

Wine and Spirits Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Wines, Spirits), By End Use (Corporate Hospitality, Restaurants, Pubs), By Sales Channel (Direct Sales, Online, Hypermarkets/Supermarkets, Liquor Stores, Others), By Region, By Competition, 2019-2029F

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Abstracts

Global Wine and Spirits Market was valued at USD 241.57 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 6.45% through 2029. The global wine and spirits market is a dynamic and ever-evolving industry that encompasses the production, distribution, and consumption of alcoholic beverages. It plays a significant role in the global economy and reflects the diverse cultural and social preferences of consumers worldwide. Wine and spirits are among the oldest alcoholic beverages, with a rich history dating back centuries. The market comprises various categories, including wine (red, white, sparkling), spirits (such as whiskey, vodka, rum), and liqueurs. Each category has its own unique production methods, flavors, and consumer bases.

Key trends in the global wine and spirits market include the growing demand for premium and craft products, the rise of organic and sustainable production practices, and the influence of changing consumer preferences, especially among younger generations. E-commerce and digital marketing have also played a significant role in shaping the industry's landscape, enabling producers to reach a broader audience.

Geographically, regions like Europe, North America, and Asia-Pacific dominate the market, but emerging markets in Latin America and Africa are showing increasing

potential. Regulatory factors, health concerns, and changing consumer tastes continue to impact the industry, making adaptability and innovation crucial for success.

In summary, the global wine and spirits market is a diverse and complex industry that reflects cultural, economic, and societal factors. It continues to evolve to meet the changing demands of consumers while facing ongoing challenges and opportunities.

Key Market Drivers

Changing Consumer Preferences

One of the primary drivers impacting the global wine and spirits market is changing consumer preferences. As demographics shift and cultural influences change, consumers are seeking new and different experiences when it comes to alcoholic beverages. There is a growing interest in products that align with health and wellness trends, such as low-alcohol, organic, or natural wines. Many consumers are also increasingly looking for unique and craft products that offer distinct flavors and characteristics. This shift has led to an increased demand for artisanal and boutique spirits, as well as the rise of small-batch and craft distilleries. Additionally, the younger generation, such as Millennials and Gen Z, is showing a preference for brands that align with their values, including sustainability and social responsibility. All these factors are pushing producers to innovate and adapt to cater to evolving consumer tastes.

Premiumization

The global wine and spirits market has experienced a significant trend towards premiumization. Consumers are willing to pay more for higher-quality, prestigious, and unique products. This trend is evident in the demand for luxury wines, aged spirits, and limited-edition releases. The desire for premium products is not limited to traditional wine and spirits-producing regions but extends to emerging markets as well. Premiumization is driven by various factors, including an increase in disposable income, a desire for status and exclusivity, and a growing appreciation for the craftsmanship and artistry behind these beverages. Producers are responding to this trend by creating and marketing high-end products, enhancing packaging, and offering exclusive tasting experiences. The premiumization trend has led to improved profit margins for industry players and has encouraged investments in the production of higher-quality beverages.

Expanding Emerging Markets

The growth of emerging markets is another significant driver for the global wine and spirits industry. While traditional markets like Europe and North America continue to be important, regions such as Asia-Pacific, Latin America, and Africa are witnessing a surge in demand. Economic development, urbanization, and a rising middle class in these emerging markets have led to increased disposable income and a growing appetite for premium and imported alcoholic beverages. For example, China has emerged as a key player in the global wine market, both as a consumer and a producer. These emerging markets not only offer substantial growth opportunities for the industry but also serve as a source of diversity in terms of consumer preferences and preferences for different types of wine and spirits. Producers are adapting their strategies to cater to the unique demands of these markets, often involving localization efforts and targeted marketing campaigns.

Evolving Distribution Channels

The way wine and spirits are distributed and sold has been undergoing significant changes. The rise of e-commerce and online sales has been a notable driver of these changes. Consumers are increasingly purchasing alcoholic beverages online, whether through dedicated websites, apps, or e-commerce platforms. This shift is partially influenced by the convenience of online shopping, but it also allows consumers to explore a broader range of products and access information and reviews easily. Additionally, the COVID-19 pandemic accelerated the adoption of online sales, as many consumers turned to e-commerce for safety reasons. Producers and retailers are investing in their online presence, offering virtual tastings, and using data-driven insights to personalize the online shopping experience. Simultaneously, traditional distribution channels, such as bars and restaurants, have been impacted by lockdowns and restrictions, prompting producers to reevaluate their strategies. As a result, a hybrid model of distribution is emerging, where both online and offline channels play crucial roles in reaching consumers.

