



**Drinks Ireland**  
Beer

**Irish Beer  
Market  
Report  
2019**

[drinksireland.ie/beer](https://drinksireland.ie/beer)

# Overview

**This annual beer market report highlights the performance of Ireland's brewing sector in 2019. The data in this report predates the Covid-19 crisis which has had a significant impact on the brewing industry in terms of production, exports, and sales. This report details the sector's performance at a time when the economy was performing well. In 2019, the employment rate grew by 3.5%, household spending grew by 3.3% and GDP grew by 5.5% while there was a marginal increase in inflation by 0.9%.**

This report shows that beer comfortably remains Ireland's most popular alcohol beverage with a 44.6% share of the alcohol market. This represents a marginal decline of 0.4% from the previous year.

2019 saw total beer sales decline by 2%, with per capita consumption falling by 2.6%. This decline in per capita consumption is in line with an overall trend of declining alcohol consumption in Ireland. The decrease in total beer sales is reflected in the decrease in beer production in Ireland by 1% in 2019 compared to the previous year. In terms of the production share, 64.3% of beer produced in Ireland was stout. Lager's production share is 29.8% with ale's share standing at 5.9%. Direct employment in Ireland's brewing sector rose in 2019 by 4%.

The decrease in domestic sales has been tempered by an increase in the value of beer exports by 8.5% to €305 million in 2019, up from adjusted figures of €281 million in 2018. Ireland is estimated to be the 7th largest exporter of beer in the EU. The UK remains the top destination for Ireland's beer exports accounting for €113 million worth of exports in 2019. Brexit uncertainty and the continuing Covid-19 crisis are a serious concern for the prospects of Ireland's brewing sector.

Lager remains the nation's favourite beer variant with a 63.5% share of the market. Stout's market share is 29.3% while ale's share is 6.2%. Low/non-alcoholic beer's market share rose from 0.6% in 2018 to 1.0% in 2019 suggesting the growing popularity of these products among Irish consumers.

Ireland's on-trade beer sales continue to outperform off-trade sales with 62.7% share of beer purchases being in pubs, restaurants, and hotels. This share fell marginally from a 63.5% share in 2018. Over 80% of Ireland's stout sales and 78% of ale sales in the on-trade.

The brewing sector continues to make a significant contribution to the exchequer both directly and indirectly. In 2019 beer contributed €421 million in excise alone, a slight decrease from €430 million in 2018. Over the past decade, Irish beer drinkers have paid €3.8 billion in excise to the exchequer due to paying the second highest rate of excise on beer in the EU. **Drinks Ireland | Beer** calls on the Government to assist the hospitality sector with financial support as well as help the hard-pressed consumer by reducing excise on beer in the forthcoming budget.

**Jonathan McDade**  
Head of Drinks Ireland | Beer

Over the past decade, Irish beer drinkers have paid **€3.8 billion** in excise to the exchequer due to paying the second highest rate of excise on beer in the EU.

