



EUROPEAN BEER TRENDS

STATISTICS REPORT | 2019 EDITION





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The Brewers of Europe

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**PIERRE-OLIVIER BERGERON**

Secretary General
The Brewers of Europe

Dear Reader,

I'm pleased to present the latest trends in Europe's beer sector as part of the 2019 edition of our annual statistical report.

It is fantastic to be able to announce the 10,000th brewery in the European Union! Indeed, The Brewers of Europe welcomes all new breweries, many of which are SMEs and microbreweries, and we are very much encouraged by their role in diversifying and improving the sector as a whole across Europe. More than ever, brewers have stepped up to meet consumers' expectations for innovation in products, more sustainable production, as well as increased choice such as lower-alcohol offerings and speciality beers.

We are delighted that the figures presented here show continued growth in many key metrics; not only in the numbers of breweries, but also in the production, consumption and export of beer in Europe.

For half a decade now, we have seen a gradual, but upward movement in most, if not all, of our numbers. They tell a story of steady and sustained progress, further strengthening beer's contribution to the European economy as a major consumer good and export commodity.

Across Europe, beer production volumes have again risen, surpassing the 400 million hectolitre mark in the EU for the first time in a decade. We have said that beer has bounced back from the economic crisis, but what we can say now is that it has come back different and better than ever.

Indeed, more people are choosing beer more often. Beer consumption rose compared to the previous year in every single country. This at a time when overall alcohol volumes and harmful drinking are declining in Europe, as some consumers seem to be switching towards lower strength products such as beer and also towards lower alcohol and non-alcohol varieties within the beer category too. What is also interesting is that the styles of beer people are drinking are more varied, more specialised and now more transparent.

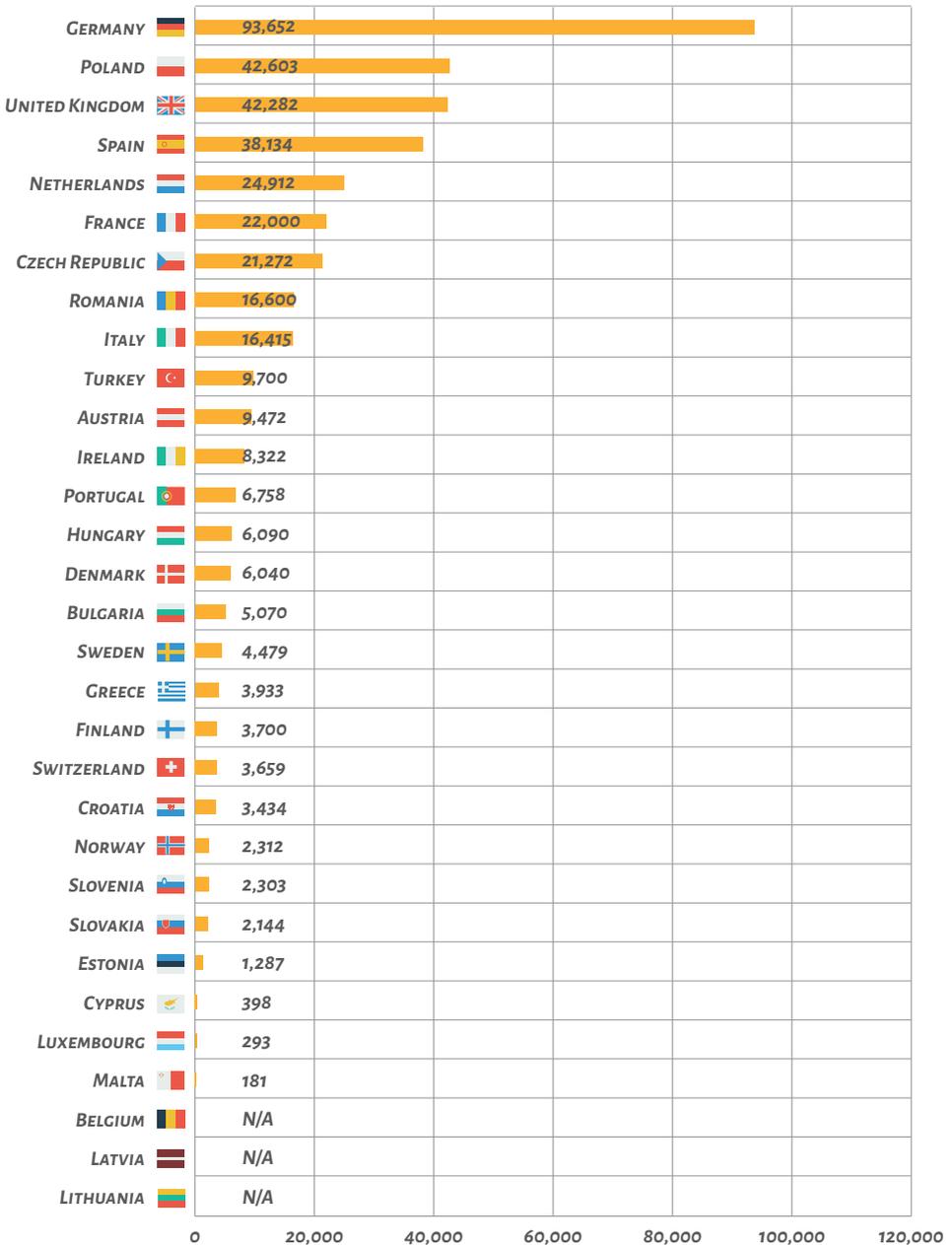
That is to say, aside from continuing to meet consumers' expectations of quality and choice of products, we have made important steps towards fulfilling our commitments to better consumer information – culminating this year in the signing of a memorandum of understanding by The Brewers of Europe and its members to label calorie values and ingredients on all cans and bottles by 2022. We are proud to be clear.

Furthermore, with European policy makers poised to seriously tackle climate change, The Brewers of Europe Forum in June 2019 created headlines around green and sustainability pledges. Along with more than 1,100 participants, we left Antwerp energised after a hugely successful event and look forward to the third edition of the Forum in 2020. It will take place in Brussels once again and have a major focus on sustainability, aligning brewers with the new European Commission's emphasis on the European Green Deal and other climate measures in its next term.

At the 2020 Forum, we plan to bring together not only the vast brewing community, but to earnestly connect with the European institutions – especially through initiatives such as the relaunch of the European Parliament Beer Club for the new legislature. We invite MEPs from across the political spectrum to, yes, enjoy a beer, but also to consider how our sector is interlinked with a variety of policy areas that shape Europe's vision for the future.

As represented by the statistics in this report, beer is growing in Europe and in many individual countries and markets – no matter how big or how small. We sincerely hope that these trends continue, and congratulate the passionate, engaged, innovative people in the 10,000+ breweries that enable our sector to celebrate its progress.

Pierre-Olivier Bergeron
Secretary General of The Brewers of Europe



COUNTRY	2012	2013	2014	2015	2016	2017	2018
 AUSTRIA	8,924	9,045	9,001	9,023	9,227	9,312	9,472
 BELGIUM	18,751	18,138	18,207	19,811	20,616	N/A	N/A
 BULGARIA	4,992	5,112	4,890	4,960	5,180	5,020	5,070
 CROATIA	3,634	3,408	3,405	3,379	3,348	3,395	3,434
 CYPRUS	329	322	318	341	365	383	398
 CZECH REPUBLIC	18,692	18,690	19,129	19,530	20,475	20,322	21,272
 DENMARK	6,080	6,166	6,110	5,970	6,200	6,060	6,040
 ESTONIA	1,433	1,465	1,608	1,398	1,416	1,369	1,287
 FINLAND	4,030	4,020	4,010	3,970	4,100	3,812	3,700
 FRANCE	17,600	18,300	19,850	20,300	20,650	21,000	22,000
 GERMANY	94,618	94,365	95,274	95,623	94,957	93,013	93,652
 GREECE	3,745	3,750	3,700	3,820	3,827	3,800	3,933
 HUNGARY	6,312	6,181	6,239	5,965	6,239	6,279	6,090
 IRELAND	8,195	8,008	7,288	7,755	7,680	8,019	8,322
 ITALY	13,293	13,256	13,521	14,286	14,516	15,673	16,415
 LATVIA	1,405	1,467	968	856	739	820	N/A
 LITHUANIA	2,841	2,886	3,172	3,108	2,999	2,727	N/A
 LUXEMBOURG	292	281	271	287	290	290	293
 MALTA	135	138	146	154	170	175	181
 NETHERLANDS	24,271	23,636	23,726	24,012	24,559	24,313	24,912
 POLAND	39,294	40,001	40,075	40,890	41,369	40,382	42,603
 PORTUGAL	7,986	7,323	7,290	6,465	6,474	6,994	6,758
 ROMANIA	18,000	16,110	14,750	15,950	15,780	16,050	16,600
 SLOVAKIA	2,998	2,883	2,648	2,404	2,385	2,467	2,144
 SLOVENIA	1,819	2,011	2,098	2,029	1,696	1,399	2,303
 SPAIN	33,029	32,691	33,614	34,888	36,344	37,391	38,134
 SWEDEN	4,711	4,755	4,643	4,689	4,442	4,421	4,480
 UNITED KINGDOM	42,047	41,956	41,204	41,270	38,084	40,480	42,282
TOTAL EU 28	389,456	386,364	387,155	393,133	394,127	≈ 395,982	≈ 405,938
 NORWAY	2,256	2,293	2,250	2,290	2,361	2,199	2,312
 SWITZERLAND	3,515	3,370	3,432	3,438	3,422	3,464	3,659
 TURKEY	11,013	9,809	10,252	9,819	9,567	9,597	9,700
TOTAL ALL	406,240	401,836	403,089	408,680	409,477	≈ 411,242	≈ 421,721

Slovenian data does not cover craft brewer production which represents less than 1% of the market

