



drinksireland.ie/beer

A proud drinks industry at the
heart of the Irish economy.



Irish Beer Market Report 2023



Pride of Place

Policies for growth of the Irish drinks industry 2025-2030

The Irish drinks industry is proud of the communities we support in every town and city in the land, as well as the support we give to farmers, whose grain, milk and apples we buy. We are proud too of the world-leading brands we make, which help put Ireland on the map.

And we are proud of the role we have played, and continue to play, in supporting moderation, as Ireland's attitude to alcohol changes and matures. Per capita alcohol consumption in Ireland has fallen 30% over the last two decades.

Our place is at the heart of Irish communities – rural and urban, North and South. Our place is beyond Ireland too – we are exporting to over 120 countries globally and we are exporting more each year. And for many throughout the world, our drinks are synonymous with this country and the great food and drinks and hospitality and conviviality we have to offer.

Our policies are practical, balanced and considered and will support, in turn, a critical Irish industry.

Key Pillars



GROWING THE RURAL ECONOMY

10,000 people directly employed by the sector and 170,000 employees supported by hospitality jobs throughout Ireland.

DRIVING EXPORTS

Drinks exports were worth €2 in billion 2022 and are shipped to over 120 markets around the world.

INSPIRING INNOVATION

Ireland produces hundreds of drinks brands and new innovations like zero alcohol beer and spirits provide consumers with unprecedented choice.



PROMOTING RESPONSIBILITY

An industry committed to promoting moderation. Consumption in Ireland has decreased by 30% in the last 20 years.

EMBRACING SUSTAINABILITY

The industry is committed to mitigating carbon emissions and are leading on the sustainability agenda.

SUPPORTING THE EXPERIENCE ECONOMY

Irish Drinks industry is at the heart of the experience economy, with visitor centres welcoming 2.4 million visitors a year.

Continuing to grow with support:

- Evidence-based policy and proper engagement with industry
- Export development grants
- Greater levels of grant support for sustainability investments
- Support for the integrity of the EU single market
- Alignment of excise duty rates on drinks products and European averages
- A practical regulatory environment that supports innovation and right to responsible promotion

Introduction

Drinks Ireland annual beer market report for 2023 reflects a return to more normal trends for the Irish beer sector following the pandemic and the strong recovery of production and sales in 2022. The continued strong growth of non-alcohol beer sales stands out, as consumers of all ages are drinking more moderately and seeking more balance in how they drink. While overall beer sales were down marginally in 2023, non-alcohol beer grew last year by 18%.

In 2023, official Revenue data showed that beer sales decreased by 0.5% following a strong bounce back in 2022 after the Covid pandemic. There was also a further drop in per capita consumption in 2023 resulting in an almost 11% decrease since 2019. This is in line with the long-term trend of alcohol consumption decline in Ireland, down by 30% in the past 20 years. Per capita alcohol consumption in Ireland is now less than the United Kingdom and most European countries, including Spain, France, and Germany.

Based on member data, domestic beer production increased slightly by 1.6% following significant recovery in 2022 when it increased by 110% following major curtailment during the pandemic. However, the production of non-alcohol beer grew substantially, by 50%, as producers responded to the consumer led demand for this product. Our beer exports grew by more than 11% and reached a value of €330 million in 2023.

The industry has a strong ambition for further growth with significant investments ongoing in capacity, innovation, and market development.

Lager remains the dominant beer category in the Irish market despite a decrease of 2% to 57.6% of the market. In 2023, stout saw its market share increase by 2.6% to 35.6%. Ale's market share saw marginal growth to 4.9%. The phenomenal growth seen in the emerging non-alcohol beer category continued in 2023. Non-alcohol beer share is now 2% of market, an almost 100% increase in market share over the last four years.

This growth in non-alcohol products has accelerated even further over recent months through the increased availability of 0.0 alternatives in pubs, restaurants, hotels and in the off trade. This is on the back of strong consumer driven demand, linked to the ongoing trend of moderation and consumers seeking balance in their drinking.

