



Passport

Wine in Latvia

Euromonitor International
August 2022

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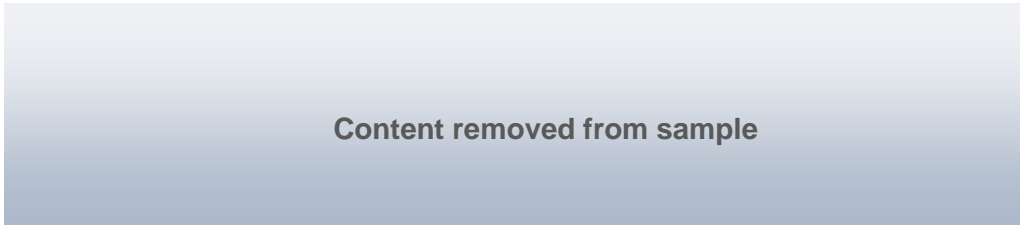
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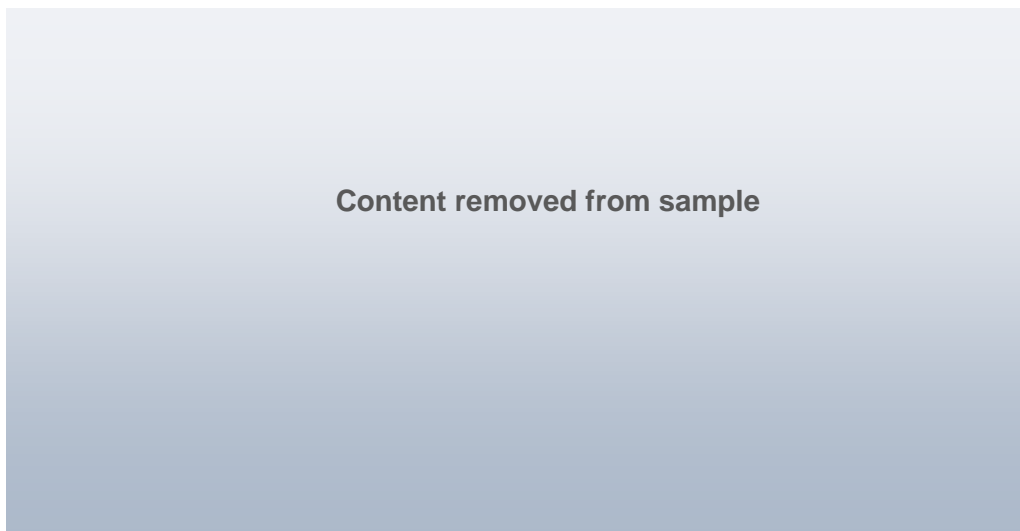
WINE IN LATVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

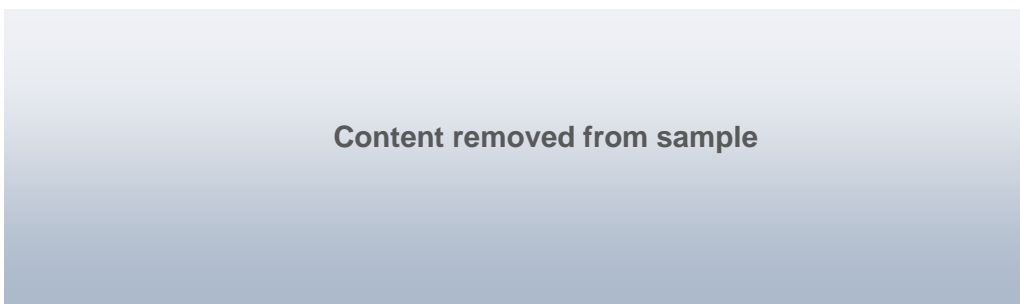


2021 DEVELOPMENTS

Sparkling wine is the big winner as most other categories see declining volume sales



On-trade growth rebounds somewhat during 2021 as off-trade sales decline



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PROSPECTS AND OPPORTUNITIES

Wine slated for A strong recovery, with on-trade sales set to boom

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Lidl expected to become A major player in wine, to the benefit of private label

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Local wines set to become more popular as imported wines continue to dominate