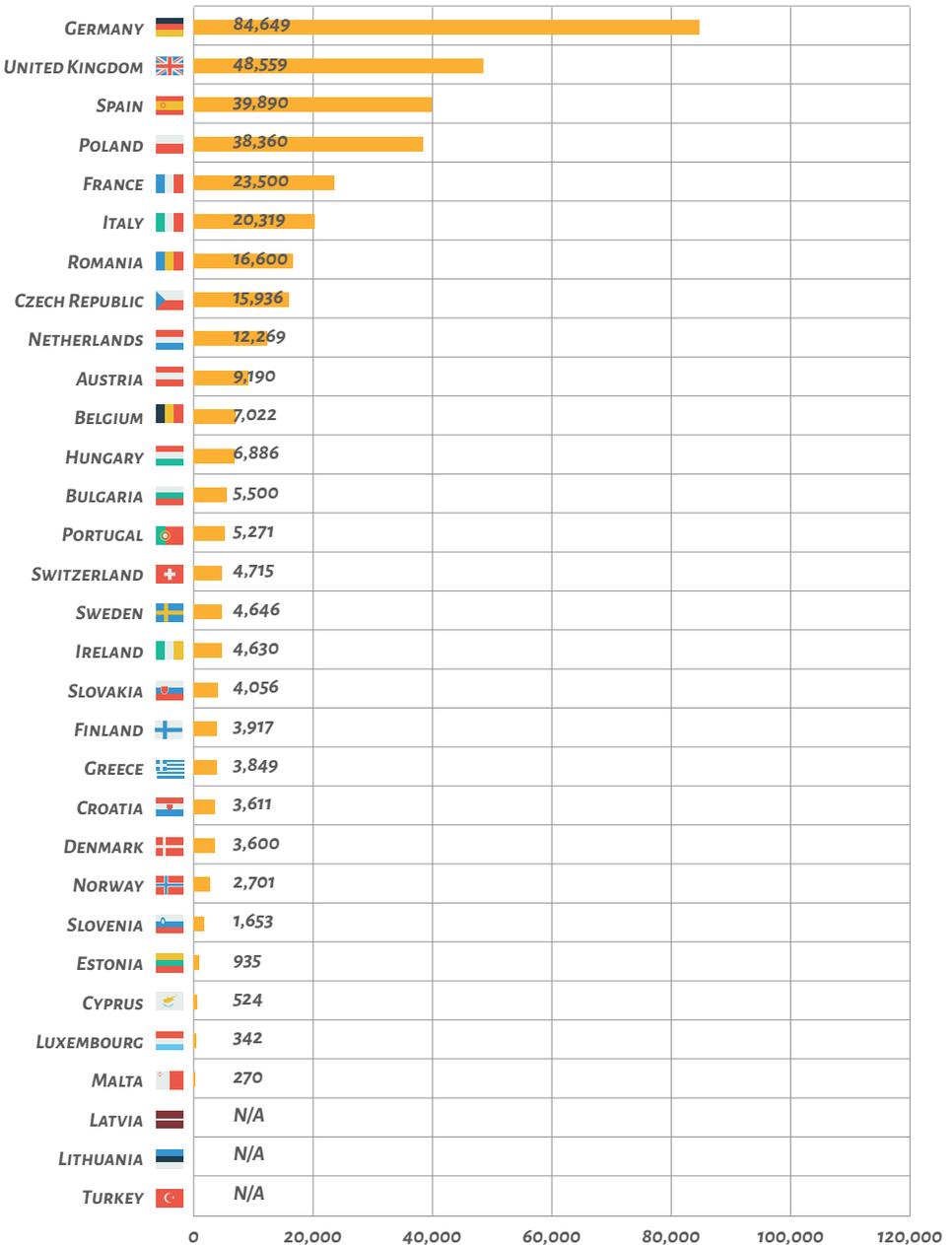
Austrian, Lituanian and UK definitions meet the customs code definition

Bulgarian, Czech, Greek, Slovenian and Spanish 'beer' comprises alcohol-free beer, non-alcohol and low alcohol beers and beer mixes (including Radlers)

Belgian, Estonian, French, Swedish, Maltese and Portuguese 'beer' comprises alcohol-free beer, non-alcohol and low alcohol beers

Norwegian 'beer' comprises alcohol-free beer, non-alcohol and low alcohol beers from 0.0% ABV to 2.7% ABV

Finnish 'beer' comprises alcohol-free beer, non-alcohol and low alcohol beers and beer mixes of the members of the association who represent about 91% of the market sales



BEER CONSUMPTION 2012 - 2018

(in 1,000 HL)

COUNTRY	2012	2013	2014	2015	2016	2017	2018
 AUSTRIA	9,110	9,005	8,885	8,977	9,030	8,984	9,190
 BELGIUM	8,228	8,092	8,095	7,951	7,689	7,013	7,022
 BULGARIA	5,404	5,462	5,230	5,300	5,500	5,400	5,500
 CROATIA	3,411	3,286	3,218	3,322	3,292	3,398	3,611
 CYPRUS	471	480	425	457	468	515	524
 CZECH REPUBLIC	15,960	15,798	15,768	15,703	15,875	15,518	15,936
 DENMARK	3,437	3,530	3,650	3,430	3,680	3,580	3,600
 ESTONIA	1,010	1,020	931	900	888	905	935
 FINLAND	4,286	4,337	4,244	4,209	4,208	4,109	3,917
 FRANCE	19,941	19,421	19,956	20,600	21,190	21,500	23,500
 GERMANY	86,279	85,888	86,512	86,018	85,532	83,582	84,649
 GREECE	3,945	3,916	3,845	3,825	3,882	3,801	3,849
 HUNGARY	5,958	5,704	5,793	6,541	6,704	6,757	6,886
 IRELAND	4,677	4,328	4,481	4,414	4,576	4,479	4,630
 ITALY	17,458	17,544	17,755	18,914	19,029	19,684	20,319
 LATVIA	1,543	1,545	1,555	1,523	1,510	1,604	N/A
 LITHUANIA	2,830	2,760	2,784	2,680	2,532	2,213	N/A
 LUXEMBOURG	319	316	308	300	312	321	342
 MALTA	199	202	211	218	231	247	270
 NETHERLANDS	12,122	11,721	11,326	11,696	11,871	11,935	12,269
 POLAND	37,803	37,388	37,644	37,706	37,903	37,223	38,360
 PORTUGAL	4,927	4,937	4,764	4,741	4,891	5,251	5,271
 ROMANIA	18,201	16,300	14,900	15,800	15,800	16,110	16,600
 SLOVAKIA	4,125	3,874	3,720	3,956	3,708	3,914	4,056
 SLOVENIA	1,520	1,562	1,615	1,583	1,635	1,608	1,653
 SPAIN	35,106	35,212	36,315	37,456	38,511	39,378	39,890
 SWEDEN	4,660	4,713	4,399	4,368	4,454	4,542	4,646
 UNITED KINGDOM	42,962	42,422	43,752	43,762	43,731	45,924	48,559
TOTAL EU 28	355,892	350,763	352,082	356,350	358,631	359,494	≈ 369,801
 NORWAY	2,496	2,523	2,504	2,536	2,666	2,618	2,701
 SWITZERLAND	4,623	4,595	4,657	4,624	4,605	4,623	4,715
 TURKEY	9,988	9,047	9,680	9,082	9,003	9,151	N/A
TOTAL ALL	372,998	366,928	368,923	372,592	374,905	375,886	≈ 386,368

Slovenian data does not cover craft brewer production which represents less than 1% of the market

Austrian, Lituanian and UK definitions meet the customs code definition

Bulgarian, Czech, Greek, Slovenian and Spanish 'beer' comprises alcohol-free beer, non-alcohol and low alcohol beers and beer mixes (including Radlers)

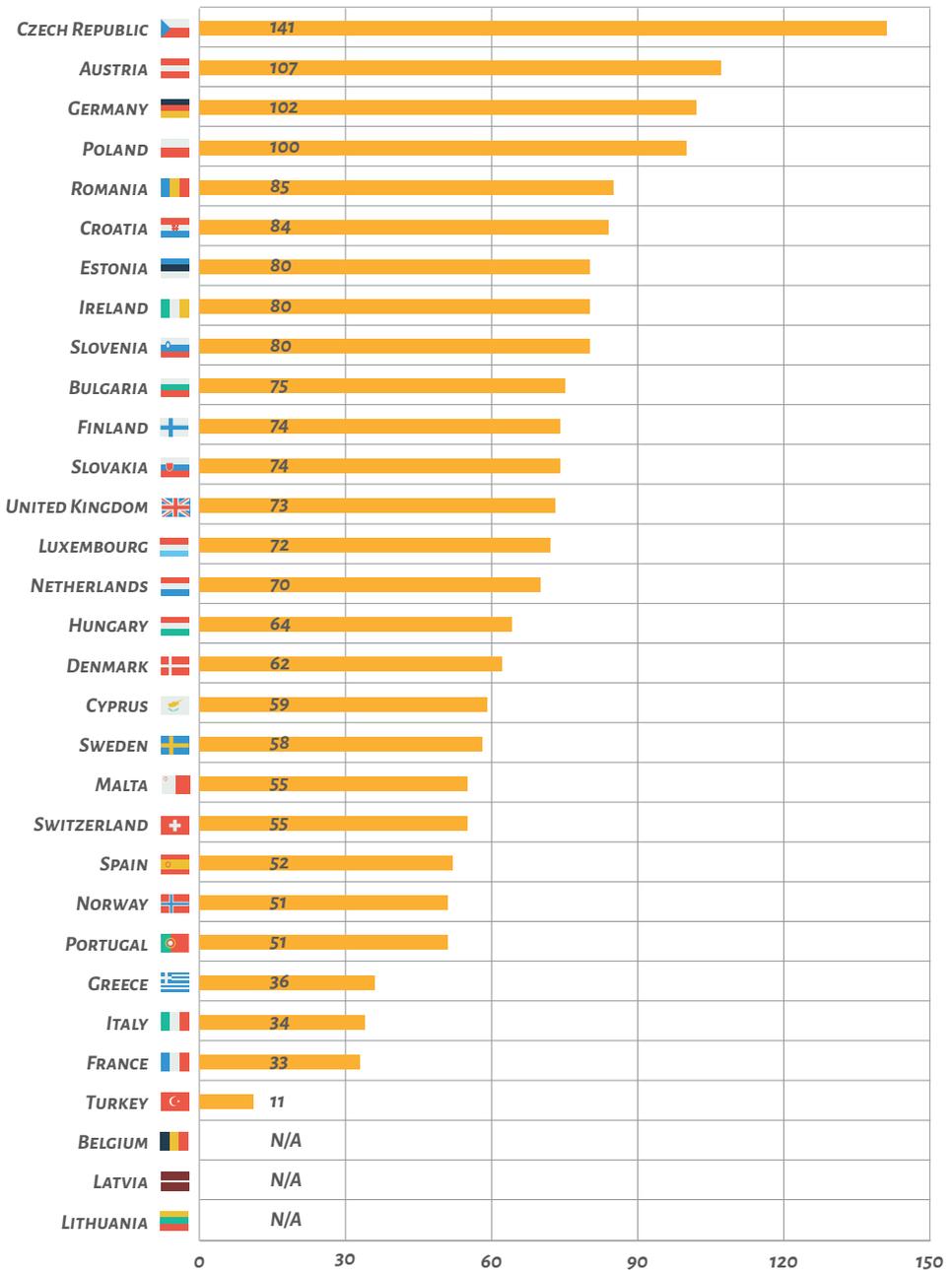
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BEER CONSUMPTION PER CAPITA 2018

