



Euromonitor
International

Alcoholic Drinks in Ethiopia

July 2025

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

On-trade establishments

Taxation and Duty Levies

Operating Environment

Contraband/parallel trade

Duty free

Cross-border/private imports

Key New Product Launches

MARKET DATA

Table 1 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024

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

Table 3 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024

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

Table 5 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2024

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

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

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

Table 9 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024

Table 10 - Distribution of Alcoholic Drinks by Format: % Off-trade Volume 2019-2024

Table 11 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024

Table 12 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029

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

Table 14 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029

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

DISCLAIMER

BEER

Key Data Findings

2024 Developments

Redevelopment, tax pressures and affordability challenges reshape consumption

Heineken leads as market prepares for new entrants and strategic shifts

On-trade remains dominant despite cost and security constraints

Prospects and Opportunities

Affordability constraints and regional instability to limit growth potential

Modest off-trade expansion and market consolidation expected

Product and distribution innovation to accelerate among brewers

Category Data

Table 16 - Sales of Beer by Category: Total Volume 2019-2024

Table 17 - Sales of Beer by Category: Total Value 2019-2024

Table 18 - Sales of Beer by Category: % Total Volume Growth 2019-2024

Table 19 - Sales of Beer by Category: % Total Value Growth 2019-2024

Table 20 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024

Table 21 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024

Table 22 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 23 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024

Table 24 - GBO Company Shares of Beer: % Total Volume 2020-2024

Table 25 - NBO Company Shares of Beer: % Total Volume 2020-2024

Table 26 - LBN Brand Shares of Beer: % Total Volume 2021-2024

Table 27 - Forecast Sales of Beer by Category: Total Volume 2024-2029

Table 28 - Forecast Sales of Beer by Category: Total Value 2024-2029

Table 29 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029

Table 30 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

WINE

Key Data Findings

2024 Developments

Consumption of wine expands as local preferences evolve and affordability drives choices

Product innovation strengthens consumer engagement and cultural relevance

Off-trade and digital distribution channels expand reach amid shifting purchasing behaviours

Prospects and Opportunities

Local wine to drive growth as Tekesheno sustains cultural demand

Innovation expected to remain limited amid market consolidation

Digital platforms and retail partnerships to shape distribution landscape

Category Data

Table 31 - Sales of Wine by Category: Total Volume 2019-2024

Table 32 - Sales of Wine by Category: Total Value 2019-2024

Table 33 - Sales of Wine by Category: % Total Volume Growth 2019-2024

Table 34 - Sales of Wine by Category: % Total Value Growth 2019-2024

Table 35 - Sales of Wine by Off-trade vs On-trade: % Volume Breakdown 2019-2024

Table 36 - Sales of Wine by Off-trade vs On-trade: % Value Breakdown 2019-2024

Table 37 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 38 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024

Table 39 - Forecast Sales of Wine by Category: Total Volume 2024-2029

Table 40 - Forecast Sales of Wine by Category: Total Value 2024-2029

Table 41 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029

Table 42 - Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

SPIRITS

Key Data Findings

2024 Developments

Rising costs reshape consumer choices and shift demand to domestic and traditional spirits

Domestic players gain ground as imported brands face affordability challenges

Distribution adapts to regulatory pressures and evolving consumption habits

Prospects and Opportunities

Ongoing economic pressure likely to suppress consumption and drive informal market growth

Consumer downtrading to continue as excise pressure intensifies

Innovation expected in premium domestic spirits and traditional drink formalisation

Category Data

Table 43 - Sales of Spirits by Category: Total Volume 2019-2024
 Table 44 - Sales of Spirits by Category: Total Value 2019-2024
 Table 45 - Sales of Spirits by Category: % Total Volume Growth 2019-2024
 Table 46 - Sales of Spirits by Category: % Total Value Growth 2019-2024
 Table 47 - Sales of Spirits by Off-trade vs On-trade: % Volume Breakdown 2019-2024
 Table 48 - Sales of Spirits by Off-trade vs On-trade: % Value Breakdown 2019-2024
 Table 49 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024
 Table 50 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024
 Table 51 - GBO Company Shares of Spirits: % Total Volume 2020-2024
 Table 52 - NBO Company Shares of Spirits: % Total Volume 2020-2024
 Table 53 - LBN Brand Shares of Spirits: % Total Volume 2021-2024
 Table 54 - Forecast Sales of Spirits by Category: Total Volume 2024-2029
 Table 55 - Forecast Sales of Spirits by Category: Total Value 2024-2029
 Table 56 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029
 Table 57 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

CIDER/PERRY

2024 Developments

Prospects and Opportunities

Category Data

Table 58 - Sales of Cider/Perry: Total Volume 2019-2024
 Table 59 - Sales of Cider/Perry: Total Value 2019-2024
 Table 60 - Sales of Cider/Perry: % Total Volume Growth 2019-2024
 Table 61 - Sales of Cider/Perry: % Total Value Growth 2019-2024
 Table 62 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2024
 Table 63 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2024
 Table 64 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2019-2024
 Table 65 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024
 Table 66 - GBO Company Shares of Cider/Perry: % Total Volume 2020-2024
 Table 67 - NBO Company Shares of Cider/Perry: % Total Volume 2020-2024
 Table 68 - LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024
 Table 69 - Forecast Sales of Cider/Perry: Total Volume 2024-2029
 Table 70 - Forecast Sales of Cider/Perry: Total Value 2024-2029
 Table 71 - Forecast Sales of Cider/Perry: % Total Volume Growth 2024-2029
 Table 72 - Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

RTDS

2024 Developments

Prospects and Opportunities

Category Data

Table 73 - Sales of RTDs by Category: Total Volume 2019-2024
 Table 74 - Sales of RTDs by Category: Total Value 2019-2024
 Table 75 - Sales of RTDs by Category: % Total Volume Growth 2019-2024
 Table 76 - Sales of RTDs by Category: % Total Value Growth 2019-2024
 Table 77 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024
 Table 78 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024
 Table 79 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024
 Table 80 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024
 Table 81 - GBO Company Shares of RTDS: % Total Volume 2020-2024
 Table 82 - NBO Company Shares of RTDS: % Total Volume 2020-2024
 Table 83 - LBN Brand Shares of RTDS: % Total Volume 2021-2024
 Table 84 - Forecast Sales of RTDs by Category: Total Volume 2024-2029
 Table 85 - Forecast Sales of RTDs by Category: Total Value 2024-2029

Table 86 - Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029

Table 87 - Forecast Sales of RTDs 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-ethiopia/report.