

India Whiskey Market, By Product Type (Indian Whiskey, American Whiskey, Irish Whiskey, Scotch Whiskey, Canadian Whiskey, Others), By Quality (Premium, High-End Premium, Super Premium), By Distribution Channel (Off-Trade, On-Trade), By Region & Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

India Whiskey Market was valued at USD 19.16 Billion in 2024 and is expected to reach USD 48.65 Billion by 2030 with a CAGR of 16.8% during the forecast period. The Indian whiskey market is one of the largest and fastest-growing globally, driven by increasing consumer preference for premium alcoholic beverages, rising disposable incomes, and a growing urban population. Whiskey accounts for a significant share of India's alcoholic beverage consumption, with a diverse product portfolio catering to varying preferences and price sensitivities.

By Product Type, Indian whiskey dominates the market, supported by its affordability, local flavor preferences, and widespread availability. Scotch whiskey follows, benefiting from the rising aspirational consumption among middle and upper-class consumers, with blended Scotch variants being particularly popular. American, Irish, and Canadian whiskeys, though niche, are gaining traction among urban millennials and connoisseurs, who seek international and craft whiskey brands. The Others category, including flavored and experimental whiskeys, also contributes to the market's diversification, appealing to younger demographics. By Quality, the market is experiencing a premiumization trend, with high-end premium and super-premium segments expanding at a robust pace. These categories are fuelled by the increasing spending power of consumers, the rise of experiential drinking, and the influence of global lifestyle trends. While the standard segment still leads due to affordability and mass appeal, the

demand for premium offerings is steadily rising, especially in metropolitan areas. By Distribution Channel, the market is split between off-trade and on-trade sales. The off-trade channel, including liquor stores and retail outlets, accounts for the majority of sales, driven by convenience and competitive pricing. The on-trade segment, encompassing bars, pubs, and restaurants, is witnessing significant growth, spurred by evolving social drinking habits and the proliferation of premium dining establishments. Post-pandemic recovery in the hospitality sector and a surge in whiskey-based cocktail culture further boost on-trade demand. Key growth drivers for the Indian whiskey market include favourable demographics, increasing urbanization, and greater acceptance of alcohol consumption in social settings. Marketing initiatives by leading brands, such as localized flavors, innovative packaging, and digital campaigns, enhance consumer engagement. Moreover, government policy reforms in alcohol taxation and distribution are influencing market dynamics. Challenges such as high duties on imported whiskeys and regulatory complexities, however, pose constraints to market growth. Overall, the Indian whiskey market is poised for sustained expansion, driven by shifting consumer preferences, economic growth, and innovations across product and quality segments.

Key Market Drivers

Rising Disposable Incomes and Urbanization

The Indian economy's growth has significantly increased disposable incomes, particularly among the middle and upper classes. Urbanization has created a burgeoning consumer base with access to modern retail formats and exposure to premium lifestyle products. Whiskey, viewed as a status symbol and a sophisticated beverage choice, has benefited from these socio-economic changes. Middle-class consumers increasingly aspire to purchase premium brands, driving demand in the high-end and super-premium categories.

Changing Social Attitudes Towards Alcohol Consumption

There has been a notable cultural shift in the perception of alcohol in India. Younger generations, especially millennials and Gen Z, are more open to consuming alcohol in social settings. Alcohol consumption among both men and women is higher in rural India than in urban India, as per the the National Family Health Survey-5 (NFHS-5), 2019-21 .Urban nightlife culture, bolstered by the expansion of bars, pubs, and clubs, has contributed to the growing demand for whiskey, particularly through on-trade channels. The rising acceptance of whiskey among women has further expanded the market's demographic reach.

Brand Innovation and Marketing Strategies

Leading brands in the Indian whiskey market have adopted innovative marketing strategies, such as celebrity endorsements, digital campaigns, and experiential events. Brands are also introducing new variants and limited-edition products to cater to diverse palates and preferences. Packaging innovations, including smaller packs for affordability and portability, have enhanced consumer convenience. Localized flavors and the growing prominence of craft whiskey brands have further enriched the product landscape.

