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INDIAN WINE & SPIRITS INDUSTRY OVERVIEW 2025

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ALCOHOLIC & NON-ALCOHOLIC BEVERAGE INDUSTRY IN INDIA

(Market Analysis Report)

India's beverage industry, encompassing both alcoholic and non-alcoholic segments, offers a dynamic and rapidly growing market for international brands.

ProWine Mumbai serves as a strategic gateway for brands looking to establish or expand their presence in the Indian market, providing access to key industry stakeholders, distributors, and consumers.

By leveraging market insights, understanding regional preferences, and embracing trends such as premiumization, innovation, and sustainability, international brands can effectively navigate the dynamic landscape of India's beverage industry and achieve sustainable growth and success.

Market Forecast:

According to research by Research and Markets, the **Indian alcoholic beverages market** is expected to reach a value of **\$39.7 billion by 2026**, with a Compound Annual Growth Rate (CAGR) of **7.9%** during the forecast period of 2021-2026.

Consumer Behaviour:

Indian consumers are becoming more **adventurous in their beverage** choices, seeking authenticity, quality, and variety. They are also increasingly **influenced by international trends, social media, and exposure to global cultures**. Brand loyalty is gradually giving way to **experimentation and discovery**, presenting opportunities for international brands to capture market share.

Post-pandemic shift: Indian households significantly **increased their spending on alcoholic beverages** in FY24, with a **massive 15.7% rise** – the highest since FY12.

Market Trends:

- **Rising Demand for Premiumization:** There is a noticeable shift towards premium and high-quality products in the Indian wine and spirits market. With the continued growth of the middle class, urbanization, consumers are increasingly willing to pay more for premium and imported brands, driven by a **desire for sophistication and status**. **Imported brands are projected to grow at a CAGR of 9.5%** during the forecast period.
- **Rise of Wine Culture:** Wine consumption in India is experiencing steady growth, particularly among urban millennials and young professionals. This demographic is more inclined towards experimenting with new flavors and varieties. According to a study by Euromonitor International, **wine is expected to outperform**



- **Health and Wellness Trends:** The demand for healthier beverage options is increasing, with **low-alcohol and low sugar** content gaining popularity. The wine market is expected to witness **a growth in demand for organic wines**.
- **Expansion of Sales Channels:** Retail channels for alcohol in India encompass a variety of outlets, including **government-regulated stores, licensed liquor shops, bars/restaurants, duty-free shops, and informal markets**. Alongside traditional options, new formats like **specialty liquor stores, boutique wine shops, and upscale bars/lounges** are emerging. These venues offer curated selections and personalized experiences to appeal to discerning consumers, reflecting an evolving retail landscape.
- The **quality of bars and restaurants in India is now reaching world-class standards**, with many of them ranked among **Asia's top 50** and the **world's top 50**, creating world-class environments for high-quality beverage consumption.

Key insights specific to Indian WINE MARKET:

- The India wine market was valued at **US\$ 195.3 Million** in 2023.
- According to the Indian Grape Processing Board, India's wine consumption has grown at a **CAGR of 25%** over the past decade.
- India wine market is expected to exhibit a **CAGR of 17.01% during 2024-2032**.
- The emerging trend of casual drinking during numerous occasions, such as social gatherings, festivals, birthdays and anniversaries, etc., along with the rising consumption of alcohol among the female population, is primarily driving the India wine market.
- Based on the product type, the India wine market can be categorized into still wine, sparkling wine, and fortified wine. Currently, **still wine** accounts for the majority of the total market share.



- Domestic wine production is on the rise, but imports of premium wines, especially from old-world wine-producing countries like **France, Italy, and Spain**, continue to drive market expansion, in addition to wines from **Australia, Chile and Argentina**.
- The increasing popularity of **wine and food pairings** among Indian consumers highlights the opportunity for international brands to captivate discerning Indian wine enthusiasts. As international cuisines and gourmet dining gain traction in India, there's a rising demand for premium wines that harmonize with the diverse flavors and spices of Indian cuisine.
- An increasing number of premium restaurants are enhancing their **wine programs with curated selections** of exceptional wines from renowned global regions. This aims to elevate the dining experience and distinguish them as the preferred destination for wine enthusiasts seeking memorable culinary adventures.