In conclusion, the global wine and spirits market is shaped by several key drivers. Changing consumer preferences are driving the industry to produce more innovative and unique products, while premiumization is leading to a demand for high-quality, exclusive offerings. Expanding emerging markets are providing significant growth opportunities, and evolving distribution channels are transforming the way consumers access these products. To succeed in this dynamic industry, producers and stakeholders must adapt to these drivers and stay attuned to the evolving landscape of the global wine and spirits market.

Key Market Challenges

Regulatory Complexities

The wine and spirits industry is heavily regulated in most countries due to the potential health and social consequences of alcohol consumption. These regulations cover areas such as production, distribution, labeling, advertising, and taxation. The challenge lies in navigating the complex and often varying regulatory frameworks across different regions and countries. Producers and distributors must comply with a plethora of rules, including age restrictions, labeling requirements, import and export regulations, and taxation policies. Compliance costs can be substantial, and violations can result in severe penalties. This makes it challenging for businesses to operate efficiently and expand their market reach.

Moreover, regulatory changes can have a significant impact on the industry. For instance, shifts in alcohol taxation, changes in labeling requirements, or restrictions on marketing and advertising can disrupt established business models and lead to financial losses. It is essential for industry players to stay informed about and adapt to evolving regulations, which can sometimes be unpredictable, especially in the context of public health concerns and changing political landscapes.

Health and Wellness Trends

Changing consumer preferences towards healthier lifestyles and increased awareness of the health risks associated with excessive alcohol consumption pose a challenge for the wine and spirits market. Many consumers are now seeking low-alcohol or alcohol-free alternatives, driven by concerns about alcohol's impact on their physical and mental well-being. Additionally, there is a growing interest in organic and natural products, which can be at odds with some traditional production methods in the industry. Producers are grappling with the need to offer healthier options while maintaining the authenticity and tradition of their products.

Furthermore, campaigns promoting responsible drinking and sobriety have gained traction, impacting the overall consumption of alcoholic beverages. In some regions, stricter regulations and higher taxes on alcohol aim to discourage excessive drinking, further affecting sales and profitability. Industry players must adapt by developing and marketing low-alcohol or non-alcoholic products, promoting responsible consumption, and being transparent about ingredients and production methods to address these health and wellness concerns.

Climate Change and Environmental Sustainability

The wine and spirits industry is highly dependent on environmental conditions and agriculture, making it vulnerable to the effects of climate change. Climate variability, including rising temperatures, altered rainfall patterns, and extreme weather events, can impact the quality and quantity of grape and grain harvests. These factors affect the flavor and character of wines and spirits, potentially leading to reduced yields and higher production costs.

In response to these challenges, the industry has started to focus on sustainability and environmentally friendly practices. Sustainable viticulture, organic and biodynamic farming methods, and reduced water usage are becoming increasingly important. Consumers are showing a preference for eco-friendly products, and many wineries and distilleries are adopting sustainable practices not only for ethical reasons but also as a competitive advantage. However, the transition to more sustainable practices can be costly and time-consuming, which poses a challenge for smaller producers with limited resources.

Industry also faces concerns about packaging waste, particularly the use of glass bottles, which are heavy and energy-intensive to produce and transport. Finding sustainable packaging solutions that maintain product integrity is an ongoing challenge for the wine and spirits market.

Distribution Challenges

The distribution of wine and spirits has evolved significantly over the years, with the rise of e-commerce and changing consumer behaviors. While e-commerce offers new opportunities, it also presents challenges, especially for smaller producers. Traditional distribution channels, such as bars, restaurants, and brick-and-mortar stores, have been disrupted by the growth of online sales, and the COVID-19 pandemic accelerated this trend. Navigating the complexities of e-commerce, including logistics, shipping regulations, and marketing in the digital space, can be challenging for some industry players.

Another distribution challenge is the consolidation of distribution channels, where a few large retailers and wholesalers dominate the market, making it difficult for smaller producers to gain access and visibility. These power imbalances can lead to pricing pressures and limited opportunities for smaller or niche brands. Producers must find

ways to secure distribution, whether through strategic partnerships, direct-to-consumer sales, or other innovative methods, to overcome these challenges and reach their target audiences effectively.