This development is also supported by brewers through growing availability and awareness with responsible advertising and promotion.

It is a positive trend driven by great innovation amongst drinks producers in delivering high quality non-alcohol alternatives and new offerings that support moderation. As pointed to in our report, this is a global consumer trend. For example, non-alcoholic products now account for 14% of the beer market in Spain.

Ireland is on course to similarly see the market share of non-alcohol products increase over the coming years, supporting industry and government aims of increasing moderation. We look forward to working together as an industry, and with government, to further support these products which are still at an early stage in their growth.

Ireland continues to pay the third highest level of excise tax on beer when compared to the other 26 EU member states and the UK, and in the past decade, the Irish beer sector has contributed over €4 billion in excise receipts. On every pint of lager, 55 cents in excise go to the exchequer, and when excise and VAT are combined, €1.68 of every pint is paid to Revenue. Drinks Ireland | Beer continues to call on government to reduce Irish alcohol excise rates and to move towards EU norms.

Beer remains Ireland's favourite drink, and its share of the drinks market stands at 42.9% in 2023. The report shows that sales in the on-trade sector make up a higher proportion of beer sales with 2023 sales in Ireland's pubs, restaurants, and hotels representing 63.7% of all sales, an increase of 0.2% on 2022.

With many of the world's favourite beers brewed here in Ireland, as well as a vibrant craft brewing industry, the drinks industry is committed to a greener zero emissions future.

Our members are investing heavily in carbon efficient production processes, embracing greener transport, circular packaging solutions and funding sustainable and regenerative agricultural practices amongst Ireland's grain growers. The sector needs greater levels of grant support for sustainability investments in brewing, focussing on energy and water efficiency.

Despite the positive trends found in our report, the beer market faces challenges in the wider trading and business environment. In 2023, the Irish beer sector faced the increased costs of doing business and challenging economic headwinds, in particular inflation, cost of living pressures and more restrained consumer spending. Notwithstanding this, the Irish drinks industry is resilient and adaptable, and Drinks Ireland | Beer will continue to support our members in the future growth of the drinks sector, both nationally and internationally.