(Litres)

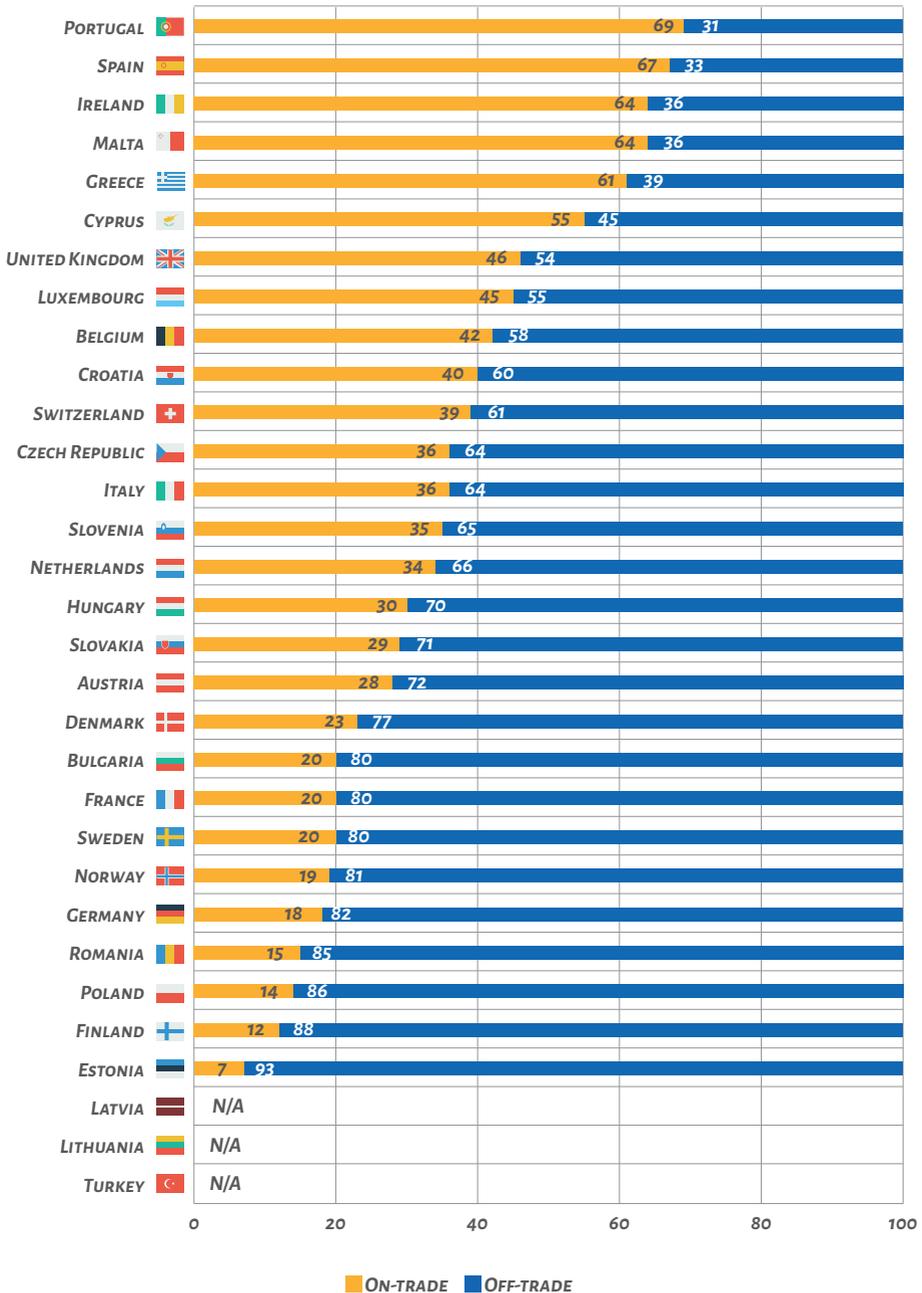


BEER CONSUMPTION PER CAPITA 2012 - 2018

(Litres)

COUNTRY	2012	2013	2014	2015	2016	2017	2018
 AUSTRIA	110	108	107	107	106	105	107
 BELGIUM	74	72	72	71	68	N/A	N/A
 BULGARIA	73	74	72	74	76	74	75
 CROATIA	78	76	80	77	75	79	84
 CYPRUS	55	55	49	54	55	58	59
 CZECH REPUBLIC	147	144	144	143	143	138	141
 DENMARK	64	64	65	60	62	62	62
 ESTONIA	90	91	84	82	80	82	80
 FINLAND	79	80	78	77	77	75	74
 FRANCE	31	30	30	31	32	33	33
 GERMANY	108	107	107	106	104	101	102
 GREECE	35	35	35	35	36	35	36
 HUNGARY	60	60	59	59	62	63	64
 IRELAND	86	79	81	80	81	79	80
 ITALY	29	29	29	31	31	32	34
 LATVIA	76	78	78	78	78	79	N/A
 LITHUANIA	96	93	95	92	88	N/A	N/A
 LUXEMBOURG	83	79	76	76	74	76	72
 MALTA	48	40	48	50	53	52	55
 NETHERLANDS	72	70	68	68	69	70	70
 POLAND	98	96	98	98	98	97	100
 PORTUGAL	49	49	46	46	47	51	51
 ROMANIA	90	81	74	80	80	82	85
 SLOVAKIA	76	72	69	73	68	72	74
 SLOVENIA	74	75	78	77	79	78	80
 SPAIN	48	46	N/A	47	46	49	52
 SWEDEN	50	50	48	47	51	55	58
 UNITED KINGDOM	67	66	68	67	67	70	73
 NORWAY	49	49	49	49	51	50	51
 SWITZERLAND	57	56	56	55	55	54	55
 TURKEY	13	12	13	12	12	11	11

*The Spanish info is provided by the Ministry of Agriculture
Estonia: as from 2012 calculation on 15+ years of age
Slovenia: on total population basis*

