

# Beer statistics

2014 edition





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2014 edition



The Brewers of Europe

Editor: Marlies Van de Walle

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Demetrio Carceller  
President of The  
Brewers of Europe

Dear Reader,

It gives me great pleasure to present to you The Brewers of Europe's 2014 Statistics booklet, which looks at the key figures from 2013, and trends since 2008, across the 28 EU Member States, Norway, Switzerland and Turkey.

What the figures show are that the signs of recovery that were already starting to appear in 2012 have spread, but we are not there yet and still need to be vigilant.

As an example of that need for vigilance, it seems that all the excise duty rate increases on beer over the period 2012-2013 have harmed the rate of recovery. There was once again in 2013 a decline in Europe both in beer production and beer consumption. Whilst around two thirds of EU countries saw a continuation of the trend of consumption shifting from the on-trade (hospitality sector) to the off-trade (retail sector). One interesting result of all this: despite all the tax increases, beer excise duty revenues for the Governments actually dropped in 2013.

Nevertheless, direct employment and exports remained somewhat stable in 2013, showing the efforts of the brewers to keep their businesses running. Indeed, it is the growth in exports that is helping to sustain the businesses of many breweries in the face of the ongoing decline in domestic consumption.

In addition to this, the numbers of breweries, and especially microbreweries, continued to grow in 2013. The EU now counts over 5000 breweries, showing the interest that many Europeans have for the diversity and variety of Europe's many different beer cultures. Europe's beer culture is also an important draw for millions of the tourists that arrive in Europe each year.

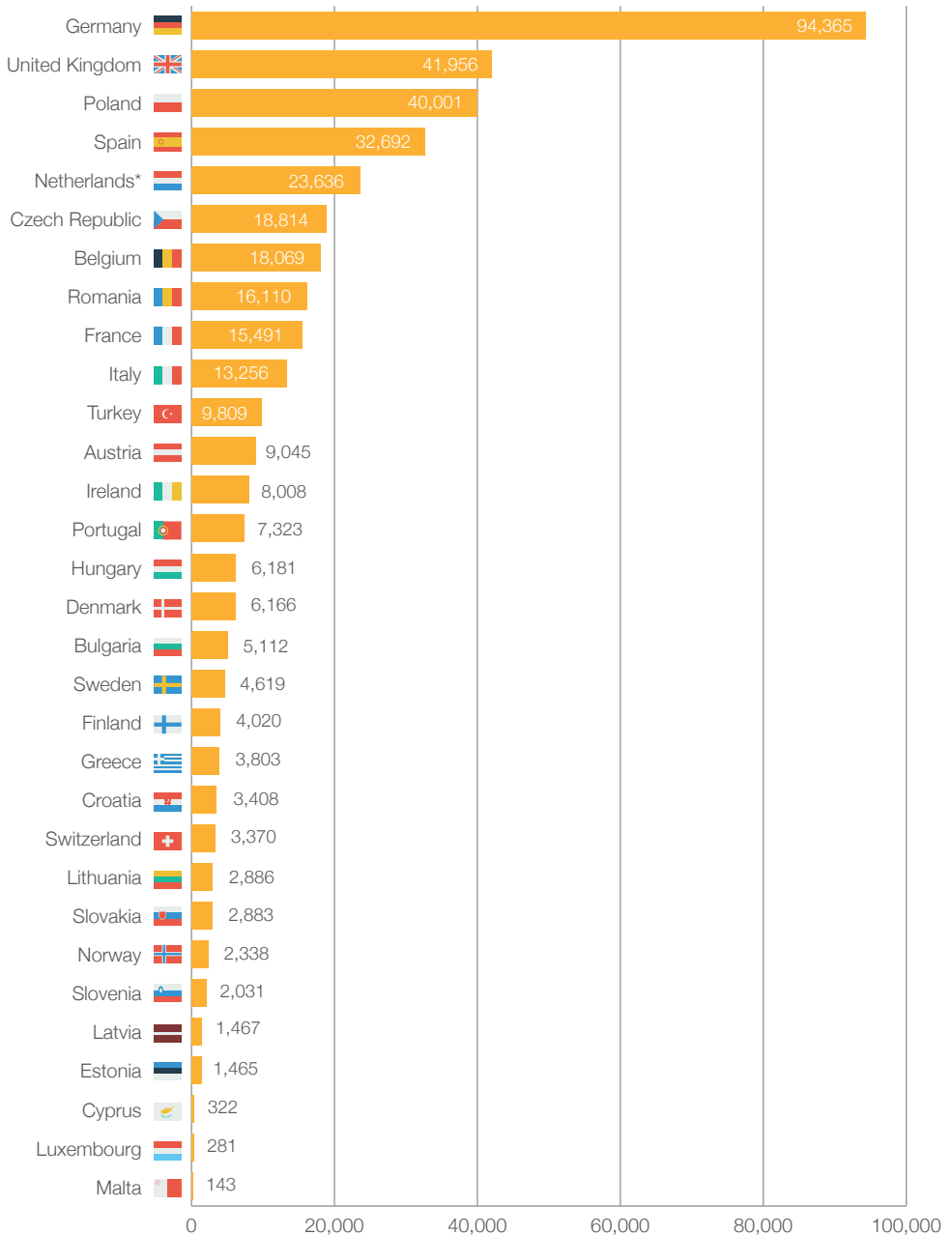
Until we start to see an actual turnaround in both production and consumption of beer, sustained over a period of years across all regions of the EU, we still cannot talk about a full recovery for Europe's beer sector, but the signs are positive.

Europe's Brewers thus call on policymakers to support the brewing sector and therefore help brewers to support the delivery of the Europe 2020 Growth Strategy. With 2 million jobs created by brewing across the whole value chain, a flourishing brewing sector can sustain not just the beer companies but all the interdependent sectors, from agriculture to retail and hospitality, and ultimately benefit Europe's wider economy and society.

Demetrio Carceller  
President of The Brewers of Europe

# 3

## BEER PRODUCTION 2013 (in 1,000 hl)







## 3

# BEER PRODUCTION 2008 - 2013

(in 1,000 hl)

