



Beer **statistics**
2018 edition



The Brewers of Europe

Beer statistics

2018 edition



December 2018

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Pavlos Photiades
President of
The Brewers of Europe

Dear Reader,

Welcome to the 2018 edition of The Brewers of Europe's annual statistical report on the state of the European beer market. I'm proud to report on yet another successful twelve months for Europe's brewers following a fourth consecutive year of growth in beer production.

Whilst consumption has stabilised after three years of growth, beer exports have been steadily increasing, hitting an all-time high that has also helped to ensure the continued buoyancy in Europe's beer market. Nearly 22% of European beer production is now exported beyond national boundaries, with one third of this beer benefitting from Europe's reputation for quality beer and being shipped to all corners of the globe.

Whilst beer production volumes are still a good way off their level prior to the economic crash nearly one decade ago, this same period has coincided with an unprecedented boom in the numbers of SMEs and new microbreweries springing up all across the continent. In one year alone, the number of breweries active in the EU grew by nearly one thousand. In the last five years the number of microbreweries has doubled, and the European Union now counts an estimated 9,500 breweries! Whilst our members from Norway, Switzerland and Turkey are also bringing a further thousand breweries to the party.

These new brewers have been helping to drive the exports that first led to the stabilisation and then the incremental growth in the European beer sector. They are also pushing all brewers to strive for even greater excellence and to innovate, meaning that beer consumers now have available to them an ever-diverse range of high quality beer brands, styles and flavours. There is also a huge amount of investment going into specialty beers, with ever better non- and lower- alcohol beers now representing around six percent of the overall European beer market.

It is this expansion of the beer and brewing landscape that led this year to the first ever Brewers of Europe Forum, which brought together in Brussels 800 participants from 40 different countries over two days. After a fascinating event that attracted over 90 high level speakers and guests from the entire beer value chain, we are expecting well over a thousand people to attend next year's event in Antwerp on 3-4 June 2019 at a Forum that also integrates the European Brewing Congress. Please come along!

The Forum is part of a broader project to ensure that The Brewers of Europe further develops as the natural home to all of Europe's brewers – micro, small, medium and large. Indeed, The Brewers of Europe is in a unique position to unite, represent, defend and promote the interests of beer and of the whole European beer sector. Our latest tool - the BrewUp knowledge portal - has been designed as a service for Europe's brewers, providing them with a central European point for information, tips, data, guidance and beer business insights.

Next year is also a key milestone for the European Union, with the first European elections following the departure of one of its members. In spite of the unfortunate departure from the EU of a key Member State, we hope it will still be a good year for Europe's brewing sector, with further growth, further diversity and hopefully the founding of Europe's ten thousandth brewery! Policymakers can be sure that The Brewers of Europe will be in touch to call for a policy environment that further supports the development and prosperity of a diverse, sustainable and responsible beer sector in Europe.

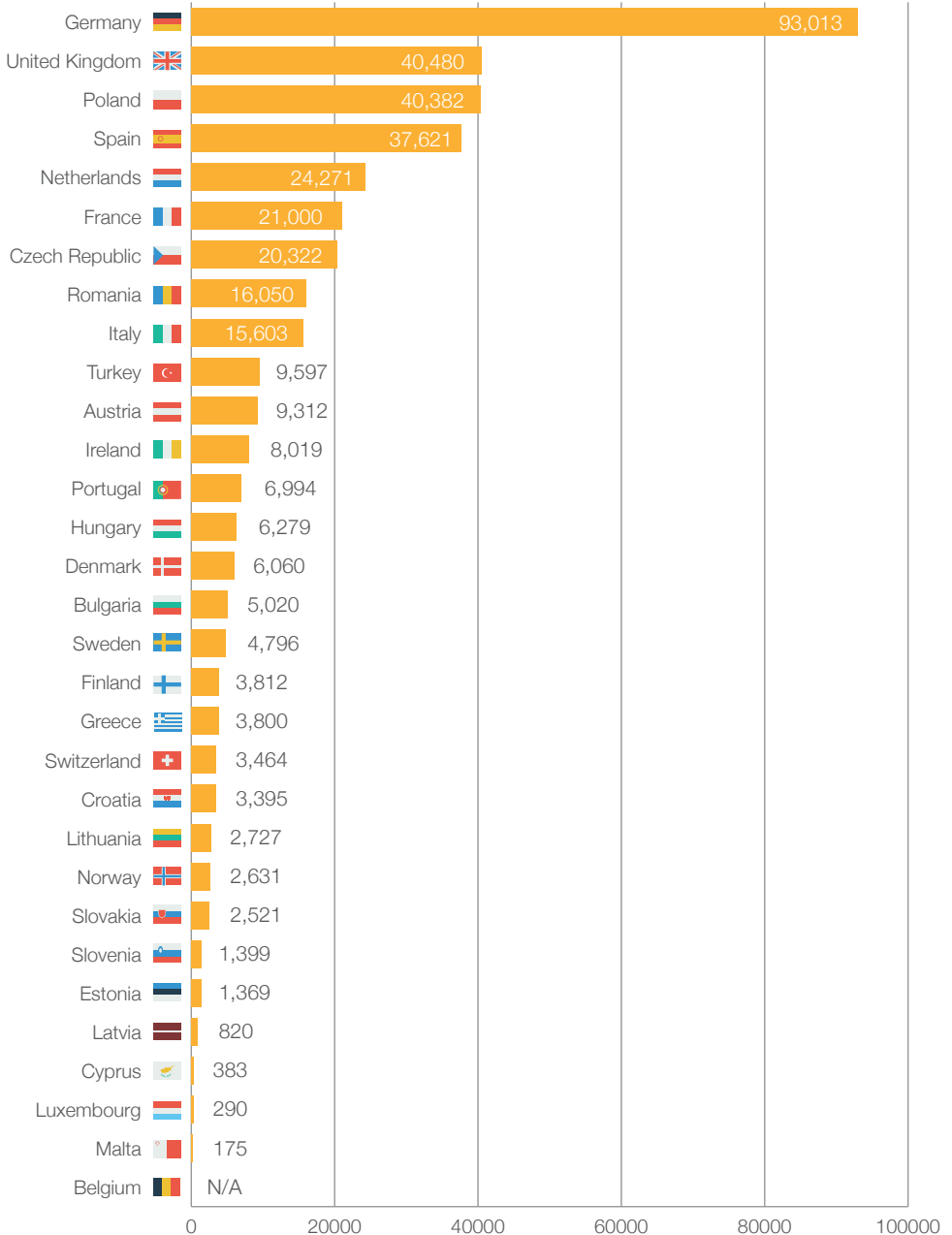
Cheers!

Pavlos Photiades
President of The Brewers of Europe

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BEER PRODUCTION 2017





















(in 1,000 hl)



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BEER PRODUCTION 2011 - 2017

(in 1,000 hl)

Country	2011	2012	2013	2014	2015	2016	2017
 Austria*	8,917	8,924	9,045	9,001	9,023	9,227	9,312
 Belgium**	18,571	18,751	18,138	18,207	19,811	20,616	N/A
 Bulgaria***	4,820	4,992	5,112	4,890	4,960	5,180	5,020
 Croatia	3,738	3,634	3,408	3,405	3,379	3,348	3,395
 Cyprus	314	329	322	318	341	365	383
 Czech Republic***	18,043	18,692	18,690	19,129	19,530	20,475	20,322
 Denmark	6,590	6,080	6,166	6,110	5,970	6,200	6,060
 Estonia**	1,360	1,433	1,465	1,608	1,398	1,416	1,369
 Finland****	4,220	4,030	4,020	4,010	3,970	4,100	3,812
 France**	17,100	17,600	18,300	19,850	20,300	20,650	21,000
 Germany	95,545	94,618	94,365	95,274	95,623	94,957	93,013
 Greece***	3,700	3,745	3,750	3,700	3,820	3,827	3,800
 Hungary	6,249	6,312	6,181	6,239	5,965	6,239	6,279
 Ireland	8,514	8,195	8,008	7,288	7,755	7,680	8,019
 Italy	13,410	13,293	13,256	13,521	14,286	14,516	15,603
 Latvia	1,529	1,405	1,467	968	856	739	820
 Lithuania*	2,922	2,841	2,886	3,172	3,108	2,999	2,727
 Luxembourg	302	292	281	271	287	290	290
 Malta**	127	135	138	146	154	170	175
 Netherlands	23,644	24,271	23,636	23,726	24,012	24,559	24,271
 Poland	38,067	39,294	40,001	40,075	40,890	41,369	40,382
 Portugal**	8,299	7,986	7,323	7,290	6,465	6,474	6,994
 Romania	16,900	18,000	16,110	14,750	15,950	15,780	16,050
 Slovakia	2,973	2,998	2,883	2,648	2,404	2,385	2,521
 Slovenia*** *****	1,984	1,819	2,011	2,098	2,029	1,696	1,399
 Spain***	33,575	33,029	32,691	33,601	34,960	36,469	37,621
 Sweden**	4,845	4,711	4,755	4,643	4,689	4,782	4,796
 United Kingdom*	45,694	42,047	41,956	41,204	41,270	38,084	40,480
Total EU 28	391,952	389,456	386,364	387,142	393,205	394,592	396,529
 Norway*****	2,298	2,260	2,296	2,509	2,537	2,664	2,631
 Switzerland	3,546	3,515	3,370	3,432	3,438	3,422	3,464
 Turkey	10,164	11,013	9,809	10,252	9,819	9,567	9,597
Total All	407,961	406,244	401,839	403,335	408,999	410,245	412,221

* Austrian, Lithuanian and UK definitions meet the customs code definition.

