



**Global Imports & Market Sizes of Non-alcoholic Drinks in Select  
Countries**

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## 1. INTRODUCTION

This document examines the market size of non-alcoholic beverages (HS220299) for selected countries in 2020. The key market size elements considered for the analysis include the value of imports, the sales volume and value. The countries for which the analysis is for are, the United States, United Kingdom, Germany, France, Australia and the Middle East.

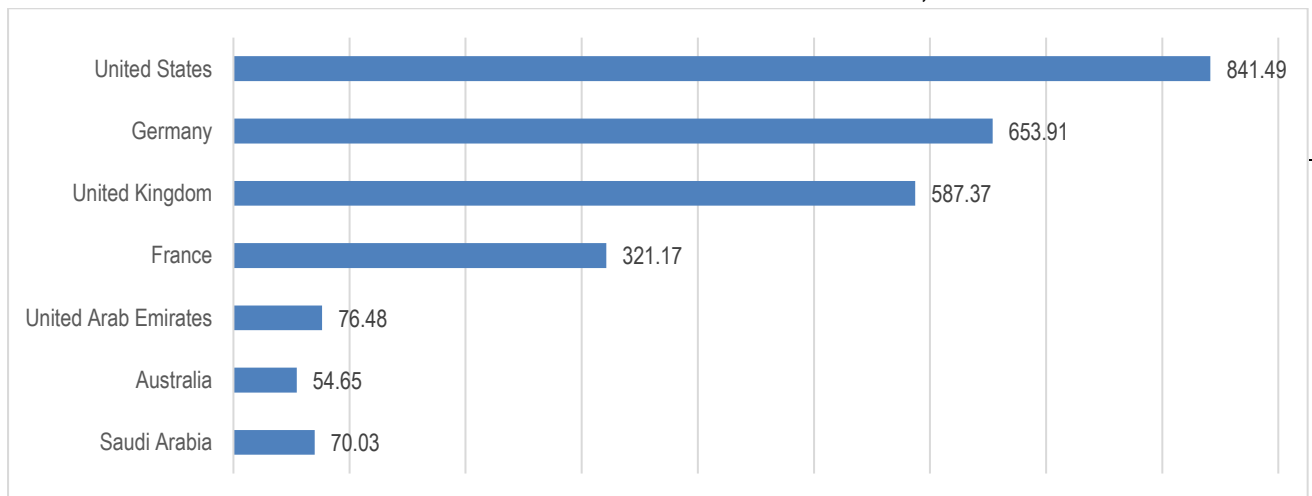
In addition, the analysis presents the key competitors, by company and brand share in each product category and for each country.

## 2. MARKET SIZE (IMPORTS)

The figure below presents the global imports of non-alcoholic beverages (HS220299) in 2020.

The United States was the largest importer of non-alcoholic beverage in 2020 at a value of USD841.49m. This was followed by Germany (USD653.91) and the United Kingdom (USD587.37).