**Beer remains
Ireland's
favourite
drink, and its
share of the
drinks market
stands at
42.9% in 2023.**



Cormac Healy
Director of Drinks Ireland



Jennifer Wallace
Director, Drinks Ireland | Beer

Headlines

	2023	2022	Difference
Total Production (1000HL)	8,209	8,083	+1.6%

Source: Drinks Ireland Beer Members

	2023	2022	Difference
Total employment	965	935	+3.2%

Source: Drinks Ireland Beer Members

	2023	2022	Difference
Total Consumption (1000HL)	4,051	4,071	-0.5%

Source: Revenue

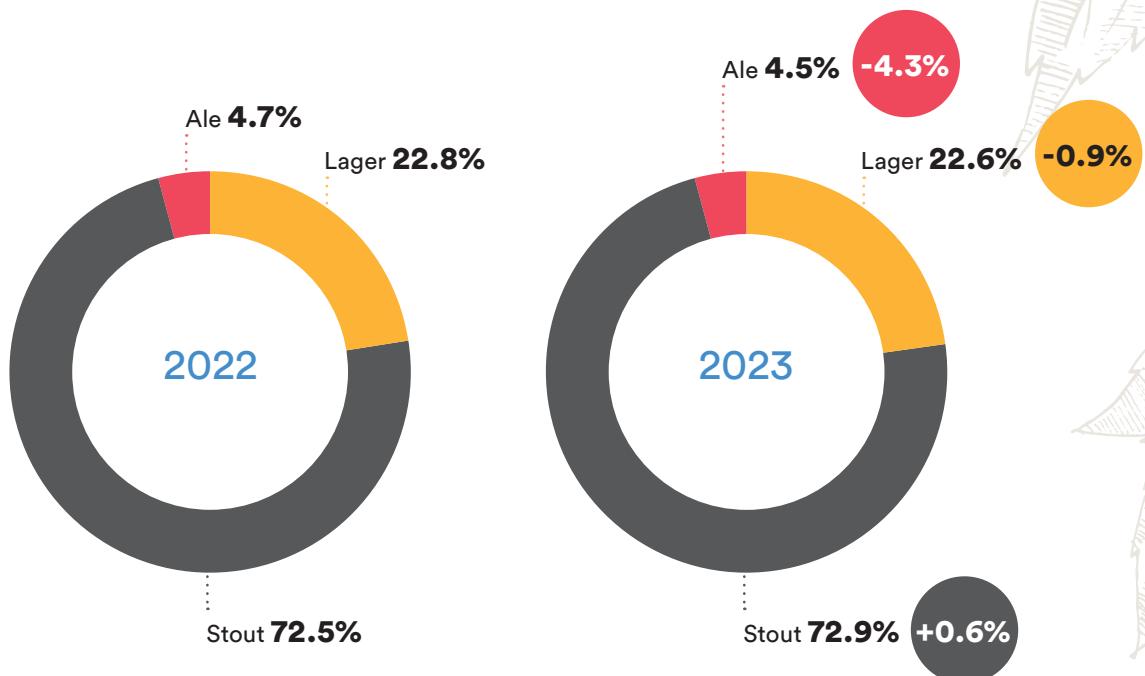
	2023	2022	Difference
Per Capita Consumption	69.0	71.2	-3.1%

Source: Calculation based on consumption at 5% ABV (pan-European benchmark) and CSO population figure of Census 2022 of 5,149,139 and of April 2023 estimate of 5,281,600.

	2023	2022	Difference
Export Value	€330m	€297m	11.1%

Source: EuroStat

Variant share of production in 2023



Non-alcohol beer sales

Ireland is one of the fastest growing alcohol-free markets globally and producers have responded to consumer demand by launching new zero alcohol innovations. In particular, the growth of 0.0% beer is a prevalent and promising trend, offering consumers a choice that supports moderation. While the category is emerging from a low base here at 2% of the Irish market, the market share for 0.0% beers has grown by almost 100% over the last four years according to Drinks Ireland | Beer member data. To continue this trajectory, and to support both the government and industry objective of encouraging moderation, brewers must have a practical regulatory environment which fosters growth in the 0.0% sector through responsible promotion and advertising. All signs are that Ireland will develop a significant 0.0% market in the years to come if promotion continues.



International market for non-alcohol beer

As outlined in our report, the growth in non-alcohol beer is a global consumer trend. Over the past 10 years, the international market for low-and no alcohol beers has grown dramatically as brewers have responded to demand for greater choice for consumers who wish to moderate their consumption and not compromise on taste. Beer now accounts for over 93% of the low and no-alcohol beverage market in Europe. While the category is emerging from a low base in Ireland, we see in Spain, for example, that non-alcohol beer has reached nearly 14% market share. At an overall EU level, 7% (1 in 14 beers) is a non-alcohol alternative. Ireland is on course to similarly see the market share of non-alcoholic products increase over the coming years, supporting industry and government aims of increasing moderation.

A practical regulatory environment, through responsible promotion and advertising, is therefore crucial for new to market products which are supporting moderation, and which are still at an early stage in their growth.

The market share for 0.0% beers has grown by almost 100% over the last four years.