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

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

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

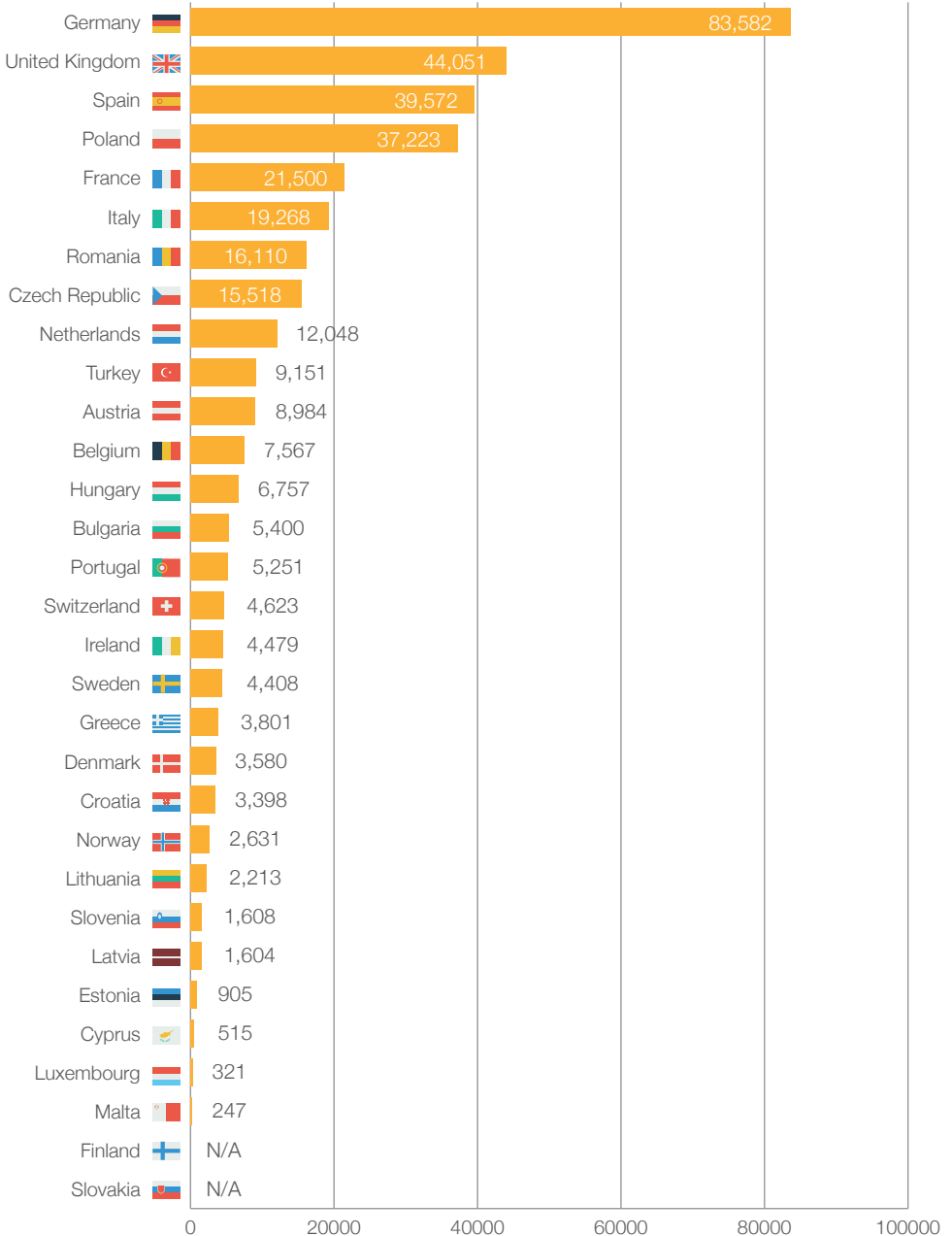
***** Slovenia data does not cover craft brewer production which represents less than 1% of the market.

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

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BEER CONSUMPTION 2017















(in 1,000 hl)



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BEER CONSUMPTION 2011 - 2017

(in 1,000 hl)

Country	2011	2012	2013	2014	2015	2016	2017
 Austria*	9,105	9,110	9,005	8,885	8,977	9,030	8,984
 Belgium**	8,574	8,228	8,092	8,095	7,951	7,689	7,567
 Bulgaria***	5,100	5,404	5,462	5,230	5,300	5,500	5,400
 Croatia	3,547	3,411	3,286	3,218	3,322	3,292	3,398
 Cyprus	456	471	480	425	457	468	515
 Czech Republic***	15,503	15,960	15,798	15,768	15,703	15,875	15,518
 Denmark	3,654	3,437	3,530	3,650	3,430	3,680	3,580
 Estonia**	1,020	1,010	1,020	931	900	888	905
 Finland****	4,551	4,286	4,337	4,244	4,209	4,208	N/A
 France**	20,000	19,941	19,421	19,956	20,600	21,190	21,500
 Germany	87,655	86,279	85,888	86,512	86,018	85,532	83,582
 Greece***	4,092	3,945	3,916	3,845	3,825	3,882	3,801
 Hungary	6,249	5,958	5,704	5,793	6,541	6,704	6,757
 Ireland	4,721	4,677	4,328	4,481	4,414	4,576	4,479
 Italy	17,715	17,458	17,544	17,755	18,914	19,029	19,268
 Latvia	1,626	1,543	1,545	1,555	1,523	1,510	1,604
 Lithuania*	2,932	2,830	2,760	2,784	2,680	2,532	2,213
 Luxembourg	325	319	316	308	300	312	321
 Malta**	189	199	202	211	218	231	247
 Netherlands	11,974	12,122	11,721	11,326	11,696	11,871	12,048
 Poland	36,236	37,803	37,388	37,644	37,706	37,903	37,223
 Portugal**	5,320	4,927	4,937	4,764	4,741	4,891	5,251
 Romania	17,000	18,201	16,300	14,900	15,800	15,800	16,110
 Slovakia	3,991	4,125	3,874	3,720	3,956	3,708	N/A
 Slovenia*** *****	1,672	1,520	1,562	1,615	1,583	1,635	1,608
 Spain***	35,233	35,106	35,212	36,302	37,528	38,636	39,572
 Sweden**	4,796	4,660	4,713	4,636	4,620	4,452	4,408
 United Kingdom*	44,844	42,962	42,422	43,752	43,762	43,731	44,051
Total EU 28	358,080	355,892	350,763	352,305	356,674	358,755	357,826
 Norway*****	2,534	2,421	2,450	2,509	2,537	2,664	2,631
 Switzerland	4,626	4,623	4,595	4,657	4,624	4,605	4,623
 Turkey	9,149	9,988	9,047	9,680	9,082	9,003	9,151
Total All	374,389	372,923	366,855	369,151	372,917	375,027	374,231

* Austrian, Lithuanian and UK definitions meet the customs code definition.