**FIGURE 1: GLOBAL IMPORTS OF NON-ALCOHOLIC BEVERAGES, 2020**



Sources: Trademap, 2022

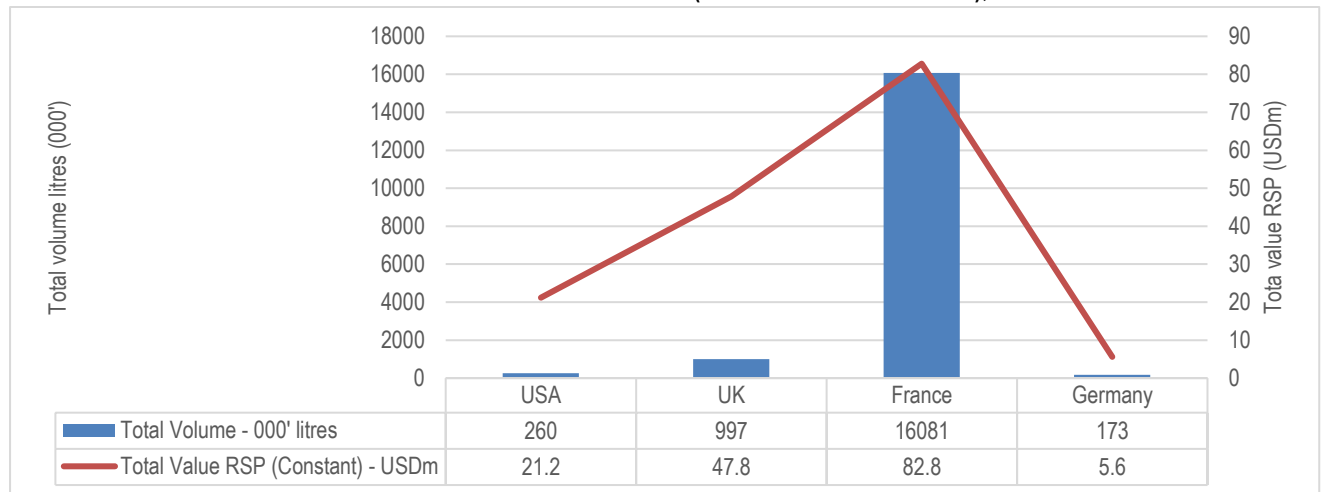
### 3. MARKET SIZE - SALES VOLUME AND VALUE

#### 3.1 Non-alcoholic spirits

Figure 2 presents the market size by sales volume and the value of retail price sales of non-alcoholic spirits in the United States, United Kingdom, France and Germany.

In 2020, France led in the non-alcoholic spirits category, having sold a total volume of 16,081 thousand litres at a value of USD82.8m. The United Kingdom followed in second place with 997 thousand litres at a value of USD47.8m. The United States came third with 206 thousand litres at USD21.2m.

**FIGURE 2: SALES OF NON-ALCOHOLIC SPIRITS (SALES VOLUME & VALUE), 2020**



Source: Euromonitor International, 2022

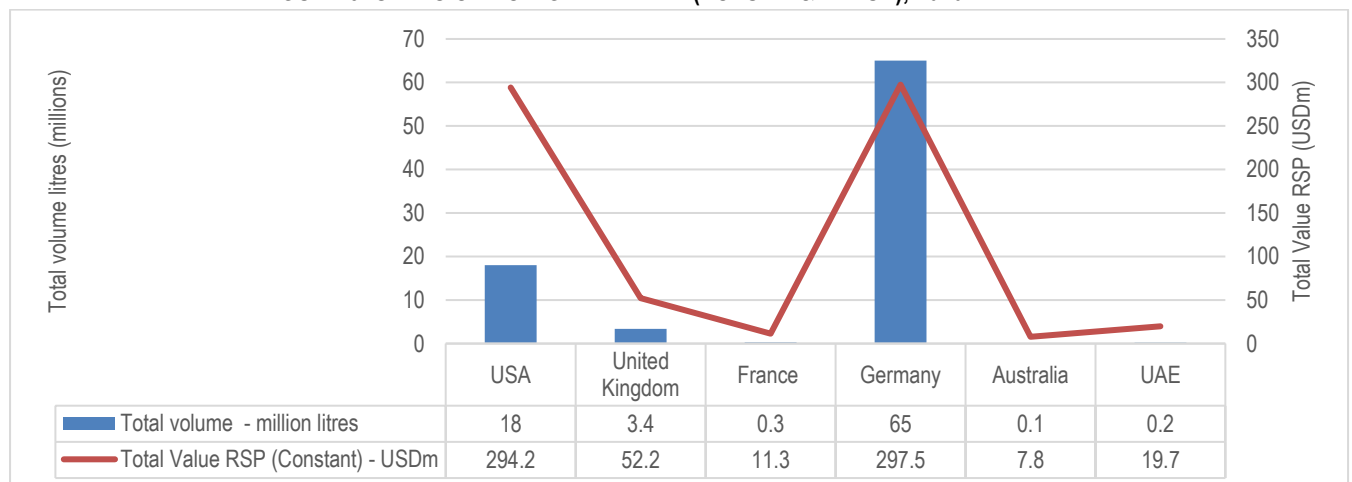
Note: RSP – Retail Sale Price

#### 3.2 Non-grape wine

The sales volume and value of non-grape wine in 2020 are shown in the figure below.