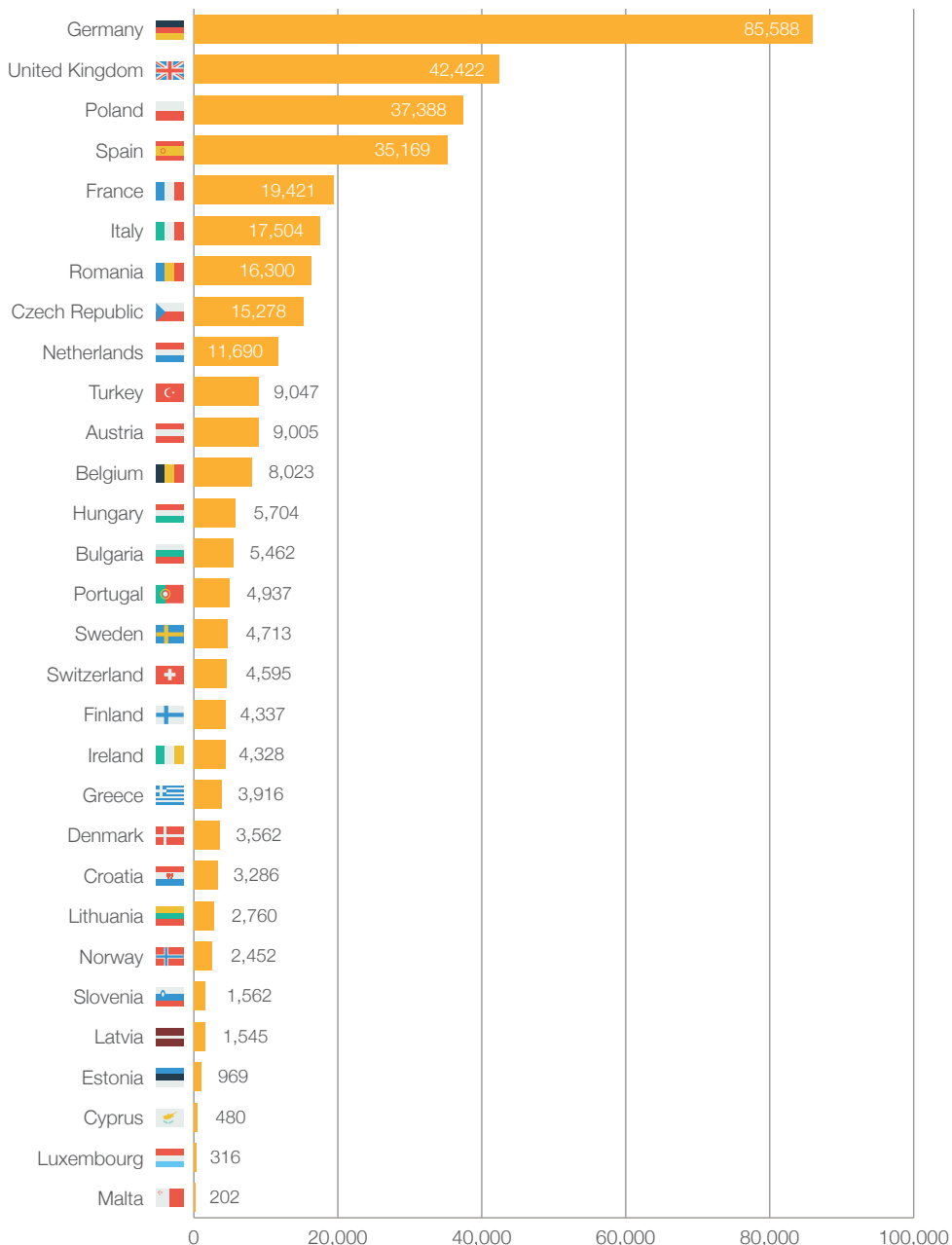
| Country  | 2008           | 2009           | 2010           | 2011           | 2012           | 2013           |
|--|----------------|----------------|----------------|----------------|----------------|----------------|
|  Austria          | 8,937          | 8,728          | 8,670          | 8,917          | 8,924          | 9,045          |
|  Belgium          | 17,796         | 18,009         | 18,122         | 18,571         | 18,751         | 18,069         |
|  Bulgaria         | 5,358          | 4,825          | 4,800          | 4,820          | 4,992          | 5,112          |
|  Croatia          | 3,887          | 3,673          | 3,438          | 3,738          | 3,634          | 3,408          |
|  Cyprus           | 396            | 356            | 340            | 314            | 329            | 322            |
|  Czech Republic   | 19,806         | 19,292         | 17,550         | 18,042         | 18,498         | 18,814         |
|  Denmark          | 6,474          | 6,046          | 6,335          | 6,590          | 6,080          | 6,166          |
|  Estonia          | 1,168          | 1,176          | 1,312          | 1,360          | 1,433          | 1,465          |
|  Finland          | 4,470          | 4,491          | 4,235          | 4,220          | 4,030          | 4,020          |
|  France           | 16,267         | 16,326         | 16,290         | 16,167         | 17,132         | 15,491         |
|  Germany          | 99,910         | 98,078         | 95,683         | 95,545         | 94,618         | 94,365         |
|  Greece           | 4,500          | 4,177          | 3,940          | 3,700          | 3,745          | 3,803          |
|  Hungary          | 7,049          | 6,348          | 6,295          | 6,249          | 6,312          | 6,181          |
|  Ireland          | 8,846          | 8,041          | 8,249          | 8,514          | 8,195          | 8,008          |
|  Italy            | 13,273         | 12,776         | 12,814         | 13,410         | 13,293         | 13,256         |
|  Latvia           | 1,307          | 1,357          | 1,455          | 1,529          | 1,405          | 1,467          |
|  Lithuania        | 3,074          | 2,794          | 2,925          | 2,922          | 2,841          | 2,886          |
|  Luxembourg       | 312            | 308            | 310            | 302            | 292            | 281            |
|  Malta            | 112            | 126            | 130            | 127            | 135            | 143            |
|  Netherlands*     | 27,181         | 25,376         | 24,218         | 23,644         | 24,271         | 23,636         |
|  Norway           | 2,580          | 2,512          | 2,436          | 2,439          | 2,310          | 2,338          |
|  Poland           | 37,107         | 36,236         | 36,647         | 38,067         | 39,294         | 40,001         |
|  Portugal        | 8,208          | 7,833          | 8,312          | 8,299          | 7,986          | 7,323          |
|  Romania        | 19,670         | 17,600         | 16,920         | 16,900         | 18,000         | 16,110         |
|  Slovakia       | 3,558          | 3,264          | 3,112          | 3,123          | 3,206          | 2,883          |
|  Slovenia       | 2,124          | 1,978          | 1,902          | 1,984          | 1,819          | 2,031          |
|  Spain          | 33,402         | 33,825         | 33,375         | 33,573         | 33,031         | 32,692         |
|  Sweden         | 4,288          | 4,455          | 4,349          | 4,491          | 4,408          | 4,619          |
|  Switzerland    | 3,625          | 3,555          | 3,539          | 3,546          | 3,515          | 3,370          |
|  Turkey         | 9,244          | 10,219         | 10,279         | 10,164         | 11,013         | 9,809          |
|  United Kingdom | 49,611         | 45,141         | 44,997         | 45,694         | 42,047         | 41,956         |
| <b>Total EU 28</b>   | <b>408,090</b> | <b>392,636</b> | <b>386,725</b> | <b>390,813</b> | <b>388,701</b> | <b>383,553</b> |
| <b>Total All</b>   | <b>423,540</b> | <b>408,922</b> | <b>402,979</b> | <b>406,962</b> | <b>405,539</b> | <b>399,070</b> |

\* Only production of members Dutch Brewers association  
 Source: National brewers' associations

## 4

## BEER CONSUMPTION 2013










(in 1,000 hl)



## 4

# BEER CONSUMPTION 2008 - 2013

(in 1,000 hl)