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# Headlines

	2018	2019	Difference
<b>Total production (1,000HL)</b>	8,322	8,240	<b>-1%</b>

Source: Drinks Ireland Beer Members

	2018	2019	Difference
<b>Total employment</b>	1,103	1,147	<b>+4%</b>

Source: Drinks Ireland Beer Members

	2018	2019	Difference
<b>Total consumption (1000HL)</b>	4,630	4,537	<b>-2%</b>

Source: Revenue

	2018	2019	Difference
<b>Per capita consumption</b>	79.5	77.2	<b>-2.9%</b>

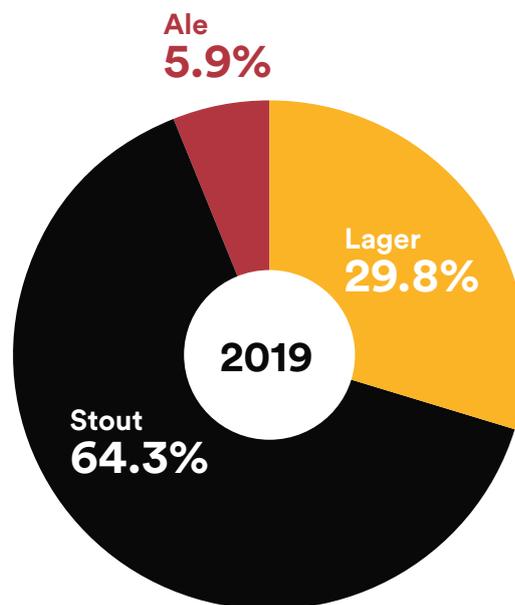
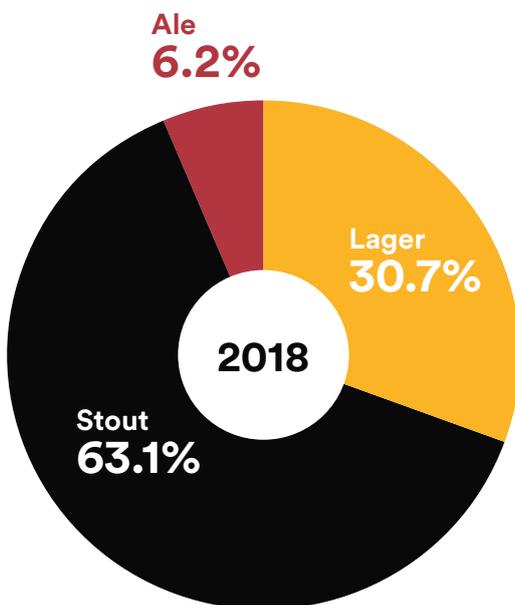
Source: Calculation based on consumption but as 5%ABV (pan-European benchmark) and CSO population figure of 2019 Census of 4,904,000

	2018	2019	Difference
<b>Export value</b>	€281m*	€305m	<b>+8.5%</b>

Source: EuroStat  
\*Revised figure



# Production



## Sales channel

	2018	2019
On-Trade	63.5%	62.7%
Off-Trade	36.5%	37.3%

Source: Drinks Ireland Beer Members

## Variants

	2018	2019	Difference
Lager	63.8%	63.5%	-0.3%
Stout	29.3%	29.3%	-
Ale	6.3%	6.2%	-0.1%
Non-alcohol	0.6%	1.0%	+0.4%

Source: Drinks Ireland Beer Members

Variant	2018 on-trade	2018 off-trade
Lager	54.5%	45.5%
Stout	80.1%	19.9%
Ale	80.7%	19.3%
Non-alcohol	33.3%	66.7%