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CATEGORY DATA

Table 1 Sales of Wine by Category: Total Volume 2016-2021

million litres

	2016	2017	2018	2019	2020	2021
Fortified Wine and Vermouth	Data removed from sample					
- Port						
- Sherry						
- Vermouth						
- Other Fortified Wine						
Non-Grape Wine						
Sparkling Wine						
- Champagne						
- Other Sparkling Wine						
Still Light Grape Wine						
- Still Red Wine						
- Still Rosé Wine						
- Still White Wine						
Wine						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Wine by Category: Total Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
Fortified Wine and Vermouth	Data removed from sample					
- Port						
- Sherry						
- Vermouth						
- Other Fortified Wine						
Non-Grape Wine						
Sparkling Wine						
- Champagne						
- Other Sparkling Wine						
Still Light Grape Wine						
- Still Red Wine						
- Still Rosé Wine						
- Still White Wine						
Wine						

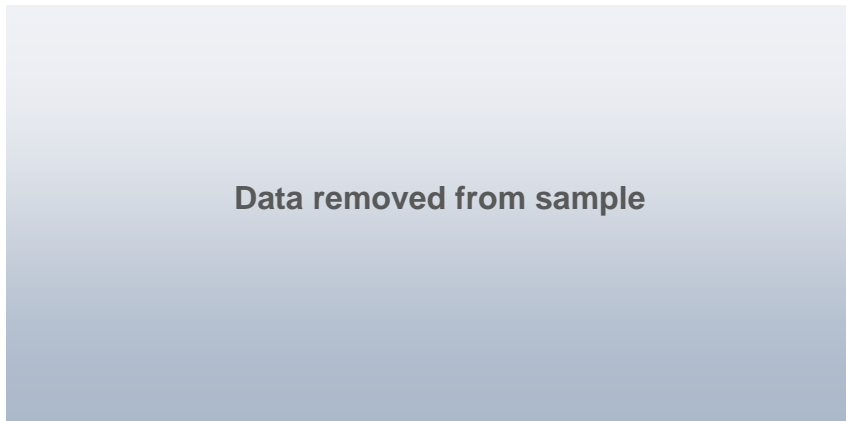
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Wine by Category: % Total Volume Growth 2016-2021

% total volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Fortified Wine and Vermouth	Data removed from sample		
- Port			

- Sherry
- Vermouth
- Other Fortified Wine
- Non-Grape Wine
- Sparkling Wine
- Champagne
- Other Sparkling Wine
- Still Light Grape Wine
- Still Red Wine
- Still Rosé Wine
- Still White Wine
- Wine



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Wine by Category: % Total Value Growth 2016-2021

% local currency, current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Fortified Wine and Vermouth	Data removed from sample		
- Port			
- Sherry			
- Vermouth			
- Other Fortified Wine			
Non-Grape Wine			
Sparkling Wine			
- Champagne			
- Other Sparkling Wine			
Still Light Grape Wine			
- Still Red Wine			
- Still Rosé Wine			
- Still White Wine			
Wine			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Wine by Off-trade vs On-trade: Volume 2016-2021

million litres

	2016	2017	2018	2019	2020	2021
Off-trade	Data removed from sample					
On-trade						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Wine by Off-trade vs On-trade: Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
Off-trade	Data removed from sample					

On-trade
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2016-2021

% volume growth

2020/21 2016-21 CAGR 2016/21 Total

Off-trade
On-trade
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Wine by Off-trade vs On-trade: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

Off-trade
On-trade
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Sales of Wine by Category: Total Volume 2021-2026

million litres

2021 2022 2023 2024 2025 2026

Fortified Wine and Vermouth
- Port
- Sherry
- Vermouth
- Other Fortified Wine
Non-Grape Wine
Sparkling Wine
- Champagne
- Other Sparkling Wine
Still Light Grape Wine
- Still Red Wine
- Still Rosé Wine
- Still White Wine
Wine

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Wine by Category: Total Value 2021-2026

EUR million

	2021	2022	2023	2024	2025	2026
Fortified Wine and Vermouth	Data removed from sample					
- Port						
- Sherry						
- Vermouth						
- Other Fortified Wine						
Non-Grape Wine						
Sparkling Wine						
- Champagne						
- Other Sparkling Wine						
Still Light Grape Wine						
- Still Red Wine						
- Still Rosé Wine						
- Still White Wine						
Wine						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Wine by Category: % Total Volume Growth 2021-2026