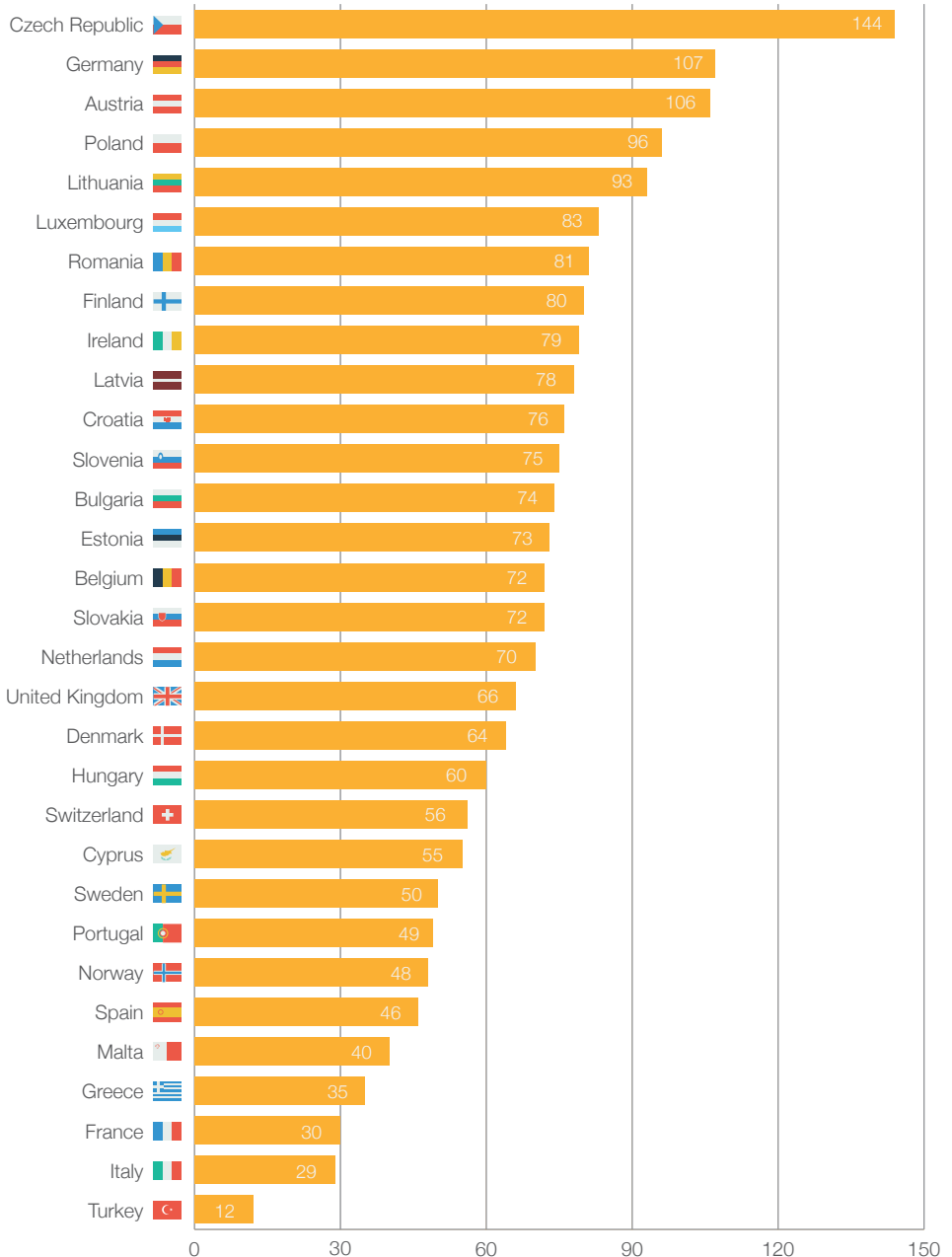
| Country  | 2008           | 2009           | 2010           | 2011           | 2012           | 2013           |
|--|----------------|----------------|----------------|----------------|----------------|----------------|
|  Austria          | 9,146          | 8,905          | 8,878          | 9,105          | 9,110          | 9,005          |
|  Belgium          | 8,546          | 8,679          | 8,439          | 8,574          | 8,228          | 8,023          |
|  Bulgaria         | 5,373          | 4,872          | 4,891          | 5,100          | 5,404          | 5,462          |
|  Croatia          | 3,755          | 3,514          | 3,321          | 3,547          | 3,411          | 3,286          |
|  Cyprus           | 440            | 483            | 519            | 456            | 471            | 480            |
|  Czech Republic   | 16,457         | 15,586         | 15,569         | 15,543         | 15,445         | 15,278         |
|  Denmark          | 4,298          | 3,946          | 3,586          | 3,654          | 3,437          | 3,562          |
|  Estonia          | 984            | 1,164          | 1,063          | 960            | 930            | 969            |
|  Finland          | 4,530          | 4,480          | 4,443          | 4,551          | 4,286          | 4,337          |
|  France           | 19,828         | 20,014         | 19,730         | 20,000         | 19,941         | 19,421         |
|  Germany          | 91,132         | 89,853         | 87,872         | 87,655         | 86,279         | 85,888         |
|  Greece           | 4,600          | 4,329          | 4,092          | 4,092          | 3,945          | 3,916          |
|  Hungary          | 7,181          | 6,500          | 6,100          | 6,249          | 5,958          | 5,704          |
|  Ireland          | 5,193          | 4,855          | 4,814          | 4,721          | 4,677          | 4,328          |
|  Italy            | 17,766         | 16,855         | 17,249         | 17,715         | 17,458         | 17,504         |
|  Latvia           | 1,551          | 1,423          | 1,492          | 1,626          | 1,543          | 1,545          |
|  Lithuania        | 3,040          | 2,794          | 2,925          | 2,932          | 2,830          | 2,760          |
|  Luxembourg       | 346            | 320            | 317            | 325            | 319            | 316            |
|  Malta            | 181            | 193            | 196            | 189            | 199            | 202            |
|  Netherlands      | 12,910         | 12,036         | 11,956         | 11,974         | 12,122         | 11,690         |
|  Norway           | 2,750          | 2,750          | 2,750          | 2,800          | 2,400          | 2,452          |
|  Poland           | 35,861         | 34,384         | 34,484         | 36,236         | 37,803         | 37,388         |
|  Portugal       | 6,200          | 6,100          | 5,900          | 5,320          | 4,927          | 4,937          |
|  Romania        | 20,193         | 17,572         | 17,000         | 17,000         | 18,201         | 16,300         |
|  Slovakia       | 4,178          | 4,050          | 3,609          | 3,997          | 4,141          | N/A            |
|  Slovenia       | 1,780          | 1,712          | 1,663          | 1,672          | 1,520          | 1,562          |
|  Spain          | 35,692         | 35,786         | 35,199         | 35,231         | 35,108         | 35,169         |
|  Sweden         | 4,900          | 4,884          | 4,894          | 4,806          | 4,659          | 4,713          |
|  Switzerland    | 4,489          | 4,480          | 4,526          | 4,626          | 4,623          | 4,595          |
|  Turkey         | 9,250          | 9,235          | 9,215          | 9,149          | 9,988          | 9,047          |
|  United Kingdom | 51,498         | 46,817         | 45,873         | 44,844         | 42,962         | 42,422         |
| <b>Total EU 28</b>   | <b>377,558</b> | <b>362,107</b> | <b>356,074</b> | <b>358,074</b> | <b>355,314</b> | <b>346,167</b> |
| <b>Total All</b>   | <b>394,047</b> | <b>378,572</b> | <b>372,565</b> | <b>374,650</b> | <b>372,324</b> | <b>362,261</b> |

Source: National brewers' associations

## 5

# BEER CONSUMPTION PER CAPITA 2013
































(in litres)



## 5

# BEER CONSUMPTION PER CAPITA 2008 - 2013

(in litres)