For non-grape wine, Germany had the highest market share, both in terms of sales volume and value in 2020. The country's total sales volume stood at 65 thousand litres, valued at USD297.5m. The United States followed with 18 thousand litres of sales at a value of USD294.2m, with the United Kingdom in third position with 3.4 thousand litres at USD52.2m.

**FIGURE 3: SALES OF NON-GRAPE WINE (VOLUME & VALUE), 2020**



Source: Euromonitor International, 2022

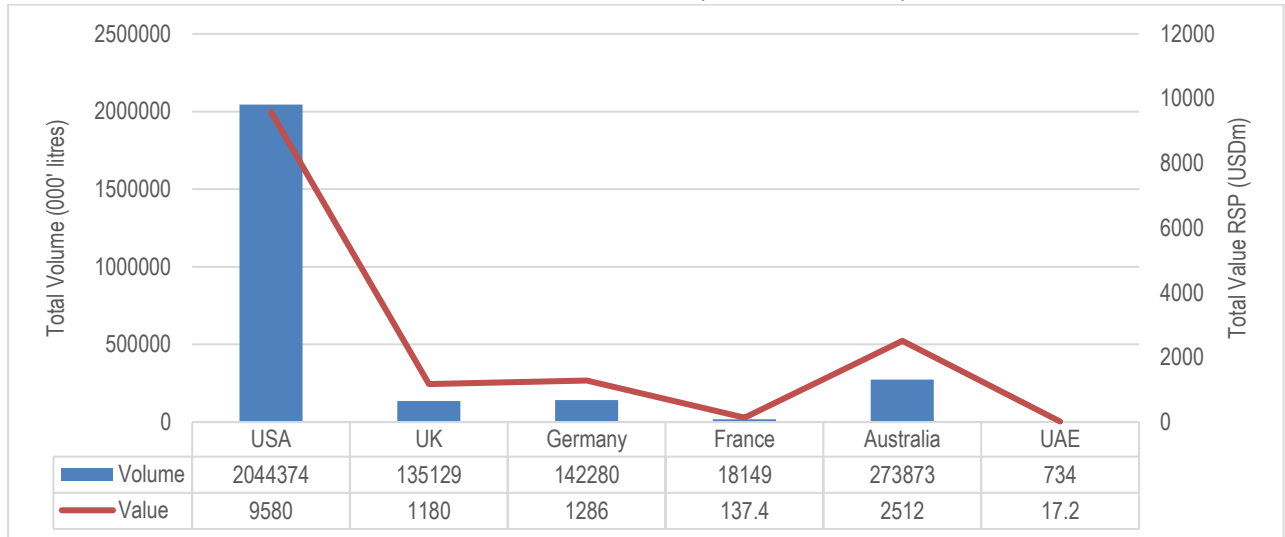
Note: RSP – Retail Sale Prices

### 3.3 Ready-to-drinks (alcoholic)

The market size of ready-to-drinks (RTD's) is shown in the figure below.

The United States led in this category with a market share of 2, 044, 374 litres valued at USD9, 580m. Australia followed in second place (273, 873 litres; USD2, 512m) and Germany in third place at 142, 280 litres valued at USD1, 286m.