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Fortified Wine and Vermouth	Data removed from sample		
- Port			
- Sherry			
- Vermouth			
- Other Fortified Wine			
Non-Grape Wine			
Sparkling Wine			
- Champagne			
- Other Sparkling Wine			
Still Light Grape Wine			
- Still Red Wine			
- Still Rosé Wine			
- Still White Wine			
Wine			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Wine by Category: % Total Value Growth 2021-2026

% local currency, constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Fortified Wine and Vermouth	Data removed from sample		
- Port			
- Sherry			
- Vermouth			
- Other Fortified Wine			
Non-Grape Wine			
Sparkling Wine	Data removed from sample		
- Champagne			
- Other Sparkling Wine			

Still Light Grape Wine
- Still Red Wine
- Still Rosé Wine
- Still White Wine
Wine

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

ALCOHOLIC DRINKS IN LATVIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Alcoholic drinks in 2021: The big picture

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2021 key trends

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Competitive landscape

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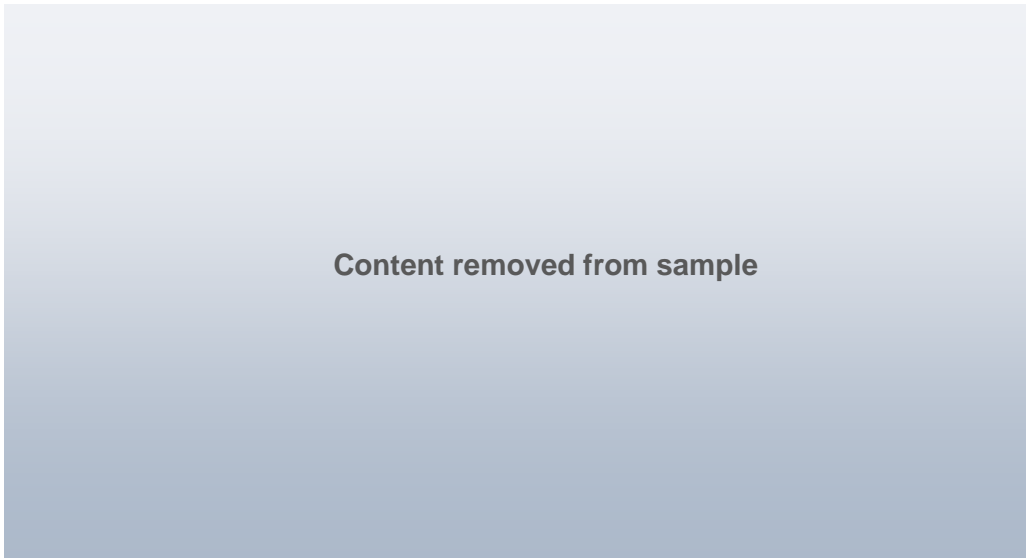
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Retailing developments

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On-trade vs. off-trade split

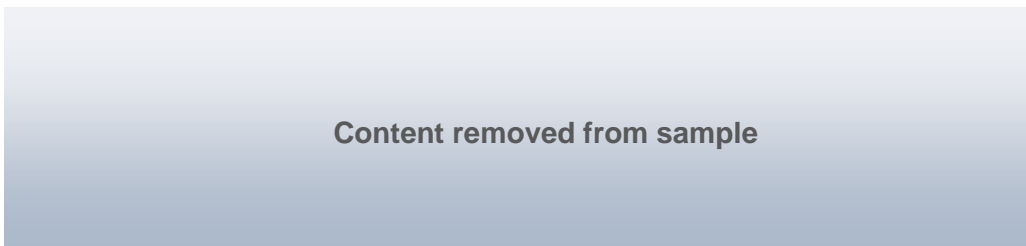
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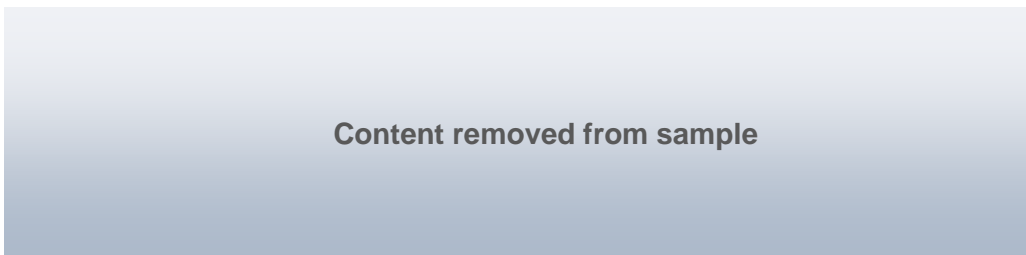
MARKET BACKGROUND