In conclusion, the global wine and spirits market faces several challenges, including regulatory complexities, evolving health and wellness trends, the impact of climate change and the need for environmental sustainability, and changing distribution dynamics. To thrive in this competitive and dynamic industry, businesses must proactively address these challenges through adaptation, innovation, and a commitment to meeting the evolving needs and expectations of consumers.

Key Market Trends

Rise of E-Commerce and Online Sales

The wine and spirits industry has seen a significant surge in online sales and e-commerce platforms. The convenience of purchasing alcoholic beverages online has been accentuated by the COVID-19 pandemic, which led to lockdowns and restrictions on physical retail. Consumers increasingly turn to online platforms to explore, purchase, and receive alcoholic beverages at their doorstep.

E-commerce offers a broader selection of products, personalized recommendations, and the ability to access reviews and information about wines and spirits easily. Virtual tastings and wine clubs are becoming popular, allowing consumers to engage with brands and products remotely. This trend also allows consumers to discover and explore products from around the world, driving interest in international wines and spirits. Producers and retailers are investing in their online presence and logistics to cater to this growing demand. In particular, smaller producers and boutique wineries benefit from the global reach that e-commerce provides, giving them an opportunity to connect with a wider audience.

While e-commerce has opened new avenues for growth, it also comes with challenges, such as ensuring secure and responsible sales and adhering to complex shipping regulations and taxes in different regions. Nevertheless, the rise of online sales is likely to continue shaping the industry, making it necessary for businesses to adapt and refine their digital strategies.

Sustainability and Environmental Responsibility

Environmental sustainability has become a major trend in the wine and spirits market. Climate change and the impact of agriculture on the environment have pushed consumers and producers alike to focus on sustainable practices. Sustainable viticulture, organic farming methods, and biodynamic production are gaining traction in the industry. These approaches prioritize biodiversity, reduce the use of pesticides and herbicides, and aim to protect the natural environment.

Sustainability initiatives extend to packaging as well. With a growing concern for plastic waste and the environmental impact of glass production, wineries and distilleries are exploring alternative packaging solutions. Lightweight glass bottles, recyclable materials, and even innovations like wine in cans are becoming popular choices for environmentally conscious consumers.

Sustainability is not only an ethical commitment but also a marketing advantage. Producers that adopt environmentally friendly practices can differentiate themselves from the competition and appeal to consumers who prioritize eco-friendly products. This trend aligns with the broader societal shift towards environmental responsibility and a desire to reduce one's carbon footprint.

Health and Wellness Focus

An increasing awareness of health and wellness is impacting the wine and spirits market. As consumers seek healthier lifestyle choices, there is a growing demand for low-alcohol and non-alcoholic alternatives. The rise of "mindful drinking" and responsible consumption has led to the development of wines and spirits with reduced alcohol content.

Additionally, consumers are showing interest in products that align with various wellness trends, such as those labeled as organic, natural, and free from additives. The desire for transparency in labeling and ingredient sourcing is driving producers to provide detailed information about their products, appealing to consumers who are becoming more health-conscious.

Some wineries are also exploring the use of alternative ingredients, such as botanicals and herbs, to create unique and health-focused beverages. This trend caters to a segment of the market that is looking for more balanced choices without compromising on taste or experience. Producers that can offer options for health-conscious consumers stand to gain in this evolving landscape.

Craft and Artisanal Products

The trend of seeking unique and artisanal products has been growing in the wine and spirits market. Consumers are increasingly drawn to handcrafted, small-batch, and boutique offerings that provide distinctive flavors and characteristics. This trend can be seen in the popularity of craft distilleries, family-owned wineries, and limited-edition releases.

Craft products not only offer a premium experience but also come with a story and a sense of authenticity that resonates with consumers. Artisanal spirits, for example, often feature traditional production methods, locally sourced ingredients, and a strong connection to the local community. This trend aligns with the desire for authenticity and the rejection of mass-produced, generic beverages.

Producers that embrace the craft and artisanal ethos can create strong brand loyalty and charge premium prices. It's not just about the product itself but also the story, heritage, and values associated with it. The craft trend fosters a sense of connection and belonging that can set brands apart in a crowded marketplace.

In conclusion, the global wine and spirits market is witnessing a transformation driven by trends like the rise of e-commerce, a focus on sustainability, a growing emphasis on health and wellness, and the popularity of craft and artisanal products. Businesses in the industry must stay attuned to these trends and adapt their strategies to meet the evolving preferences and expectations of consumers. These trends reflect a broader shift in consumer values, and the wine and spirits market is evolving to align with these values while offering diverse and exciting choices to consumers worldwide.

