

# Packaged beer market overview

## Off premise retail sales - Year ending September 2006

Total off premise packaged liquor is worth 11.3 billion and is growing at 3.7 percent for the year ending September 2006.

### Total packaged liquor

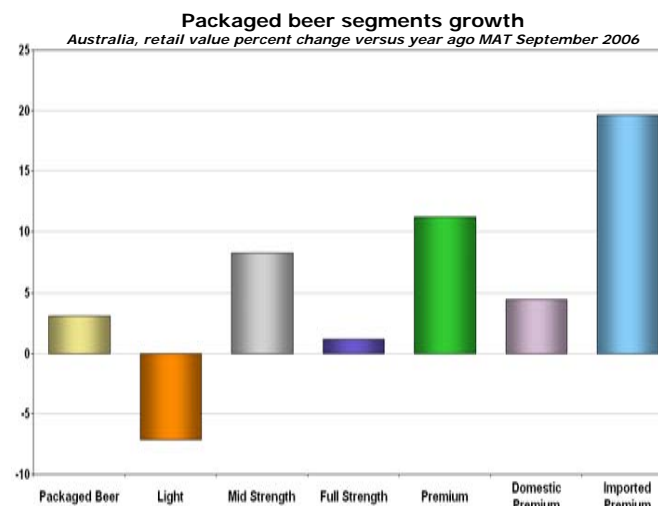
- RTDs are the leading growth category within total packaged liquor at 7.3 percent on last year.
- Spirits are also showing above average growth of 5.0 percent.
- Packaged beer is growing slightly behind the total market at 3.1 percent.

### Packaged beer

- Packaged beer sales have increased by \$131 million in the year.
- Imported premium beer is key growth driver up 19.6 percent.
- Light beer accounts for a 7.4 percent share of packaged beer, equates to \$325 million in retail sales and is declining at 7.1 percent.
- Mid strength beer is increasing by 8.2 percent year on year with Queensland contributing over 50% to the growth and 66 percent of total sales.
- Full strength beer accounts for 60.8 percent of total sales, has a growth at 1.2 percent and contributed additional retail sales of \$31 million.
- Premium beer is the fastest growing beer segment, driven by growth in premium imported beers (19.6 percent), growing by 11.2 percent and now representing 16.9 percent of the total packaged beer market.
- Premium domestic growth at 4.4 percent year on year.

### State performance – packaged beer:

- Western Australia is experiencing highest growth up 10.3 percent.
- New South Wales represents 32.0 percent of total beer retail value sales.
- Western Australia and Queensland provided the highest growth in contribution to retail sales across the states, increasing sales by \$52.5 million and \$47.2 million respectively.



**State share of packaged beer**  
Australia, retail value % share, MAT September 2006

