

AUSTRALIA OPM REPORT

June 2024



Spirits volume contracting in On Premise

Spirits volume sales in the Australian On Premise have fallen over the last 12 months, with the Gin hit harder than other spirits. CGA by NIQ's On Premise Measurement (OPM) data indicates a **0.6%** rise in spirits sales by value in the L52 weeks, and an **8.1%** dip in volume.

OPM is the only fully projected and extensively validated measure of beverage alcohol performance in the Australian On Premise. OPM Spirits Australia was launched in mid 2023 and is the barometer of On Premise share and trend tracking.



"With the On Premise facing challenges driven by inflation and cost-of-living, we see the spirits category contract in terms of volume sales. The story from a \$ value sales is different, with a slight rise in value sales, driven predominantly by price hikes.

But when we dig deeper, the story is more nuanced. Take Rum for an example, performing similarly to total spirits at a national level, but contrasting fortunes are seen between 2 of the rum segments. Golden Rum significantly outperforming White Rum. With regional differences also seen.

It is clear then that understanding the pockets of growth and opportunities using share and trend data is curial to winning in a contracting market."

JAMES PHILLIPS
Client Solutions Director -
Total Liquor ANZ



For further details on CGA's On Premise Measurement solutions, along with support in understanding trends at category, segment and brand level within the On Premise, contact James Phillips at James.Phillips@nielseniq.com or find more information [here](#).



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How rum is reflected in the Australian On Premise

Rum has seen an overall gain for the % share of the market for spirits consumption of **+0.3%**. Sales values have seen an increase of **+2.5%** compared to one year ago with the price per litre seen an increase of **+8.7%**. The total distribution has seen a fall of **-1.3%**.

Total Spirits	Spirits value \$ % change vs YA	Spirits sales volume in 9L EQ % change vs YA
	+0.6%	-8.1%

	VODKA	WHISKEY	GIN	RUM
Sales value \$ % change YA	+1.0%	+4.9	-1.5%	+2.5%
Sales volume 9L EQ % change YA	-7.1%	-5.2%	-8.9%	-5.8%
Price per 30ML % change YA	+8.7%	+10.7%	+8.2%	+8.7%

Which rums have overachieved, which have under achieved

Different rum types faired differently this year in comparison to one year ago. Golden rum distribution saw a decrease of **-4.1%** whilst seeing a great increase of sales value of **+7.6%**. Respectively we can see White rums also saw a **-1.8%** decrease in distribution with another decrease in sales value of **-9.3%** compared to one year ago.

Golden rum



TDP % change YA	-4.1%
Sales Value % change YA	+7.6%
Sales volume 9L % change YA	-0.5%
Price per 30ML % change YA	+8.2%

White rum



TDP % change YA	-1.8%
Sales Value % change YA	-9.3%
Sales volume 9L % change YA	-17.2%
Price per 30ML % change YA	+9.5%

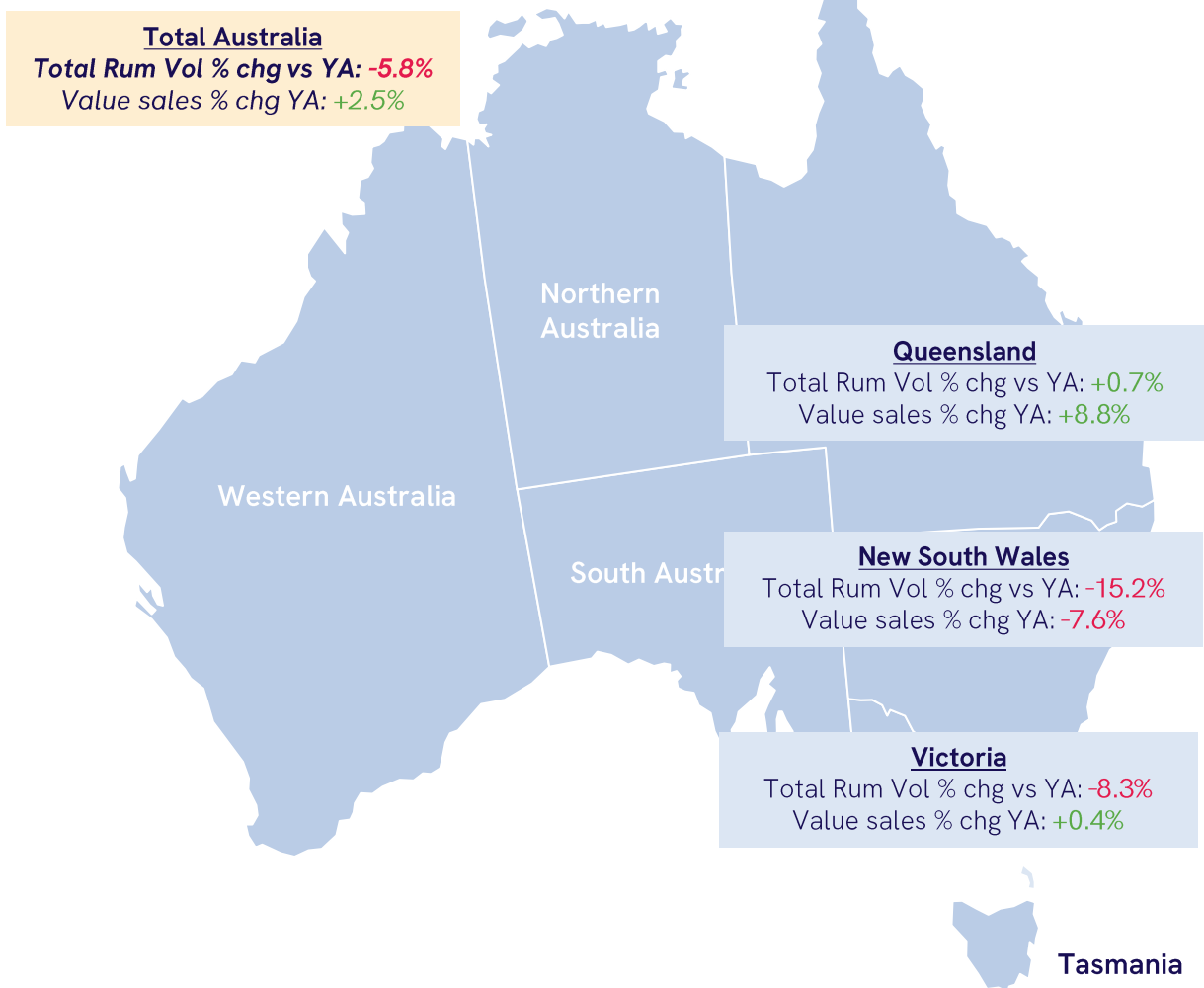
TOTAL AUSTRALIA



STATE BY STATE VIEW

The data highlights that Rum has seen a decrease throughout Australia of **-5.8%** in volume, with Queensland seeing the biggest share of this increase at **+0.7%**. Even with overall category decrease in Volume we can see a **+2.5%** increase in category value sales, there is still some back-sliding areas such as New South Wales, which saw a decrease in volume at **-1.2%** and value of sales at **-2.5%** compared to one year ago.

Total Spirits, 5 Week Value and Volume trend by state



CGA by NIQ OPM data – Spirits, mega category, value, volume Rolling 52 W/E 26/03/2024



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