Key insights specific to Indian SPIRITS MARKET:

- The Indian spirits market is **diverse, with various sub-categories** such as whisky, rum, vodka, gin, brandy, and others.
- **Whisky** remains the dominant category, accounting for over half of total spirits consumption in India, with premium and super-premium segments witnessing rapid growth. There has been a significant shift to Agave based spirits consumption with the rum category beginning to show an upward trend as well.
- **Premiumization** is evident across all spirits categories, driven by increasing disposable incomes, urbanization, and a growing aspirational class.
- International spirits brands, especially **Scotch** whisky, have gained popularity among affluent consumers seeking high-quality and premium products.
- The rise of **craft spirits and artisanal distilleries** is a notable trend, catering to discerning consumers looking for unique and authentic experiences.



Key insights specific to NON-ALCOHOLIC BEVERAGE INDUSTRY:

- The demand for zero-alcohol or low-alcohol beverages is growing steadily in India, driven by health-conscious consumers and changing lifestyle choices.
- Sub-categories within the zero-alcohol segment include non-alcoholic beer, wine alternatives, spirits alternatives, and functional beverages.
- Non-alcoholic beer has emerged as a popular alternative, with major breweries introducing alcohol-free versions of their flagship brands to cater to health-conscious consumers.
- Functional beverages, such as energy drinks, sports drinks, and wellness beverages, are gaining traction among urban millennials seeking functional benefits beyond hydration.
- International brands entering the zero-alcohol segment can capitalize on India's growing health and wellness trend by offering innovative and premium alternatives.

Indian Government's Efforts to Facilitate International Alcohol Brands:

- **Simplified Licensing Procedures:** Efforts have been made to streamline and simplify the licensing procedures for alcohol production, distribution, and retailing. This includes the introduction of online application systems to expedite the process.
- **Promotion of Wine Tourism:** The Indian government and various state tourism boards have initiated programs to promote wine tourism, which involves visiting vineyards, wine tastings, and cultural experiences related to wine. The promotion of tourism and hospitality sectors by the government is expected to indirectly boost wine consumption and demand for imported wines as well.



- **State-Specific Policy Reforms:** Some Indian states have implemented specific policy reforms to encourage the growth of the alcohol industry, such as allowing direct sales of alcohol by producers and liberalizing retail licensing norms.
 - **Relaxation of Foreign Direct Investment (FDI) Rules:** The Indian government has eased FDI regulations in various sectors, including retail, which may facilitate investment by foreign companies in the alcohol industry.
 - **Bilateral Trade Agreements:** India is actively pursuing **bilateral trade agreements with wine-producing nations** such as Australia, Switzerland, USA, UK, and the EU to lower tariffs and trade barriers, enabling international wine exporters to reach the Indian market at competitive prices. These agreements can greatly influence the import and export of alcoholic beverage (alcobev) brands by easing market access, reducing trade barriers, and fostering regulatory cooperation.
- India signed a **Trade and Economic Partnership Agreement (TEPA)** with a **4-nation non-EU European Bloc of Iceland, Norway, Liechtenstein and Switzerland** - committing to reduce tariffs.
 - **India and the USA Trade:** India has lowered the import duty **on American bourbon whisky** from 150% to 50%.
 - The **India-Australia Economic Cooperation and Trade Agreement (ECTA)**, effective since December 2022, continues to eliminate tariffs, with over 85% of Australian exports to India currently tariff-free, set to increase to 90% by January 1, 2026.
 - **India and the United Kingdom Trade:** Tariffs on gin and whisky, a key sticking point in negotiations previously, will be halved to 75%, with further reductions taking effect in later years.
 - **India and the European Union (EU)** are in discussions to revive negotiations for the **EU-India Broad-based Trade and Investment Agreement (BTIA)**. The EU is a major trading partner for India. The BTIA aims to improve market access, reduce trade barriers, and promote cooperation in services trade, investment, and regulatory alignment.