**FIGURE 4: SALES OF READY-TO-DRINKS, (VOLUME & VALUE), 2020**



Source: Euromonitor International, 2022

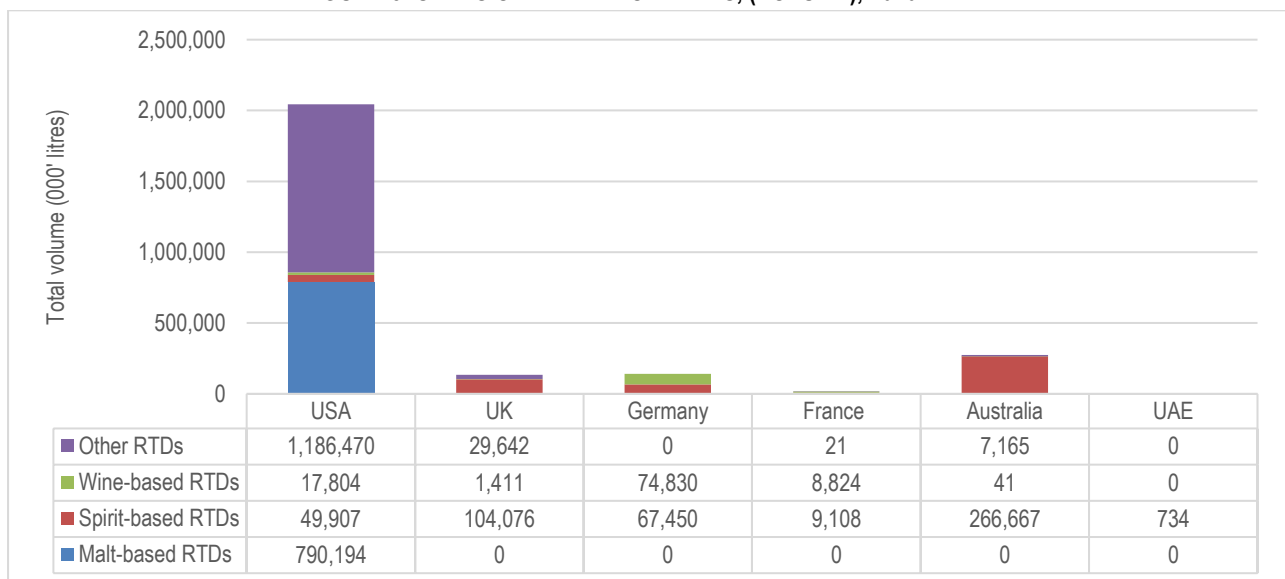
Note: RSP – Retail Price

### RTD Categories

Figure 5 shows the sales volume of each RTD category in 2020. The Spirit-based RTDs are the largest category of ready-to-drinks, followed by Wine-based RTD.

In 2020, the largest RTD category in the United States was Other RTD's (1,186,470), Spirit-based RTDs in United Kingdom (104,076), and Wine-based RTDs in Germany (74,830).

**FIGURE 5: SALES OF READY-TO-DRINKS, (VOLUME), 2020**



Source: Euromonitor International, 2022

## KEY COMPETITORS

In terms of the competitive landscape, the following tables present the top companies and brands (as measured by highest market share) in each category of non-alcoholic drinks and for each of the specified countries.

**TABLE 1:COMPETITIVE LANDSCAPE - NON-ALCOHOLIC SPIRITS**

	Company Shares of Non-Alcoholic Spirits	% Share (NBO) - Total Volume - 2020	Brand Shares of Non-Alcoholic Spirits	% Share (LBN) - Total Volume - 2020
<b>USA</b>	Lyre's Spirit Co	32.4	Lyre's	32.4
	Diageo North America Inc	25.8	Seedlip	25.8
	Pernod Ricard USA	11.7	Ceder's	11.7
	Others	30.1	Others	30.1
<b>United Kingdom</b>	Diageo Plc	55.2	Seedlip	55.2
	Pernod Ricard UK Ltd	15.1	Ceder's	15.1
	Elegantly Spirited Ltd	8.6	STRYYK	8.6
	Three Spirit Drinks Ltd	4	Three Spirit	4
	Others	17.1	Others	17.1
<b>France</b>	Ricard SA	26.5	Pacific	24.7
	Bardinet SAS	22.7	Mister Cocktail	12
	JNPR SAS	1.7	Blancart	6.5
	MHD Moët Hennessy Diageo	1.6	Palermo	4.2
	Other Private Label	28.7	Ceder's	1.8
	Others	18.8	JNPR	1.7
			Seedlip	1.6
			Other Private Label	28.7
		Others	18.8	
<b>Germany</b>	Rheinland Distillers GmbH	60	Siegfried Wonderleaf	60
	Others	40	Others	40