0.0%

Market share of non-alcohol beer



Source: Drinks Ireland Beer Members

Sales channel

	2023	2022
On-Trade	63.7%	63.5%
Off-Trade	36.3%	36.5%

Source: Drinks Ireland Beer Members

Variant share of sales

	2023	2022	Difference
Lager	57.6%	58.8%	-2.0%
Stout	35.6%	34.7%	2.6%
Ale	4.9%	4.8%	2.1%
Non-alcohol	2.0%	1.7%	17.6%

Source: Drinks Ireland Beer Members

Variant share on/off trade

Variant	2023 on trade	2023 off-trade
Lager	55.6%	44.4%
Stout	77.4%	22.6%
Ale	69.9%	30.1%
Non-alcohol	37.1%	62.9%

Source: Drinks Ireland Beer Members

Variant	2022 on trade	2022 off-trade
Lager	40.1%	59.9%
Stout	65.7%	34.2%
Ale	59.1%	40.9%
Non-alcohol	20%	80%

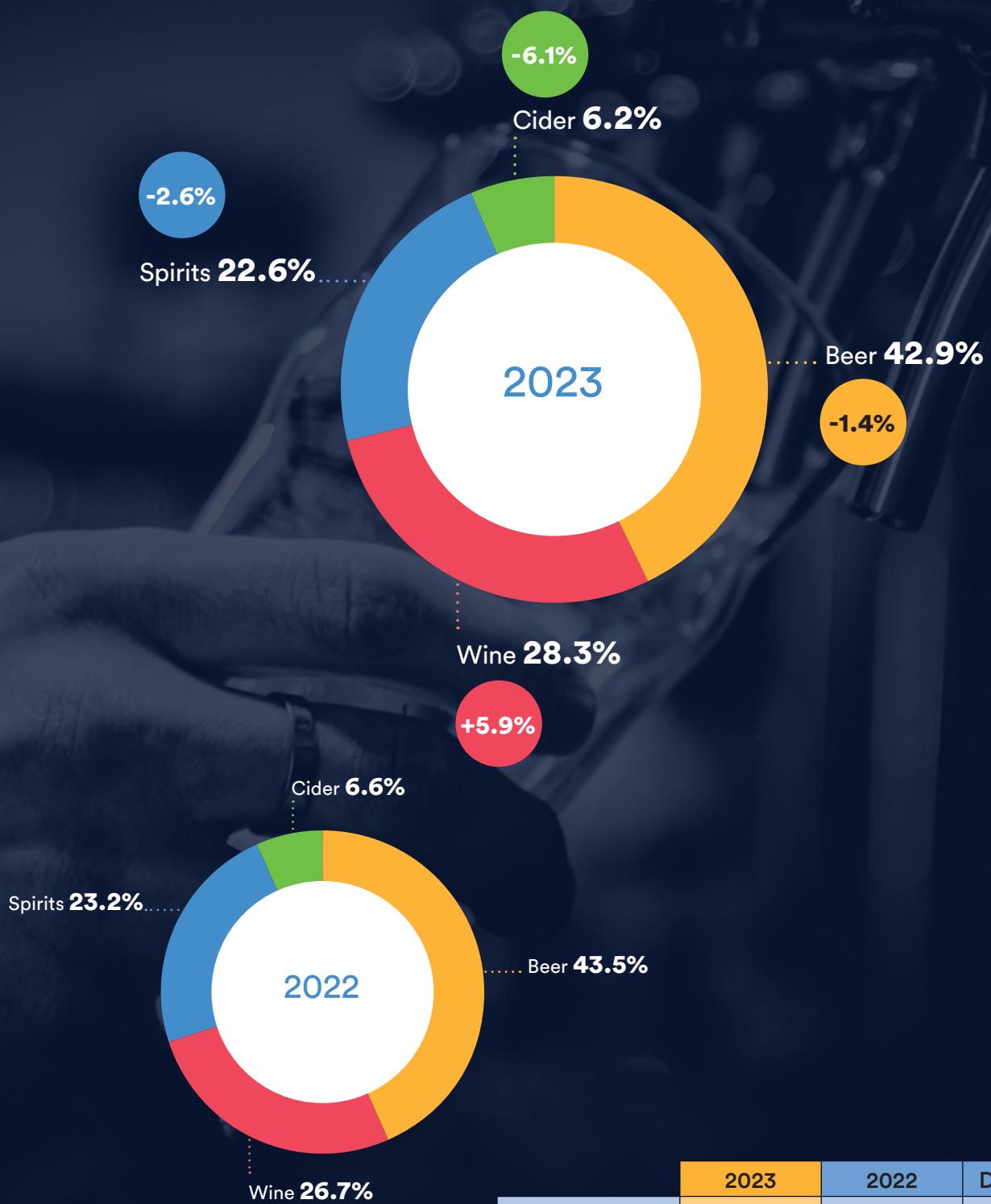
Source: Drinks Ireland Beer Members



With many of the world's favourite beers brewed here in Ireland, as well as a vibrant craft brewing industry, the drinks industry is committed to a net zero emissions future. The sector needs greater levels of grant support from for sustainability investments in brewing, focussing on energy and water efficiency.



Alcohol consumption by category mix



	2023	2022	Difference
Beer	42.9%	43.5%	-1.4%
