

Alcoholic Beverages Industry in India (2013-15)

<https://marketpublishers.com/r/A84E8DD213DEN.html>

Date: February 2013

Pages: 117

Price: US\$ 750.00 (Single User License)

ID: A84E8DD213DEN

Abstracts

EXECUTIVE SUMMARY

The Indian liquor market, which is divided into various categories like IMFL (Indian-made foreign liquor), imported liquor, beer and country-made liquor, is brimming with growth. Challenges like the restrictive policies of states with regard to movement, production, pricing, etc, increase in raw material prices (like ENA, glass, molasses etc) and impositions applied on advertising pose huge challenges for the industry. But with favorable demographics, rising disposable income levels and greater acceptance of alcoholic beverages in social circles, the outlook for the Indian alcoholic beverages continues to remain positive. In addition, changing consumer preference towards premium varieties of IMFL is likely to result in sales-mix gradually improve in favor of premium brands.

Trends in the Industry

Rising Acceptance of Social Drinking

Alcohol Consumption by Women- No More a Taboo

Flavored Alcohol

Innovative Marketing Concepts

Increasing Reach

Innovative Packaging

Indian Alcoholic Industry currently pegged at INR 507bn is stated to grow at a CAGR of ~29% to reach INR 1400bn by 2015. The alcoholic beverages industry, as they say is recession-proof. With a rising and promising GDP, the economic status of India is robust. Rising social acceptability, conspicuous consumption and high disposable income of the globalized consumer is pushing the industry to newer heights. Also, rapid urbanization in metros and tier-2 cities, is contributing further to the growth.

SCOPE OF THE REPORT

Indian Alcohol Industry at a glance

Emerging trends in the industry

Demand Supply scenario Factors driving growth, Issues & Challenges

Government Regulations

Major players , Financials and their SWOT Analysis

Forecasts

REASONS TO BUY

To understand the various factors which are fuelling the growth and those which are/will be critical for the industry performance in the near term

Comprehensive report covering all the aspects required to understand the industry performance and future prospects

The report elucidates the current market scenario of the industry and forecasts key parameters which helps to anticipate the industry performance

Contents

1. OVERVIEW

1.1 STRUCTURE OF THE INDUSTRY

- 1.1.1 Indian Made Foreign Liquor (IMFL)
- 1.1.2 BEER
- 1.1.3 Country Liquor
- 1.1.4 Imported Liquor

2. DEMAND-SUPPLY SCENARIO

3. INDUSTRY GROWTH DRIVERS

- 3.1 Increasing Level of Income
- 3.2 Attractive Demographics
- 3.3 Changing Lifestyles
- 3.4 Sales through Retail Chains

4. EMERGING TRENDS IN THE INDUSTRY

- 4.1 Rising Acceptance of Social Drinking
- 4.2 Alcohol Consumption by Women- No More a Taboo
- 4.3 Flavored Alcohol
- 4.4 Innovative Marketing Concepts
- 4.5 Increasing Reach
- 4.6 Innovative Packaging

5. GOVERNMENT REGULATIONS

6. SWOT ANALYSIS

6.1 STRENGTHS

- 6.1.1 Recession Proof Industry
- 6.1.2 India- An Attractive Market for Spirits
- 6.1.3 Favorable Demographics

