

A large, stylized white outline of a beer mug is centered on the page. The words 'IRISH BEER MARKET 2015' are written in a bold, white, sans-serif font across the body of the mug. A stalk of barley is positioned at the top left of the mug's rim.

# IRISH BEER MARKET 2015



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## Irish Beer Market Report 2015

The Irish Brewers Association (IBA) 'Beer Market Report' highlights the crucial role played by the brewing sector in the Irish economy. According to data from the Revenue Commissioners beer remains Ireland's favourite drink, accounting for 47% market share of all alcohol consumed in 2015. A percentage share that has remained consistent since 2011.

In 2015 Ireland's economy continued to perform well with falling unemployment, increased incomes, improving exchequer returns, a tourism boom and a recovering retail sector. Despite these positive conditions beer consumption fell marginally by 2% compared to 2014. Last year the IBA reported that, for the first time in a decade, per capita beer consumption rose by 3.5% in 2014 compared to 2013. The fall in consumption in 2015 however reflects the overarching trend of alcohol consumption falling by 25% since 2001.

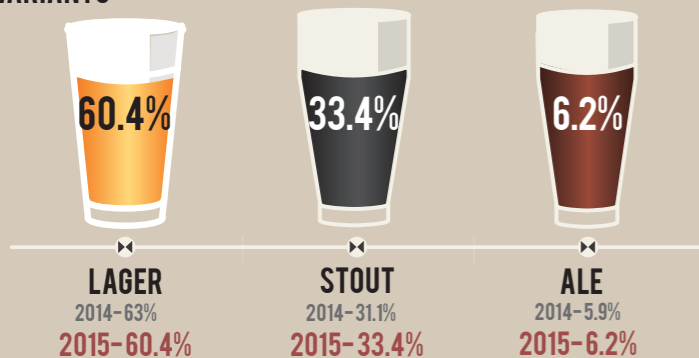
Today beer continues to contribute significantly to Ireland's export success with €265 million worth of exports in 2015. This is up 16% from €228 million in 2014 and accounts for 21% of Ireland's total beverage exports which was valued at €1.26 billion last year. The increase in exports is reflected in an increase in productivity in Ireland's breweries. For the first time since 2011 beer production has increased, going from 7,288,000 hectolitres in 2014 to 7,755,000 hectolitres, an increase of 6%. In 2015, 43% of all beer produced in Ireland was exported. The Irish craft beer movement is continuing to grow and makes up an estimated 2% of beer market share in 2015.

The brewing sector continues to make a significant contribution to the exchequer both directly and indirectly. In 2015 beer excise contributed €417 million to the exchequer, a slight fall from €425 million in 2014. However this is still a €110 million increase from 2011 due to a 42% duty increase over the past four years. Alcohol prices here are the highest in the European Union and consumers in Ireland pay the third highest rate of excise on beer in the EU, eleven times greater than Germany.

If the success story of the Irish brewing sector is to continue then the Government must support the sector with a reduction in excise on beer in this year's budget. Particularly as we are heading into uncertain economic times due to the outcome of the recent Brexit referendum. Excise is a regressive tax on jobs, regional development, the tourism sector and on hard pressed consumers. A decrease in beer excise could facilitate further investment in the brewing supply line from grain to glass.

Jonathan McDade  
Head of the Irish Brewers Association

## VARIANTS



Source: Members

## HEADLINES

<b>TOTAL PRODUCTION</b> (1,000 HL) Source: Members	2014	7,288
	2015	7,755
<b>TOTAL EMPLOYMENT</b> (Full time employees) Source: Member 2014 employment stats revised to reflect full time permanent staff.	2014	1,708
	2015	1,710
<b>TOTAL CONSUMPTION</b> (1,000 HL) Source: Revenue Commissioners	2014	4,481
	2015	4,414
<b>PER CAPITA CONSUMPTION</b> Source: Calculation based on (3) but at 5%ABV (pan-European benchmark) .and CSO population figure at April 2015 of 4,635,400.	2014	81.6
	2015	79.9
		Litres per capita
<b>% EXPORTS</b> Source: Total Production (1)-Total Consumption (3) 2014 percentage figure revised down following additional information from Revenue and IBA members.	2014	39%
	2015	43%
<b>EXPORT VALUE</b> Source: Bord Bia	2014	€228m
	2015	€265m million estimated

## CRAFT BEER MARKET

Output of microbreweries



Market Share of sales

2015 - 2.00% estimation    2014 - 1.2%    2012 - 0.6%

Source - The Development and Economic Impact of Microbreweries in Ireland - A Report for the Independent Craft Brewers of Ireland

## SALES CHANNEL

<b>ON-TRADE</b>	2014	63.6%
	2015	67.3%
<b>OFF-TRADE</b>	2014	36.4%
	2015	32.7%

Source: Members

## ALCOHOL CONSUMPTION BY CATEGORY MIX



## EXCISE RECEIPTS ON ALCOHOL (€M)

	2011	2012	2013	2014	2015
BEER	307	308	358	425	417
SPIRITS	247	264	290	301	311
CIDER	44	43	52	59	54
WINE	231	231	302	355	355
<b>TOTAL</b>	830	846	1002	1140	1137
BEER AS %	37	36	36	36	37

Source: Revenue Commissioners

## EXCISE DUTY

based on the CSO national average price index



## PAN EURO BEER PER CAPITA CONSUMPTION

- litres of beer @5% ABV

CZECH REPUBLIC	144
GERMANY	107
AUSTRIA	104
POLAND	98
LITHUANIA	95
LUXEMBOURG	83
CROATIA	80
<b>IRELAND</b>	79
FINLAND	78
LATVIA	78
SLOVENIA	78
ROMANIA	74
ESTONIA	73
BELGIUM	72
BULGARIA	72
SLOVAKIA	70
THE NETHERLANDS	68
UK	68

Source: IBA (2015) Brewers of Europe (2014).

## EUROPEAN BEER EXCISE RATES

in Euro per hectolitre of pure alcohol

FINLAND	153.84	FRANCE	35.57	LATVIA	20.16
UK	113.98	GREECE	31.20	PORTUGAL	20.00
IRELAND	108.24	CYPRUS	28.80	SLOVAKIA	17.22
SWEDEN	100.35	CROATIA	25.56	LITHUANIA	14.93
SLOVENIA	58.08	HUNGARY	24.76	CZECH REPUBLIC	12.21
ESTONIA	39.84	BELGIUM	24.05	SPAIN	9.96
NETHERLANDS	37.96	AUSTRIA	24.00	LUXEMBOURG	9.52
ITALY	36.48	MALTA	23.16	GERMANY	9.44
DENMARK	36.15	POLAND	21.26	BULGARIA	9.20
				ROMANIA	8.77

Rates at July 2016.