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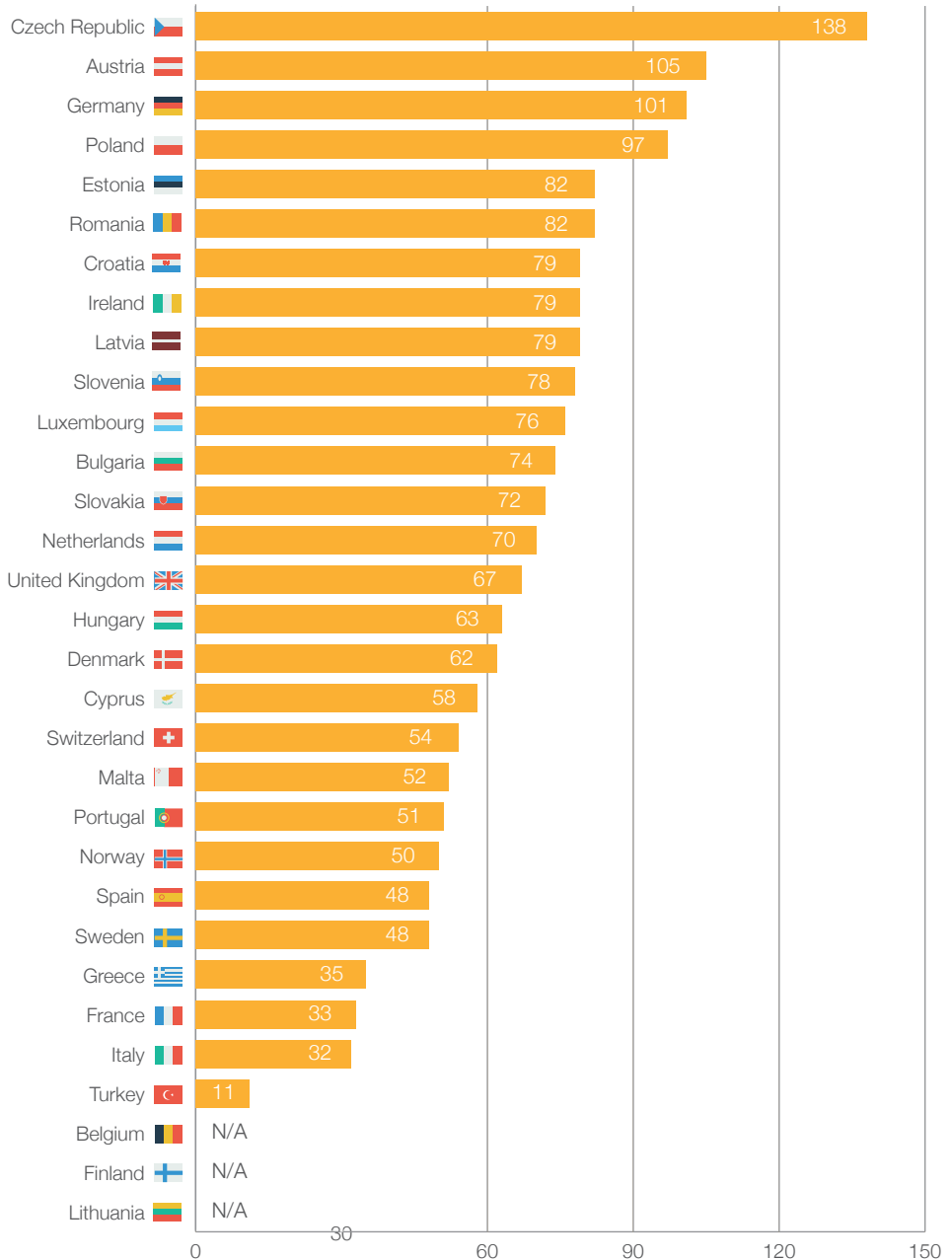
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5

BEER CONSUMPTION PER CAPITA 2017
































(in litres)



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BEER CONSUMPTION PER CAPITA 2011 - 2017

(in litres)

Country	2011	2012	2013	2014	2015	2016	2017
 Austria	110	110	108	107	107	106	105
 Belgium	78	74	72	72	71	68	N/A
 Bulgaria	69	73	74	72	74	76	74
 Croatia	86	78	76	80	77	75	79
 Cyprus	51	55	55	49	54	55	58
 Czech Republic	142	147	144	144	143	143	138
 Denmark	68	64	64	65	60	62	62
 Estonia*	72	90	91	84	82	80	82
 Finland	85	79	80	78	77	77	N/A
 France	31	31	30	30	31	32	33
 Germany	107	108	107	107	106	104	101
 Greece	35	35	35	35	35	36	35
 Hungary	60	60	60	59	59	62	63
 Ireland	86	86	79	81	80	81	79
 Italy	30	29	29	29	31	31	32
 Latvia	74	76	78	78	78	78	79
 Lithuania	96	96	93	95	92	88	N/A
 Luxembourg	85	83	79	76	76	74	76
 Malta	45	48	40	48	50	53	52
 Netherlands	72	72	70	68	68	69	70
 Poland	95	98	96	98	98	98	97
 Portugal	53	49	49	46	46	47	51
 Romania	84	90	81	74	80	80	82
 Slovakia	74	76	72	69	73	68	72
 Slovenia**	81	74	75	78	77	79	78
 Spain***	48	48	46	N/A	47	46	48
 Sweden	51	50	50	48	47	48	48
 United Kingdom	67	67	66	68	67	67	67
 Norway	51	49	49	49	49	51	50
 Switzerland	58	57	56	56	55	55	54
 Turkey	12	13	12	13	12	12	11

* Estonia: as from 2012 calculation on 15+ years old population.

** Slovenia: on total population basis.

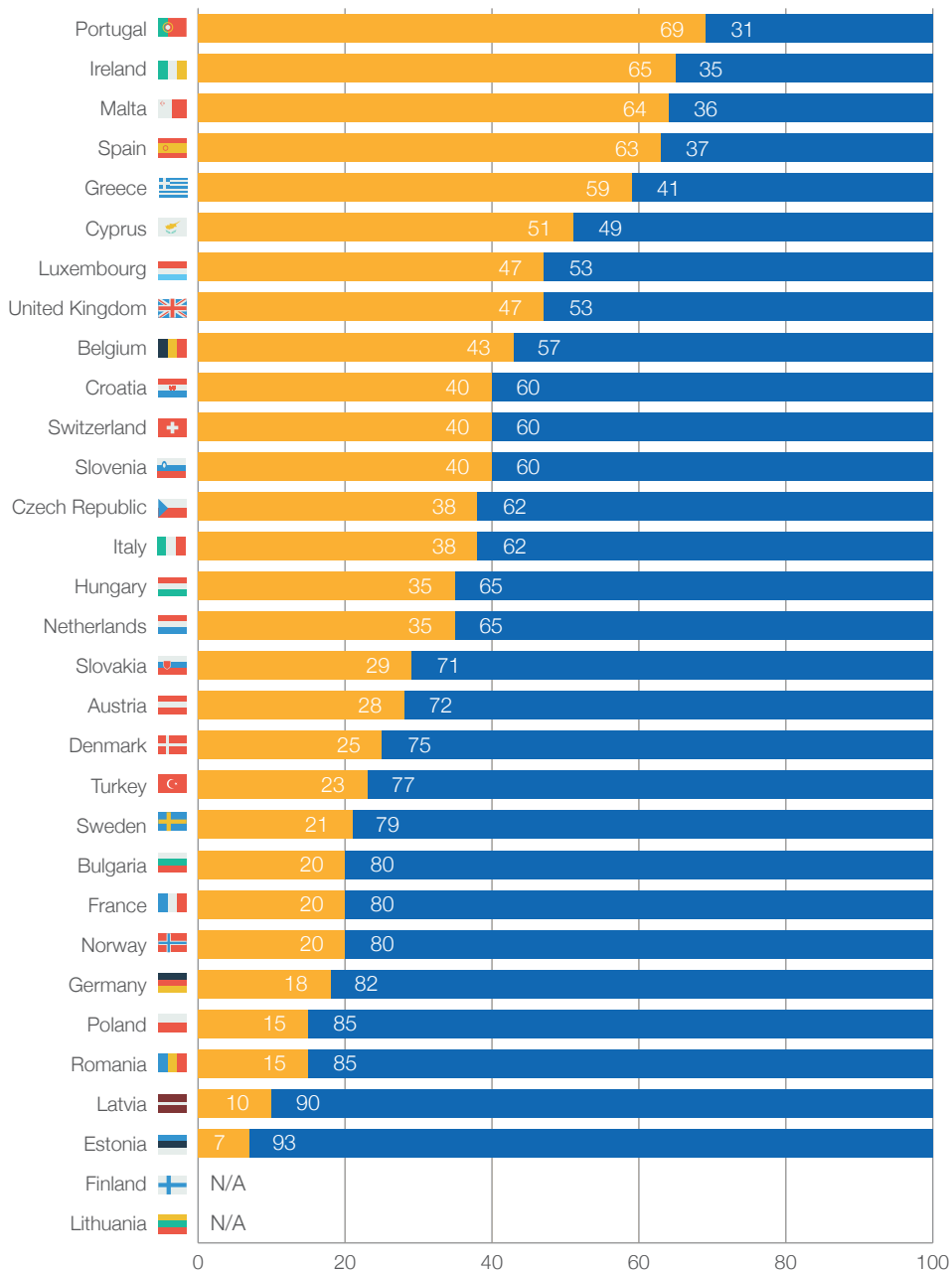
*** The Spanish info is provided by the Ministry of Agriculture.