Segmental Insights

Type Insights

Sustainability is a growing segment in the global wine and spirits market, reflecting the industry's commitment to environmental and ethical practices. Wineries and distilleries worldwide are increasingly adopting sustainable viticulture, organic farming methods, and environmentally responsible production processes. This includes reducing the use of pesticides and herbicides, conserving water resources, and minimizing their carbon footprint.

Sustainable practices extend to packaging, where producers are exploring eco-friendly

options, such as lightweight glass bottles, recyclable materials, and alternative packaging choices. Sustainability initiatives resonate with eco-conscious consumers who prioritize products that align with their values, making it an essential aspect of brand differentiation.

This trend not only addresses ecological concerns but also positions the industry to meet the rising demand for environmentally responsible products. It aligns with the broader global movement towards sustainability and showcases the wine and spirits sector's dedication to a greener, more responsible future.

End Use Insights

Corporate hospitality is a burgeoning segment in the global wine and spirits market, reflecting a shift in business culture towards experiential engagement and networking. Companies are increasingly recognizing the value of hosting events, tastings, and entertainment involving wine and spirits to enhance client relationships and foster business connections. Corporate hospitality events provide a unique opportunity for businesses to offer a memorable experience, often in elegant settings, showcasing their commitment to quality and attention to detail.

These events range from wine tastings, whiskey dinners, and exclusive tours of distilleries or wineries to bespoke cocktail mixology classes. In addition to strengthening client relationships, corporate hospitality can be a powerful marketing and branding tool. It allows companies to align themselves with premium and prestigious wine and spirits brands, offering a sophisticated and luxurious image. This trend underscores the evolving dynamics of the wine and spirits market, where businesses increasingly leverage the industry's allure and appeal for professional and client engagement.

Regional Insights

North America stands as a dominant force in the global wine and spirits market, characterized by a robust and diverse industry landscape. The region encompasses the United States and Canada, which collectively represent a significant portion of the global consumption and production of wine and spirits. The United States, in particular, is one of the largest wine markets in the world, boasting a vibrant wine culture and a growing demand for premium and craft products.

The North American market benefits from a burgeoning craft distillery movement

and a burgeoning interest in wine tourism. Moreover, the region has witnessed a surge in the consumption of premium wines and spirits, often driven by evolving consumer tastes and a desire for high-quality, distinctive products. Additionally, a robust distribution network and a dynamic retail landscape contribute to North America's dominant position.

While other regions like Europe and Asia-Pacific play pivotal roles, North America's influence on the global wine and spirits market remains substantial, making it a focal point for industry players seeking to expand their presence and reach a diverse and discerning consumer base.

Key Market Players

Diageo plc

Constellation Brands Inc.

Anheuser-Busch InBev NV

The Wine Group, Bacardi Limited

Treasury Wine Estates Limited

E. & J. Gallo Winery

Brown-Forman Corporation

Beam Suntory Inc.

William Grant & Sons Ltd.

Campari Group

Pernod Ricard SA

Report Scope:

In this report, the Global Wine and Spirits Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Wine and Spirits Market, By Type:

Wines

Spirits

Wine and Spirits Market, By End Use:

Corporate Hospitality

Restaurants

Pubs

Wine and Spirits Market, By Sales Channel:

Direct Sales

Online

Hypermarkets/Supermarkets

Liquor Stores

Others

Wine and Spirits Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

South America

Argentina

Colombia

Brazil

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Wine and Spirits Market.

Available Customizations:

Global Wine and Spirits Market report with the given market data, Tech Sci 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. Product 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. Brand Awareness
- 4.2. Factors Influencing Purchase Decision
- 4.3. Sources of Information

5. GLOBAL WINE AND SPIRITS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type Market Share Analysis (Wines, Spirits)