Source: Euromonitor International, 2022

Note: NBO – National Brand Owner; LBN – Local Brand Owner

**TABLE 1: COMPETITIVE LANDSCAPE - NON-ALCOHOLIC BEER**

	Sales - Total Volume - Million litres, 2020	Company Shares of Non-Alcoholic Beer, 2020	% Share (NBO) - Total Volume - 2020	Brand Shares of Non-Alcoholic Beer, 2020	% Share (LBN) - Total Volume - 2020
<b>USA</b>	122.6	Anheuser-Busch InBev NV	44.7	O'Doul's (Anheuser-Busch InBev NV)	29.7
		Heineken NV	17.2	Busch (Anheuser-Busch InBev NV)	8.5
		Molson Coors Brewing Co (6.3%)	6.3	Haake Beck (Anheuser-Busch InBev NV)	4.0
		Athletic Brewing Co	2.4	St Pauli Girl (Anheuser-Busch InBev NV)	2.5
		Florida Ice & Farm Co SA	0.75		
		Blue Ribbon Intermediate Holdings LLC	0.5		
		Others	28.3		
<b>Germany</b>	703.1	Oetker-Gruppe	12.5	Clausthaler (Oetker-Gruppe)	8.5
		Glaabsbräu KG	8.2	Jever (Oetker-Gruppe)	4.0
		Brauerei C & A Veltins GmbH & Co KG	7.4		
		Krombacher Brauerei Bhd Schadeberg GmbH & Co KG	7.2		
		Erdinger Privatbrauerei Weissbräu Werner Brombach GmbH	6.5		
		Anheuser-Busch InBev NV	5.0		
		Bitburger Braugruppe GmbH	4.4		
		Eichbaum GmbH & Co KG	3.9		
		Carlsberg A/S	2.7		
		Warsteiner Brauerei Haus Cramer GmbH & Co KG	1.8		
		Badische Staatsbrauerei Rothaus AG	1.6		
		Private Label	5.6		
		Others			
<b>Western Europe</b>	1417.7	Heineken NV	18.1	Buckler (Heineken NV)	12.8
		Oetker-Gruppe	7.1	Heineken (Heineken NV)	2.1
		Grupo Mahou-San Miguel SA	7.1	Amstel (Heineken NV)	1.2
		Carlsberg A/S	6.3	Gösser (Heineken NV)	0.3
		Anheuser-Busch InBev NV	6.2	Wieckse Witte (Heineken NV)	0.3
		Glaabsbräu KG	4.1	Maes (Heineken NV)	0.2

		Brauerei C & A Veltins GmbH & Co KG	3.7	Sagres (Heineken NV)	0.2
		Krombacher Brauerei Bhd Schadeberg GmbH & Co KG	3.6	Schlossgold (Heineken NV)	0.2
		Erdinger Privatbrauerei Weissbräu Werner Brombach GmbH	3.4	Affligem (Heineken NV)	0.2
		Bitburger Braugruppe GmbH	2.2	Cruzcampo (Heineken NV)	0.1
		Eichbaum GmbH & Co KG	1.9	Moretti (Heineken NV)	0.1
		Damm SA	1.6	Panachade (Heineken NV)	0.1
		Diageo Plc	1.4		
		Swinkels Family Brewers NV	1.2		
		Warsteiner Brauerei Haus Cramer GmbH & Co KG	0.9		
		Private Label	5.4		
		Others	22.5		