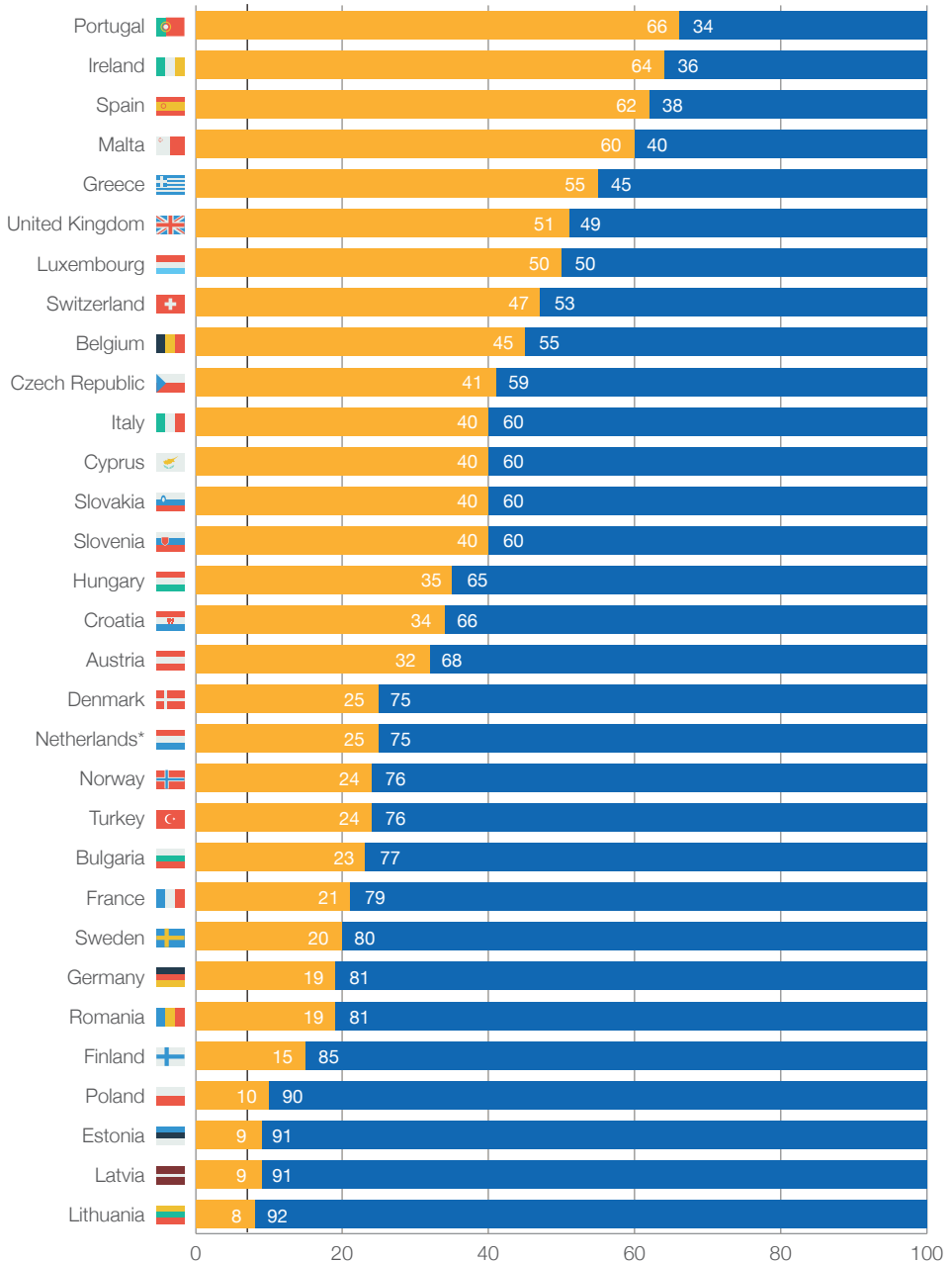
| Country  | 2008      | 2009      | 2010      | 2011      | 2012      | 2013      |
|--|-----------|-----------|-----------|-----------|-----------|-----------|
|  Austria          | 110       | 107       | 106       | 108       | 108       | 106       |
|  Belgium          | 82        | 81        | 78        | 78        | 74        | 72        |
|  Bulgaria         | 73        | 67        | 67        | 69        | 73        | 74        |
|  Croatia          | 85        | 79        | 74        | 86        | 78        | 76        |
|  Cyprus           | 58        | 51        | 52        | 51        | 55        | 55        |
|  Czech Republic   | 158       | 159       | 144       | 145       | 148       | 144       |
|  Denmark          | 78        | 72        | 69        | 68        | 64        | 64        |
|  Estonia          | 88        | 85        | 78        | 72        | 72        | 73        |
|  Finland          | 85        | 84        | 83        | 85        | 79        | 80        |
|  France           | 31        | 31        | 31        | 31        | 31        | 30        |
|  Germany          | 111       | 110       | 107       | 107       | 108       | 107       |
|  Greece           | 41        | 39        | 36        | 35        | 35        | 35        |
|  Hungary          | 72        | 65        | 61        | 60        | 60        | 60        |
|  Ireland          | 99        | 91        | 90        | 86        | 86        | 79        |
|  Italy            | 29        | 28        | 29        | 30        | 29        | 29        |
|  Latvia           | 68        | 69        | 70        | 74        | 76        | 78        |
|  Lithuania        | 91        | 83        | 90        | 96        | 96        | 93        |
|  Luxembourg       | 94        | 86        | 85        | 85        | 83        | 83        |
|  Malta            | 45        | 47        | 47        | 45        | 48        | 40        |
|  Netherlands      | 79        | 73        | 72        | 72        | 72        | 70        |
|  Norway         | 54        | 55        | 56        | 56        | 47        | 48        |
|  Poland         | 94        | 91        | 91        | 95        | 98        | 96        |
|  Portugal       | 61        | 60        | 59        | 53        | 49        | 49        |
|  Romania        | 99        | 88        | 87        | 84        | 90        | 81        |
|  Slovakia       | 81        | 79        | 79        | 73        | 76        | 72        |
|  Slovenia       | 93        | 89        | 82        | 81        | 74        | 75        |
|  Spain          | 52        | 51        | 48        | 48        | 48        | 46        |
|  Sweden         | 52        | 52        | 50        | 51        | 50        | 50        |
|  Switzerland    | 58        | 57        | 57        | 58        | 57        | 56        |
|  Turkey         | 13        | 13        | 12        | 12        | 13        | 12        |
|  United Kingdom | 84        | 76        | 74        | 74        | 67        | 66        |
| <b>Average EU 28</b>   | <b>78</b> | <b>75</b> | <b>73</b> | <b>73</b> | <b>72</b> | <b>71</b> |
| <b>Average All</b>   | <b>75</b> | <b>71</b> | <b>70</b> | <b>70</b> | <b>69</b> | <b>68</b> |

Source: National brewers' associations

## 6

ON-TRADE / OFF-TRADE 2013  
(in %)

■ On-trade  
■ Off-trade



## 6

# ON-TRADE / OFF-TRADE 2008 - 2013

(in %)