Legislation

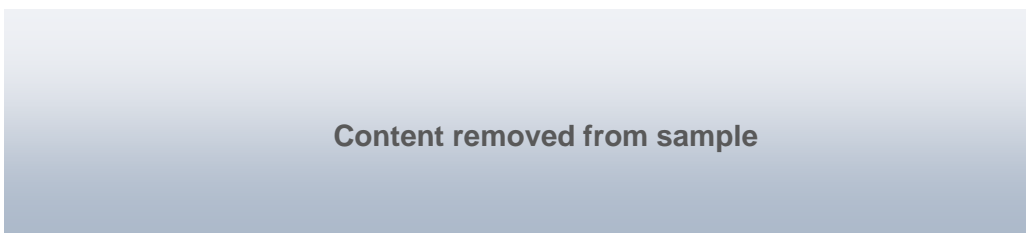
Legal purchasing age and legal drinking age



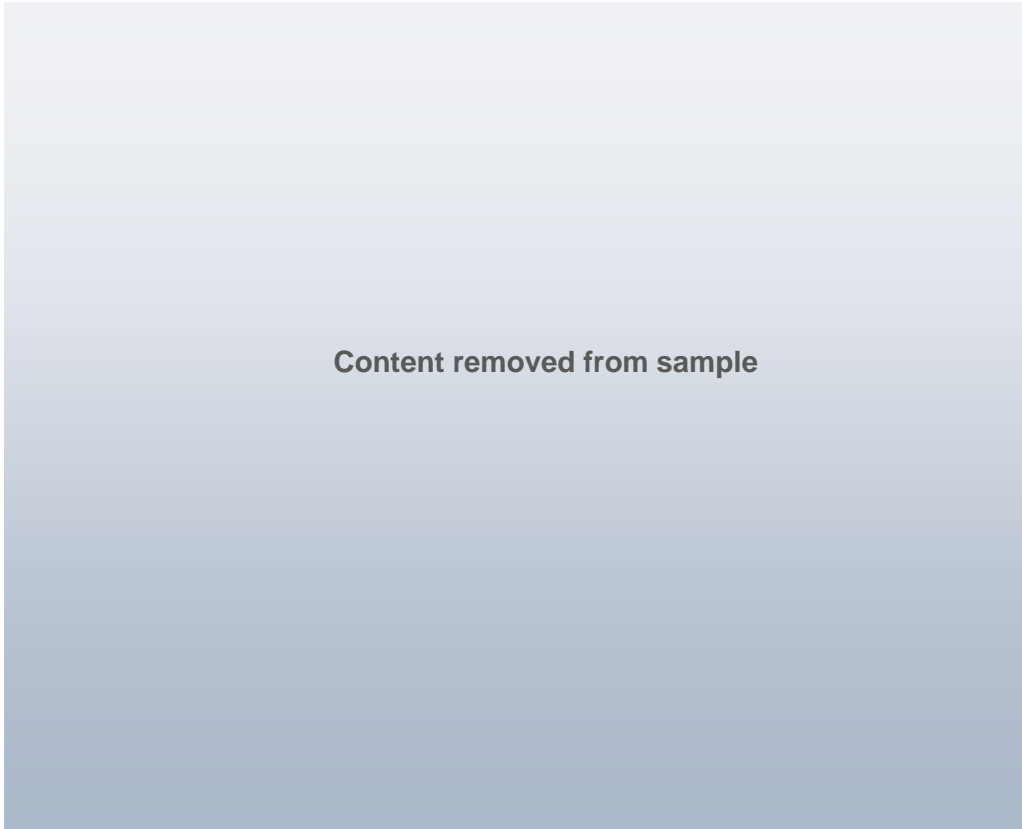
Drink driving



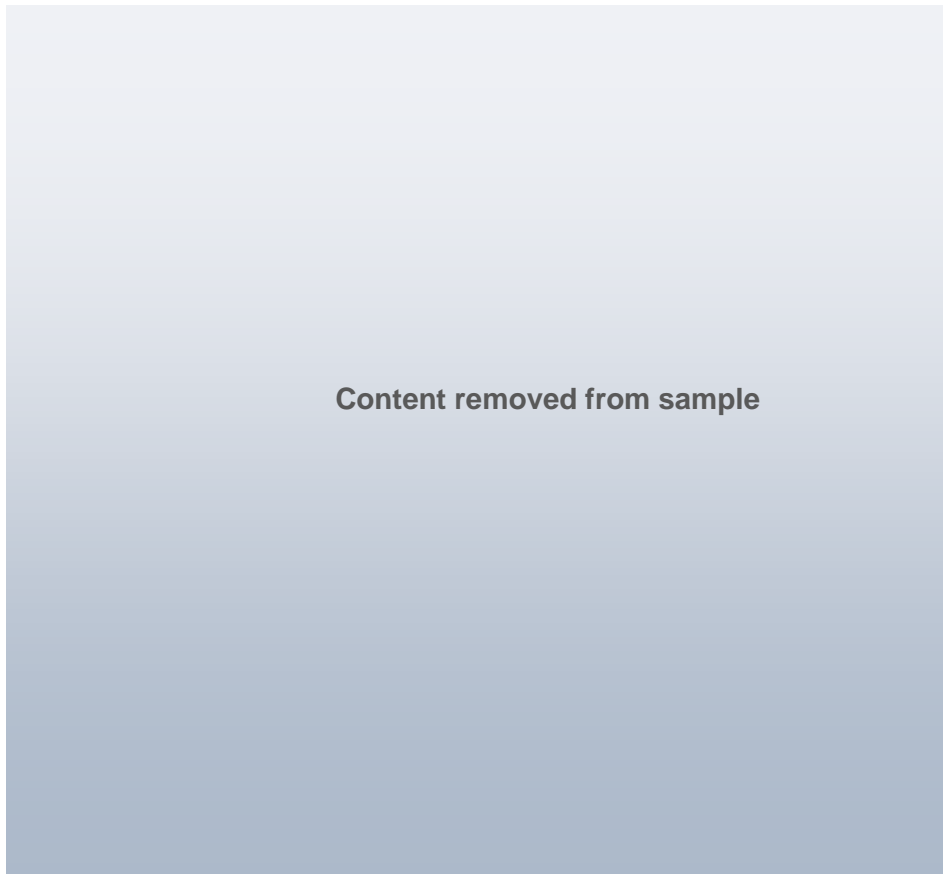
Advertising



Smoking ban



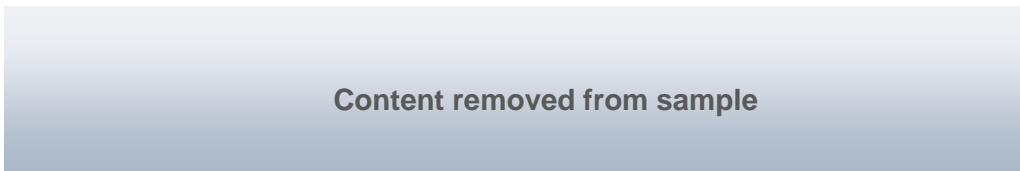
Opening hours



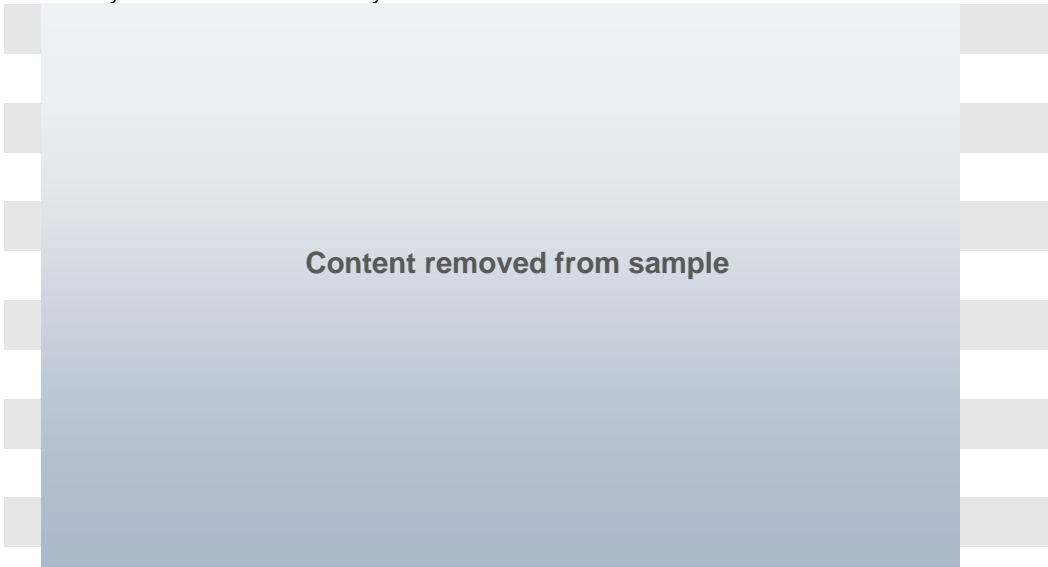
On-trade establishments



TAXATION AND DUTY LEVIES



Summary 1 Taxation and Duty Levies on Alcoholic Drinks 2021



Source: Euromonitor International

OPERATING ENVIRONMENT

Contraband/parallel trade

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Duty free

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Cross-border/private imports

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KEY NEW PRODUCT LAUNCHES

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Outlook

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MARKET INDICATORS