6

ON-TRADE / OFF-TRADE 2017

(in %)

On-trade
Off-trade

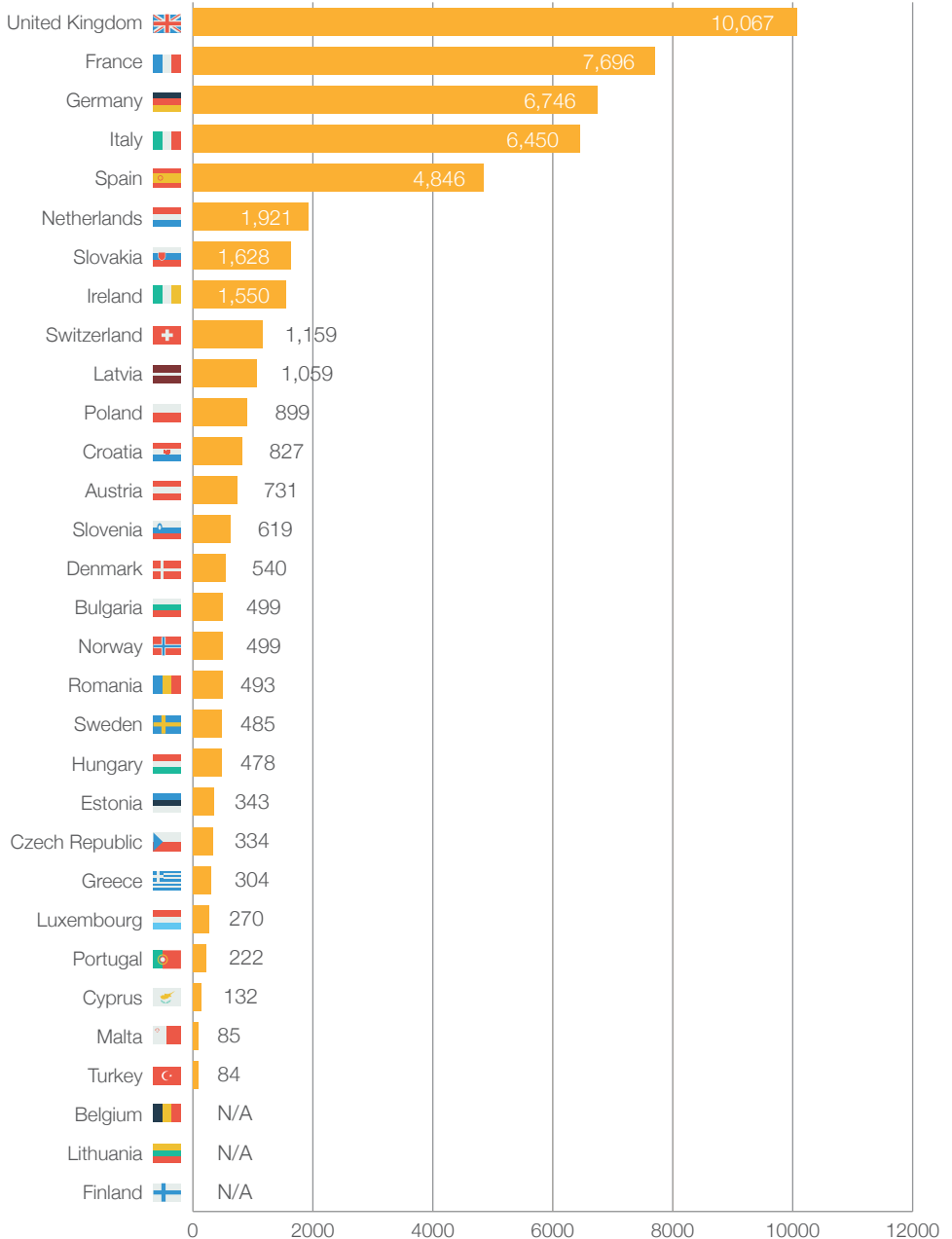


Country	2012		2013		2014		2015		2016		2017	
	On-trade	Off-trade	On-trade	Off-trade	On-trade	Off-trade	On-trade	Off-trade	On-trade	Off-trade	On-trade	Off-trade
 Austria	32	68	32	68	29	71	28	72	29	71	28	72
 Belgium	46	54	45	55	45	55	44	56	44	56	43	57
 Bulgaria	25	75	23	77	20	80	22	78	20	80	20	80
 Croatia	35	65	36	64	39	61	40	60	40	60	40	60
 Cyprus	42	58	40	60	42	58	42	58	42	58	51	49
 Czech Republic	43	57	41	59	41	59	40	60	39	61	38	62
 Denmark	25	75	25	75	25	75	23	77	23	77	25	75
 Estonia	9	91	9	91	9	91	8	92	8	92	7	93
 Finland	15	85	15	85	15	85	15	85	14	86	N/A	N/A
 France	23	77	21	79	20	80	20	80	20	80	20	80
 Germany	19	81	19	81	19	81	19	81	18	82	18	82
 Greece	56	44	56	44	55	45	57	43	59	41	59	41
 Hungary	38	62	35	65	35	65	35	65	35	65	35	65
 Ireland	61	39	64	36	64	36	67	33	66	34	65	35
 Italy	42	58	41	59	41	59	40	60	39	61	38	62
 Latvia	8	92	9	91	10	90	10	90	10	90	10	90
 Lithuania	8	92	8	92	10	90	9	91	10	90	N/A	N/A
 Luxembourg	52	48	52	48	51	49	49	51	48	52	47	53
 Malta	62	38	60	40	60	40	60	40	65	35	64	36
 Netherlands	27	73	25	75	35	65	35	65	35	65	35	65
 Poland	10	90	10	90	15	85	15	85	15	85	15	85
 Portugal	68	33	63	37	64	36	63	37	63	37	69	31
 Romania	22	78	19	81	18	82	18	82	16	84	15	85
 Slovakia	37	63	36	64	34	66	33	67	31	69	29	71
 Slovenia	40	60	40	60	40	60	40	60	40	60	40	60
 Spain	63	37	62	38	63	37	64	36	62	38	63	37
 Sweden	20	80	20	80	20	80	21	79	21	79	21	79
 United Kingdom	53	47	51	49	50	50	49	51	48	52	47	53
 Norway	25	75	24	76	21	79	21	79	20	80	20	80
 Switzerland	50	50	47	53	46	54	44	56	40	60	40	60
 Turkey	26	74	24	76	24	76	24	76	23	77	23	77

7

TOTAL IMPORTS 2017
































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



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IMPORTS 2012 - 2014

(in 1,000 hl)

Country	2012		2013		2014	
	Intra-EU	Extra-EU	Intra-EU	Extra-EU	Intra-EU	Extra-EU
 Austria	589	91	535	84	590	65
 Belgium	992	171	984	44	1,001	110
 Bulgaria	342	82	355	73	367	99
 Croatia	347	91	352	87	547	141
 Cyprus	132	10	147	11	107	9
 Czech Republic	511	1	493	5	286	5
 Denmark	296		373	42	474	
 Estonia	378	43	391		307	
 Finland	478	33	491	39	391	34
 France	7,227	206	5,984	212	6,526	237
 Germany	7,186	93	6,213	93	6,730	53
 Greece	548	107	494	81	406	34
 Hungary	848	99	206		343	
 Ireland	1,605		1,264		1,344	
 Italy	5,905	250	5,998	217	5,996	233
 Latvia	416	65	443	78	801	N/A
 Lithuania	453	265	460	275	650	
 Luxembourg	192		180		180	
 Malta	62	2	62	2	60	6
 Netherlands	2,759		2,058		1,647	
 Poland	608	29	542		737	30
 Portugal	296	8	133	0	182	0
 Romania	408	20	522	17	430	20
 Slovakia	1,101	6	1,157		1,276	
 Slovenia	243	10	250	10	337	12
 Spain	3,130	186	3,742	145	4,305	151
 Sweden	477		502		495	
 United Kingdom	8,305	751	8,181	627	7,824	679
Total EU 28	48,453		44,654		≈ 46,335	
 Norway	173	48	165	49	178	56
 Switzerland	1,108		1,174	51	1,172	53
 Turkey	32		29		48	
Total All	49,814		46,122		≈ 47842	