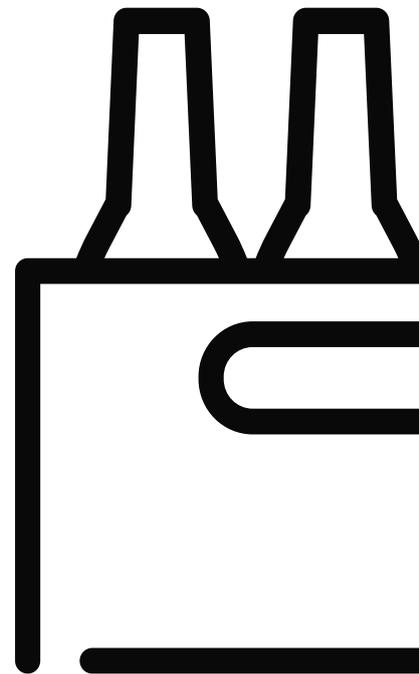
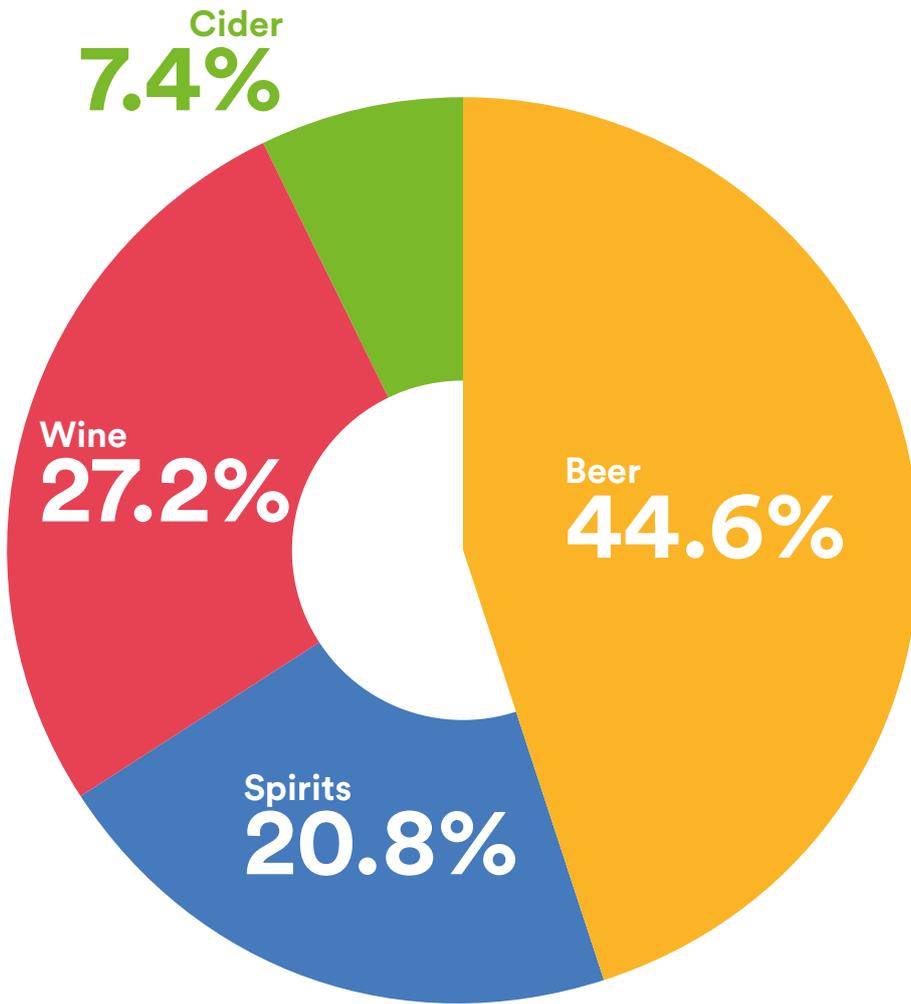
Source: Drinks Ireland Beer Members

Variant	2019 on-trade	2019 off-trade
Lager	53.1%	46.9%
Stout	80.9%	19.1%
Ale	78.3%	21.7%
Non-alcohol	33.8%	67.2%

Source: Drinks Ireland Beer Members



# Alcohol consumption by category mix



## Excise receipts (€ million)

Year	Beer	Wine	Spirits	Cider	Total	Beer as %
2010	€320	€219	€244	€44	€827	39%
2011	€307	€231	€247	€44	€829	37%
2012	€308	€231	€284	€43	€866	36%
2013	€358	€302	€290	€52	€1,002	36%
2014	€425	€355	€302	€59	€1,141	37%
2015	€417	€355	€311	€54	€1,137	37%
2016	€430	€380	€338	€59	€1,207	36%
2017	€424	€382	€353	€61	€1,220	35%
2018	€430	€376	€372	€61	€1,239	35%
2019	€421	€378	€373	€60	€1,232	34%