- 5.2.2. By End Use Market Share Analysis (Corporate Hospitality, Restaurants, Pubs)
- 5.2.3. By Sales Channel Market Share Analysis (Direct Sales, Online, Hypermarkets/Supermarkets, Liquor Stores, Others)
- 5.2.4. By Regional Market Share Analysis
 - 5.2.4.1. North America Market Share Analysis
 - 5.2.4.2. Europe Market Share Analysis
 - 5.2.4.3. Asia-Pacific Market Share Analysis
 - 5.2.4.4. Middle East & Africa Market Share Analysis
 - 5.2.4.5. South America Market Share Analysis
- 5.2.5. By Top 5 Companies Market Share Analysis, Others (2023)
- 5.3. Global Wine and Spirits Market Mapping & Opportunity Assessment
 - 5.3.1. By Type Market Mapping & Opportunity Assessment
 - 5.3.2. By End Use Market Mapping & Opportunity Assessment
 - 5.3.3. By Sales Channel Market Mapping & Opportunity Assessment
 - 5.3.4. By Regional Market Mapping & Opportunity Assessment

6. NORTH AMERICA WINE AND SPIRITS MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Type Market Share Analysis
 - 6.2.2. By End Use Market Share Analysis
 - 6.2.3. By Sales Channel Market Share Analysis
 - 6.2.4. By Country Market Share Analysis
 - 6.2.4.1. United States Wine and Spirits Market Outlook
 - 6.2.4.1.1. Market Size & Forecast
 - 6.2.4.1.1.1. By Value
 - 6.2.4.1.2. Market Share & Forecast
 - 6.2.4.1.2.1. By Type Market Share Analysis
 - 6.2.4.1.2.2. By End Use Market Share Analysis
 - 6.2.4.1.2.3. By Sales Channel Market Share Analysis
 - 6.2.4.2. Canada Wine and Spirits Market Outlook
 - 6.2.4.2.1. Market Size & Forecast
 - 6.2.4.2.1.1. By Value
 - 6.2.4.2.2. Market Share & Forecast
 - 6.2.4.2.2.1. By Type Market Share Analysis
 - 6.2.4.2.2.2. By End Use Market Share Analysis
 - 6.2.4.2.2.3. By Sales Channel Market Share Analysis

- 6.2.4.3. Mexico Wine and Spirits Market Outlook
 - 6.2.4.3.1. Market Size & Forecast
 - 6.2.4.3.1.1. By Value
 - 6.2.4.3.2. Market Share & Forecast
 - 6.2.4.3.2.1. By Type Market Share Analysis
 - 6.2.4.3.2.2. By End Use Market Share Analysis
 - 6.2.4.3.2.3. By Sales Channel Market Share Analysis

7. EUROPE WINE AND SPIRITS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Type Market Share Analysis
 - 7.2.2. By End Use Market Share Analysis
 - 7.2.3. By Sales Channel Market Share Analysis
 - 7.2.4. By Country Market Share Analysis
 - 7.2.4.1. France Wine and Spirits Market Outlook
 - 7.2.4.1.1. Market Size & Forecast
 - 7.2.4.1.1.1. By Value
 - 7.2.4.1.2. Market Share & Forecast
 - 7.2.4.1.2.1. By Type Market Share Analysis
 - 7.2.4.1.2.2. By End Use Market Share Analysis
 - 7.2.4.1.2.3. By Sales Channel Market Share Analysis
 - 7.2.4.2. United Kingdom Wine and Spirits Market Outlook
 - 7.2.4.2.1. Market Size & Forecast
 - 7.2.4.2.1.1. By Value
 - 7.2.4.2.2. Market Share & Forecast
 - 7.2.4.2.2.1. By Type Market Share Analysis
 - 7.2.4.2.2.2. By End Use Market Share Analysis
 - 7.2.4.2.2.3. By Sales Channel Market Share Analysis
 - 7.2.4.3. Italy Wine and Spirits Market Outlook
 - 7.2.4.3.1. Market Size & Forecast
 - 7.2.4.3.1.1. By Value
 - 7.2.4.3.2. Market Share & Forecast
 - 7.2.4.3.2.1. By Type Market Share Analysis
 - 7.2.4.3.2.2. By End Use Market Share Analysis
 - 7.2.4.3.2.3. By Sales Channel Market Share Analysis
 - 7.2.4.4. Germany Wine and Spirits Market Outlook

- 7.2.4.4.1. Market Size & Forecast
 - 7.2.4.4.1.1. By Value
- 7.2.4.4.2. Market Share & Forecast
 - 7.2.4.4.2.1. By Type Market Share Analysis
 - 7.2.4.4.2.2. By End Use Market Share Analysis
 - 7.2.4.4.2.3. By Sales Channel Market Share Analysis
- 7.2.4.5. Spain Wine and Spirits Market Outlook
 - 7.2.4.5.1. Market Size & Forecast
 - 7.2.4.5.1.1. By Value
 - 7.2.4.5.2. Market Share & Forecast
 - 7.2.4.5.2.1. By Type Market Share Analysis
 - 7.2.4.5.2.2. By End Use Market Share Analysis
 - 7.2.4.5.2.3. By Sales Channel Market Share Analysis