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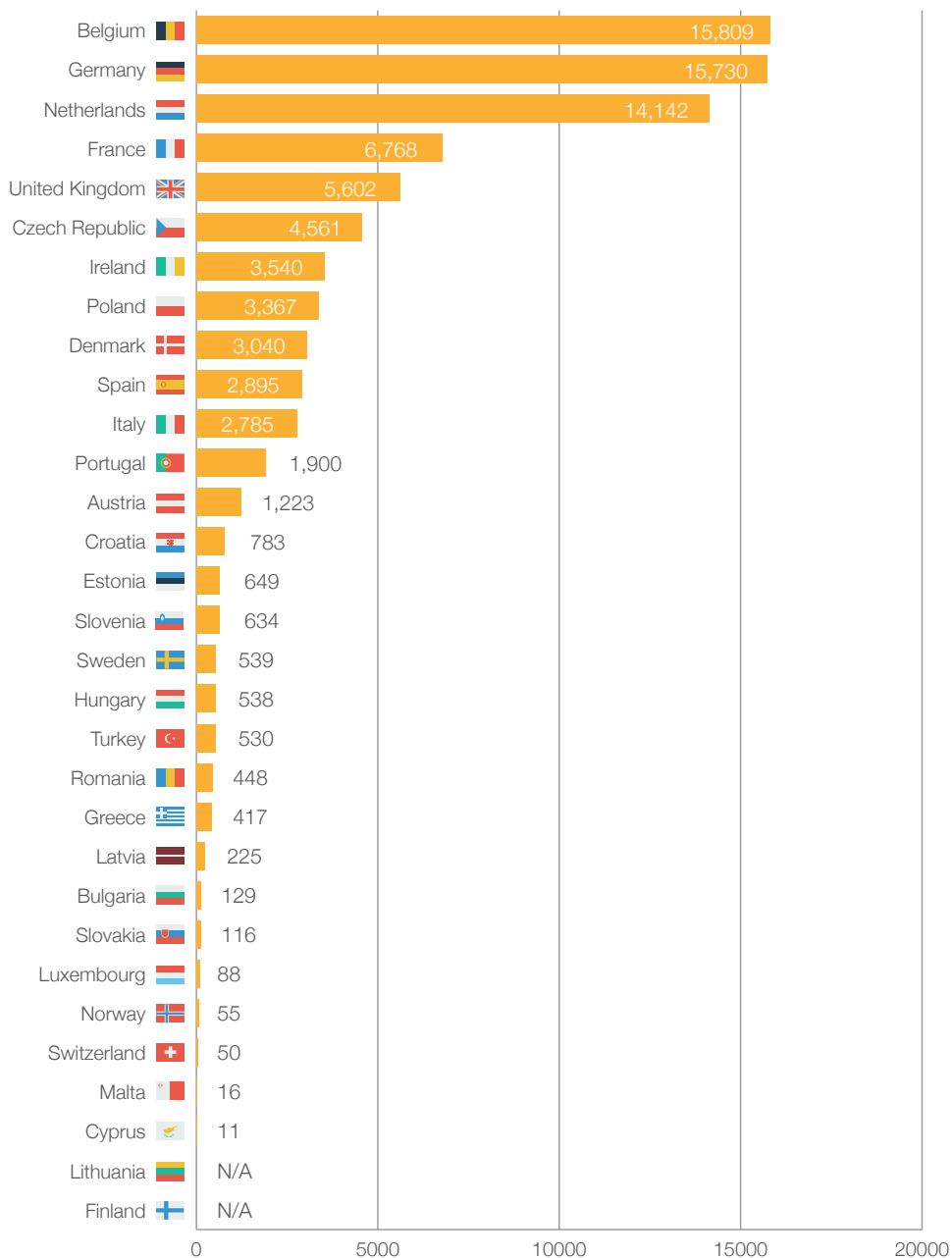
IMPORTS 2015 - 2017

(in 1,000 hl)

Country	2015		2016		2017	
	Intra-EU	Extra-EU	Intra-EU	Extra-EU	Intra-EU	Extra-EU
 Austria	584	81	653	88	627	104
 Belgium	1,006	158	1,001	157	N/A	N/A
 Bulgaria	393	145	327	201	269	230
 Croatia	563	137	545	148	681	146
 Cyprus	108	7	96	6	124	8
 Czech Republic	309	3	317	9	324	10
 Denmark	540		575		540	
 Estonia	281		297		343	
 Finland	406	36	369	48	N/A	N/A
 France	6,900	245	7,340	308	7,387	309
 Germany	6,616	81	7,171	116	6,568	178
 Greece	351	92	352	96	238	66
 Hungary	572		465		478	
 Ireland	1,208		1,176		1,550	
 Italy	6,878	297	6,785	310	6,107	343
 Latvia	785	N/A	869	N/A	1,059	N/A
 Lithuania	480		525		N/A	
 Luxembourg	274		274		270	
 Malta	63	7	61	7	79	6
 Netherlands	1,652		1,789		1,921	
 Poland	594	123	653	49	838	61
 Portugal	160	0	183	0	222	0
 Romania	325	25	414	44	441	52
 Slovakia	1,627		1,518		1,628	
 Slovenia	401		500		619	
 Spain	4,670	155	4,341	198	4,600	246
 Sweden	487		487		485	
 United Kingdom	8,151	884	9,472	1,113	8,743	1,324
Total EU 28	≈ 48,938		≈ 51,531		≈ 51,324	
 Norway	194	53	217	86	425	74
 Switzerland	1,122	64	1,111	72	1,074	85
 Turkey	62		64		84	
Total All	≈ 50,433		≈ 53,081		≈ 53,144	

TOTAL EXPORTS 2017
































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



8

EXPORTS 2012 - 2014

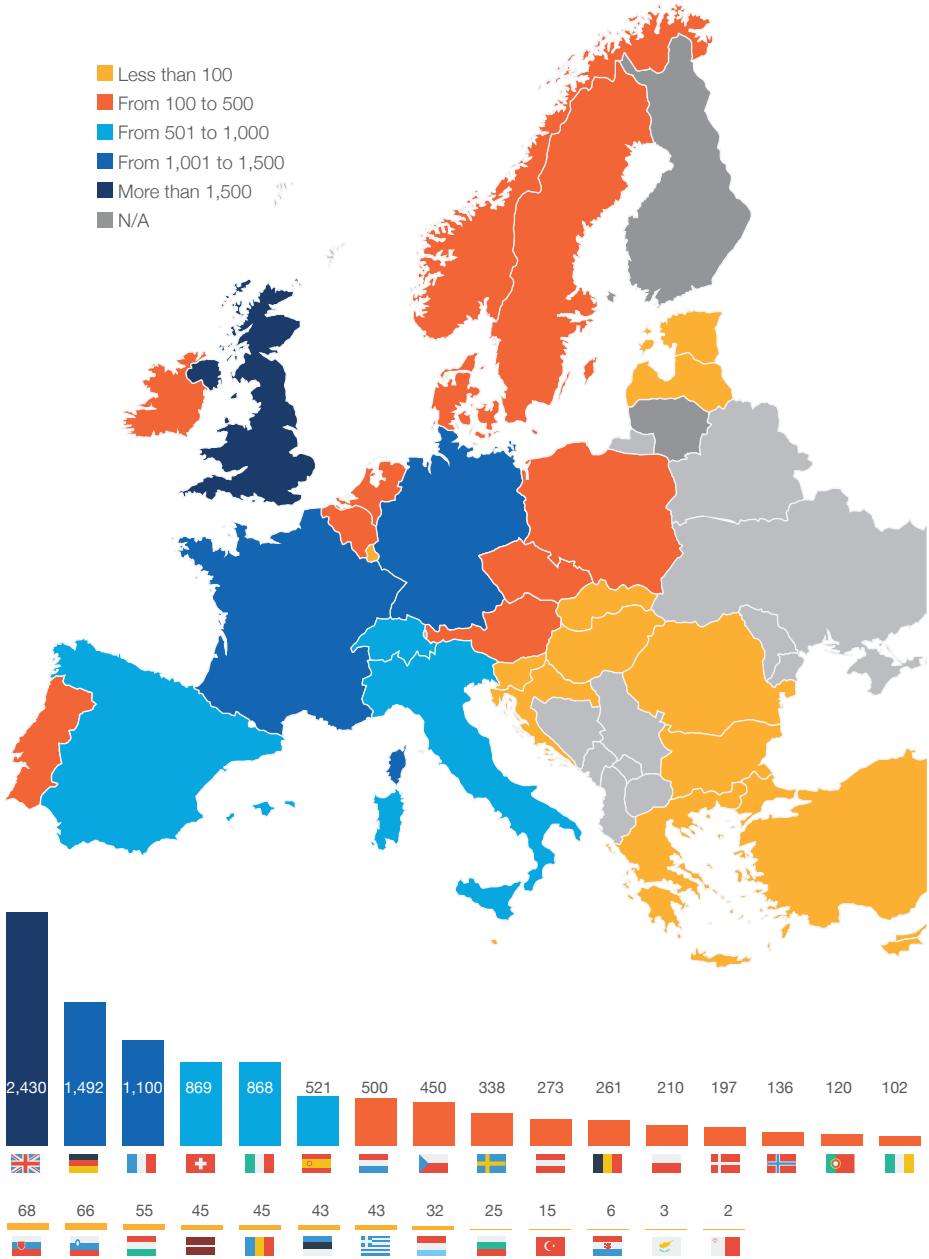
(in 1,000 hl)

Country	2012		2013		2014	
	Intra-EU	Extra-EU	Intra-EU	Extra-EU	Intra-EU	Extra-EU
 Austria	551	155	578	245	744	144
 Belgium	9,085	2,601	8,247	2,827	7,906	3,316
 Bulgaria	71	22	51	27	50	70
 Croatia	81	564	54	501	140	539
 Cyprus	4	1	5	2	5	2
 Czech Republic	2,701	544	2,783	609	3,026	626
 Denmark	2,930		2,646	373	3,040	
 Estonia	528	26	495		601	
 Finland	171	50	144	47	157	36
 France	4,200	942	4,441	662	5,930	769
 Germany	11,255	4,442	10,342	4,749	11,405	4,222
 Greece	110	299	148	215	67	162
 Hungary	352	30	480		446	
 Ireland	3,518		3,988		2,807	
 Italy	1,315	675	1,290	602	1,671	474
 Latvia	291	46	363	68	181	26
 Lithuania	407	77	430	80	653	
 Luxembourg	77		65		63	
 Malta	5	3	5	3	12	5
 Netherlands	14,727		3,656	10,526	3,364	10,594
 Poland	2,016	211	2,541		2,571	261
 Portugal	860	2,370	809	1,699	776	1,848
 Romania	162	65	277	121	253	47
 Slovakia	164	7	290		205	
 Slovenia	425	95	560	160	656	168
 Spain	453	785	495	871	726	1,028
 Sweden	528		500	44	499	55
 United Kingdom	4,420	2,043	4,479	2,080	3,399	1,843
Total EU 28	77,460		76,673		77,588	
 Norway	19		17		44	
 Switzerland	80		52	1	59	4
 Turkey	1,056		1,048		868	
Total All	78,615		77,791		78,563	

