Euromonitor Passport
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France

Beer Key Findings

- Total volume sales increase by 5% in 2021 to 2.2 billion liters
- Non/low alcohol beer is the best performing category in 2021, with total volume sales rising by 14% to 69 million liters
- Heineken Entreprise SAS is the leading player in 2021, with a total volume share of 34%
- Total volume sales are set to increase at a CAGR of 3% over the forecast period to 2.5 billion liters

Wine Key Findings

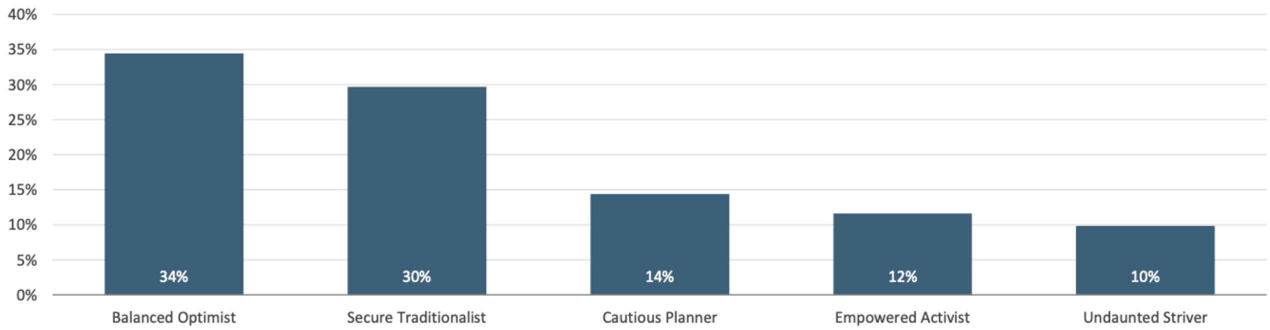
- Total volume sales rise by 4% in 2021 to 2.0 billion liters
- Non-grape wine is the best performing category in 2021, with total volume sales rising by 10% to 294,700 liters
- Total volume sales are set to increase at a CAGR of 0.3% over the forecast period to 2.1 billion liters
- Producers have struggled to engage the younger generations who have shown a growing preference for beer, which is easier to access in terms of branding and concept.

Spirits Key Findings

- Total volume sales rise by 5% in 2021 to 383 million liters
- Tequila (and mezcal) is the best performing category in 2021, with total volume sales growing by 18% to 1.5 million liters
- Ricard SA is the leading player in 2021, with a total volume share of 16%
- Total volume sales are set to rise at a CAGR of 1% over the forecast period to 409 million liters

Breakdown of consumer types in France

Consumer types in France
n = 1,007; % of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2022