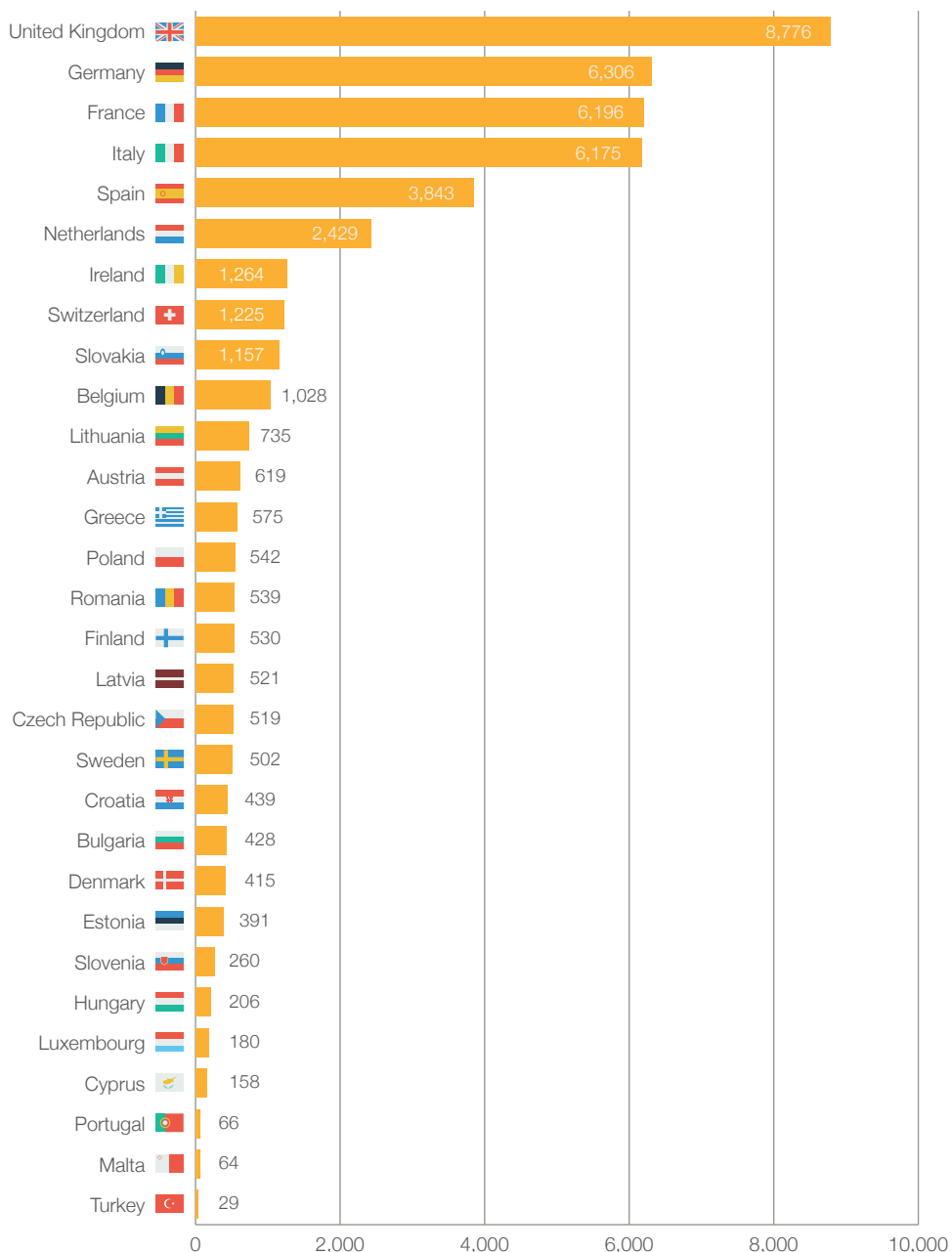
| Country  | 2008     |           | 2009     |           | 2010     |           | 2011     |           | 2012     |           | 2013     |           |
|--|----------|-----------|----------|-----------|----------|-----------|----------|-----------|----------|-----------|----------|-----------|
|  | On-trade | Off-trade | On-trade | Off-trade | On-trade | Off-trade | On-trade | Off-trade | On-trade | Off-trade | On-trade | Off-trade |
|  Austria          | 34       | 66        | 34       | 66        | 33       | 67        | 33       | 67        | 32       | 68        | 32       | 68        |
|  Belgium          | 51       | 49        | 49       | 51        | 48       | 52        | 46       | 54        | 46       | 54        | 45       | 55        |
|  Bulgaria         | 30       | 70        | 28       | 72        | 26       | 74        | 26       | 74        | 25       | 75        | 23       | 77        |
|  Croatia          | 39       | 61        | 40       | 60        | 36       | 64        | 37       | 63        | 35       | 65        | 34       | 66        |
|  Cyprus           | 49       | 51        | 49       | 51        | 48       | 52        | 45       | 55        | 42       | 58        | 40       | 60        |
|  Czech Republic   | 51       | 49        | 50       | 50        | 48       | 52        | 48       | 52        | 43       | 57        | 41       | 59        |
|  Denmark          | 27       | 73        | 23       | 77        | 23       | 77        | 23       | 77        | 25       | 75        | 25       | 75        |
|  Estonia          | 5        | 95        | 8        | 92        | 9        | 91        | N/A      | N/A       | 9        | 91        | 9        | 91        |
|  Finland          | 17       | 83        | 16       | 84        | 16       | 84        | 15       | 85        | 15       | 85        | 15       | 85        |
|  France           | 24       | 76        | 25       | 75        | 24       | 76        | 22       | 78        | 23       | 77        | 21       | 79        |
|  Germany          | 29       | 71        | 27       | 73        | 22       | 78        | 20       | 80        | 19       | 81        | 19       | 81        |
|  Greece           | 65       | 35        | 62       | 38        | 62       | 38        | 60       | 40        | 56       | 44        | 55       | 45        |
|  Hungary          | 40       | 60        | 40       | 60        | 38       | 62        | 38       | 62        | 38       | 62        | 35       | 65        |
|  Ireland          | 69       | 31        | 71       | 29        | 66       | 34        | 65       | 36        | 61       | 39        | 64       | 36        |
|  Italy            | 44       | 56        | 44       | 56        | 43       | 57        | 42       | 58        | 41       | 59        | 40       | 60        |
|  Latvia           | 7        | 93        | 6        | 94        | 6        | 94        | 8        | 92        | 8        | 92        | 9        | 91        |
|  Lithuania        | 10       | 90        | 10       | 90        | 9        | 91        | 9        | 91        | 8        | 92        | 8        | 92        |
|  Luxembourg       | 60       | 40        | 60       | 40        | 55       | 45        | 55       | 45        | 52       | 48        | 50       | 50        |
|  Malta            | 60       | 40        | 60       | 40        | 60       | 40        | 64       | 36        | 62       | 38        | 60       | 40        |
|  Netherlands*     | 29       | 71        | 26       | 74        | 27       | 73        | 26       | 74        | 27       | 73        | 25       | 75        |
|  Norway          | 21       | 79        | 25       | 75        | 25       | 75        | 25       | 75        | 25       | 75        | 24       | 76        |
|  Poland         | 20       | 80        | 15       | 85        | 15       | 85        | 13       | 87        | 10       | 90        | 10       | 90        |
|  Portugal       | 70       | 30        | 70       | 30        | 69       | 31        | 69       | 31        | 68       | 33        | 66       | 34        |
|  Romania        | 35       | 65        | 30       | 70        | 28       | 72        | 25       | 75        | 22       | 78        | 19       | 81        |
|  Slovakia       | 40       | 60        | 40       | 60        | 40       | 60        | 40       | 60        | 40       | 60        | 40       | 60        |
|  Slovenia       | 40       | 60        | 40       | 60        | 40       | 60        | 40       | 60        | 40       | 60        | 40       | 60        |
|  Spain          | 69       | 31        | 67       | 33        | 66       | 34        | 65       | 35        | 63       | 37        | 62       | 38        |
|  Sweden         | 20       | 80        | 19       | 81        | 19       | 81        | 19       | 81        | 20       | 80        | 20       | 80        |
|  Switzerland    | 45       | 55        | 50       | 50        | 48       | 52        | 50       | 50        | 50       | 50        | 47       | 53        |
|  Turkey         | 22       | 78        | 22       | 78        | 23       | 77        | 26       | 74        | 26       | 74        | 24       | 76        |
|  United Kingdom | 54       | 46        | 54       | 46        | 52       | 48        | 52       | 48        | 53       | 47        | 51       | 49        |

\* Only data members Dutch brewers association  
Source: National brewers' associations

## 7

## TOTAL IMPORTS 2013

(in 1,000 hl)





## 7

## IMPORTS 2008 - 2010

(in 1,000 hl)
































| Country            | 2008          |          | 2009          |          | 2010          |          |
|--------------------|---------------|----------|---------------|----------|---------------|----------|
|                    | Intra-EU      | Extra-EU | Intra-EU      | Extra-EU | Intra-EU      | Extra-EU |
| Austria            | 546           | 54       | 577           | 39       | 569           | 46       |
| Belgium            | 702           | 178      | 726           | 168      | 727           | 198      |
| Bulgaria           | 97            | 30       | 171           | 36       | 157           | 40       |
| Croatia            | 313           | 100      | 285           | 85       | 282           | 119      |
| Cyprus             | 95            | 8        | 120           | 7        | 169           | 9        |
| Czech Republic     | 356           | 1        | 638           | 2        | 999           | 1        |
| Denmark            | 430           |          | 342           |          | 373           |          |
| Estonia            | 123           | 35       | 155           | 37       | 367           | 41       |
| Finland            | 452           | 16       | 397           | 22       | 584           | 38       |
| France             | 5,939         |          | 5,943         |          | 6,832         |          |
| Germany            | 6,405         | 80       | 6,424         | 108      | 7,334         | 151      |
| Greece             | 519           | 67       | 466           | 89       | 527           | 101      |
| Hungary            | 766           | 56       | 816           | 56       | 819           | 46       |
| Ireland            | N/A           |          | N/A           |          | N/A           |          |
| Italy              | 5,746         | 250      | 5,632         | 190      | 6,088         | 237      |
| Latvia             | 231           | 68       | 200           | 92       | 275           | 114      |
| Lithuania          | 268           | 18       | 263           | 30       | 354           | 161      |
| Luxembourg         | 189           |          | 185           |          | 185           |          |
| Malta              | 90            | 3        | 77            | 4        | 67            | 4        |
| Netherlands        | 2,402         |          | 2,043         |          | 2,327         |          |
| Norway             | N/A           |          | N/A           |          | N/A           |          |
| Poland             | 336           | 12       | 264           | 90       | 276           | 43       |
| Portugal           | 255           | 4        | 303           | 3        | 269           | 10       |
| Romania            | 565           | 25       | 181           | 4        | 227           | 3        |
| Slovakia           | 1,648         | 1        | 905           | 1        | 912           | 0        |
| Slovenia           | 297           | 9        | 289           | 11       | 261           | 10       |
| Spain              | 2,799         | 241      | 2,447         | 195      | 2,507         | 220      |
| Sweden             | 427           |          | 466           |          | 459           |          |
| Switzerland        | 864           |          | 926           |          | 988           |          |
| Turkey             | 6             |          | 4             |          | 14            |          |
| United Kingdom     | 8,364         | 1,008    | 6,692         | 1,043    | 6,945         | 1,110    |
| <b>Total EU 28</b> | <b>42,625</b> |          | <b>39,319</b> |          | <b>43,593</b> |          |
| <b>Total All</b>   | <b>43,495</b> |          | <b>40,249</b> |          | <b>44,595</b> |          |

Source: National brewers' associations

## 7

## IMPORTS 2011 - 2013

(in 1,000 hl)