Country	2015		2016		2017	
	Intra-EU	Extra-EU	Intra-EU	Extra-EU	Intra-EU	Extra-EU
Austria	762	143	943	145	1,064	159
Belgium	8,891	4,134	9,332	4,753	10,241	5,568
Bulgaria	84	54	81	69	52	77
Croatia	163	605	189	626	186	597
Cyprus	6	3	6	3	8	3
Czech Republic	3,547	593	3,675	687	3,750	811
Denmark	3,015		3,084		3,040	
Estonia	429		470		649	
Finland	183	28	201	28	N/A	
France	6,100	820	6,050	950	5,696	1,072
Germany	10,812	5,137	10,755	5,772	9,213	6,517
Greece	125	307	115	164	218	199
Hungary	418		587		538	
Ireland	3,335		3,104		3,540	
Italy	1,889	658	2,065	517	2,023	762
Latvia	73	37	49	53	112	113
Lithuania	613		682		N/A	
Luxembourg	80		85		85	3
Malta	1	9	1	12	5	11
Netherlands	2,687	11,446	3,516	10,961	3,546	10,596
Poland	2,924	333	2,883	414	2,817	550
Portugal	871	977	919	768	1,900	
Romania	378	122	306	139	296	152
Slovakia	98		130		116	
Slovenia	577	165	361	159	634	
Spain	968	1,289	1,008	1,364	1,744	1,151
Sweden	500	56	504	48	491	48
United Kingdom	3,570	2,080	3,759	2,206	3,211	2,391
Total EU 28	82,095		84,698		≈ 86,866	
Norway	46		50		55	
Switzerland	50	10	77	2	49	1
Turkey	799		682		530	
Total All	83,000		85,509		≈ 87,501	


























9

NUMBER OF ACTIVE BREWERIES 2017



9

NUMBER OF ACTIVE BREWERIES
2011 - 2017

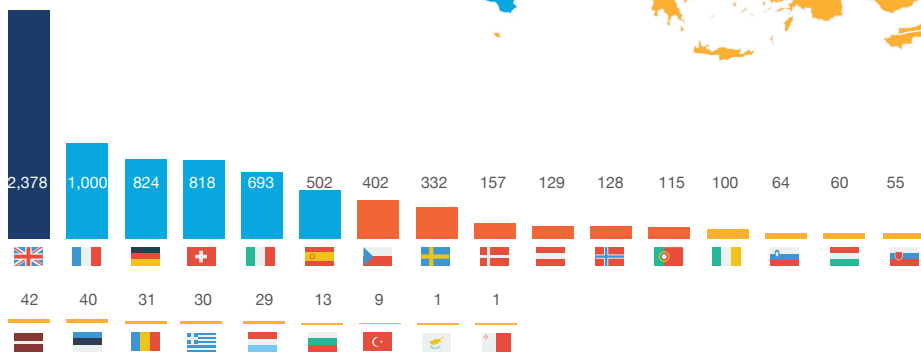
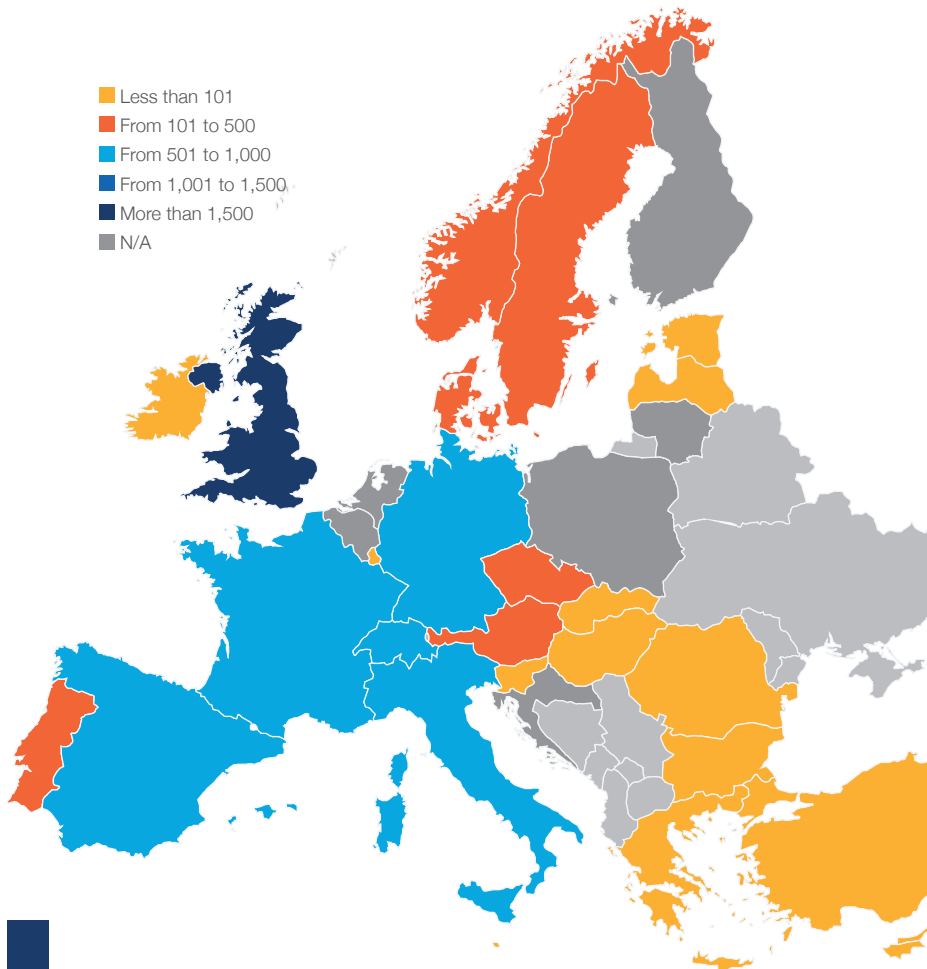
Country	2011	2012	2013	2014	2015	2016	2017
 Austria	170	173	194	198	214	235	273
 Belgium	123	150	160	168	199	224	261
 Bulgaria	13	13	13	16	18	17	25
 Croatia*	7	6	6	6	6	6	6
 Cyprus	2	2	2	4	4	3	3
 Czech Republic	191	213	308	338	390	398	450
 Denmark	150	150	150	159	172	180	197
 Estonia	6	7	10	15	20	33	43
 Finland	25	30	43	49	59	82	N/A
 France	442	503	580	663	793	950	1,100
 Germany	1,347	1,340	1,349	1,352	1,388	1,408	1,492
 Greece	17	18	20	20	28	43	43
 Hungary	24	50	50	50	50	50	55
 Ireland	26	26	30	50	64	93	102
 Italy	350	421	509	599	688	757	868
 Latvia	16	16	25	29	37	41	45
 Lithuania	73	73	73	75	75	72	N/A
 Luxembourg	7	7	7	7	7	30	32
 Malta	1	1	1	1	2	2	2
 Netherlands	125	165	N/A	263	320	400	500
 Poland	117	132	155	133	150	210	210
 Portugal	7	9	18	35	64	94	120
 Romania	17	17	18	22	30	34	45
 Slovakia	25	30	38	39	51	61	68
 Slovenia	N/A	N/A	30	51	55	62	66
 Spain	88	132	221	332	427	483	521
 Sweden	54	75	105	154	219	283	338
 United Kingdom	948	1,300	1,490	1,700	1,880	2,250	2,430
Total EU 28	≈ 4,396	≈ 5,087	≈ 5,819	6,528	7,397	8,501	≈ 9,449
 Norway	34	41	52	75	101	128	136
 Switzerland	360	375	409	483	623	753	869
 Turkey	11	11	12	9	12	10	15
Total All	≈ 4,801	≈ 5,514	≈ 6,292	7,095	8,146	9,392	≈ 10,469

* Croatia: microbreweries not included.