Table 13 Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Total	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: 2021 data is forecast

MARKET DATA

Table 14 Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

	2016	2017	2018	2019	2020	2021
Beer (million litres)	Data removed from sample					
Cider/Perry ('000 litres)						
RTDs ('000 litres)						
Spirits ('000 litres)						
Wine (million litres)						
Alcoholic Drinks (million litres)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Alcoholic Drinks by Category: Total Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Beer	Data removed from sample					
Cider/Perry						
RTDs						
Spirits						
Wine						
Alcoholic Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

% total volume growth	2020/21	2016-21 CAGR	2016/21 Total
Beer	Data removed from sample		
Cider/Perry			
RTDs			

Spirits
Wine
Alcoholic Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021

% local currency, current value growth

2020/21 2016-21 CAGR 2016/21 Total

Beer
Cider/Perry
RTDs
Spirits
Wine
Alcoholic Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

Off-trade On-trade Total

Beer (million litres)
Cider/Perry ('000 litres)
RTDs ('000 litres)
Spirits ('000 litres)
Wine (million litres)
Alcoholic Drinks (million litres)

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

EUR million

Off-trade On-trade Total

Beer
Cider/Perry
RTDs
Spirits
Wine
Alcoholic Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

% volume analysis

Off-trade On-trade Total

Beer
Cider/Perry
RTDs
Spirits
Wine
Alcoholic Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

% value analysis

	Off-trade	On-trade	Total
Beer	Data removed from sample		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

% total volume
Company

	2017	2018	2019	2020	2021
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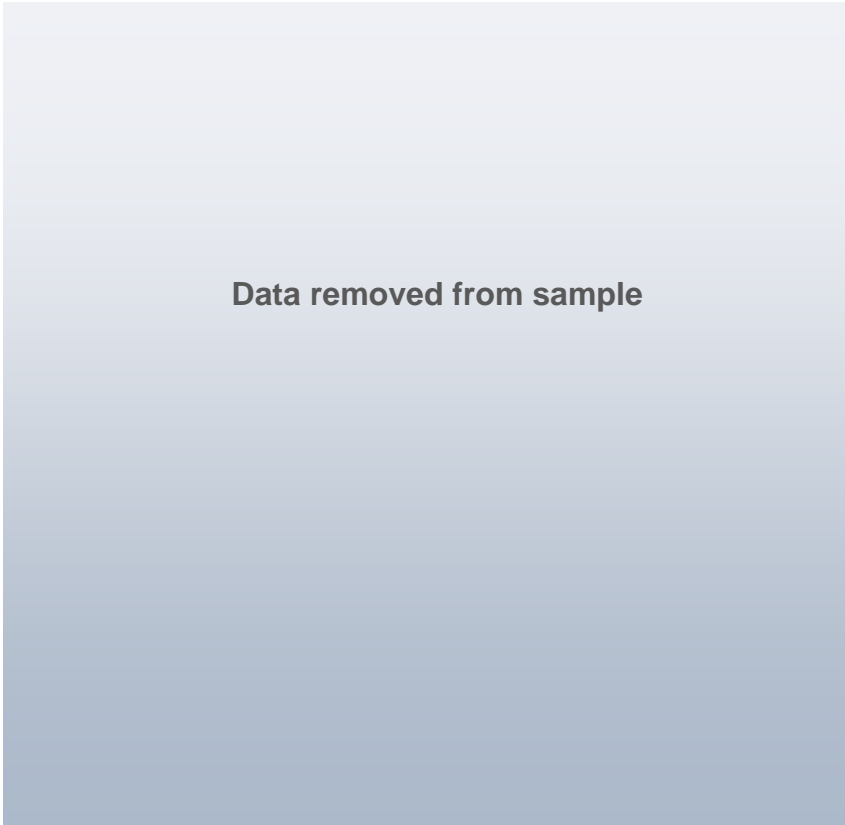
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