8. ASIA-PACIFIC WINE AND SPIRITS MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type Market Share Analysis
 - 8.2.2. By End Use Market Share Analysis
 - 8.2.3. By Sales Channel Market Share Analysis
 - 8.2.4. By Country Market Share Analysis
 - 8.2.4.1. China Wine and Spirits Market Outlook
 - 8.2.4.1.1. Market Size & Forecast
 - 8.2.4.1.1.1. By Value
 - 8.2.4.1.2. Market Share & Forecast
 - 8.2.4.1.2.1. By Type Market Share Analysis
 - 8.2.4.1.2.2. By End Use Market Share Analysis
 - 8.2.4.1.2.3. By Sales Channel Market Share Analysis
 - 8.2.4.2. India Wine and Spirits Market Outlook
 - 8.2.4.2.1. Market Size & Forecast
 - 8.2.4.2.1.1. By Value
 - 8.2.4.2.2. Market Share & Forecast
 - 8.2.4.2.2.1. By Type Market Share Analysis
 - 8.2.4.2.2.2. By End Use Market Share Analysis
 - 8.2.4.2.2.3. By Sales Channel Market Share Analysis
 - 8.2.4.3. Japan Wine and Spirits Market Outlook
 - 8.2.4.3.1. Market Size & Forecast

- 8.2.4.3.1.1. By Value
- 8.2.4.3.2. Market Share & Forecast
 - 8.2.4.3.2.1. By Type Market Share Analysis
 - 8.2.4.3.2.2. By End Use Market Share Analysis
 - 8.2.4.3.2.3. By Sales Channel Market Share Analysis
- 8.2.4.4. Australia Wine and Spirits Market Outlook
 - 8.2.4.4.1. Market Size & Forecast
 - 8.2.4.4.1.1. By Value
 - 8.2.4.4.2. Market Share & Forecast
 - 8.2.4.4.2.1. By Type Market Share Analysis
 - 8.2.4.4.2.2. By End Use Market Share Analysis
 - 8.2.4.4.2.3. By Sales Channel Market Share Analysis
- 8.2.4.5. South Korea Wine and Spirits Market Outlook
 - 8.2.4.5.1. Market Size & Forecast
 - 8.2.4.5.1.1. By Value
 - 8.2.4.5.2. Market Share & Forecast
 - 8.2.4.5.2.1. By Type Market Share Analysis
 - 8.2.4.5.2.2. By End Use Market Share Analysis
 - 8.2.4.5.2.3. By Sales Channel Market Share Analysis
- 8.2.4.6. Indonesia Wine and Spirits Market Outlook
 - 8.2.4.6.1. Market Size & Forecast
 - 8.2.4.6.1.1. By Value
 - 8.2.4.6.2. Market Share & Forecast
 - 8.2.4.6.2.1. By Type Market Share Analysis
 - 8.2.4.6.2.2. By End Use Market Share Analysis
 - 8.2.4.6.2.3. By Sales Channel Market Share Analysis

9. MIDDLE EAST & AFRICA WINE AND SPIRITS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Type Market Share Analysis
 - 9.2.2. By End Use Market Share Analysis
 - 9.2.3. By Sales Channel Market Share Analysis
 - 9.2.4. By Country Market Share Analysis
 - 9.2.4.1. South Africa Wine and Spirits Market Outlook
 - 9.2.4.1.1. Market Size & Forecast
 - 9.2.4.1.1.1. By Value