Key Market Challenges

High Taxation and Regulatory Complexities

Alcohol is a heavily regulated sector in India, with high excise duties and taxes varying across states. These cost burdens are often passed on to consumers, making premium products less accessible. Regulatory complexities, such as varying distribution laws and licensing requirements, pose additional challenges for manufacturers and retailers. Imported whiskeys face steep import duties, further limiting their market penetration.

Intense Competition and Market Saturation

The Indian whiskey market is highly competitive, with numerous domestic and international players vying for market share. Established brands dominate the mass-market segment, while premium categories face competition from craft distilleries and international imports. Maintaining brand loyalty amidst such competition is challenging, particularly as consumers become more experimental and price sensitive.

Health Concerns and Growing Advocacy for Responsible Drinking

Rising awareness of health risks associated with alcohol consumption poses a challenge to the whiskey market. Advocacy for responsible drinking, combined with government campaigns to curb alcohol abuse, may impact demand. Additionally, younger generations are increasingly conscious of health and wellness, potentially opting for low-alcohol or non-alcoholic alternatives.

Key Market Trends

Rising Popularity of Craft and Flavored Whiskeys

Craft whiskey, characterized by small-batch production, unique flavor profiles, and artisanal techniques, is gaining traction among Indian consumers, especially millennials and Gen Z. These consumers value authenticity, storytelling, and exclusivity, making craft whiskey a natural fit. Younger consumers seek variety and are willing to experiment with unconventional flavors like honey, cinnamon, and smoky infusions. This diversification is fueled by their exposure to global trends and a preference for personalized drinking experiences. Homegrown brands like Amrut, Paul John, and Rampur are at the forefront, combining traditional techniques with innovative flavors. They have gained both domestic and international acclaim, elevating India's position in the global whiskey market. Flavored whiskeys cater to new drinkers and those transitioning from other beverages like rum or beer. These products reduce the sharpness often associated with traditional whiskey, broadening the market's appeal.

Accelerated Digital Transformation in Sales and Marketing

Digital platforms are becoming integral to how whiskey brands connect with consumers, especially post-pandemic, when online interactions surged. From e-commerce to virtual events, the digital realm is revolutionizing consumer engagement. With increasing smartphone penetration and evolving consumer habits, online alcohol sales are on the rise. Many states in India now allow e-commerce for alcoholic beverages, enabling brands to reach a wider audience conveniently. Leading brands are hosting virtual events and masterclasses to educate consumers about whiskey varieties, tasting techniques, and food pairings. These events bridge the gap between brands and consumers, fostering loyalty. Social media influencers, bloggers, and whiskey enthusiasts are playing a significant role in shaping consumer preferences. Storytelling through platforms like Instagram, YouTube, and TikTok has become a critical tool for creating brand awareness and driving product adoption.

Focus on Sustainability and Ethical Practices

As environmental consciousness grows among Indian consumers, whiskey brands are aligning with sustainable practices to appeal to this sentiment. From sourcing to packaging, sustainability is becoming a competitive differentiator. Many brands are shifting to biodegradable, recyclable, or minimalistic packaging to reduce their environmental footprint. This not only aligns with global sustainability goals but also appeals to urban consumers who prioritize green initiatives. Brands are investing in sustainable farming practices for grain production and exploring ways to reduce water

usage during the distillation process. For example, some distilleries now recycle water or use renewable energy sources. Ethical production and social responsibility campaigns are helping brands resonate with younger, socially conscious consumers. Initiatives focused on local community support, such as empowering farmers, enhance brand image.