Source: Revenue Commissioners

### Excise duty on a pint of lager



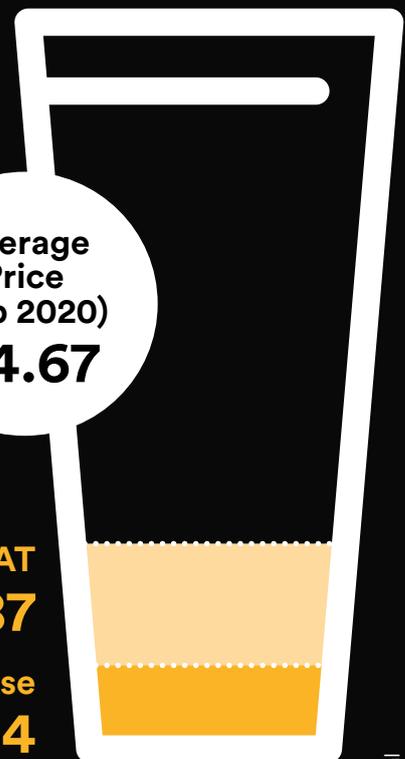
Average Price  
(Feb 2020)  
**€5.06**

VAT  
**€0.95**  
Excise  
**€0.55**

% paid in tax  
**29.6%**

Excise contribution in decade  
**€3.84 billion**

### Excise duty on a pint of stout



Average Price  
(Feb 2020)  
**€4.67**

VAT  
**€0.87**  
Excise  
**€0.54**

% paid in tax  
**30.2%**

Source: DGI

**Brexit uncertainty and the continuing Covid-19 crisis are a serious concern for the prospects of Ireland's brewing sector.**

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# Pan European Beer Per Capita Consumption

Litres of beer at 5 percent of ABV

Rank	Country	Per Capita Consumption
1	Czech Republic	141
2	Germany	102
3	Poland	100
4	Austria	107
5	Lithuania**	80
6	Estonia	80
7	Romania	85
8	Croatia	84
9	Slovenia*	80
10	Latvia	79
<b>11</b>	<b>Ireland</b>	<b>77</b>
12	Bulgaria	75
13	Finland	74
14	Slovakia	74
15	United Kingdom	73
16	Luxembourg	72
17	Netherlands**	70
18	Belgium	68
19	Hungary	64
20	Denmark	62
21	Cyprus	59
22	Sweden	58
23	Malta	55
24	Spain	52
25	Portugal	51
26	Greece	36
27	Italy	34
28	France	33

Source: Brewers of Europe (2019)

\*Source: Brewers of Europe (2018)

\*\*Source: Brewers of Europe (2017)