6.2 WEAKNESS

- 6.2.1 Multiplicity of Taxes
- 6.2.2 Ban on Advertising

6.2.3 Inter State Transfer Fees on Molasses

6.2.4 Limited SKUs Result in Slower Distribution Expansion

6.3 OPPORTUNITIES

6.3.1 Low Per Capita Consumption of Alcohol in India -Room for Growth

6.3.2 Rising Middle Class

6.3.3 Increase in Disposable Income and Discretionary Spending

6.4 THREATS

6.4.1 Religious Influence

6.4.2 Increasing Competition

6.4.3 Increasing Raw Material Costs

6.4.4 Inappropriate and Delay in Government Policies

7. PORTERS 5 FORCES

7.1 Bargaining power of buyers

7.2 Bargaining power of suppliers

7.3 Threat of substitutes

7.4 Rivalry among existing players

7.5 Threat of new entrants

8. KEY PLAYERS

8.1 UNITED BREWERIES LTD.

8.1.1 SWOT ANALYSIS

8.1.2 FINANCIAL HIGHLIGHTS

8.2 UNITED SPIRITS LTD.

8.2.1 SWOT ANALYSIS

8.2.2 FINANCIAL HIGHLIGHTS

8.3 RADICO KHAITAN LTD.

8.3.1 SWOT ANALYSIS

8.3.2 FINANCIAL HIGHLIGHTS

8.4 GLOBUS SPIRITS LTD.

8.4.1 SWOT ANALYSIS

8.4.2 FINANCIAL HIGHLIGHTS

9. THE HERFINDAHL-HIRSCHMAN INDEX

10. INDUSTRY PERFORMANCE

11. FORECASTS & OUTLOOK

12. ANNEXURE

List Of Figures

LIST OF FIGURES & TABLES

- Figure 1 Indian Alcoholic Beverage - Market Size (INR Bn)
- Figure 2 Alcohol Consumption in India (In mn litres)
- Figure 3 Market Segmentation- Indian Liquor Industry
- Figure 4 Growth in IMFL in India (In Mn Cases)
- Figure 5 Indian Spirit Market (Volumes)-CY2011
- Figure 6 Indian Spirit Market (Value)-CY2011
- Figure 7 Whisky Consumption (In Mn Cases)
- Figure 8 Whisky Market Share (FY11)
- Figure 9 Brandy Market Share
- Figure 10 Per Capita Consumption of Rum (In ltrs)
- Figure 11 Vodka Consumption (Mn Cases) and Per Capita Consumption (MI)
- Figure 12 Gin Consumption (Mn Cases) and Per Capita Consumption
- Figure 13 Per Capita Consumption- Beer (In Liters)
- Figure 14 Beer Industry- Break Up
- Figure 15 Beer Companies- Market Share
- Figure 16 IMIL Consumption- In Mn Cases
- Figure 17 IMFL and Country Liquor (Million Cases) (CY04-CY11)
- Figure 18 IMFL (Million Cases) (CY12E-CY15E)
- Figure 20 Income Distribution (Million Households)
- Figure 19 Per Capita Income India (In INR, 2006-15E)
- Figure 21 Indian Population Structure (In mn, 2001-11)
- Figure 22 Sugarcane Production in India
- Figure 23 Per Capita Consumption- litres per annum (lpa)
- Figure 24 Number of Middle Class Households (In Millions, Current-2026E)
- Figure 25 Growing Discretionary Spend (2000-20)
- Figure 26 WPI of Molasses
- Figure 27 WPI of Glass Bottles
- Figure 28 UBL's Market Share- Million Cases (FY11)
- Figure 29 India- % distribution of population (1991-2011)
- Figure 30 UBL- Selling and Distribution Expenses
- Figure 31 Middle Class Population and Urbanization (2011-2026E)
- Figure 32 Barley Futures Prices on India's NCDEX
- Figure 33 ENA Prices/litre
- Figure 34 Molasses Price/Qtl
- Figure 35 Premium Brand Volumes as % of Total Volumes

Figure 36 Radico- Price of Raw Materials per Quintal
Figure 37 GSL Sales Break Up- H1FY13
Figure 38 GSL-Consumer Business Break Up
Figure 39 Bulk Alcohol and IMFL Franchisee Sales Trend (INR Mn)
Figure 40 Increase in NREGA Allocations
Figure 41 Minimum Support Prices
Figure 42 Price Trend of HDPE (Packaging Material)
Figure 43 WPI of Molasses
Figure 44 Market Concentration- IMFL (Volume Terms)
Figure 45 Market Concentration- BEER
Figure 46 Household Income Growth
Figure 47 Growth in Middle Class Income
Figure 48 IMFL Consumption- Region Wise
Figure 49 Whiskey Consumption (Mn Cases) and Consumption Per Capita (lts)
Figure 50 Global Whiskey Consumption
Table 1 Segment Split -Brandy
Table 2 Segmental Split- Rum
Table 3 Segmental Split- Vodka
Table 4 Segmental Split- Gin
Table 5 Brands and their Advertisements
Table 6 Liquor Distribution Systems in India
Table 7 Liquor Companies in India and Major Brands
Table 8 Negotiating leverage of buyers
Table 9 Negotiating leverage of suppliers
Table 10 Threat of substitutes
Table 11 Degree of rivalry
Table 12 Entry Barriers
Table 13 Peer Group Comparison
Table 14 Radico- Broad Consumer Choices
Table 15 Strong Brands Created- Radico
Table 16 Manufacturing Facilities
Table 17 Stronger and Weaker Segments of Competitors
Table 18 Market Volume of Franchisors in FY12 (Mn Cases)

I would like to order

Product name: Alcoholic Beverages Industry in India (2013-15)

Product link: <https://marketpublishers.com/r/A84E8DD213DEN.html>

Price: US\$ 750.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/A84E8DD213DEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970