% off-trade

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery						

- Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Drugstores/parapharmacies
- Other Non-Grocery Alcoholic Drinks Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



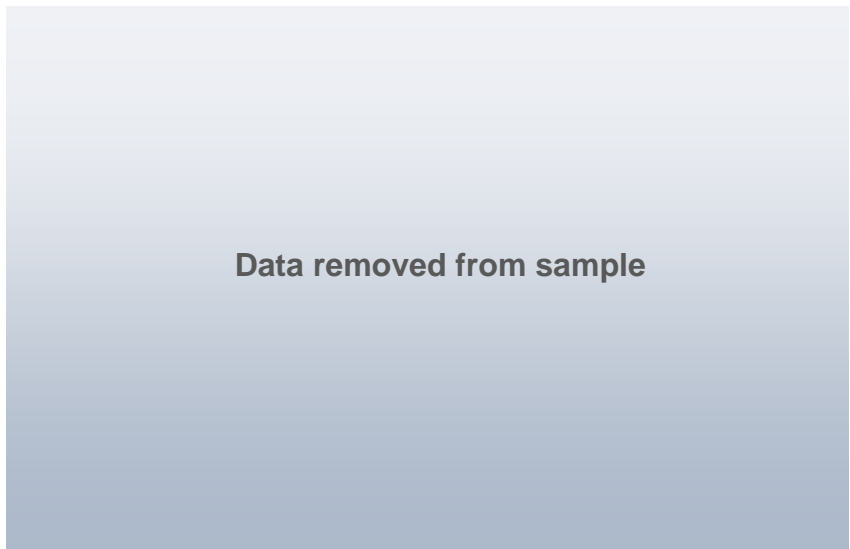
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 **Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2020**

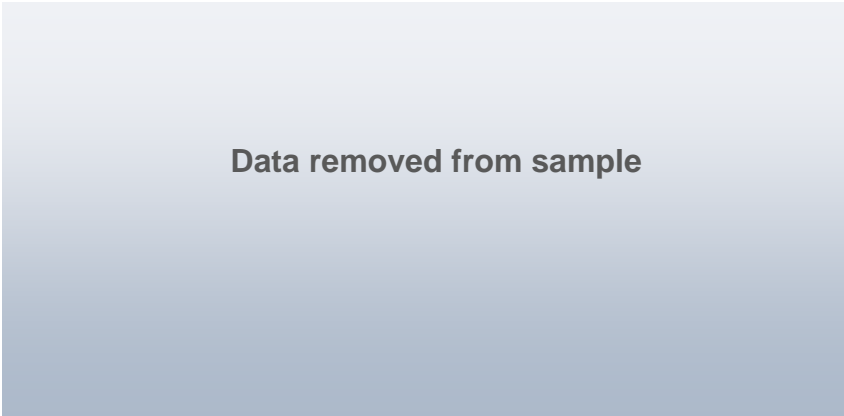
% off-trade

Beer Cider/Perry RTDs Spirits Wine

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Drugstores/



- parapharmacies
- Other Non-Grocery Alcoholic Drinks Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026

	2021	2022	2023	2024	2025	2026
Beer (million litres)	Data removed from sample					
Cider/Perry ('000 litres)						
RTDs ('000 litres)						
Spirits ('000 litres)						
Wine (million litres)						
Alcoholic Drinks (million litres)						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 26 Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Beer	Data removed from sample					
Cider/Perry						
RTDs						
Spirits						
Wine						
Alcoholic Drinks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 27 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Beer	Data removed from sample		
Cider/Perry			
RTDs			

Spirits
Wine
Alcoholic Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 28 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

% local currency, constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Beer	Data removed from sample		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

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SOURCES

Sources used during the research included the following:

Summary 2 Research Sources

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Source: Euromonitor International