Wine	28.3%	26.7%	5.9%
Spirits	22.6%	23.2%	-2.6%
Cider	6.2%	6.6%	-6.1%

Source: Revenue Commissioners

Excise receipts (€ million)

Year	Beer	Wine	Spirits	Cider	Total	Beer as %
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	€1,233	34%
2020	€351	€425	€374	€53	€1,203	29%
2021	€351	€385	€389	€51	€1,176	30%
2022	€392	€375	€411	€52	€1,230	32%
2023	€404	€396	€410	€50	€1,260	32%

Source: Revenue Commissioners

Excise duty on a pint of lager



Excise duty on a pint of stout



Source: CSO



Consumers of all ages are drinking more moderately and seeking more balance in how they drink.



EU (& UK) Beer Excise Rates 2023

Rank	Country	Euro per HL
1	Finland	€38.05
2	United Kingdom	€23.34
3	Ireland	€22.55
4	Sweden	€18.22
5	Estonia	€12.70
6	Greece	€12.50
7	Slovenia	€12.10
8	Lithuania	€8.60
9	Latvia	€8.20
10	France	€7.82
11	Netherlands	€7.59
12	Italy	€7.55
13	Denmark	€6.55
14	Cyprus	€6.00
15	Croatia	€5.31
16	Poland	€5.12
17	Belgium	€5.01
18	Austria	€5.00
19	Malta	€4.83
20	Hungary	€4.24
21	Portugal	€4.39
22	Slovakia	€3.59
23	Czech Republic	€3.26
24	Romania	€2.12
25	Spain	€1.99
26	Luxembourg	€1.98
27	Germany	€1.97
28	Bulgaria	€1.92