## Export destinations

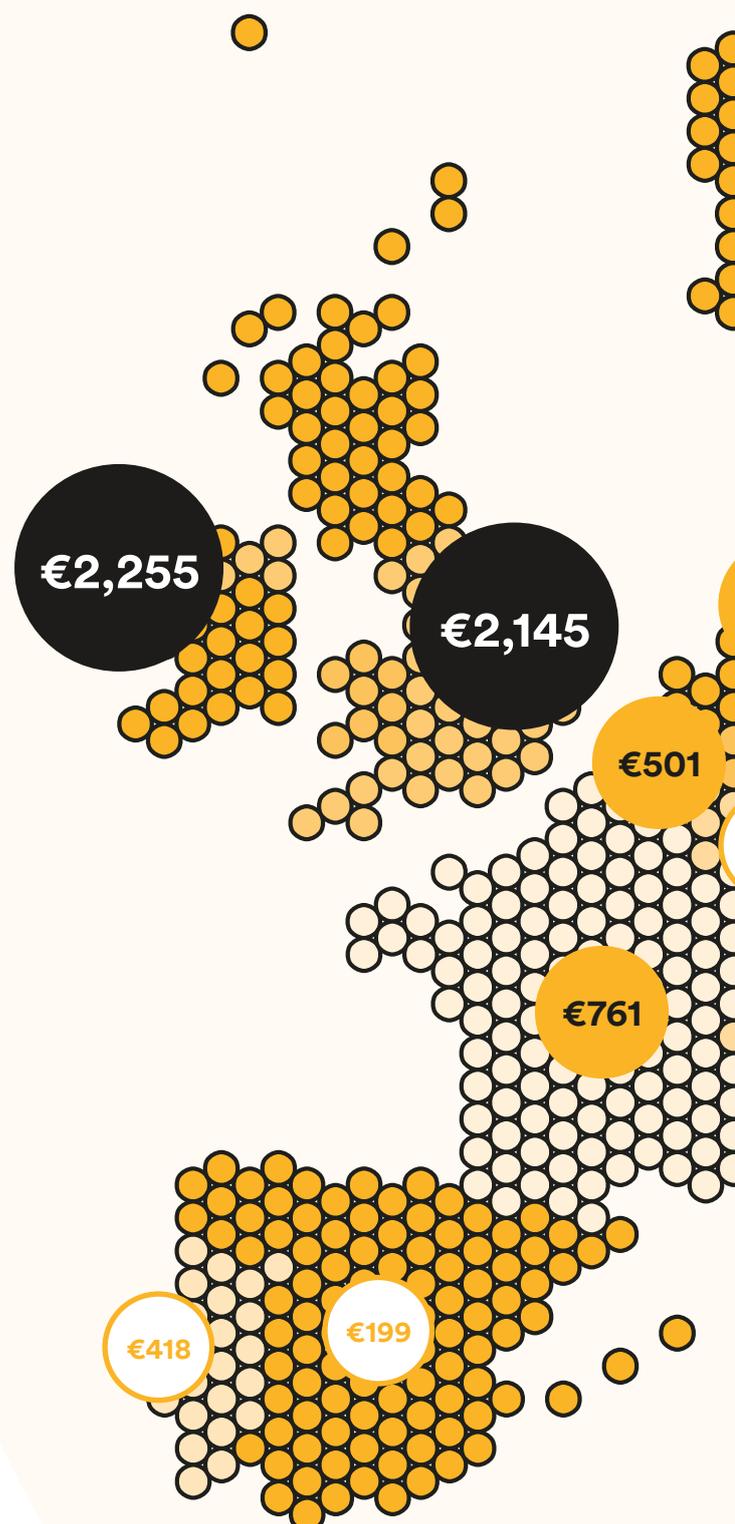
Rank	Country	€
1	United Kingdom	<b>113,273,284</b>
2	France	<b>57,332,962</b>
3	USA	<b>50,245,437</b>
4	Germany	<b>13,673,230</b>
5	Canada	<b>11,574,041</b>