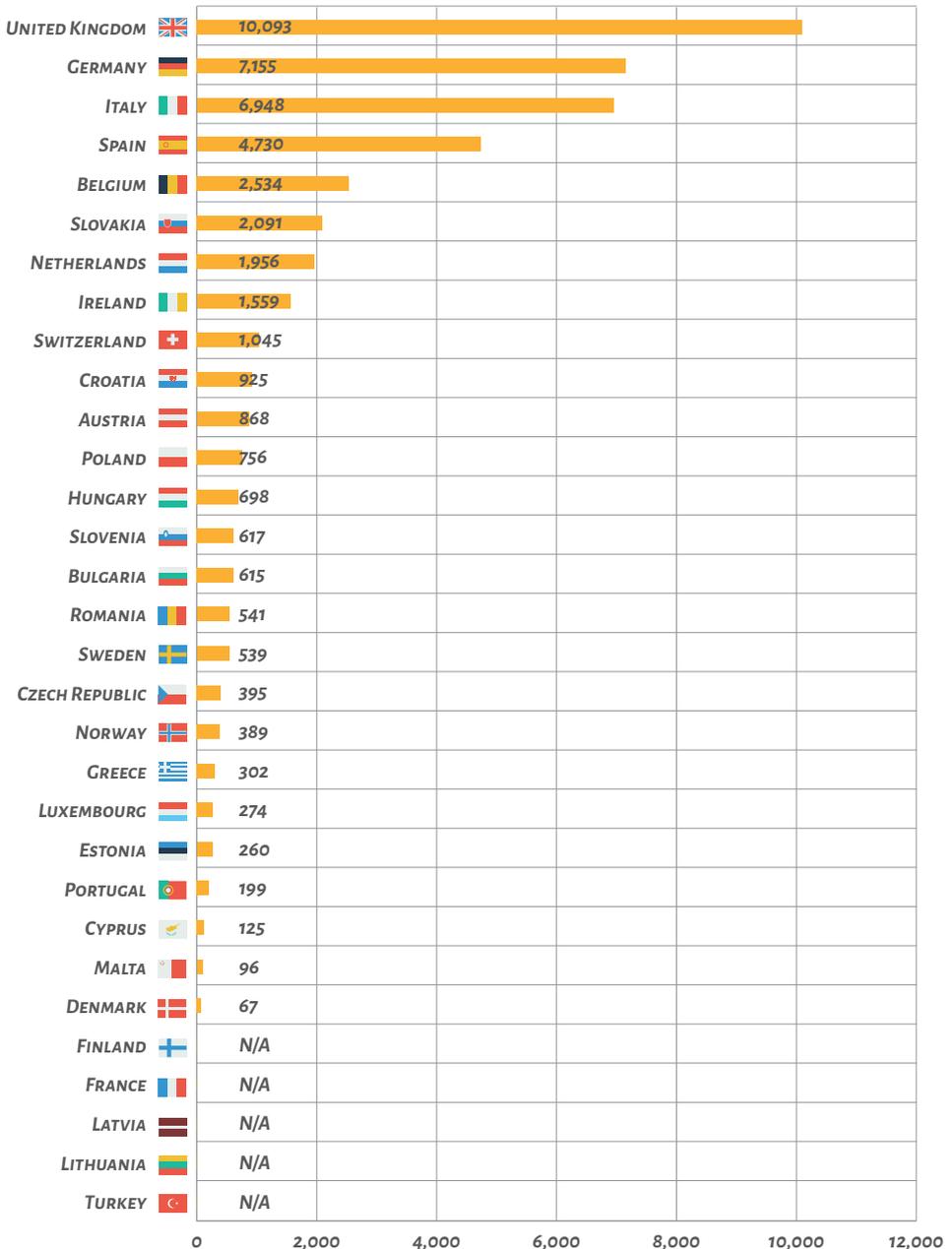


COUNTRY	2012		2013		2014		2015		2016		2017		2018	
	ON	OFF												
 AUSTRIA	32	68	32	68	29	71	28	72	29	71	28	72	28	72
 BELGIUM	46	54	45	55	45	55	44	56	44	56	43	57	42	58
 BULGARIA	25	75	23	77	20	80	22	78	20	80	20	80	20	80
 CROATIA	35	65	36	64	39	61	40	60	40	60	40	60	40	60
 CYPRUS	42	58	40	60	42	58	42	58	42	58	51	49	55	45
 CZECH REPUBLIC	43	57	41	59	41	59	40	60	39	61	38	62	36	64
 DENMARK	25	75	25	75	25	75	23	77	23	77	25	75	23	77
 ESTONIA	9	91	9	91	9	91	8	92	8	92	7	93	7	93
 FINLAND	15	85	15	85	15	85	15	85	14	86	13	87	12	88
 FRANCE	23	77	21	79	20	80	20	80	20	80	20	80	20	80
 GERMANY	19	81	19	81	19	81	19	81	18	82	18	82	18	82
 GREECE	56	44	56	44	55	45	57	43	59	41	59	41	61	39
 HUNGARY	38	62	35	65	35	65	35	65	35	65	35	65	30	70
 IRELAND	61	39	64	36	64	36	67	33	66	34	65	35	64	36
 ITALY	42	58	41	59	41	59	40	60	39	61	38	62	36	64
 LATVIA	8	92	9	91	10	90	10	90	10	90	10	90	N/A	N/A
 LITHUANIA	8	92	8	92	10	90	9	91	10	90	N/A	N/A	N/A	N/A
 LUXEMBOURG	52	48	52	48	51	49	49	51	48	52	47	53	45	55
 MALTA	62	38	60	40	60	40	60	40	65	35	64	36	64	36
 NETHERLANDS	27	73	25	75	35	65	35	65	35	65	34	66	34	66
 POLAND	10	90	10	90	15	85	15	85	15	85	15	85	14	86
 PORTUGAL	68	33	63	37	64	36	63	37	63	37	69	31	69	31
 ROMANIA	22	78	19	81	18	82	18	82	16	84	15	85	15	85
 SLOVAKIA	37	63	36	64	34	66	33	67	31	69	29	71	29	71
 SLOVENIA	40	60	40	60	40	60	40	60	40	60	40	60	35	65
 SPAIN	63	37	62	38	63	37	64	36	62	38	63	37	67	33
 SWEDEN	20	80	20	80	20	80	21	79	21	79	21	79	20	80
 UNITED KINGDOM	53	47	51	49	50	50	49	51	48	52	47	53	46	54
 NORWAY	24	76	20	80	20	80	20	80	19	81	19	81	19	81
 SWITZERLAND	50	50	47	53	46	54	44	56	40	60	40	60	39	61
 TURKEY	26	74	24	76	24	76	24	76	23	77	23	77	N/A	N/A

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TOTAL IMPORTS 2018

(intra-EU and extra-EU in 1,000 HL)



IMPORTS 2013 - 2015

(in 1,000 HL)

COUNTRY	2013		2014		2015	
	INTRA-EU	EXTRA-EU	INTRA-EU	EXTRA-EU	INTRA-EU	EXTRA-EU
 AUSTRIA	535	84	590	65	584	81
 BELGIUM	984	44	1,001	110	1,006	158
 BULGARIA	355	73	367	99	393	145
 CROATIA	352	87	547	141	563	137
 CYPRUS	147	11	107	9	108	7
 CZECH REPUBLIC	493	5	286	5	309	3
 DENMARK	373	42		474		540
 ESTONIA		391		307		281
 FINLAND	491	39	391	34	406	36
 FRANCE	5,984	212	6,526	237	6,900	245
 GERMANY	6,213	93	6,730	53	6,616	81
 GREECE	494	81	406	34	351	92
 HUNGARY		206		343		572
 IRELAND		1,504		1,652		1,525
 ITALY	5,998	217	5,996	233	6,878	297
 LATVIA	443	78	801	N/A	785	N/A
 LITHUANIA	460	275		650		480
 LUXEMBOURG		180		180		274
 MALTA	62	2	60	6	63	7
 NETHERLANDS		2,058		1,647		1,652
 POLAND		542	737	30	594	123
 PORTUGAL	133	0	182	0	160	0
 ROMANIA	522	17	430	20	325	25
 SLOVAKIA		1,157		1,276		1,627
 SLOVENIA	250	10	337	12		401
 SPAIN	3,742	145	4,305	151	4,670	155
 SWEDEN		502		495		487
 UNITED KINGDOM	8,181	627	7,824	679	8,151	884
TOTAL EU 28	44,894		≈ 46,643		≈ 49,255	
 NORWAY		229		255		245
 SWITZERLAND	1,174	51	1,172	53	1,122	64
 TURKEY		29		48		62
TOTAL ALL	46,377		≈ 48,171		≈ 50,748	

Spanish data includes imports from NC 2203 (and 220291 as from 2017)

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IMPORTS 2016 - 2018

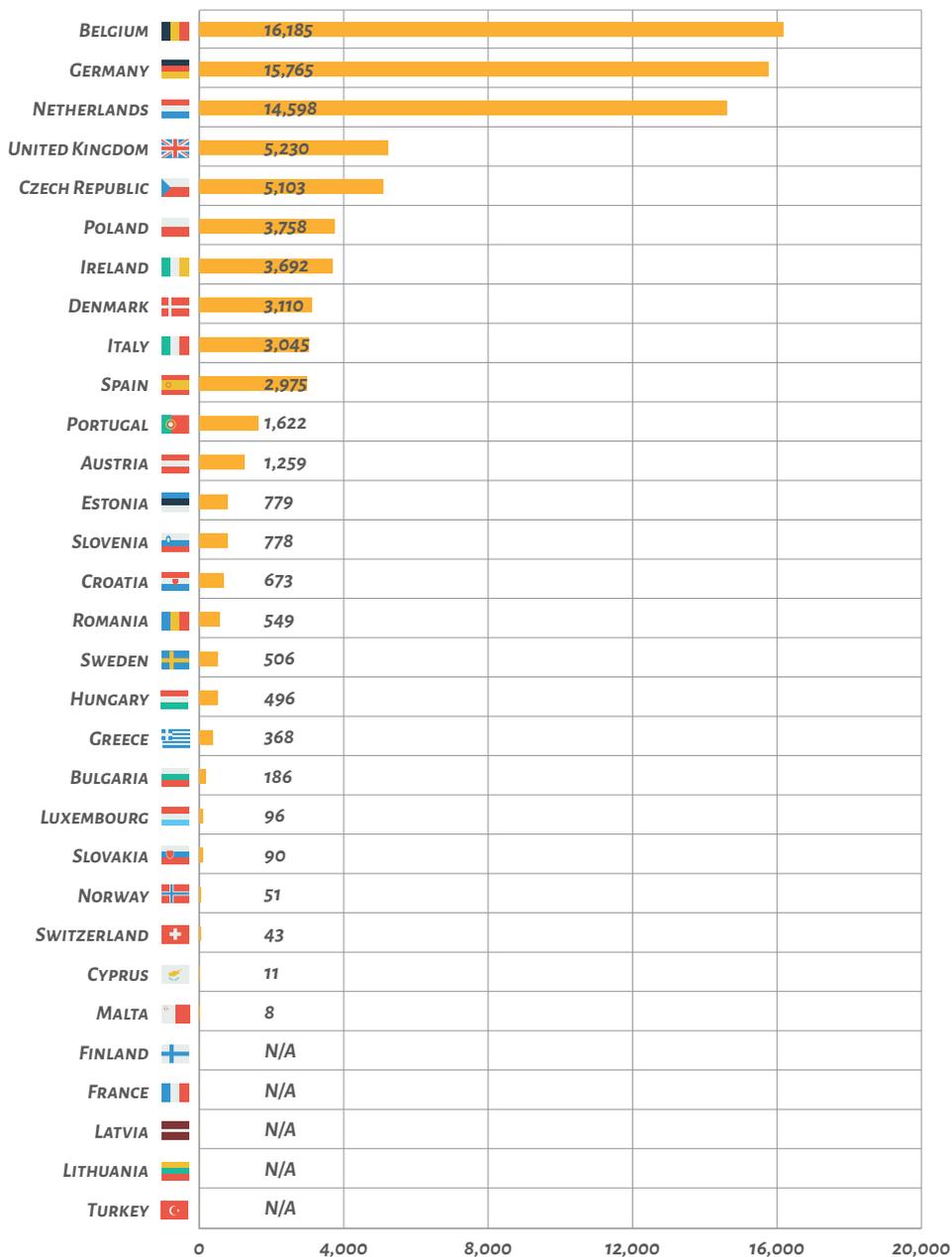
(in 1,000 HL)

