lack of differentiation in taxation between low ABV and high ABV categories, coupled with the inability to set prices, restricts growth of beer

PROSPECTS AND OPPORTUNITIES

Companies set to continue focus on premiumisation as India develops at a rapid pace
Microbreweries will aid the growth of beer in India
Retail e-commerce remains underdeveloped with scope for expansion

CATEGORY BACKGROUND

Lager price band methodology
Summary 3 - Lager by Price Band 2024
Summary 4 - Number of Breweries 2019-2024

CATEGORY DATA

- Table 17 - Sales of Beer by Category: Total Volume 2019-2024
- Table 18 - Sales of Beer by Category: Total Value 2019-2024
- Table 19 - Sales of Beer by Category: % Total Volume Growth 2019-2024
- Table 20 - Sales of Beer by Category: % Total Value Growth 2019-2024
- Table 21 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024
- Table 22 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024
- Table 23 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 24 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 25 - Sales of Beer by Craft vs Standard 2019-2024
- Table 26 - GBO Company Shares of Beer: % Total Volume 2020-2024
- Table 27 - NBO Company Shares of Beer: % Total Volume 2020-2024
- Table 28 - LBN Brand Shares of Beer: % Total Volume 2021-2024
- Table 29 - Forecast Sales of Beer by Category: Total Volume 2024-2029
- Table 30 - Forecast Sales of Beer by Category: Total Value 2024-2029
- Table 31 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029
- Table 32 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

Rtds in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Young demographic and convenience trend drive sales of RTDs in India
Bacardi-Martini retains its dominance, assisted by launch of new options
Hard seltzer fails to attract Indian consumers

PROSPECTS AND OPPORTUNITIES

Inflation and taxation remain the biggest challenges for RTDs
Spirit-based RTDs likely to grow, but face increased competition from other variants

CATEGORY DATA

- Table 33 - Sales of RTDs by Category: Total Volume 2019-2024
- Table 34 - Sales of RTDs by Category: Total Value 2019-2024
- Table 35 - Sales of RTDs by Category: % Total Volume Growth 2019-2024

Table 36 - Sales of RTDs by Category: % Total Value Growth 2019-2024

Table 37 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024

Table 38 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024

Table 39 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 40 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024

Table 41 - GBO Company Shares of RTDs: % Total Volume 2020-2024

Table 42 - NBO Company Shares of RTDs: % Total Volume 2020-2024

Table 43 - LBN Brand Shares of RTDs: % Total Volume 2021-2024

Table 44 - Forecast Sales of RTDs by Category: Total Volume 2024-2029

Table 45 - Forecast Sales of RTDs by Category: Total Value 2024-2029

Table 46 - Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029

Table 47 - Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

Spirits in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Overall growth holds steady despite slight momentum loss in brown spirits

United Spirits leads, followed by host of Indian companies

Exports a significant avenue for whisky manufacturers to drive topline growth, as locally produced premium offerings gain wider acceptance in global markets

PROSPECTS AND OPPORTUNITIES

India-UK FTA expected to boost scotch whisky consumption in India

Companies will continue to struggle with their bottom line as they are unable to set prices

India anticipated to lead shift of whisky consumption to developing market

CATEGORY BACKGROUND

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

Summary 5 - Benchmark Brands 2024

CATEGORY DATA

Table 48 - Sales of Spirits by Category: Total Volume 2019-2024

Table 49 - Sales of Spirits by Category: Total Value 2019-2024

Table 50 - Sales of Spirits by Category: % Total Volume Growth 2019-2024

Table 51 - Sales of Spirits by Category: % Total Value Growth 2019-2024

Table 52 - Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024

Table 53 - Sales of Spirits by Off-trade vs On-trade: Value 2019-2024

Table 54 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 55 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024

Table 56 - Sales of Dark Rum by Price Platform: % Total Volume 2019-2024

Table 57 - Sales of White Rum by Price Platform: % Total Volume 2019-2024

Table 58 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024

Table 59 - Sales of English Gin by Price Platform: % Total Volume 2019-2024

Table 60 - Sales of Vodka by Price Platform: % Total Volume 2019-2024

Table 61 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024

Table 62 - GBO Company Shares of Spirits: % Total Volume 2020-2024

Table 63 - NBO Company Shares of Spirits: % Total Volume 2020-2024

Table 64 - LBN Brand Shares of Spirits: % Total Volume 2021-2024

Table 65 - Forecast Sales of Spirits by Category: Total Volume 2024-2029

Table 66 - Forecast Sales of Spirits by Category: Total Value 2024-2029

Table 67 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029

Table 68 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

KEY DATA FINDINGS

2024 DEVELOPMENTS

Millennials and a low consumer base drive category growth in 2024
Samant Soma Wines leads wine thanks to extensive product range and strong focus on wine tourism
India is witnessing demand for imported wines from various countries

PROSPECTS AND OPPORTUNITIES

India likely to continue to see a rise in experiential stores during forecast period
Small domestic manufacturers seek to carve out niche positions for non-grape wines in export markets

CATEGORY DATA

- Table 69 - Sales of Wine by Category: Total Volume 2019-2024
- Table 70 - Sales of Wine by Category: Total Value 2019-2024
- Table 71 - Sales of Wine by Category: % Total Volume Growth 2019-2024
- Table 72 - Sales of Wine by Category: % Total Value Growth 2019-2024
- Table 73 - Sales of Wine by Off-trade vs On-trade: Volume 2019-2024
- Table 74 - Sales of Wine by Off-trade vs On-trade: Value 2019-2024
- Table 75 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 76 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 77 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 78 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 79 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 80 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 81 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024
- Table 82 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024
- Table 83 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024
- Table 84 - GBO Company Shares of Champagne: % Total Volume 2020-2024
- Table 85 - NBO Company Shares of Champagne: % Total Volume 2020-2024
- Table 86 - LBN Brand Shares of Champagne: % Total Volume 2021-2024
- Table 87 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024
- Table 88 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024
- Table 89 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024
- Table 90 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024
- Table 91 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024
- Table 92 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024
- Table 93 - GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024
- Table 94 - NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024
- Table 95 - LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024
- Table 96 - Forecast Sales of Wine by Category: Total Volume 2024-2029
- Table 97 - Forecast Sales of Wine by Category: Total Value 2024-2029
- Table 98 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029
- Table 99 - Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

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-india/report.