Segmental Insights

Indian whiskey lead in the market. Indian whiskey is highly affordable compared to international variants, making it accessible to a broad consumer base across urban and rural areas. Indian consumers have a strong cultural alignment with locally produced spirits, and Indian whiskey brands cater to traditional tastes with unique flavor profiles that resonate with the masses. Leading Indian whiskey brands like Royal Stag, McDowell's No. 1, and Officer's Choice have established significant brand loyalty over decades. Indian whiskey enjoys unmatched distribution across liquor stores, bars, and restaurants nationwide, ensuring its market dominance. With competitive pricing and consistent quality, Indian whiskey provides excellent value for money, making it the top choice for middle- and lower-income groups. While Indian whiskey dominates the overall market, it is particularly strong in the standard and mid-priced segments. However, premiumization within Indian whiskey is also emerging, with brands like Blenders Pride and Antiquity catering to the high-end segment.

Regional Insights

North India was the largest and most dominant region in the Indian whiskey market. Whiskey consumption is deeply ingrained in the social fabric of North India. States like Punjab, Haryana, and Rajasthan have high per capita alcohol consumption, with whiskey being the preferred choice. Cultural acceptance of whiskey as a celebratory drink further drives its popularity in this region. North India is home to several affluent cities such as Delhi, Chandigarh, and Gurugram, where consumers have higher disposable incomes. This economic advantage supports the consumption of both standard and premium whiskey brands. Liquor retailing is well-organized in North India, with a robust network of licensed liquor stores and bars. Additionally, states like Uttar Pradesh and Delhi are significant markets due to their large populations and urban centers. With an expanding middle class and urbanization, North India is witnessing increased demand for premium and high-end whiskey brands, including Scotch and Indian premium whiskey.

Key Market Players

United Breweries Limited

Allied Blenders and Distillers Pvt. Ltd

Radico Khaitan

Jagatjit Industries Ltd.

Diageo plc

Amrut Distilleries

Paul John Whisky

Tulleeho Portals Pvt. Ltd

Beam Suntory Inc.

The Macallan Distillers Limited

Report Scope:

In this report, the India whiskey market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Whiskey Market, By Product Type:

Indian Whiskey

American Whiskey

Irish Whiskey

Scotch Whiskey

Canadian Whiskey

Others

India Whiskey Market, By Quality:

Premium

High-End Premium

Super Premium

India Whiskey Market, By Distribution Channel:

Off-Trade

On-Trade

India Whiskey Market, By Region:

North

South

East

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India whiskey market.

Available Customizations:

India whiskey market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. INTRODUCTION

- 1.1. Market Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. VOICE OF CUSTOMER

- 4.1. Factors Influencing Awaiting Decision
- 4.2. Challenges Faced Post Purchase
- 4.3. Brand Awareness

5. INDIA WHISKEY MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product Type Market Share Analysis (Indian Whiskey, American Whiskey,

Irish Whiskey, Scotch Whiskey, Canadian Whiskey, Others)