COUNTRY	2016		2017		2018	
	INTRA-EU	EXTRA-EU	INTRA-EU	EXTRA-EU	INTRA-EU	EXTRA-EU
 AUSTRIA	653	88	580	103	760	107
 BELGIUM	1,001	157	N/A	N/A	2,534	
 BULGARIA	327	201	269	230	291	324
 CROATIA	545	148	681	146	797	128
 CYPRUS	96	6	124	8	113	12
 CZECH REPUBLIC	317	9	324	10	387	8
 DENMARK	575		540		67	
 ESTONIA	297		343		260	
 FINLAND	369	48	317	N/A	247	N/A
 FRANCE	7,340	308	7,387	309	N/A	N/A
 GERMANY	7,171	116	6,568	178	6,931	224
 GREECE	352	96	238	66	256	45
 HUNGARY	465		478		698	
 IRELAND	1,601		1,550		1,559	
 ITALY	6,785	310	6,522	344	6,600	348
 LATVIA	869	N/A	1,059	N/A	N/A	N/A
 LITHUANIA	525				N/A	N/A
 LUXEMBOURG	274		270		274	
 MALTA	61	7	79	6	86	10
 NETHERLANDS	1,789		1,877		1,956	
 POLAND	653	49	838	61	679	77
 PORTUGAL	183	0	222	0	198	1
 ROMANIA	414	44	441	52	492	49
 SLOVAKIA	1,518		1,628		2,091	
 SLOVENIA	500		619		612	5
 SPAIN	4,341	198	4,632	246	4,415	315
 SWEDEN	487		485		539	
 UNITED KINGDOM	9,472	1,113	8,743	1,324	8,341	1,752
TOTAL EU 28	≈ 51,956		≈ 52,394		≈ 53,995	
 NORWAY	305		419		389	
 SWITZERLAND	1,111	72	1,074	85	975	70
 TURKEY	64		84		N/A	N/A
TOTAL ALL	≈ 53,508		≈ 53,956		≈ 55,513	

Spanish data includes imports from NC 2203 (and 220291 as from 2017)

TOTAL EXPORTS 2018

(intra-EU and extra-EU in 1,000 HL)



EXPORTS 2013 - 2015

(in 1,000 HL)

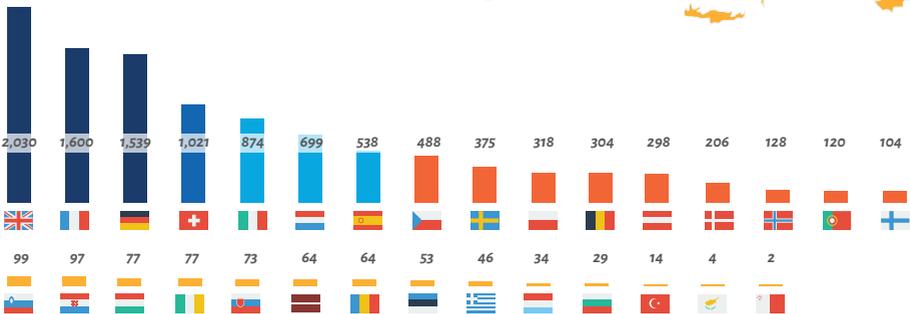
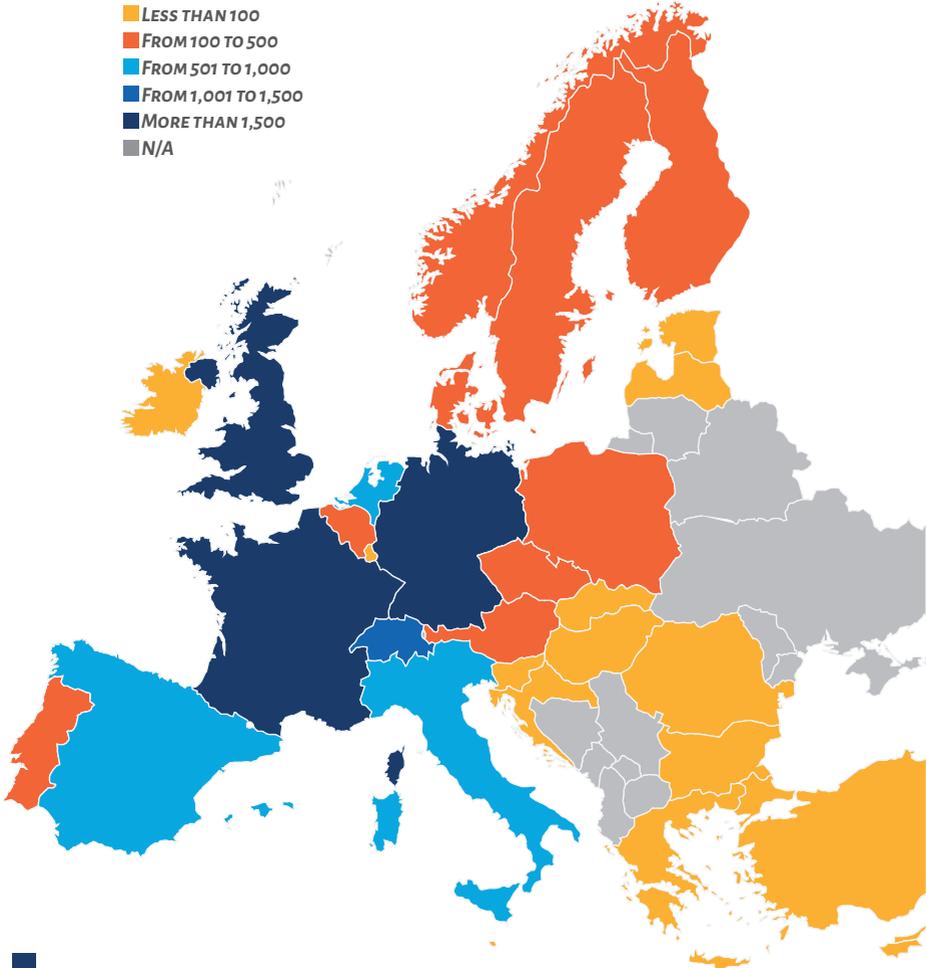
COUNTRY	2013		2014		2015	
	INTRA-EU	EXTRA-EU	INTRA-EU	EXTRA-EU	INTRA-EU	EXTRA-EU
 AUSTRIA	578	245	744	144	762	143
 BELGIUM	8,247	2,827	7,906	3,316	8,891	4,134
 BULGARIA	51	27	50	70	84	54
 CROATIA	54	501	140	539	163	605
 CYPRUS	5	2	5	2	6	3
 CZECH REPUBLIC	2,783	609	3,026	626	3,547	593
 DENMARK	2,646	373	3,040		3,015	
 ESTONIA	495		601		429	
 FINLAND	144	47	157	36	183	28
 FRANCE	4,441	662	5,930	769	6,100	820
 GERMANY	10,342	4,749	11,405	4,222	10,812	5,137
 GREECE	148	215	67	162	125	307
 HUNGARY	480		446		418	
 IRELAND	3,988		2,807		3,335	
 ITALY	1,290	602	1,671	474	1,889	658
 LATVIA	363	68	181	26	73	37
 LITHUANIA	430	80	653		613	
 LUXEMBOURG	65		63		80	
 MALTA	5	3	12	5	1	9
 NETHERLANDS	3,656	10,526	3,364	10,594	2,687	11,446
 POLAND	2,541		2,571	261	2,924	333
 PORTUGAL	809	1,699	776	1,848	871	977
 ROMANIA	277	121	253	47	378	122
 SLOVAKIA	290		205		98	
 SLOVENIA	560	160	656	168	577	165
 SPAIN	495	871	726	1,028	968	1,289
 SWEDEN	500	44	499	55	500	56
 UNITED KINGDOM	4,479	2,080	3,399	1,843	3,570	2,080
TOTAL EU 28	76,673		77,588		82,095	
 NORWAY	14		15		20	
 SWITZERLAND	52	1	59	4	50	10
 TURKEY	1,048		868		799	
TOTAL ALL	77,788		78,534		82,974	

Spanish data includes exports from NC 2203 (and 220291 as from 2017)

COUNTRY	2016		2017		2018	
	INTRA-EU	EXTRA-EU	INTRA-EU	EXTRA-EU	INTRA-EU	EXTRA-EU
 AUSTRIA	943	145	1,017	153	1,076	183
 BELGIUM	9,332	4,753	10,241	5,568	10,795	5,390
 BULGARIA	81	69	52	77	88	98
 CROATIA	189	626	186	597	119	554
 CYPRUS	6	3	8	3	8	3
 CZECH REPUBLIC	3,675	687	3,750	811	4,131	972
 DENMARK	3,084		3,040		3,110	
 ESTONIA	470		649		779	
 FINLAND	201	28	164	N/A	130	N/A
 FRANCE	6,050	950	5,696	1,072	N/A	N/A
 GERMANY	10,755	5,772	9,213	6,517	8,951	6,814
 GREECE	115	164	218	199	149	219
 HUNGARY	587		538		496	
 IRELAND	3,104		3,540		3,692	
 ITALY	2,065	517	2,093	763	2,207	838
 LATVIA	49	53	112	113	N/A	N/A
 LITHUANIA	682		N/A	N/A	N/A	N/A
 LUXEMBOURG	85		85	3	96	
 MALTA	1	12	5	11	6	2
 NETHERLANDS	3,516	10,961	3,546	10,596	3,798	10,800
 POLAND	2,883	414	2,817	550	2,972	786
 PORTUGAL	919	768	1,900		932	690
 ROMANIA	306	139	296	152	362	187
 SLOVAKIA	130		116		90	
 SLOVENIA	361	159	634		526	252
 SPAIN	1,008	1,364	1,744	1,147	1,648	1,327
 SWEDEN	504	48	491	48	454	52
 UNITED KINGDOM	3,759	2,206	3,211	2,391	2,897	2,333
TOTAL EU 28	84,698		≈ 86,843		≈ 88,715	
 NORWAY	23		30		51	
 SWITZERLAND	77	2	49	1	42	1
 TURKEY	682		530		N/A	N/A
TOTAL ALL	85,482		≈ 87,453		≈ 89,339	