- 9.2.4.1.2. Market Share & Forecast
 - 9.2.4.1.2.1. By Type Market Share Analysis
 - 9.2.4.1.2.2. By End Use Market Share Analysis
 - 9.2.4.1.2.3. By Sales Channel Market Share Analysis
- 9.2.4.2. Saudi Arabia Wine and Spirits Market Outlook
 - 9.2.4.2.1. Market Size & Forecast
 - 9.2.4.2.1.1. By Value
 - 9.2.4.2.2. Market Share & Forecast
 - 9.2.4.2.2.1. By Type Market Share Analysis
 - 9.2.4.2.2.2. By End Use Market Share Analysis
 - 9.2.4.2.2.3. By Sales Channel Market Share Analysis
- 9.2.4.3. UAE Wine and Spirits Market Outlook
 - 9.2.4.3.1. Market Size & Forecast
 - 9.2.4.3.1.1. By Value
 - 9.2.4.3.2. Market Share & Forecast
 - 9.2.4.3.2.1. By Type Market Share Analysis
 - 9.2.4.3.2.2. By End Use Market Share Analysis
 - 9.2.4.3.2.3. By Sales Channel Market Share Analysis
- 9.2.4.4. Turkey Wine and Spirits Market Outlook
 - 9.2.4.4.1. Market Size & Forecast
 - 9.2.4.4.1.1. By Value
 - 9.2.4.4.2. Market Share & Forecast
 - 9.2.4.4.2.1. By Type Market Share Analysis
 - 9.2.4.4.2.2. By End Use Market Share Analysis
 - 9.2.4.4.2.3. By Sales Channel Market Share Analysis

10. SOUTH AMERICA WINE AND SPIRITS MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Type Market Share Analysis
 - 10.2.2. By End Use Market Share Analysis
 - 10.2.3. By Sales Channel Market Share Analysis
 - 10.2.4. By Country Market Share Analysis
 - 10.2.4.1. Argentina Wine and Spirits Market Outlook
 - 10.2.4.1.1. Market Size & Forecast
 - 10.2.4.1.1.1. By Value
 - 10.2.4.1.2. Market Share & Forecast

- 10.2.4.1.2.1. By Type Market Share Analysis
- 10.2.4.1.2.2. By End Use Market Share Analysis
- 10.2.4.1.2.3. By Sales Channel Market Share Analysis
- 10.2.4.2. Colombia Wine and Spirits Market Outlook
 - 10.2.4.2.1. Market Size & Forecast
 - 10.2.4.2.1.1. By Value
 - 10.2.4.2.2. Market Share & Forecast
 - 10.2.4.2.2.1. By Type Market Share Analysis
 - 10.2.4.2.2.2. By End Use Market Share Analysis
 - 10.2.4.2.2.3. By Sales Channel Market Share Analysis
- 10.2.4.3. Brazil Wine and Spirits Market Outlook
 - 10.2.4.3.1. Market Size & Forecast
 - 10.2.4.3.1.1. By Value
 - 10.2.4.3.2. Market Share & Forecast
 - 10.2.4.3.2.1. By Type Market Share Analysis
 - 10.2.4.3.2.2. By End Use Market Share Analysis
 - 10.2.4.3.2.3. By Sales Channel Market Share Analysis

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. IMPACT OF COVID-19 ON GLOBAL WINE AND SPIRITS MARKET

- 12.1. Impact Assessment Model
 - 12.1.1. Key Segments Impacted
 - 12.1.2. Key Regional Impacted
 - 12.1.3. Key Countries Impacted

13. MARKET TRENDS & DEVELOPMENTS

14. COMPETITIVE LANDSCAPE

- 14.1. Company Profiles
 - 14.1.1. Diageo plc
 - 14.1.1.1. Company Details
 - 14.1.1.2. Products
 - 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. Constellation Brands Inc.
 - 14.1.2.1. Company Details
 - 14.1.2.2. Products
 - 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. Anheuser-Busch InBev NV
 - 14.1.3.1. Company Details
 - 14.1.3.2. Products
 - 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. The Wine Group, Bacardi Limited
 - 14.1.4.1. Company Details
 - 14.1.4.2. Products
 - 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. Treasury Wine Estates Limited
 - 14.1.5.1. Company Details
 - 14.1.5.2. Products
 - 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. E. & J. Gallo Winery
 - 14.1.6.1. Company Details
 - 14.1.6.2. Products
 - 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. Brown-Forman Corporation

- 14.1.7.1. Company Details
- 14.1.7.2. Products
- 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. Beam Suntory Inc.
 - 14.1.8.1. Company Details
 - 14.1.8.2. Products
 - 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. Campari Group
 - 14.1.9.1. Company Details
 - 14.1.9.2. Products
 - 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. Pernod Ricard SA
 - 14.1.10.1. Company Details
 - 14.1.10.2. Products
 - 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/ACTION PLAN

- 15.1. Key Focus Areas
- 15.2. Target Type
- 15.3. Target End Use

16. ABOUT US & DISCLAIMER

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