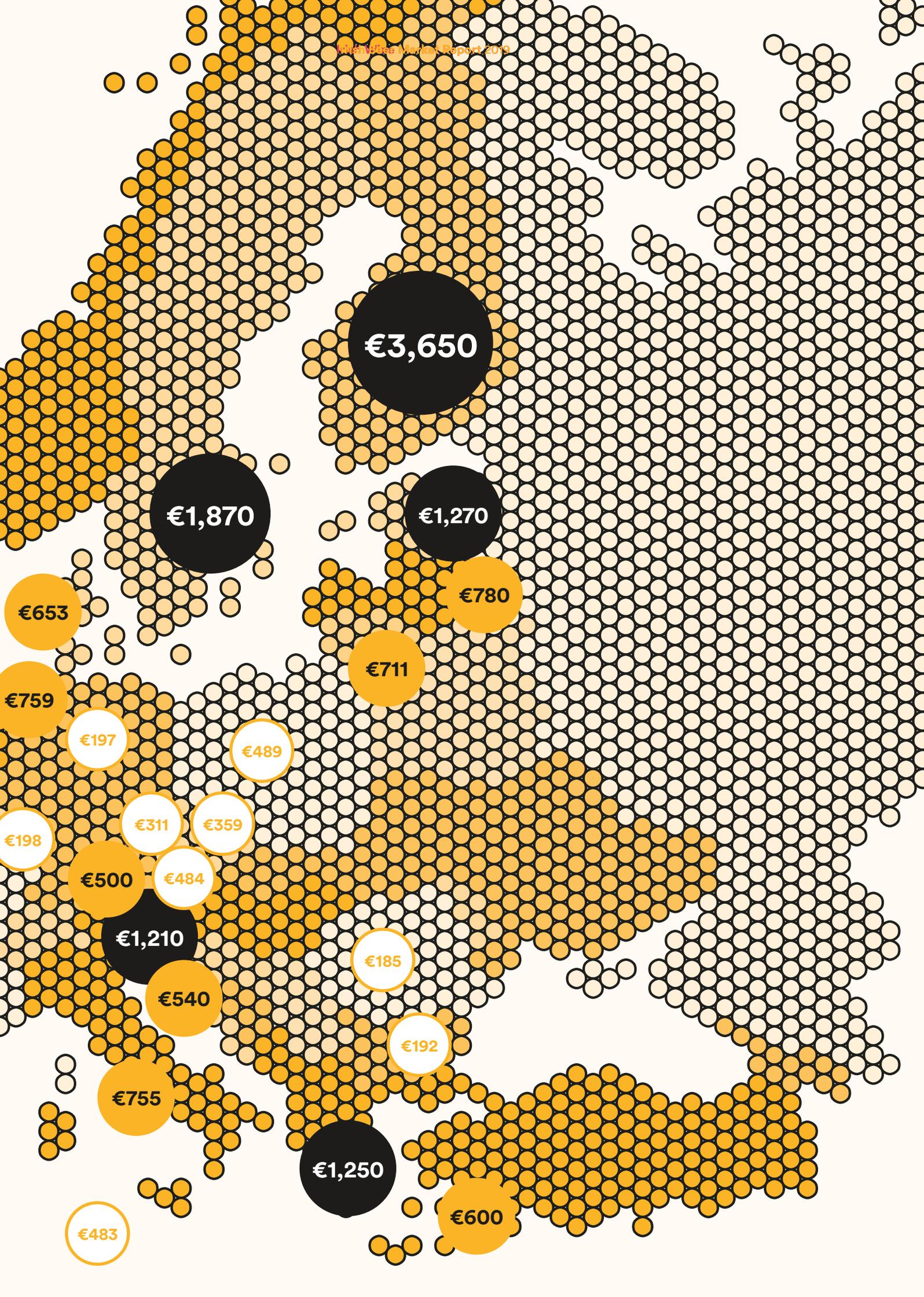
Source: Eurostat

# European Beer Excise Rates

Rank	Country	EU alcohol tax rates (excise) (euro per Hectolitre of pure alcohol) May 2020
1	Finland	€3,650
<b>2</b>	<b>Ireland</b>	<b>€2,255</b>
3	United Kingdom	€2,145
4	Sweden	€1,870
5	Estonia	€1,270
6	Greece	€1,250
7	Slovenia	€1,210
8	Latvia	€780
9	France	€761
10	Netherlands	€759
11	Italy	€755
12	Lithuania	€711
13	Denmark	€653
14	Cyprus	€600
15	Croatia	€540
16	Belgium	€501
17	Austria	€500
18	Poland	€489
19	Hungary	€484
20	Malta	€483
21	Portugal	€418
22	Slovakia	€359
23	Czech Republic	€311
24	Spain	€199
25	Luxembourg	€198
26	Germany	€197
27	Bulgaria	€192
28	Romania	€185

Rates at May 2020  
Source: Brewers of Europe









Established in 1904, **Drinks Ireland | Beer** is the representative voice for the brewing industry in Ireland. Today over 90% of all beer sold in Ireland is manufactured or distributed by members of the association. The success of the Irish brewing industry is demonstrated by the fact that premium Irish beers are now enjoyed the world over. The role of Drinks Ireland | Beer is to promote the beer category and highlight its huge contribution to Ireland economically, culturally and socially.

**Drinks Ireland | Beer is a part of Drinks Ireland**



**Drinks Ireland** is the **Ibec** group that represents alcohol drinks manufacturers and suppliers in Ireland. Ibec is the national voice of business in Ireland. Ibec represents the interests of business in Ireland and provides a wide range of direct services to its 7,500 member companies.



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