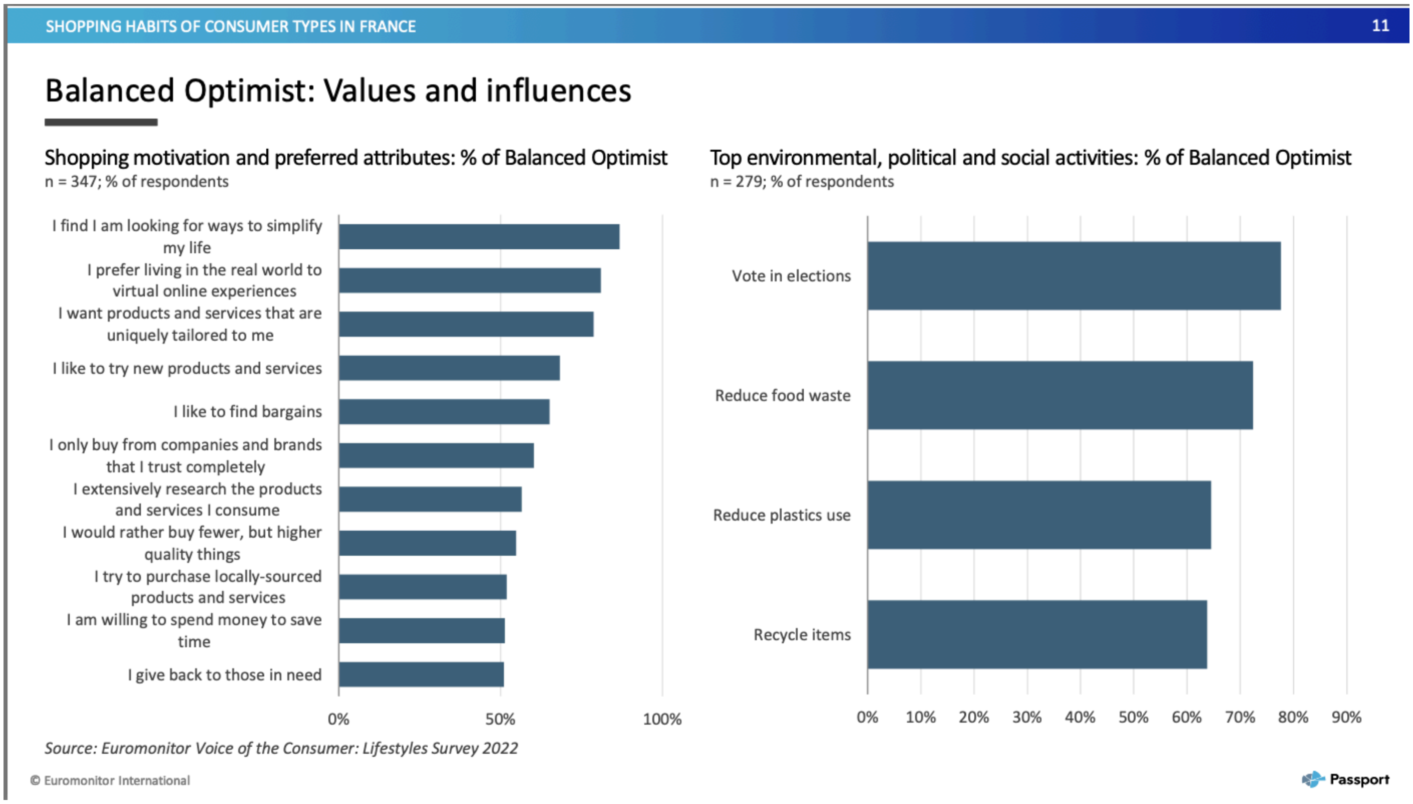
Numbers of respondents				
347	299	145	117	99

Who is the Balanced Optimist?

Consumers seeking a balanced lifestyle focusing on enjoying the present and planning for the future. Often prioritising time with friends and family.

- 17% like to be actively involved in brands
- 71% use technology to improve their day-to-day life
- 80% try to have a positive impact on the environment through their daily actions
- 19% are actively involved in political and social issues
- 70% participate in physical exercise at least 1-2 times a week
- 4% order food for home delivery at least 1-2 times a week
- 26% reheat or prepare a ready meal at least 1-2 times a week
- 28% take health supplements/ vitamins at least 1-2 times a week

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2022



Singapore:

Beer Key Findings

- Total volume sales grew by 10% in 2021 to 117 million litres
- Stout is the best performing category in 2021, with total volume sales rising by 13% to 4.8 million litres
- Asia Pacific Breweries Ltd is the leading player in 2021, with a total volume share of 43%
- Total volume sales are set to rise at a CAGR of 4% over the forecast period to 145 million litres

With consumers confined to their homes during the Circuit Breaker, there has a greater focus on online platforms, advertising and delivery options due to the search for convenience and competitive prices. **This trend is likely to gain further momentum in the future. Therefore, online third party delivery platforms such as GrabFood and foodpanda where alcoholic drinks are easily available, and which operate until as late as 03.00hrs, emerged during the pandemic.**