10






























MICROBREWERIES 2017

- Less than 101
- From 101 to 500
- From 501 to 1,000
- From 1,001 to 1,500
- More than 1,500
- N/A



10

MICROBREWERIES
2011 - 2017

Country	2011	2012	2013	2014	2015	2016	2017
 Austria	97	92	109	109	114	123	129
 Belgium	N/A	N/A	N/A	N/A	N/A	N/A	N/A
 Bulgaria	5	5	5	6	6	7	13
 Croatia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
 Cyprus	0	0	0	2	2	1	1
 Czech Republic	90	20	207	238	202	350	402
 Denmark	N/A	N/A	130	129	132	140	157
 Estonia	3	4	7	12	17	30	40
 Finland	22	27	22	25	41	55	N/A
 France	373	433	504	566	690	850	1,000
 Germany	659	666	673	682	723	738	824
 Greece	7	8	9	10	15	25	30
 Hungary	20	46	46	46	46	55	60
 Ireland	N/A	N/A	N/A	N/A	N/A	91	100
 Italy	336	407	491	505	540	718	693
 Latvia	N/A	N/A	20	26	34	38	42
 Lithuania	N/A	N/A	30	32	32	31	N/A
 Luxembourg	4	2	2	12	15	22	29
 Malta	0	0	0	0	1	1	1
 Netherlands	N/A	N/A	N/A	N/A	N/A	N/A	N/A
 Poland	N/A	50	N/A	N/A	N/A	N/A	N/A
 Portugal	1	3	12	30	60	89	115
 Romania	2	2	3	7	15	20	31
 Slovakia	20	26	28	29	39	48	55
 Slovenia	20	28	28	49	50	60	64
 Spain*	70	114	203	314	409	465	502
 Sweden	49	70	100	149	214	278	332
 United Kingdom**	898	1252	1,442	1,648	1,828	2,198	2,378
 Norway	26	33	43	65	91	120	128
 Switzerland	313	328	363	440	573	703	818
 Turkey	5	5	3	0	7	8	9

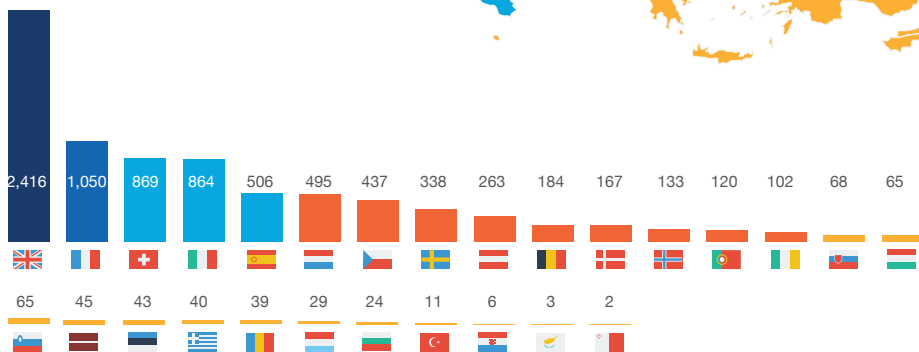
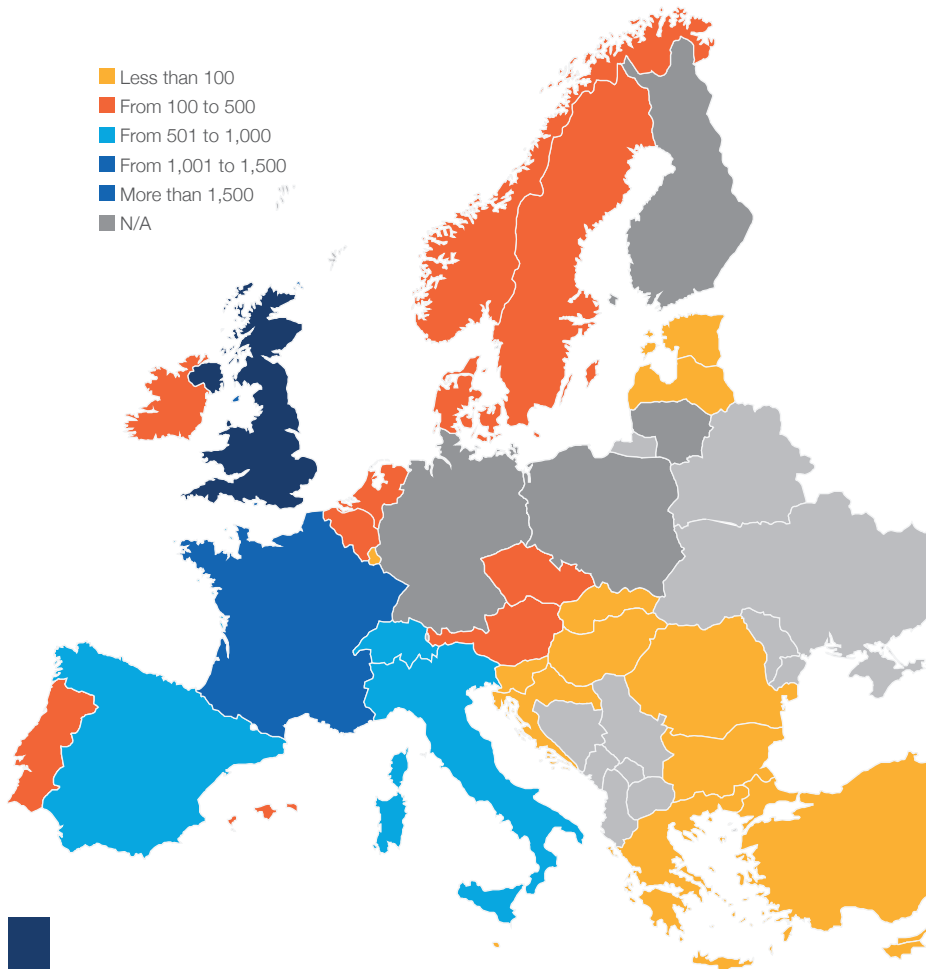
* Spanish data cover all microbreweries irrespective their volume of production.

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






























11

NUMBER OF ACTIVE BREWING COMPANIES 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



NUMBER OF ACTIVE BREWING COMPANIES 2011 - 2017

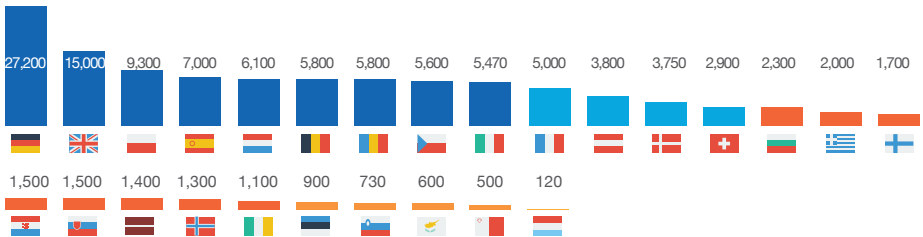
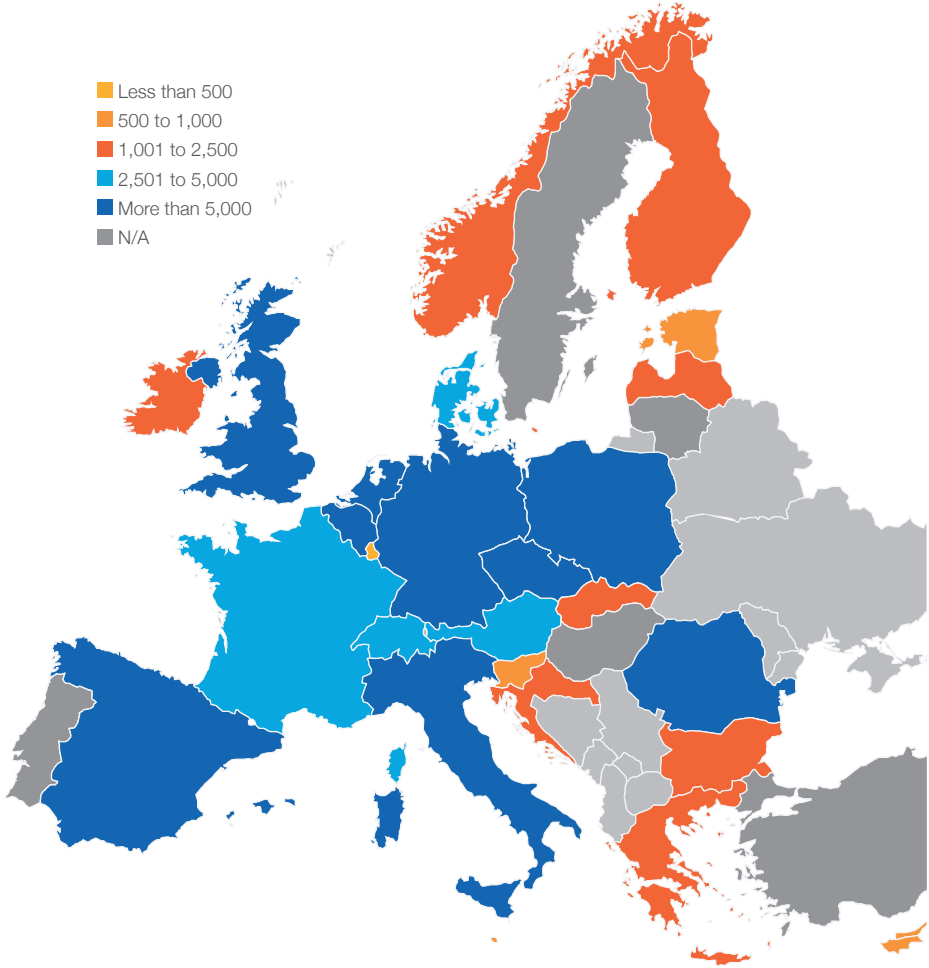
Country	2011	2012	2013	2014	2015	2016	2017
 Austria	161	164	185	189	205	225	263
 Belgium	N/A	60	N/A	N/A	N/A	147	184
 Bulgaria	11	11	11	14	16	16	24
 Croatia*	7	6	6	6	6	6	6
 Cyprus	2	2	2	4	4	3	3
 Czech Republic	177	197	289	322	374	385	437
 Denmark	120	120	120	139	142	150	167
 Estonia	6	7	10	15	20	33	43
 Finland	25	30	43	49	54	76	N/A
 France	440	501	577	660	790	945	1,050
 Germany	N/A	N/A	N/A	N/A	N/A	N/A	N/A
 Greece	15	16	18	18	25	40	40
 Hungary	24	50	50	50	50	60	65
 Ireland	24	24	30	50	64	93	102
 Italy	344	415	503	593	682	751	864
 Latvia	16	16	25	29	37	41	45
 Lithuania	73	73	71	73	73	72	N/A
 Luxembourg	7	6	6	7	7	27	29
 Malta	1	1	1	1	2	2	2
 Netherlands	120	160	185	258	315	395	495
 Poland	N/A	87	N/A	N/A	138	N/A	N/A
 Portugal	7	9	17	35	64	94	120
 Romania	12	12	12	16	25	28	39
 Slovakia	25	30	38	39	51	61	68
 Slovenia	22	30	30	50	55	61	65
 Spain	76	120	209	320	415	471	506
 Sweden	54	75	105	154	219	283	338
 United Kingdom	937	1,291	1,481	1,689	1,866	2,236	2,416
Total EU 28	≈ 4,230	≈ 4,853	≈ 5,610	≈ 6,368	≈ 5,686	≈ 8,329	≈ 9,232
 Norway	30	37	47	70	96	125	133
 Switzerland	358	373	407	483	623	753	869
 Turkey	7	7	8	10	12	10	11
Total All	≈ 4,625	≈ 5,270	≈ 6,072	≈ 6,931	≈ 7,943	≈ 9,207	≈ 10,234