Spanish data includes exports from NC 2203 (and 220291 as from 2017)

- LESS THAN 100
- FROM 100 TO 500
- FROM 501 TO 1,000
- FROM 1,001 TO 1,500
- MORE THAN 1,500
- N/A

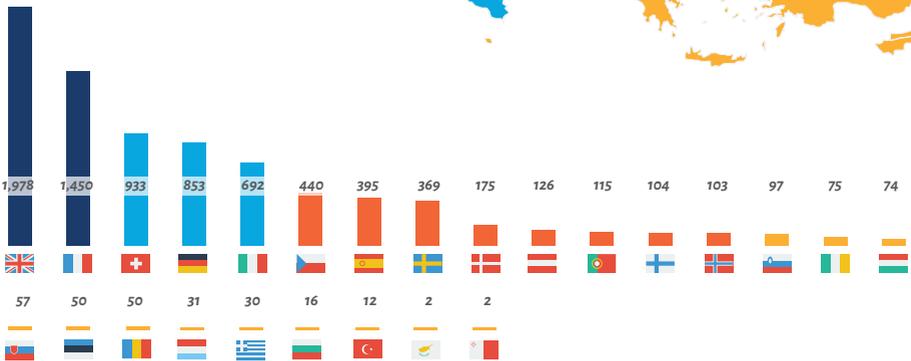
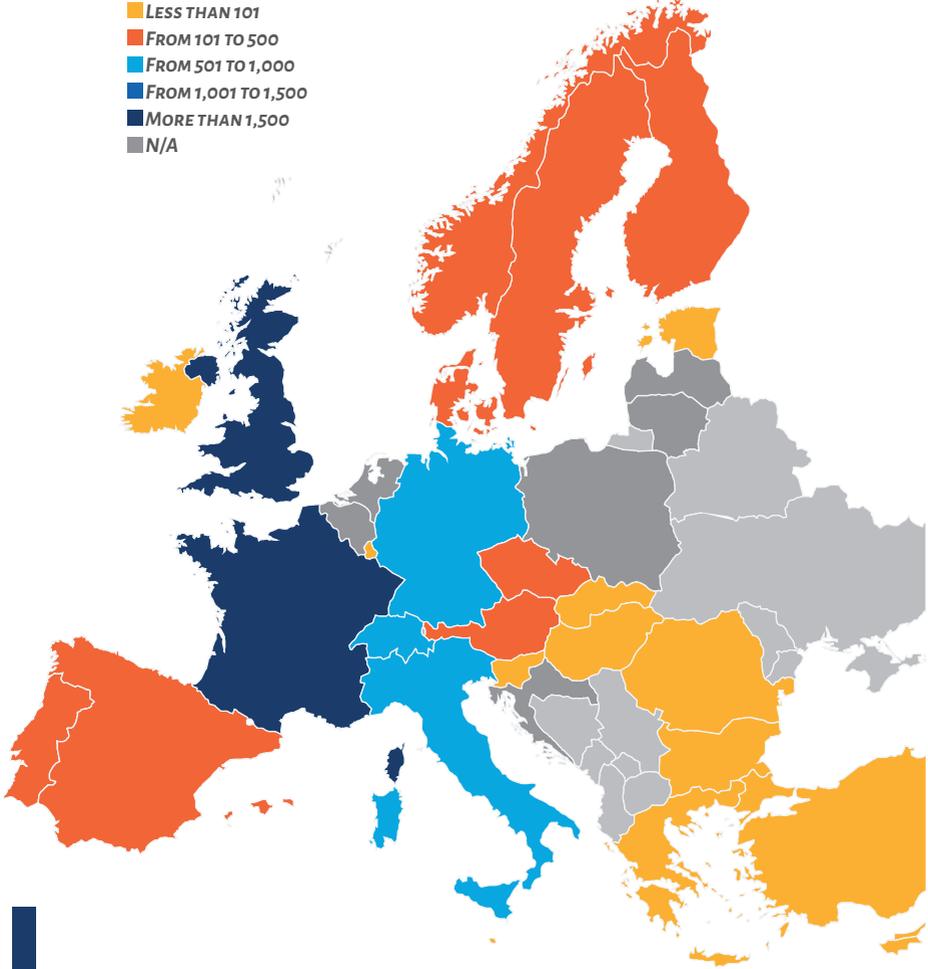


COUNTRY	2012	2013	2014	2015	2016	2017	2018
 AUSTRIA	173	194	198	214	235	273	298
 BELGIUM	150	160	168	199	224	261	304
 BULGARIA	13	13	16	18	17	25	29
 CROATIA	6	6	6	6	6	6	97
 CYPRUS	2	2	4	4	3	3	4
 CZECH REPUBLIC	213	308	338	390	398	450	488
 DENMARK	150	150	159	172	180	197	206
 ESTONIA	7	10	15	20	33	43	53
 FINLAND	30	43	49	59	82	N/A	104
 FRANCE	503	580	663	793	950	1,100	1,600
 GERMANY	1,340	1,349	1,352	1,388	1,408	1,492	1,539
 GREECE	18	20	20	28	43	43	46
 HUNGARY	50	50	50	50	50	55	77
 IRELAND	17	23	32	50	64	72	77
 ITALY	421	509	599	688	757	868	874
 LATVIA	16	25	29	37	41	45	64
 LITHUANIA	73	73	75	75	72	N/A	N/A
 LUXEMBOURG	7	7	7	7	30	32	34
 MALTA	1	1	1	2	2	2	2
 NETHERLANDS	177	219	302	398	489	605	699
 POLAND	132	155	133	150	210	275	318
 PORTUGAL	9	18	35	64	94	120	120
 ROMANIA	17	18	22	30	34	45	64
 SLOVAKIA	30	38	39	51	61	68	73
 SLOVENIA	N/A	30	51	55	62	66	99
 SPAIN	132	221	332	427	483	521	538
 SWEDEN	75	105	154	219	283	338	375
 UNITED KINGDOM	1,080	1,240	1,430	1,580	1,870	1,930	2,030
TOTAL EU 28	4,842	5,567	6,279	7,174	8,181	≈9,089	≈10,284
 NORWAY	41	52	75	101	128	136	128
 SWITZERLAND	375	409	483	623	753	869	1,021
 TURKEY	11	12	9	12	10	15	14
TOTAL ALL	5,269	6,040	6,846	7,910	9,072	≈10,109	≈11,447

Croatia: microbreweries not included until 2018

Poland: Nielsen data in 2017 and 2018

- LESS THAN 101
- FROM 101 TO 500
- FROM 501 TO 1,000
- FROM 1,001 TO 1,500
- MORE THAN 1,500
- N/A



COUNTRY	2012	2013	2014	2015	2016	2017	2018
 AUSTRIA	92	109	109	114	123	129	126
 BELGIUM	N/A						
 BULGARIA	5	5	6	6	7	13	16
 CROATIA	N/A						
 CYPRUS	0	0	2	2	1	1	2
 CZECH REPUBLIC	20	207	238	202	350	402	440
 DENMARK	N/A	130	129	132	140	157	175
 ESTONIA	4	7	12	17	30	40	50
 FINLAND	27	22	25	41	55	N/A	104
 FRANCE	433	504	566	690	850	1,000	1,450
 GERMANY	666	673	682	723	738	824	853
 GREECE	8	9	10	15	25	30	30
 HUNGARY	46	46	46	46	55	60	74
 IRELAND	N/A	N/A	N/A	N/A	N/A	45	75
 ITALY	407	491	505	540	718	693	692
 LATVIA	N/A	20	26	34	38	42	N/A
 LITHUANIA	N/A	30	32	32	31	N/A	N/A
 LUXEMBOURG	2	2	12	15	22	29	31
 MALTA	0	0	0	1	1	1	2
 NETHERLANDS	N/A						
 POLAND	50	N/A	N/A	N/A	N/A	N/A	N/A
 PORTUGAL	3	12	30	60	89	115	115
 ROMANIA	2	3	7	15	20	31	50
 SLOVAKIA	26	28	29	39	48	55	57
 SLOVENIA	28	28	49	50	60	64	97
 SPAIN	114	203	233	307	363	392	395
 SWEDEN	70	100	149	214	270	328	369
 UNITED KINGDOM	1,032	1,192	1,378	1,527	1,817	1,878	1,978
 NORWAY	21	35	51	76	85	107	103
 SWITZERLAND	328	363	440	573	703	818	933
 TURKEY	5	3	0	7	8	9	12