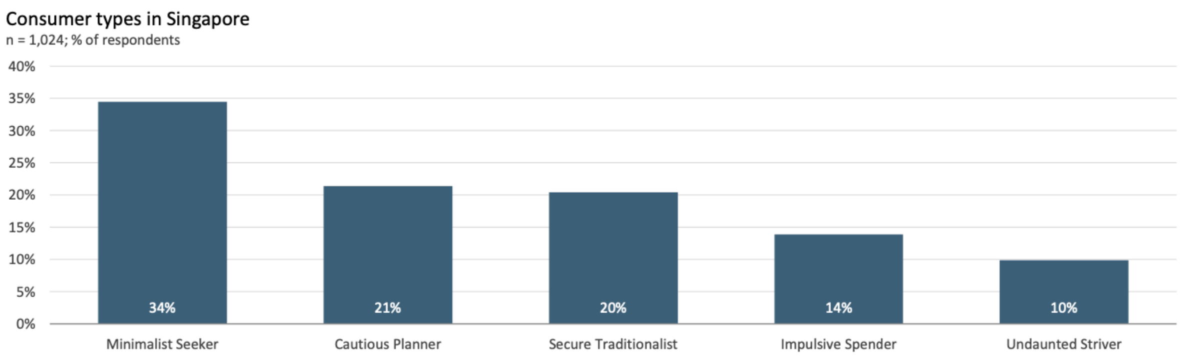
Wine Key Findings

- Total volume sales grow by 10% in 2021 to 14 million litres
- Non-grape wine is the best performing category in 2021, with total volume sales rising by 51% to 1.0 million litres
- Total volume sales are set to rise at a CAGR of 5% over the forecast period to 18 million litres

Spirit Key Findings

- Total volume sales increase by 26% in 2021 to 7.0 million litres
- Other spirits is the best performing category in 2021, with total volume sales rising by 66% to 66,000 litres
- House of Amber Nectar Pte Ltd is the leading player in 2021, with a total volume share of 23%
- Total volume sales are set to increase at a CAGR of 9% over the forecast period to 11 million litres

Breakdown of consumer types in Singapore



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2022

Who is the Minimalist Seeker?

Consumers who do not place much importance on their image and strive to live within a modest lifestyle. Value saving money and are unlikely to buy luxury and non-essential products.

13% like to be actively involved in brands

81% use technology to improve their day-to-day life

72% try to have a positive impact on the environment through their daily actions

7% are actively involved in political and social issues

72% participate in physical exercise at least 1-2 times a week

22% order food for home delivery at least 1-2 times a week

24% reheat or prepare a ready meal at least 1-2 times a week

68% take health supplements/ vitamins at least 1-2 times a week

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2022

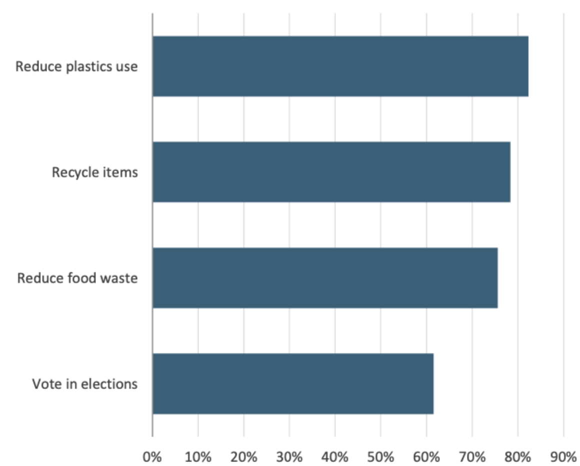
Minimalist Seeker: Values and influences

Shopping motivation and preferred attributes: % of Minimalist Seeker

n = 353; % of respondents

Top environmental, political and social activities: % of Minimalist Seeker

n = 254; % of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2022