

KARNATAKA RETAINED THE TOP NATIONAL SLOT BY CONTRIBUTING 17% OF PAN-INDIA VOLUMES IN FY25

South India accounts for 58% of all-India whiskey sales in previous financial year

Andhra Pradesh, Karnataka, Kerala, Tamil Nadu, Telangana—along with Puducherry UT, collectively consumed 23.18 crore cases of IMFL during FY25

NEW DELHI: South Indian states continued to dominate the Indian-Made Foreign Liquor (IMFL) market in FY25, accounting for 58 per cent of total revenue, with Karnataka retaining the top national slot by contributing 17 per cent of pan-India volumes, according to data from the Confederation of Indian Alcoholic Beverage Companies (CIABC).

The five southern states—Andhra Pradesh, Karnataka, Kerala, Tamil Nadu, Telangana—along with the Union Territory of Puducherry, col-

lectively consumed 23.18 crore cases of IMFL during FY25. CIABC noted that "South's dominance is near-absolute," while the rest of India accounted for the remaining 42 per cent.

At the national level, IMFL whisky sales slowed to 1.4 per cent growth, reaching 40.17 crore cases, up from 39.62 crore cases in FY24. CIABC Director General Anant S Iyer attributed the muted growth to a weak Q1 last year, influenced by general elections and excise policy changes in several states. "Significant hikes in state levies and



policy adjustments impact sales in the short to medium term," he said.

Karnataka, with 6.88 crore cases, led the charts, followed by Tamil Nadu at 6.47 crore cases. Telangana and Andhra

Closer Look

- » Northern region accounted for 20% of IMFL sales, led by Uttar Pradesh with 2.50 crore cases & a 6% growth
- » Rajasthan, Delhi, and Haryana ranked ninth, tenth, and eleventh with 1.37 crore, 1.18 crore, and 1.17 crore cases, respectively. Overall growth in the north was 1%

Pradesh contributed 3.71 crore and 3.55 crore cases, respectively, each representing roughly 9 per cent of total IMFL sales. Kerala ranked seventh with 2.29 crore cases. Puducherry reported a notable 10 per cent

growth with 0.28 crore cases. Overall, the southern region saw nearly 1 per cent growth in sales volume.

The northern region accounted for 20 per cent of IMFL sales, led by Uttar Pradesh

with 2.50 crore cases and a 6 per cent growth rate. Rajasthan, Delhi, and Haryana ranked ninth, tenth, and eleventh with 1.37 crore, 1.18 crore, and 1.17 crore cases, respectively. Overall growth in the north was 1 per cent.

The western region contributed 12 per cent of total sales, with Maharashtra leading at 2.71 crore cases, a 4 per cent annual increase. The region recorded 3 per cent growth overall. In the eastern region, which contributed 10 per cent of sales, West Bengal led with

1.49 crore cases (8th nationally) and 4 per cent growth, followed by Odisha, Assam, and Jharkhand.

Sales declined in Punjab (-20 per cent) and J&K (-15 per cent), while Jharkhand, Rajasthan, and Puducherry saw growth of 15 per cent, 13 per cent, and 10 per cent, respectively. Iyer highlighted emerging opportunities in Uttar Pradesh, Rajasthan, West Bengal, Odisha, and Andhra Pradesh, and noted that Delhi awaits a new excise policy to boost sales.

Premium and luxury seg-

ments, particularly whiskies, have witnessed strong growth, with companies experimenting with premium offerings and innovations. However, challenges remain, including high taxes, policy changes like Maharashtra's MML, discrimination in IMFL brands, and pending duties in Telangana, which continue to affect the industry.

India remains the largest whisky market globally by volume, increasingly shifting toward premiumisation, even as southern states maintain their dominant share.

AGENCIES