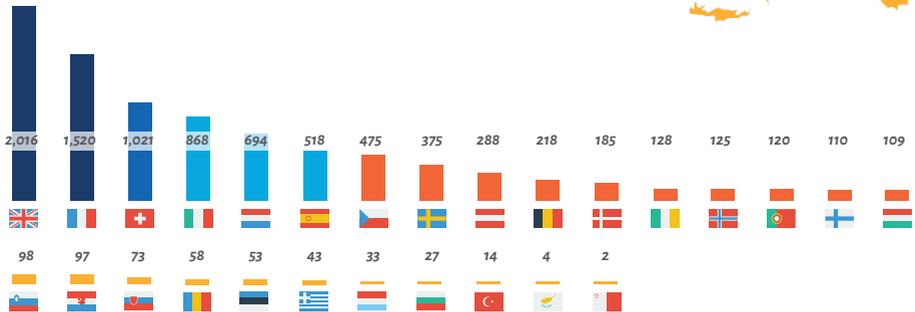
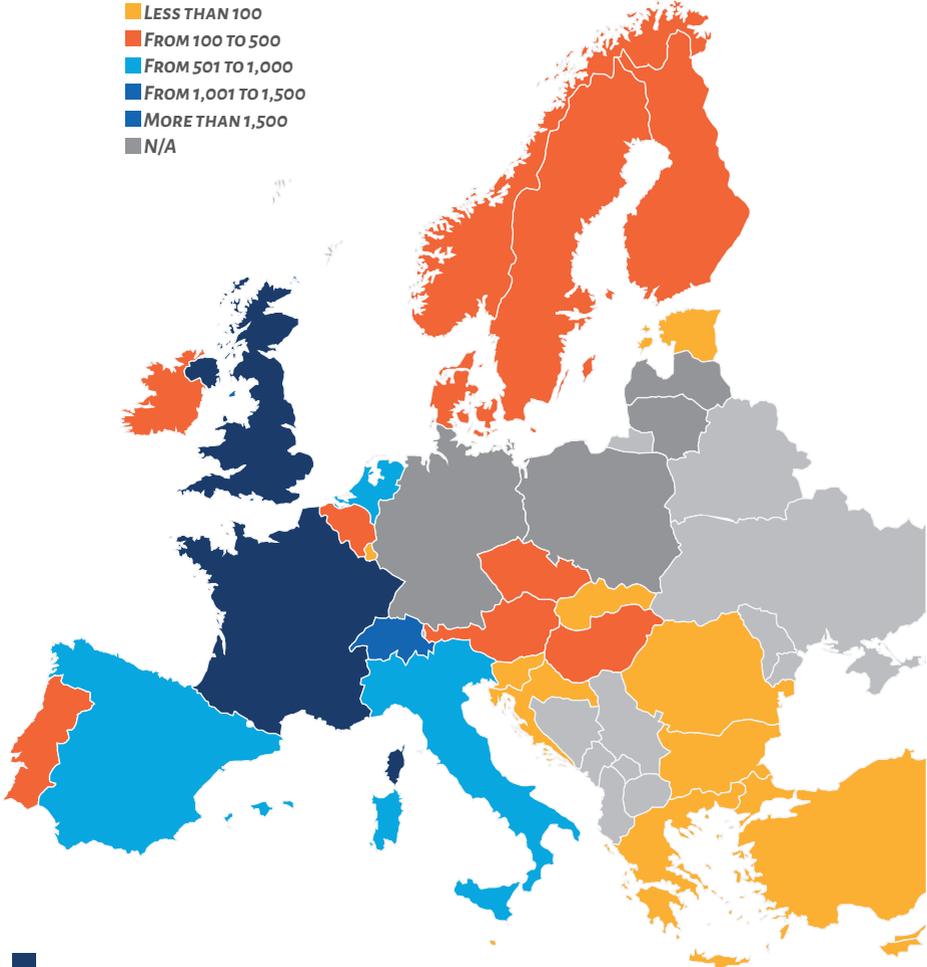
Spanish data cover all microbreweries irrespective their volume of production

UK data cover all breweries with a production up to 60,000 HL per year and which receive "small brewer relief" in the UK

Romania data cover all microbreweries irrespective of their volume of production

NUMBER OF ACTIVE BREWING COMPANIES 2018

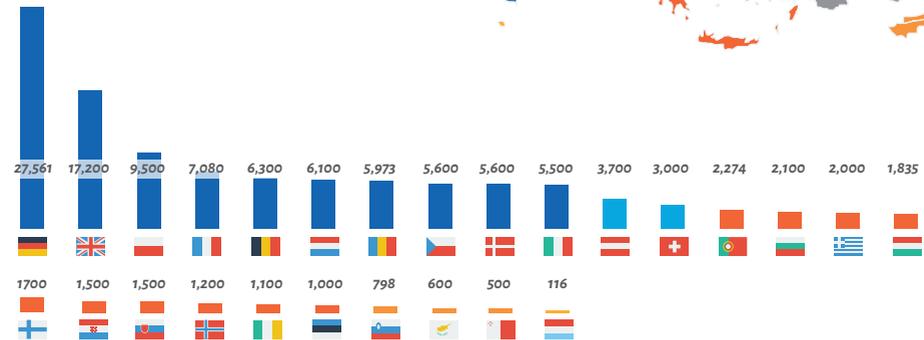
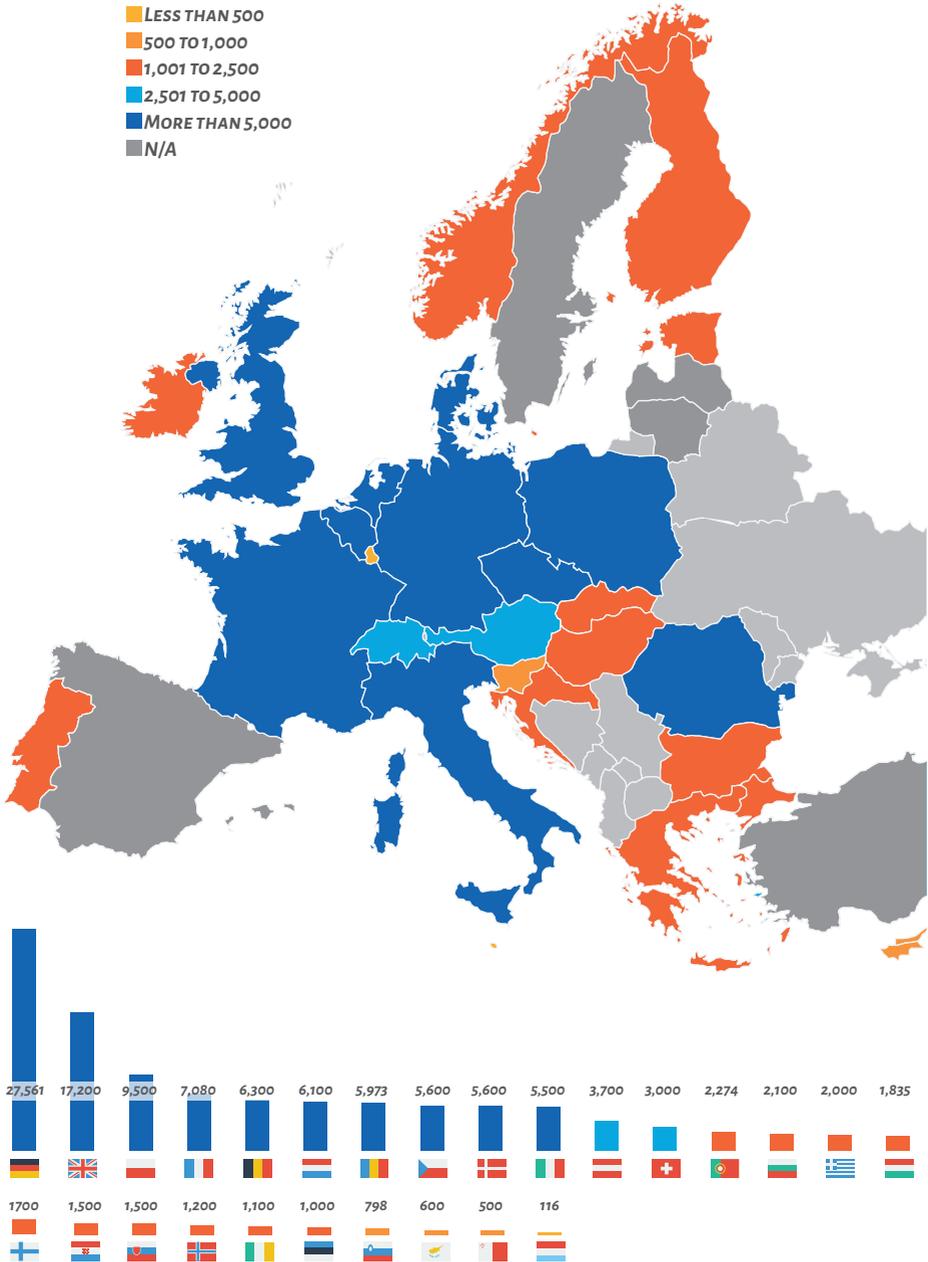
- LESS THAN 100
- FROM 100 TO 500
- FROM 501 TO 1,000
- FROM 1,001 TO 1,500
- MORE THAN 1,500
- N/A



NUMBER OF ACTIVE BREWING COMPANIES 2012 - 2018

COUNTRY	2012	2013	2014	2015	2016	2017	2018
 AUSTRIA	164	185	189	205	225	263	288
 BELGIUM	60	N/A	N/A	N/A	147	184	218
 BULGARIA	11	11	14	16	16	24	27
 CROATIA	6	6	6	6	6	6	97
 CYPRUS	2	2	4	4	3	3	4
 CZECH REPUBLIC	197	289	322	374	385	437	475
 DENMARK	120	120	139	142	150	167	185
 ESTONIA	7	10	15	20	33	43	53
 FINLAND	30	43	49	54	76	N/A	110
 FRANCE	501	577	660	790	945	1,100	1,520
 GERMANY	N/A	N/A	N/A	N/A	N/A	N/A	N/A
 GREECE	16	18	18	25	40	40	43
 HUNGARY	50	50	50	50	60	65	109
 IRELAND	24	30	50	64	93	102	128
 ITALY	415	503	593	682	751	864	868
 LATVIA	16	25	29	37	41	45	N/A
 LITHUANIA	73	71	73	73	72	N/A	N/A
 LUXEMBOURG	6	6	7	7	27	29	33
 MALTA	1	1	1	2	2	2	2
 NETHERLANDS	172	214	297	393	484	600	694
 POLAND	87	N/A	N/A	138	N/A	N/A	N/A
 PORTUGAL	9	17	35	64	94	120	120
 ROMANIA	12	12	16	25	28	39	58
 SLOVAKIA	30	38	39	51	61	68	73
 SLOVENIA	30	30	50	55	61	65	98
 SPAIN	120	209	320	415	471	506	518
 SWEDEN	75	105	154	219	283	338	375
 UNITED KINGDOM	1,071	1,231	1,419	1,566	1,856	1,916	2,016
TOTAL EU 28	3,305	≈ 5,338	≈ 6,125	≈ 6,990	≈ 7,956	≈ 8,804	≈ 9,902
 NORWAY	37	47	70	96	125	133	125
 SWITZERLAND	373	407	483	623	753	869	1,021
 TURKEY	7	8	10	12	10	11	14
TOTAL ALL	3,722	≈ 5,800	≈ 6,688	≈ 7,721	≈ 8,844	≈ 9,817	≈ 11,062