Projected Trends And Opportunities

1. Regional Expansion and Localization:

- As consumption patterns vary across different regions of India, brands must adopt a localized approach by understanding regional preferences and cultural nuances.
- Tier 2 and Tier 3 cities are emerging as lucrative markets for alcoholic and non-alcoholic beverages, presenting opportunities for brands to expand their distribution networks beyond metro cities.
- ProWine Mumbai provides a platform for brands to connect with regional distributors and retailers, facilitating market penetration and localized marketing strategies.

2. Sustainability and Ethical Practices:

- With increasing awareness about environmental sustainability and ethical practices, consumers are gravitating towards brands that prioritize sustainability throughout their supply chain.
- Brands participating in ProWine Mumbai can showcase their commitment to sustainability through eco-friendly packaging, responsible sourcing, and corporate social responsibility initiatives, thereby enhancing brand reputation and consumer loyalty.

3. Premiumization and Innovation:

- The trend towards premiumization is expected to continue across both alcoholic and non-alcoholic beverage segments, as consumers increasingly seek higher quality and differentiated products.
- Innovation in product offerings, packaging, and marketing strategies will be key for brands to capture market share and stay competitive in India's dynamic beverage market.
- ProWine Mumbai offers an ideal platform for international brands to showcase their innovative products and connect with discerning Indian consumers.



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HOW ALCOHOLIC & NON-ALCOHOLIC BEVERAGE BRANDS CAN BENEFIT FROM PARTICIPATING IN PROWINE MUMBAI?

- **Brand Exposure:** ProWine Mumbai offers a prestigious platform for alco-bev manufacturers to showcase their offerings to a discerning audience in the Indian market, enhancing brand recognition and reputation among connoisseurs and industry professionals, thereby establishing themselves as a leader in its category.
- **Market Expansion:** Entering the Indian market presents an opportunity for wine & spirit brands to expand their reach beyond traditional markets and tap into a growing consumer base. Diversifying into emerging markets like India can help them reduce dependency on existing markets and spread risk across different regions.
- **Regional Opportunities:** India is a diverse market with regional preferences and regulations varying across states. ProWine Mumbai can provide insights into specific regional opportunities within India, allowing brands to tailor their strategies accordingly.
- **Educational Workshops and Masterclasses:** Brands can utilize masterclasses at ProWine Mumbai to share insights into their country specific wine & spirits culture, winemaking/brewing/fermentation techniques, and member estates' unique terroirs, elevating the perception of their regional alcoholic beverages in India.



- **Export Opportunities:** ProWine Mumbai serves as a platform for exploring export opportunities for wineries and spirit manufacturers in the Indian market. By connecting with potential importers and distributors, brands can facilitate the distribution of their products in India, tapping into the country's growing demand for high-quality international alcoholic beverages.
- **Local Insights and Networking:** ProWine Mumbai offers exhibitors a chance to network with wine and spirits importers, bonders, distributors, wholesalers, local retailers, HoReCa professionals, high net worth individuals (HNIs), wine & spirit enthusiasts, accessory brands, investors, sommeliers, chefs, F&B teams, wines and spirits clubs, academia, institutes, and various other industry stakeholders familiar with the Indian market's intricacies. Establishing connections with these local participants can prove pivotal in navigating the complexities of distribution and retail in India.
- **Market Understanding:** Direct engagement with Indian consumers at ProWine Mumbai allows brands to understand their preferences, tastes, and demands firsthand, enabling better tailoring of offerings to suit the Indian palate and enhance market penetration.



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