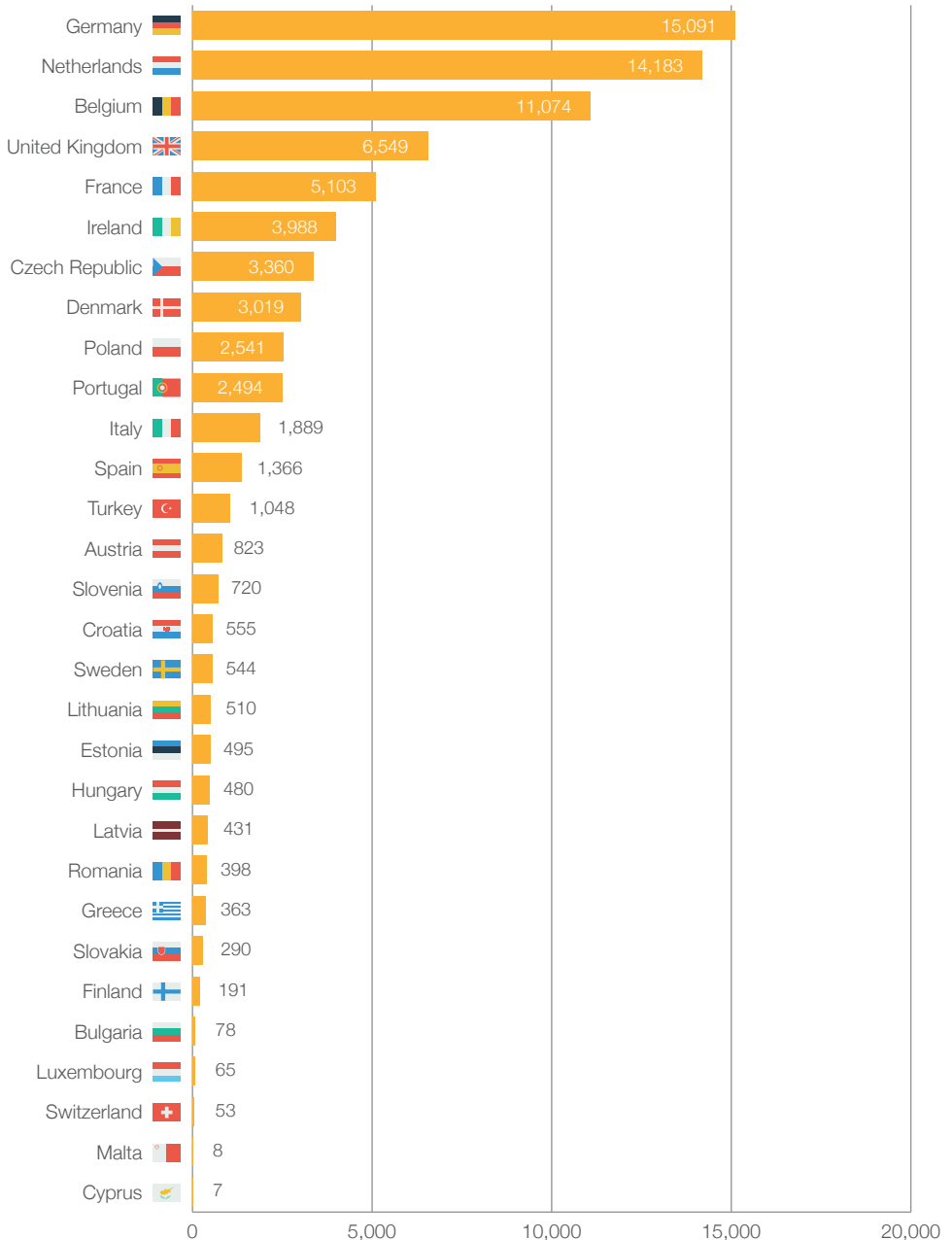
| Country  | 2011          |          | 2012          |          | 2013          |          |
|--|---------------|----------|---------------|----------|---------------|----------|
|  | Intra-EU      | Extra-EU | Intra-EU      | Extra-EU | Intra-EU      | Extra-EU |
|  Austria          | 615           | 59       | 589           | 91       | 535           | 84       |
|  Belgium          | 897           | 197      | 992           | 171      | 984           | 44       |
|  Bulgaria         | 255           | 41       | 342           | 82       | 355           | 73       |
|  Croatia          | 454           | 116      | 347           | 91       | 352           | 87       |
|  Cyprus           | 133           | 9        | 132           | 10       | 147           | 11       |
|  Czech Republic   | 583           | 1        | 511           | 1        | 514           | 5        |
|  Denmark          | 348           |          | 296           |          | 373           | 42       |
|  Estonia          | 343           | 53       | 378           | 43       | 391           |          |
|  Finland          | 546           | 27       | 477           | 31       | 491           | 39       |
|  France           | 6,890         |          | 7,484         |          | 5,984         | 212      |
|  Germany          | 7,591         | 103      | 7,186         | 93       | 6,213         | 93       |
|  Greece           | 611           | 90       | 548           | 107      | 494           | 81       |
|  Hungary          | 847           | 83       | 848           | 99       | 206           |          |
|  Ireland          | N/A           |          | 1,605         |          | 1,264         |          |
|  Italy            | 6,150         | 215      | 5,905         | 250      | 5,958         | 217      |
|  Latvia           | 366           | 85       | 416           | 65       | 443           | 78       |
|  Lithuania        | 422           | 239      | 453           | 265      | 460           | 275      |
|  Luxembourg       | 189           |          | 192           |          | 180           |          |
|  Malta           | 56            | 5        | 62            | 2        | 62            | 2        |
|  Netherlands    | 2,437         |          | 2,759         |          | 2,429         |          |
|  Norway         | N/A           |          | N/A           |          | N/A           |          |
|  Poland         | 419           | 18       | 608           | 29       | 542           |          |
|  Portugal       | 252           | 8        | 296           | 8        | 66            |          |
|  Romania        | 320           | 12       | 408           | 20       | 522           | 17       |
|  Slovakia       | 1,025         | 1        | 1,101         | 6        | 1,157         |          |
|  Slovenia       | 224           | 10       | 243           | 10       | 250           | 10       |
|  Spain          | 2,487         | 158      | 3,130         | 186      | 3,698         | 145      |
|  Sweden         | 467           |          | 477           |          | 502           |          |
|  Switzerland    | 1,080         |          | 1,108         |          | 1,225         |          |
|  Turkey         | 43            |          | 32            |          | 29            |          |
|  United Kingdom | 7,440         | 953      | 8,003         | 794      | 8,117         | 659      |
| <b>Total EU 28</b>   | <b>44,852</b> |          | <b>48,243</b> |          | <b>44,863</b> |          |
| <b>Total All</b>   | <b>45,975</b> |          | <b>49,383</b> |          | <b>46,117</b> |          |

Source: National brewers' associations

## 8

# TOTAL EXPORTS 2013
































(in 1,000 hl)



## 8

## EXPORTS 2008 - 2010

(in 1,000 hl)