5.2.2. By Quality Market Share Analysis (Premium, High-End Premium, Super Premium)

5.2.3. By Distribution Channel Market Share Analysis (Off-Trade, On-Trade)

5.2.4. By Regional Market Share Analysis

5.2.4.1. North Market Share Analysis

5.2.4.2. South Market Share Analysis

5.2.4.3. East Market Share Analysis

5.2.4.4. West Market Share Analysis

5.2.5. By Top 5 Companies Market Share Analysis, Others (2024)

5.3. India Whiskey Market Mapping & Opportunity Assessment

5.3.1. By Product Type Market Mapping & Opportunity Assessment

5.3.2. By Quality Market Mapping & Opportunity Assessment

5.3.3. By Distribution Channel Market Mapping & Opportunity Assessment

5.3.4. By Regional Market Mapping & Opportunity Assessment

6. INDIA PREMIUM WHISKEY MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Quality Market Share Analysis

6.2.2. By Distribution Channel Market Share Analysis

7. INDIA HIGH-END PREMIUM WHISKEY MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Quality Market Share Analysis

7.2.2. By Distribution Channel Market Share Analysis

8. INDIA SUPER PREMIUM WHISKEY MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Quality Market Share Analysis

8.2.2. By Distribution Channel Market Share Analysis

9. MARKET DYNAMICS

- 9.1. Drivers
- 9.2. Challenges

10. MARKET TRENDS & DEVELOPMENTS

11. SWOT ANALYSIS

- 11.1. Strength
- 11.2. Weakness
- 11.3. Opportunity
- 11.4. Threat

12. INDIA ECONOMIC PROFILE

13. POLICY AND REGULATORY LANDSCAPE

14. COMPETITIVE LANDSCAPE

- 14.1. Company Profiles
 - 14.1.1. United Breweries Limited.
 - 14.1.1.1. Company Details
 - 14.1.1.2. Products & Services
 - 14.1.1.3. Financials (As Per Availability)
 - 14.1.1.4. Key Market Focus & Geographical Presence
 - 14.1.1.5. Recent Developments
 - 14.1.1.6. Key Management Personnel
 - 14.1.2. Allied Blenders and Distillers Pvt. Ltd.
 - 14.1.2.1. Company Details
 - 14.1.2.2. Products & Services
 - 14.1.2.3. Financials (As Per Availability)
 - 14.1.2.4. Key Market Focus & Geographical Presence
 - 14.1.2.5. Recent Developments
 - 14.1.2.6. Key Management Personnel
 - 14.1.3. Radico Khaitan.
 - 14.1.3.1. Company Details
 - 14.1.3.2. Products & Services

- 14.1.3.3. Financials (As Per Availability)
- 14.1.3.4. Key Market Focus & Geographical Presence
- 14.1.3.5. Recent Developments
- 14.1.3.6. Key Management Personnel
- 14.1.4. Jagatjit Industries Ltd.
 - 14.1.4.1. Company Details
 - 14.1.4.2. Products & Services
 - 14.1.4.3. Financials (As Per Availability)
 - 14.1.4.4. Key Market Focus & Geographical Presence
 - 14.1.4.5. Recent Developments
 - 14.1.4.6. Key Management Personnel
- 14.1.5. Diageo plc.
 - 14.1.5.1. Company Details
 - 14.1.5.2. Products & Services
 - 14.1.5.3. Financials (As Per Availability)
 - 14.1.5.4. Key Market Focus & Geographical Presence
 - 14.1.5.5. Recent Developments
 - 14.1.5.6. Key Management Personnel
- 14.1.6. Amrut Distilleries.
 - 14.1.6.1. Company Details
 - 14.1.6.2. Products & Services
 - 14.1.6.3. Financials (As Per Availability)
 - 14.1.6.4. Key Market Focus & Geographical Presence
 - 14.1.6.5. Recent Developments
 - 14.1.6.6. Key Management Personnel
- 14.1.7. Paul John Whisky.
 - 14.1.7.1. Company Details
 - 14.1.7.2. Products & Services
 - 14.1.7.3. Financials (As Per Availability)
 - 14.1.7.4. Key Market Focus & Geographical Presence
 - 14.1.7.5. Recent Developments
 - 14.1.7.6. Key Management Personnel
- 14.1.8. Tulleeho Portals Pvt. Ltd.
 - 14.1.8.1. Company Details
 - 14.1.8.2. Products & Services
 - 14.1.8.3. Financials (As Per Availability)
 - 14.1.8.4. Key Market Focus & Geographical Presence
 - 14.1.8.5. Recent Developments
 - 14.1.8.6. Key Management Personnel

14.1.9. Beam Suntory Inc.

14.1.9.1. Company Details

14.1.9.2. Products & Services

14.1.9.3. Financials (As Per Availability)

14.1.9.4. Key Market Focus & Geographical Presence

14.1.9.5. Recent Developments

14.1.9.6. Key Management Personnel

14.1.10. The Macallan Distillers Limited.

14.1.10.1. Company Details

14.1.10.2. Products & Services

14.1.10.3. Financials (As Per Availability)

14.1.10.4. Key Market Focus & Geographical Presence

14.1.10.5. Recent Developments

14.1.10.6. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

15.1. Key Focus Areas

15.1.1. Target Product Type

15.1.2. Target Distribution Channel

15.1.3. Target Region

16. ABOUT US & DISCLAIMER

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