Rates in 2023

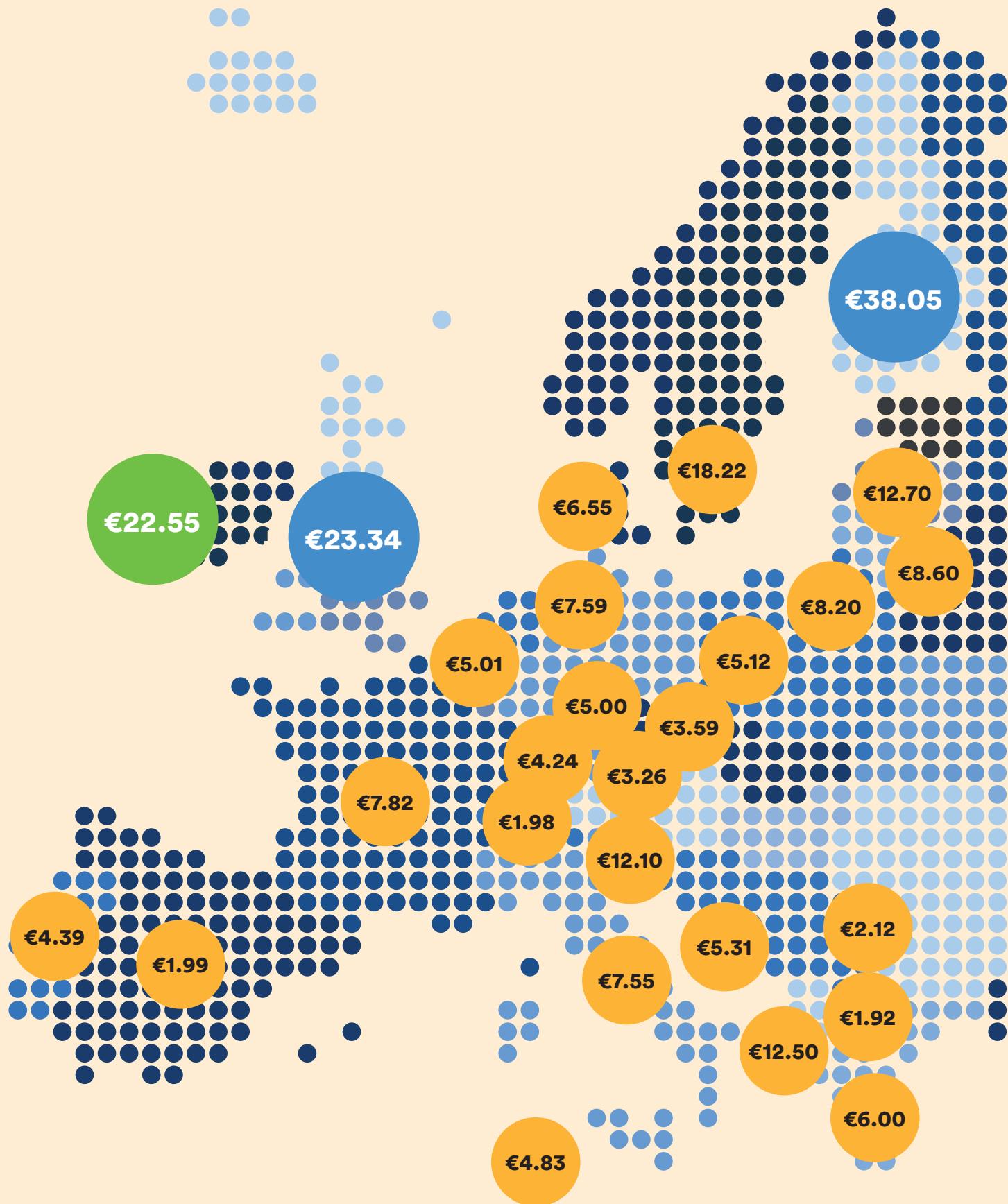
Source: European Commission

Export destinations

Rank	Country	€
1	United Kingdom	€160m
2	USA	€65m
3	France	€40m
4	Germany	€15m
5	Belgium	€15m

Source: Eurostat

EU (& UK) Beer Excise Rates 2023





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 Ibex sector that represents the interests of alcohol drinks manufacturers and suppliers on the island of Ireland. Drinks Ireland is globally unique as it represents all categories of alcohol products in one umbrella organisation through its various trade associations.

**Drinks Ireland | Beer
Drinks Ireland | Cider
Drinks Ireland | Spirits
Drinks Ireland | Wine
Irish Whiskey Association**

Drinks Ireland aims to ensure that the business environment on the island of Ireland is conducive to drinks enterprise. Through our activity we aim to ensure that the industry is recognised for the positive contribution it makes to the economic and cultural landscape.



Drinks Ireland
84/86 Lower Baggot Street
Dublin 2

T: + 353 1 605 1500
E: info@drinksireland.ie
W: www.drinksireland.ie
@DrinksIreland @DrinksIrlBeer