| Country  | 2008          |          | 2009          |          | 2010          |          |
|--|---------------|----------|---------------|----------|---------------|----------|
|  | Intra-EU      | Extra-EU | Intra-EU      | Extra-EU | Intra-EU      | Extra-EU |
|  Austria          | 436           | 129      | 551           | 117      | 558           | 138      |
|  Belgium          | 8,214         | 1,917    | 8,007         | 2,217    | 8,587         | 2,021    |
|  Bulgaria         | 83            | 20       | 42            | 18       | 42            | 28       |
|  Croatia          | 86            | 496      | 51            | 494      | 44            | 475      |
|  Cyprus           | 5             | 1        | 4             | 0        | 5             | 1        |
|  Czech Republic   | 3,093         | 604      | 3,008         | 445      | 2,744         | 490      |
|  Denmark          | 3,530         |          | 3,840         |          | 3,120         |          |
|  Estonia          | 206           | 1        | 260           | 2        | 443           | 5        |
|  Finland          | 137           | 48       | 129           | 42       | 158           | 47       |
|  France           | 2,378         |          | 2,200         |          | 2,986         |          |
|  Germany          | 12,733        | 3,039    | 11,092        | 2,954    | 11,317        | 3,844    |
|  Greece           | 74            | 264      | 70            | 272      | 79            | 242      |
|  Hungary          | 526           | 4        | 267           | 6        | 369           | 5        |
|  Ireland          | N/A           |          | N/A           |          | N/A           |          |
|  Italy            | 950           | 553      | 1,135         | 608      | 1,384         | 524      |
|  Latvia           | 60            | 16       | 109           | 11       | 217           | 20       |
|  Lithuania        | 129           | 49       | 139           | 25       | 271           | 36       |
|  Luxembourg       | 67            |          | 73            |          | 72            |          |
|  Malta           | 2             | 1        | 4             | 0        | 5             | 2        |
|  Netherlands    | 16,673        |          | 15,383        |          | 14,105        |          |
|  Norway         | N/A           |          | N/A           |          | N/A           |          |
|  Poland         | 1,272         | 188      | 1,447         | 179      | 1,707         | 208      |
|  Portugal       | 421           | 1,735    | 422           | 1,497    | 518           | 1,856    |
|  Romania        | 56            | 9        | 150           | 26       | 98            | 40       |
|  Slovakia       | 103           | 12       | 2             | 13       | 263           | 8        |
|  Slovenia       | 381           | 110      | 389           | 90       | 394           | 76       |
|  Spain          | 433           | 318      | 372           | 309      | 488           | 415      |
|  Sweden         | 355           |          | 472           |          | 526           |          |
|  Switzerland    | 68            |          | 53            |          | 57            |          |
|  Turkey         | 736           |          | 988           |          | 1,077         |          |
|  United Kingdom | 3,018         | 2,106    | 2,745         | 2,003    | 2,585         | 1,998    |
| <b>Total EU 28</b>   | <b>67,042</b> |          | <b>63,691</b> |          | <b>65,565</b> |          |
| <b>Total All</b>   | <b>67,846</b> |          | <b>64,732</b> |          | <b>66,699</b> |          |

Source: National brewers' associations and Eurostat

## 8

## EXPORTS 2011 - 2013

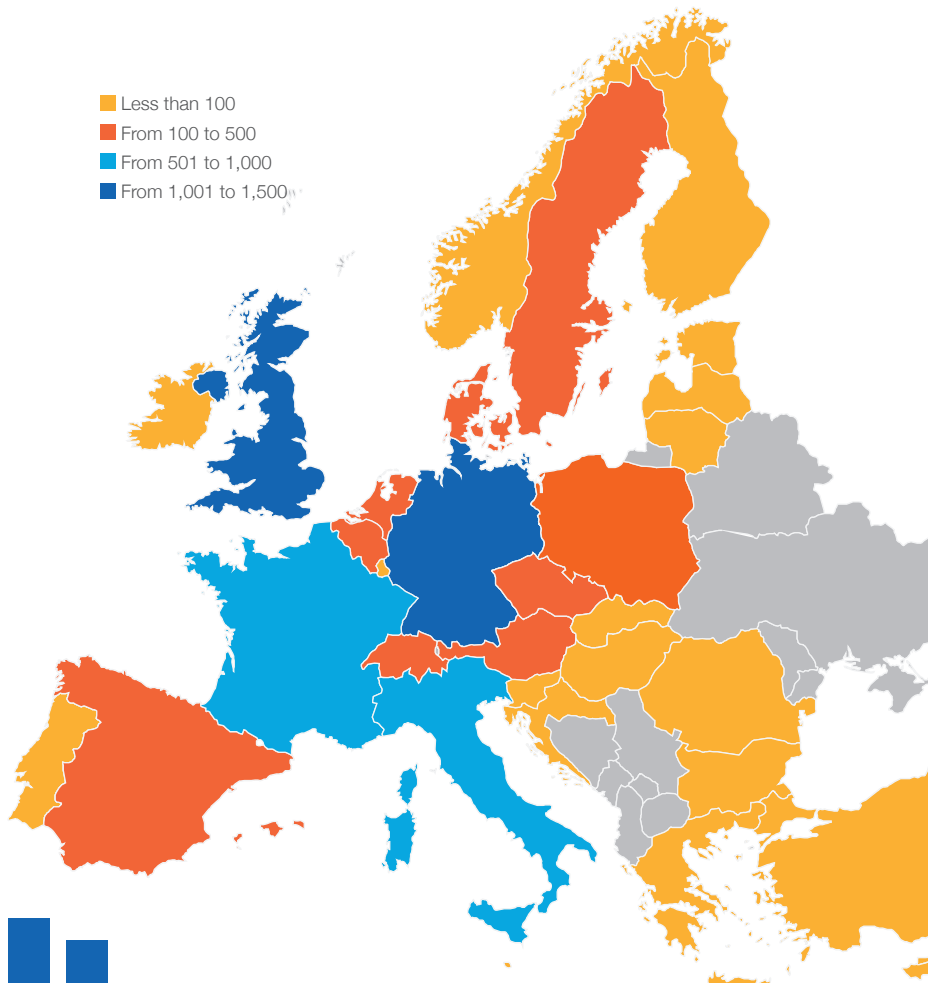
(in 1,000 hl)

| Country            | 2011          |          | 2012          |          | 2013          |          |
|--------------------|---------------|----------|---------------|----------|---------------|----------|
|                    | Intra-EU      | Extra-EU | Intra-EU      | Extra-EU | Intra-EU      | Extra-EU |
| Austria            | 567           | 146      | 551           | 155      | 578           | 245      |
| Belgium            | 8,729         | 2,362    | 9,085         | 2,601    | 8,247         | 2,827    |
| Bulgaria           | 78            | 33       | 71            | 22       | 51            | 27       |
| Croatia            | 60            | 565      | 81            | 564      | 54            | 501      |
| Cyprus             | 5             | 1        | 4             | 1        | 5             | 2        |
| Czech Republic     | 2,626         | 499      | 2,508         | 544      | 2,800         | 560      |
| Denmark            | 3,370         |          | 2,930         |          | 2,646         | 373      |
| Estonia            | 456           | 24       | 528           | 26       | 495           |          |
| Finland            | 124           | 50       | 171           | 50       | 144           | 47       |
| France             | 4,012         |          | 5,146         |          | 4,441         | 662      |
| Germany            | 11,778        | 4,208    | 11,255        | 4,442    | 10,342        | 4,749    |
| Greece             | 87            | 238      | 110           | 299      | 148           | 215      |
| Hungary            | 466           | 25       | 352           | 30       | 480           |          |
| Ireland            | N/A           |          | 3,518         |          | 3,988         |          |
| Italy              | 1,549         | 546      | 1,315         | 675      | 1,287         | 602      |
| Latvia             | 318           | 36       | 291           | 46       | 363           | 68       |
| Lithuania          | 372           | 50       | 407           | 77       | 430           | 80       |
| Luxembourg         | 75            |          | 77            |          | 65            |          |
| Malta              | 5             | 3        | 4             | 3        | 6             | 2        |
| Netherlands        | 13,940        |          | 14,727        |          | 14,183        |          |
| Norway             | N/A           |          | N/A           |          | N/A           |          |
| Poland             | 1,818         | 192      | 2,016         | 211      | 2,541         |          |
| Portugal           | 842           | 2,145    | 860           | 2,370    | 2,494         |          |
| Romania            | 138           | 59       | 162           | 65       | 277           | 121      |
| Slovakia           | 129           | 6        | 164           | 7        | 290           |          |
| Slovenia           | 394           | 69       | 425           | 95       | 560           | 160      |
| Spain              | 459           | 530      | 453           | 785      | 495           | 871      |
| Sweden             | 514           |          | 528           |          | 500           | 44       |
| Switzerland        | 79            |          | 80            |          | 53            |          |
| Turkey             | 951           |          | 1,056         |          | 1,048         |          |
| United Kingdom     | 2,447         | 2,081    | 3,810         | 2,043    | 4,469         | 2,080    |
| <b>Total EU 28</b> | <b>69,227</b> |          | <b>76,659</b> |          | <b>76,615</b> |          |
| <b>Total All</b>   | <b>70,257</b> |          | <b>77,795</b> |          | <b>77,716</b> |          |