* Croatia: Microbreweries not included.

12

DIRECT EMPLOYMENT 2017

- Less than 500
- 500 to 1,000
- 1,001 to 2,500
- 2,501 to 5,000
- More than 5,000
- N/A



12

DIRECT EMPLOYMENT
2011 - 2017


Country	2011	2012	2013	2014	2015	2016	2017
 Austria	3,800	3,800	3,800	3,800	3,800	3,800	3,800
 Belgium	5,000	4,500	4,500	4,500	4,700	4,700	5,800
 Bulgaria	2,900	2,500	2,500	2,500	2,400	2,300	2,300
 Croatia	1,600	1,600	1,600	1,500	1,500	1,500	1,500
 Cyprus	700	600	600	600	600	600	600
 Czech Republic	6,800	7,000	5,800	5,900	6,100	5,800	5,600
 Denmark	N/A	3,500	3,500	3,600	3,700	3,750	3,750
 Estonia	700	700	700	800	900	900	900
 Finland	2,300	2,100	2,000	1,900	1,700	1,700	1,700
 France	3,600	3,900	4,000	4,100	4,300	4,500	5,000
 Germany	27,100	26,900	26,800	26,800	26,900	27,200	27,200
 Greece	1,900	1,900	1,900	1,900	2,000	2,000	2,000
 Hungary	1,700	1,600	1,700	1,700	1,700	1,700	N/A
 Ireland	1,600	1,500	2,000	2,000	1,700	1,400	1,100
 Italy	4,500	4,700	4,800	5,000	5,350	5,350	5,470
 Latvia	N/A	1,100	1,200	1,300	1,400	1,400	1,400
 Lithuania	2,000	2,000	2,000	2,300	2,300	2,300	N/A
 Luxembourg	130	130	130	130	125	120	120
 Malta	300	400	400	400	500	500	500
 Netherlands	6,800	6,300	6,000	6,100	6,100	6,100	6,100
 Poland*	N/A	16,000	16,000	16,000	10,000	10,000	9,300
 Portugal	1,500	1,400	1,500	2,100	1,900	2,100	N/A
 Romania	5,900	5,900	5,700	5,400	5,500	5,600	5,800
 Slovakia	1,700	1,700	1,600	1,500	1,500	1,400	1,500
 Slovenia	700	700	700	800	700	650	730
 Spain	6,000	6,000	5,600	5,600	5,900	5,900	7,000
 Sweden	4,000	4,100	4,000	4,000	4,100	4,200	N/A
 United Kingdom	14,000	12,800	13,300	13,900	14,500	14,300	15,000
Total EU 28	≈ 127,530	125,330	124,330	126,130	121,916	121,770	≈ 124,470
 Norway	2,500	2,200	1,400	1,400	1,300	1,300	1,300
 Switzerland	2,800	2,800	2,800	2,800	2,800	2,800	2,900
 Turkey	2,300	2,400	2,800	2,400	2,400	2,400	N/A
Total All	≈ 135,130	132,730	131,330	132,730	128,375	128,270	≈ 131,070

* Poland 2015 data only cover full time positions.

13

EXCISE DUTY REVENUES

(in million Euros)

Country	2011	2012	2013	2014	2015	2016	2017
 Austria	190.00	191.30	193.10	195.20	189.00	196.00	192.00
 Belgium	183.78	180.80	183.36	196.46	194.00	201.59	200.80
 Bulgaria	39.35	41.15	40.23	38.05	39.56	41.57	40.59
 Croatia	N/A	88.00	79.52	77.94	83.58	82.73	85.44
 Cyprus	10.81	10.88	13.51	12.23	12.35	12.35	13.50
 Czech Republic	178.93	182.55	179.08	166.88	170.04	170.41	171.52
 Denmark	118.59	138.73	131.40	125.19	121.35	127.75	122.30
 Estonia	36.98	38.97	42.03	43.06	48.38	51.67	58.32
 Finland*	530.00	581.00	575.00	610.00	605.00	606.00	595.93
 France	295.25	307.83	670.33	863.63	831.18	854.48	950.00
 Germany	702.26	697.00	672.67	679.38	676.85	678.00	664.00
 Greece	115.45	110.24	112.96	107.44	105.84	155.25	194.78
 Hungary	140.74	130.17	147.47	146.48	142.88	148.50	152.16
 Ireland	307.30	308.00	358.01	424.84	417.28	430.00	424.00
 Italy*	462.73	428.00	482.00	536.00	619.00	661.00	703.00
 Latvia	26.35	25.88	24.36	25.14	27.12	32.07	36.84
 Lithuania	46.60	46.15	41.71	50.98	48.75	47.90	88.57
 Luxembourg	3.71	3.85	3.75	3.80	5.12	5.70	5.74
 Malta	2.29	2.29	2.30	3.15	2.84	3.33	4.00
 Netherlands	381.97	387.00	405.91	443.73	441.18	446.00	447.00
 Poland	765.07	878.90	841.23	828.26	840.09	817.14	829.44
 Portugal	73.09	65.78	71.30	69.27	70.80	75.42	84.39
 Romania	133.92	141.67	151.43	149.59	157.65	137.92	133.53
 Slovakia	54.83	56.08	55.73	55.46	57.21	56.97	57.54
 Slovenia	74.28	72.80	75.77	80.80	85.50	85.34	80.15
 Spain*	305.52	307.91	304.65	311.93	317.52	324.24	345.59
 Sweden	338.01	374.00	375.90	370.53	424.77	416.29	419.40
 United Kingdom	3,973.02	4,229.73	3,976.16	4,308.97	4,449.26	3,878.32	3,882.95
 Norway*	555.42	573.54	566.54	478.15	592.98	599.07	N/A
 Switzerland	N/A	93.00	93.00	93.00	100.00	100.00	94.00
 Turkey	N/A	1,295.00	N/A	N/A	1,390.00	N/A	N/A

Note: Excise duties have been converted to Euro, as used in the European Commission's (DG Taxud) database. For information in local currency, please consult the same database.

* Finland, Italy, Spain and Norway data as provided by the national association.

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.

15

METHODOLOGY

The data for the 2018 edition were mainly collated via the national brewers' associations through surveys carried out by The Brewers of Europe from 2011 until 2018.

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.

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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.

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