Source: Euromonitor International, 2022

Note: NBO – National Brand Owner; LBN – Local Brand Owner



**TABLE 3: COMPETITIVE LANDSCAPE - NON-GRAPE WINE**

	Company Shares of Non-Grape Wine	% Share (NBO) - Total Volume - 2020	Brand Share of Non-Grape Wine	% Share (LBN) - Total Volume - 2020
<b>USA</b>	Takara Sake USA Inc	31.4	Takara	31.4
	Sidney Frank Importing Co Inc	18.7	Gekkeikan Sake	18.1
	Ozeki Sake USA Inc	15.4	Ozeki	15.4
	Others	34.5	Others	34.5
<b>UK</b>	Cwm Deri Vineyard	7.7	Cwm Deri Vineyard	7.7
	Cairn O' Mohr Ltd	6.3	Cairn O' Mohr Ltd	6.3
	Rimon Winery	6.2	Rimon Winery	6.2
	Others	79.8	Others	79.8
<b>France</b>	La Maison du Whisky SA	54.4	BIJITO Junmai Ginjo	18.5
	Kirin Holdings Co Ltd	12.1	Kirin Jihoshu	12.1
	Others	33.5	Others	69.4
<b>Germany</b>	Landkellerei Höhl Hochstadt GmbH & Co KG	14.3	Höhl	14.3
	Katlenburger Kellerei GmbH & Co KG	12.9	Katlenburger	12.9
	Kellerei Possmann GmbH & Co KG	10.7	Possmann	10.7
	Kellerei Heil OHG	7.7	Heil	7.7
	Bembel-with-care GmbH & Co KG	2.4	Bembel-with-care	2.4
	Bavaria Waldfrucht GmbH	0.8	Hitzkopf	0.8
	Other Private Label	4.2	Other Private Label	4.2
	Others	46.8	Others	46.8
<b>Australia</b>	Sun Masamune Pty Ltd	17.3	Go-Shu	17.3
	Brown-Forman Australia Pty Ltd	13.3	Gekkeikan	13.3
	Déjà Vu Wine Co	11.5	Yoshinogawa	7.2
	Others	57.8	Amanoto	4.3
			Others	57.8
<b>UAE</b>	Asahi-Shuzo Sake Brewing Co Ltd	24.1	Hakkaisan	14.6
	Hakkaisan Sake Brewery Co Ltd	14.6	Hakutsuru	14.5
	Hakutsuru Sake Brewing Co Ltd	14.5	Dassai	13.5
	Others	46.7	Dassai 50	10.5

		Others	46.7
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Source: Euromonitor International, 2022

Note: NBO – National Brand Owner; LBN – Local Brand Owner

**TABLE 4: COMPETITIVE LANDSCAPE – ALCOHOLIC READY-TO-DRINKS**

	Company Shares of RTDs	% Share (NBO) - Total Volume - 2020	% Share (LBN) - Total Volume - 2020	Brand Share of RTDs
USA	Mike's Hard Beverage	40.6	White Claw Hard Seltzer	28.7
	Boston Beer Co Inc, The	22.2	Truly Spiked & Sparkling	14.1
	Diageo North America Inc	7.3	Mike's Hard Lemonade	11.8
	Anheuser-Busch InBev NV	6.9	Twisted Tea	8.1
	Boathouse Beverage Co	2.7	Smirnoff	5.9
	North American Breweries Inc	2.7	Ritas	5.2
	Phusion Projects LLC	1.8	Bon & Viv Spiked Seltzer	2.7
	Proximo Spirits Inc	0.8	Seagram's Escapes	2.3
	MillerCoors LLC	0.7	Four Loko	1.8
	Brown-Forman Corp	0.5	Natural Light Seltzer	1.8
	American Beverage Corp	0.3	Smirnoff Spiked Sparkling SeltzeR	1.4
	Other	12.8	José Cuervo Authentic Margaritas	0.8
			Others	13
United Kingdom	Beverage Brands (UK) Ltd	19.6	WKD	19.6
	Diageo Plc	17.4	Crabbie's Ginger	13
	Halewood International Ltd	16.4	VK	8.8
	Bacardi Brown-Forman Brands	12.3	Smirnoff	5.8
	Global Brands Ltd	10.3	Bacardi Breezer	5
	Tesco Plc	1.3	Bacardi & Cola	3.5
	Pernod Ricard UK Ltd	1.2	Jack Daniel's & Cola	3.4
	G & J Greenall Group Ltd	1.1	Gordon's & Tonic	3.3
	Kopparbergs Bryggeri AB	0.9	Gordon's	2.8
	J Sainsbury Plc	0.8	Gordon's & Slimline Tonic	2.2
	Accolade Wines Ltd	0.5	Caribbean Twist	2.2
	Other private label	2.3	Captain Morgan	1.5
	Others	14.5	Pimm's & Lemonade	1.4
			Tesco	1.3
			Malibu & Cola	1.2
		Red Square	1.2	
		Frank's	0.9	