Croatia: Microbreweries not included until 2018



COUNTRY	2012	2013	2014	2015	2016	2017	2018
 AUSTRIA	3,800	3,800	3,800	3,800	3,800	3,800	3,700
 BELGIUM	4,500	4,500	4,500	4,700	4,700	5,800	6,300
 BULGARIA	2,500	2,500	2,500	2,400	2,300	2,300	2,100
 CROATIA	1,600	1,600	1,500	1,500	1,500	1,500	1,500
 CYPRUS	600	600	600	600	600	600	600
 CZECH REPUBLIC	7,000	5,800	5,900	6,100	5,800	5,600	5,600
 DENMARK	3,500	3,500	3,600	3,700	3,750	3,750	5,600
 ESTONIA	700	700	800	900	900	900	1,000
 FINLAND	2,100	2,000	1,900	1,700	1,700	1,700	1,700
 FRANCE	3,900	4,000	4,100	4,300	5,800	6,500	7,080
 GERMANY	26,900	26,800	26,800	26,900	27,200	27,200	27,561
 GREECE	1,900	1,900	1,900	2,000	2,000	2,000	2,000
 HUNGARY	1,600	1,700	1,700	1,700	1,700	1,700	1,835
 IRELAND	1,500	2,000	2,000	1,700	1,400	1,100	1,100
 ITALY	4,700	4,800	5,000	5,350	5,350	5,470	5,500
 LATVIA	1,100	1,200	1,300	1,400	1,400	1,400	N/A
 LITHUANIA	2,000	2,000	2,300	2,300	2,300	N/A	N/A
 LUXEMBOURG	130	130	130	125	120	120	116
 MALTA	400	400	400	500	500	500	500
 NETHERLANDS	6,300	6,000	6,100	6,100	6,100	6,100	6,100
 POLAND	16,000	16,000	16,000	10,000	10,000	9,300	9,500
 PORTUGAL	1,400	1,500	2,100	1,900	2,100	2,183	2,274
 ROMANIA	5,900	5,700	5,400	5,500	5,600	5,800	5,973
 SLOVAKIA	1,700	1,600	1,500	1,500	1,400	1,500	1,500
 SLOVENIA	700	700	800	700	650	730	798
 SPAIN	5,800	5,600	6,800	7,000	6,900	7,200	N/A
 SWEDEN	4,100	4,000	4,000	4,550	4,580	4,700	N/A
 UNITED KINGDOM	13,300	13,900	14,500	14,300	15,000	16,100	17,200
TOTAL EU 28	125,630	124,930	127,930	123,225	125,150	≈127,853	≈132,737
 NORWAY	2,200	1,400	1,400	1,300	1,300	1,300	1,200
 SWITZERLAND	2,800	2,800	2,800	2,800	2,800	2,900	3,000
 TURKEY	2,400	2,800	2,400	2,400	2,400	N/A	N/A
TOTAL ALL	133,030	131,930	134,530	129,725	131,650	≈134,453	≈139,337

Poland 2015 data only cover full time positions

COUNTRY	2012	2013	2014	2015	2016	2017	2018
 AUSTRIA	191.30	193.10	195.20	189.00	196.00	192.00	200.00
 BELGIUM	180.80	183.36	196.46	194.00	201.59	200.80	200.98
 BULGARIA	41.15	40.23	38.05	39.56	41.57	40.59	41.40
 CROATIA	88.00	79.52	77.94	83.58	82.73	85.44	89.86
 CYPRUS	10.88	13.51	12.23	12.35	12.35	13.50	14.60
 CZECH REPUBLIC	182.55	179.08	166.88	170.04	170.41	171.52	190.29
 DENMARK	138.73	131.40	125.19	121.35	127.75	122.30	114.80
 ESTONIA	38.97	42.03	43.06	48.38	51.67	58.32	66.58
 FINLAND	581.00	575.00	610.00	605.00	606.00	595.93	653.85
 FRANCE	307.83	670.33	863.63	831.18	854.48	950.00	950.00
 GERMANY	697.00	672.67	679.38	676.85	678.00	664.00	655.00
 GREECE	110.24	112.96	107.44	105.84	155.25	194.78	196.27
 HUNGARY	130.17	147.47	146.48	142.88	148.50	138.24	135.53
 IRELAND	308.00	358.01	424.84	417.28	430.00	424.00	430.00
 ITALY	428.00	482.00	536.00	619.00	661.00	703.00	711.00
 LATVIA	25.88	24.36	25.14	27.12	32.08	36.85	53.05
 LITHUANIA	46.15	41.71	50.98	52.68	52.90	88.57	101.49
 LUXEMBOURG	3.85	3.75	3.80	5.12	5.70	5.74	5.70
 MALTA	2.29	2.30	3.15	2.84	3.33	4.00	3.83
 NETHERLANDS	387.00	405.91	443.73	441.18	446.00	450.00	457.00
 POLAND	878.90	841.23	828.26	840.09	817.14	829.44	833.52
 PORTUGAL	65.78	71.30	69.27	70.80	75.42	84.39	87.64
 ROMANIA	141.67	151.43	149.59	157.65	137.92	133.53	133.44
 SLOVAKIA	56.08	55.73	55.46	57.21	56.97	57.54	59.70
 SLOVENIA	72.80	75.77	80.80	85.50	85.34	87.34	91.44
 SPAIN	298.61	298.47	309.50	317.86	327.82	342.96	353.63
 SWEDEN	374.00	375.90	370.53	424.77	416.29	419.40	425.28
 UNITED KINGDOM	4,229.73	3,976.16	4,308.97	4,449.26	4,449.26	3,939.77	4,096.93
 NORWAY	573.54	566.54	478.15	592.98	599.07	612.44	647.36
 SWITZERLAND	93.00	93.00	93.00	100.00	100.00	94.00	109.00
 TURKEY	1,295.00	0.00	0.00	1,390.00	N/A	N/A	N/A

Finland, Italy, Spain and Norway data as provided by the national association
Romania 2018 data are provided by the National Agency for Fiscal Administration (ANAF)
Spanish data as available from Spanish Treasury
Polish 2018 data based on average exchange rate of Polish Central Bank: 1EUR = 4,2623PLN

BEER PRODUCTION:

Beer produced within a given country.

BEER CONSUMPTION:

Beer consumed within a given country.

BEER CONSUMPTION PER CAPITA:

Consumption per head in a given country.

BREWERY:

A plant or an establishment for beer production.

BREWING COMPANY:

A company which produces and / or sells beer, operating one or more breweries. These companies may also be involved in activities other than brewing beer, such as the production of soft drinks and bottled mineral water.

DIRECT EMPLOYMENT:

Employment directly by the brewing companies.

EXCISE DUTY REVENUE RELATED TO BEER:

Government revenues generated from excise duties on the sale of beer.

EXPORT - EXTRA-EU:

Extra-EU exports of goods are goods which leave the territory of the European Union for a third country after being placed under the customs procedure for exports (for definitive export) or outward processing (goods for working, further processing) or repair or following inward processing.

EXPORT - INTRA-EU:

Intra-EU exports of goods are goods which leave a Member State of the EU for another Member State for definitive export, outward processing or repair or following inward processing.

HECTOLITRE (HL):

A hectolitre is a metric unit of volume or capacity where one hectolitre equals 100 litres.

IMPORT - EXTRA-EU:

Extra-EU imports of goods are goods which enter the territory of the European Union from a third country and are placed under the customs procedure for free circulation within the EU (as a general rule goods intended for consumption), inward processing or processing under customs control (goods for working, processing or repair) immediately or after bonded warehousing.

IMPORT - INTRA-EU:

Intra-EU imports of goods are goods which enter a Member State of the EU from another Member State for definitive import (as a general rule goods intended for consumption), inward processing or processing under customs control (goods for working, processing or repair) immediately or after bonded warehousing.

MICROBREWERY:

A brewery with yearly production up to 1,000 hectolitres.

OFF-TRADE SECTOR:

Beer sales through wholesale and retail (shops, supermarkets and other outlets).

ON-TRADE SECTOR:

Beer sales through (licensed) pubs, clubs, bars, restaurants, etc., also called the hospitality sector.

The data for the 2019 edition were mainly collated via the national brewers' associations through surveys carried out by The Brewers of Europe from 2012 until 2019.

With the received data the corresponding tables and charts have been prepared and verified with the interlocutors from different countries. Therefore, unless indicated otherwise in this or previous editions, all data comes from national brewers associations.

When data was not available through national associations other sources were used to complete as much as possible the tables. The sources used for this edition include:

- National brewers' associations data
- Eurostat

Figures contained in some tables may have been rounded and also corrected from previous editions of this publication.

The Brewers of Europe Secretariat would like to thank all those from national brewers associations who contributed to this brochure.

We thank Woomera Communications sprl for the document's design and support.

The information and data contained in this document are those provided by national associations unless stated otherwise. Where possible The Brewers of Europe Secretariat ensured the accuracy of the figures with those submitted by the national associations and those coming from other sources.

The Brewers of Europe does not take any responsibility for omissions, mistakes or errors appearing in this brochure which do not come from its own activities.

The Brewers of Europe Secretariat

European Beer Trends
Statistics Report | 2019 Edition
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