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South India accounts for 58% of all-India whiskey sales in FY25; this state leads the chart with 17% share

Representational image.

Synopsis

South Indian states dominate India's IMFL market, contributing 58% of sales in FY25, with Karnataka leading at 17% of national volumes, followed by Tamil Nadu. Southern states consumed 23.18 cr cases, while overall IMFL whisky sales fell 1.4% to 40.17 cr cases.

By PTI

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South Indian states dominate the sales of IMFL, accounting for 58 per cent revenue in FY25, with Karnataka retaining the top national slot by contributing 17 per cent of the pan-India volumes in FY25, according to data from industry body CIABC.

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Five Southern states - Andhra Pradesh, Karnataka, Kerala, Tamil Nadu, and Telangana, along with Union Territory Puducherry, have retained their dominance in the sales of the Indian-Made Foreign Liquor (IMFL), consuming 23.18 crore cases (jointly contributing 58 per cent sales) for the financial year ended on March 31, 2025.

"South's dominance is near-absolute" in IMFL sales in FY25, with "the rest of India shares the remaining 42 per cent", said data sourced from the Confederation of Indian Alcoholic Beverage Companies (CIABC).

However, on a pan-India level, sales volume of IMFL Whisky has declined 1.4 per cent year-on-year in FY25 to 40.17 crore cases.

When asked, CIABC Director General Anant S Iyer said overall sales have been slow in FY25 due to a weak Q1 last year, primarily on account of the general elections and excise policy issues in some states, which impacted volumes.

"We have been constantly in touch with the state governments, raising our concerns regarding these Excise policy issues. Every year, we see a significant hike in state levies and policy changes, which impact sales in the short to medium term," Iyer told PTI.

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Regulators use the term IMFL, which includes Whisky, Vodka, Rum, Gin and Brandy, to distinguish it from country liquor and traditional alcoholic beverages such as todi, fenny, and arrack, among others.

Karnataka, with 6.88 crore cases, has again topped the chart, contributing 17 per cent of IMFL volume sales, followed by Tamil Nadu at the second position with 6.47 crore cases, accounting for nearly 16 per cent of the national sales.

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In FY24, Karnataka was in the lead position with consumption of 6.83 crore cases, while Tamil Nadu ranked second, registering sales of 6.44 crore cases.

Telangana and Andhra Pradesh contributed around 9 per cent each of the IMFL sales with 3.71 crore and 3.55 crore cases, respectively, in FY25. Kerala ranked seventh with 2.29 crore cases in IMFL sales, according to CIABC data.

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The Southern region has an overall growth of nearly 1 per cent in sales volume. Interestingly, Puducherry reported 10 per cent growth in FY25 with 0.28 crore cases, ranking 19th.

The southern part was followed by the northern region, which contributed 20 per cent of IMFL sales, where Uttar Pradesh was leading the chart with 2.50 crore cases.

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On the national level, Uttar Pradesh was ranked sixth with a 6 per cent growth rate. It was followed by Rajasthan, Delhi and Haryana, which were ranked 9th, 10th and 11th in IMFL sales with 1.37 crore cases, 1.18 crore cases and 1.17 crore cases, respectively.

Overall, the northern region reported only 1 per cent growth in FY25 in IMFL sales.

The western region contributed 12 per cent of IMFL sales with 4.70 crore cases,

where Maharashtra topped the list with the consumption of 2.71 crore cases.

Maharashtra has been ranked fifth in terms of sales, contributing 58 per cent of the western region sales with a 4 per cent annual growth.

The western region reported 3 per cent growth in IMFL sales in FY25.

The eastern region accounted for only 10 per cent of IMFL sales, where West Bengal led the chart with 1.49 crore cases.

West Bengal ranked 8th pan-India with a 4 per cent growth in FY25. It was followed by Odisha, Assam and Jharkhand, with 0.98 crore cases, 0.96 crore cases and 0.32 crore cases, respectively.

In Punjab and J&K, IMFL sales were down 20 per cent and 15 per cent, respectively, in FY25.

Markets like Jharkhand, Rajasthan and Puducherry reported 15 per cent, 13 per cent and 10 per cent growth, respectively.

"We are seeing some good growth in Uttar Pradesh, Rajasthan, West Bengal, Odisha and Andhra Pradesh. Delhi is a major market, where we are waiting for a new Excise policy, which will push growth," Iyer said.

When asked about the industry trend, he said the premium and luxury segments, particularly in whiskies, have seen good growth in recent years.

"We see a lot of companies experimenting with premium whiskies, rums and vodkas. We will continue to see premium brands performing well with new introductions and innovations," he added.

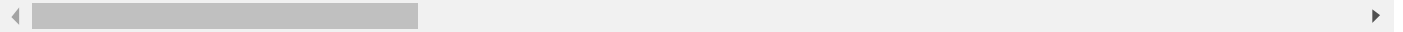
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However, Iyer also raised concerns about issues impacting sales, such as high taxation levels, policy changes like the recent MML introduction in Maharashtra, the discrimination of IMFL vide BIO brands, and the nonpayment of old dues in Telangana, which continue to adversely affect the industry.

India is the largest whisky market globally by volume, which is witnessing premiumisation.



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