			Greenall's Gin & Tonic	0.9
			Other Private Label	2.3
			Others	19.7
Germany	Aldi Einkauf GmbH & Co oHG	13.4	Aldi	13.4
	Brown-Forman Deutschland GmbH	12.6	Jack Daniel's & Cola	12.4
	Rotkäppchen-Mumm Sektkellereien GmbH	7.1	Jive	6.4
	Peter Herres Wein- & Sektkellerei GmbH	6.4	Rotkäppchen Fruchtsecco	6.3
	Mertes KG Weinkellerei, Peter	4.9	Jim Beam Cola	2.9
	Henkell & Co Sektkellerei KG	4.3	Mionetto il Ugo	2.5
	Berentzen-Gruppe AG	3.5	Berentzen Fruchtige	2.2
	Beam Suntory Deutschland GmbH	3.2	Käfer Hugo	1.9
	Kattenburger Kellerei GmbH & Co KG	1.8	Katlenburger	1.8
	Bacardi GmbH	1.8	Bacardi & Cola	1.8
	Diageo Deutschland GmbH	1.7	Käfer Sprizzer	1.4
	Waldemar Behn GmbH & Co KG	1.1	Kleiner Feigling	1.1
	Rewe Group	0.7	Gordon's & Tonic	1
	Other Private Label	7.3	Rewe	0.7
	Others	27.7	Other Private Label	7.3
		Others	34.2	
France	J García Carrión SA	16.5	Don Garcia & Don Simon	16.5
	Bardinet SAS	15.3	Old Nick	14.1
	MHD Moët Hennessy Diageo	8.4	Smirnoff Ice	8.4
	Pernod SA	8.1	Cruz García Real Sangría	5.6
	La Martiniquaise SVS	7.1	Peñasol Sangría	5
	Bodegas Félix Solis France	5	Carrefour	4.9
	Carrefour France SA	4.9	Maria Olé & Questa	4.4
	Grands Chais de France SA, Les	4.4	Poliakov	4.1
	ITM Entreprises SA	4.1	Saint James	3
	Galec - Centre Distributeur Edouard Leclerc 3.6	3.6	Intermarché & On/Off	2.6
	Bacardi-Martini SA	2.4	François d'Aubigné & Marque Repèr	2.5
	Brown-Forman France SA	1.9	Martini Royale	2.5
	Auchan France	1.3	Jack Daniel's	1.9
Australia	Beam Suntory Australia Pty Ltd	29.7	Canadian Club	15.7
	Diageo Australia Ltd	17.7	Jim Beam Cola	13.9

	Asahi Premium Beverages Pty Ltd	15.7	Jack Daniel's	12
	Brown-Forman Australia Pty Ltd	12	Vodka Cruiser	8.3
	Campari Australia Pty Ltd	4.2	Bundaberg	7.5
	Foster's Group Pty Ltd	3	Woodstock & Cola	6.6
	Aldi Stores Supermarkets Pty Ltd	1.4	Wild Turkey Kentucky Straight 5.0%	3.1
	Iworths Group Ltd	1	UDL	2.1
	Lion Pty Ltd	0.7	Cougar	2
	Vok Beverages Pty Ltd	0.7	Smirnoff Ice Double Black	1.6
	Matso's Broome Brewery	0.6	Johnnie Walker	1.5
	Bacardi-Martini Australia Pty Ltd	0.3	Aldi	1.4
	Southtrade International Pty Ltd	0.3	Black Douglas	1.1
	Angove's Pty Ltd	0.2	Smirnoff Signature Serves	0.9
	Others	12.6	Wild Turkey 101 6.5%	0.7
			Smirnoff Ice Red	0.7
			White Claw Hard Seltzer	0.6
			Others	18.2
UAE	Bacardi-Martini Ltd	46.2	Bacardi-Martini Ltd	46.2
	Diageo Plc	45.5	Diageo Plc	45.5
	Others	8.2	Others	8.2

Source: Euromonitor International, 2022

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