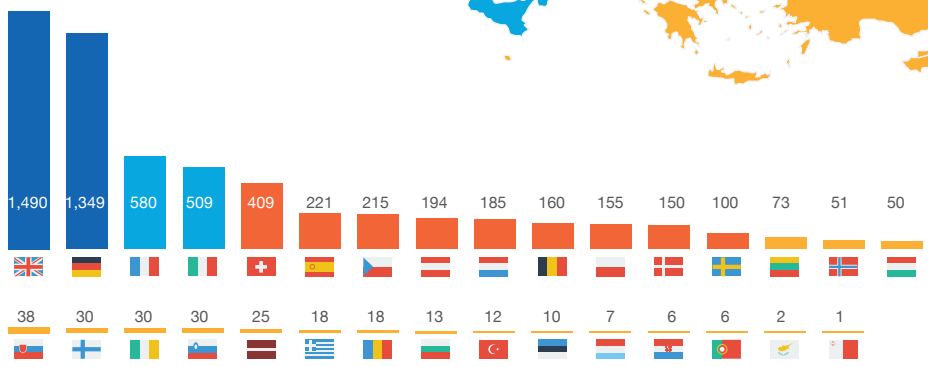
Source: National brewers' associations and Eurostat

# 9

## NUMBER OF ACTIVE BREWERIES 2013


































- Less than 100
- From 100 to 500
- From 501 to 1,000
- From 1,001 to 1,500



## 9

# NUMBER OF ACTIVE BREWERIES 2008 - 2013

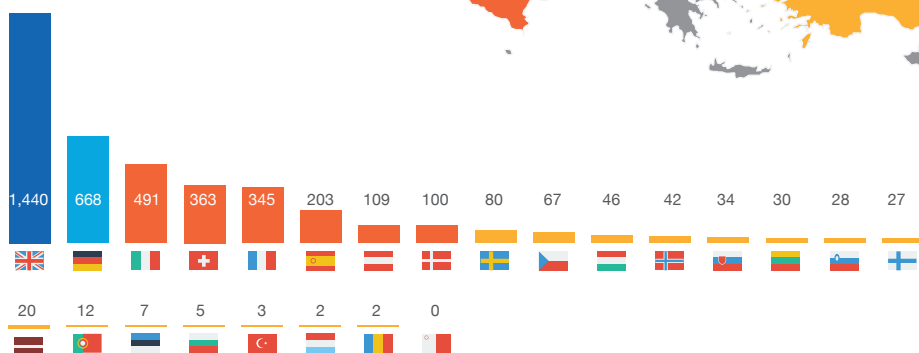
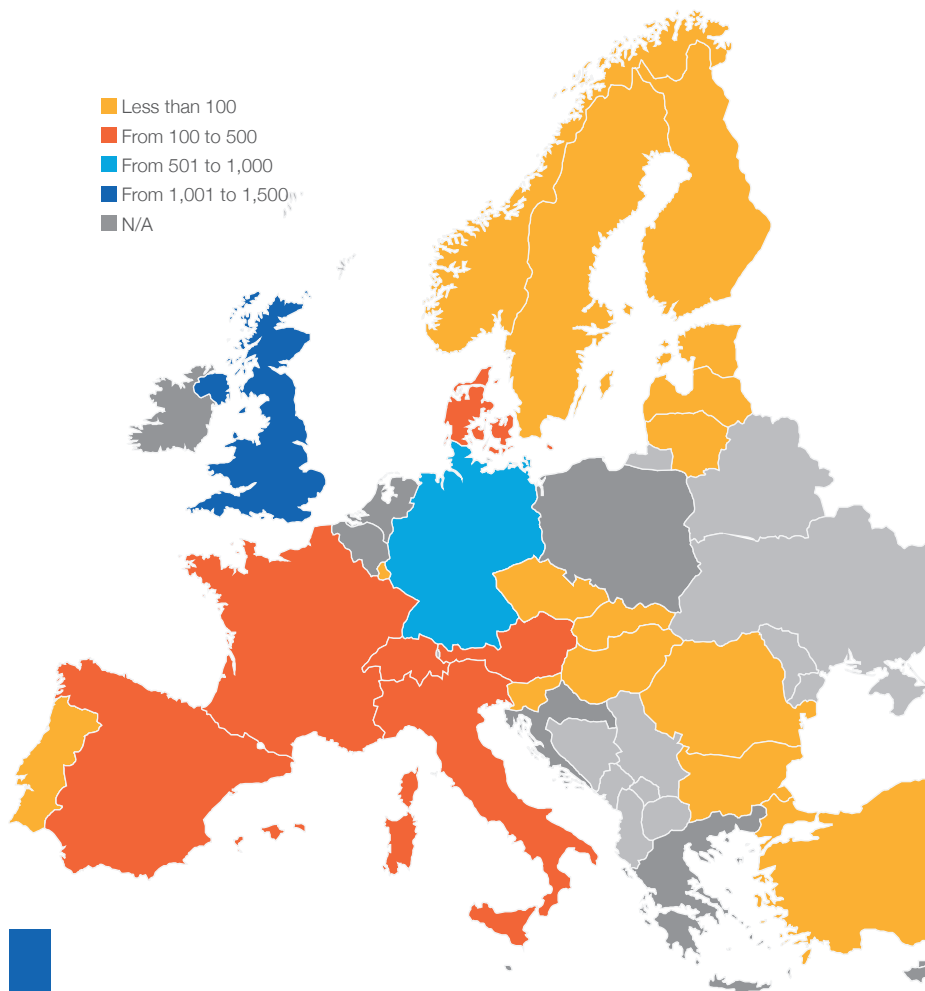
| Country  | 2008         | 2009         | 2010         | 2011         | 2012         | 2013         |
|--|--------------|--------------|--------------|--------------|--------------|--------------|
|  Austria          | 173          | 172          | 172          | 170          | 173          | 194          |
|  Belgium*         | 135          | 127          | 135          | 123          | 150          | 160          |
|  Bulgaria         | 9            | 8            | 8            | 13           | 13           | 13           |
|  Croatia*         | 7            | 7            | 7            | 7            | 6            | 6            |
|  Cyprus*          | 2            | 2            | 2            | 2            | 2            | 2            |
|  Czech Republic   | 128          | 133          | 151          | 191          | 213          | 215          |
|  Denmark*         | N/A          | N/A          | N/A          | 150          | 150          | 150          |
|  Estonia          | 6            | 6            | 6            | 6            | 7            | 10           |
|  Finland          | 18           | 18           | 25           | 25           | 30           | 30           |
|  France           | 132          | 322          | 387          | 442          | 503          | 580          |
|  Germany          | 1,328        | 1,331        | 1,333        | 1,347        | 1,340        | 1,349        |
|  Greece*          | 11           | 11           | 11           | 17           | 18           | 18           |
|  Hungary          | N/A          | N/A          | N/A          | 24           | 50           | 50           |
|  Ireland*         | 26           | 26           | 26           | 26           | 26           | 30           |
|  Italy            | 220          | 256          | 308          | 350          | 421          | 509          |
|  Latvia           | 17           | 17           | 15           | 16           | 16           | 25           |
|  Lithuania        | 55           | 49           | 41           | 73           | 73           | 73           |
|  Luxembourg       | 5            | 6            | 7            | 7            | 7            | 7            |
|  Malta            | 1            | 1            | 1            | 1            | 1            | 1            |
|  Netherlands*     | 72           | N/A          | N/A          | 125          | 165          | 185          |
|  Norway           | 19           | 22           | 30           | 33           | 40           | 51           |
|  Poland           | 86           | 89           | 103          | 117          | 132          | 155          |
|  Portugal        | 7            | 7            | 7            | 8            | 7            | 6            |
|  Romania        | 21           | 21           | 18           | 17           | 17           | 18           |
|  Slovakia       | 13           | 15           | 19           | 25           | 30           | 38           |
|  Slovenia       | 22           | 22           | 22           | N/A          | N/A          | 30           |
|  Spain          | 41           | 47           | 65           | 88           | 132          | 221          |
|  Sweden         | 20           | 30           | 45           | 65           | 75           | 100          |
|  Switzerland    | 270          | 280          | 328          | 360          | 375          | 409          |
|  Turkey         | 11           | 11           | 11           | 11           | 11           | 12           |
|  United Kingdom | 725          | 745          | 828          | 948          | 1,300        | 1,490        |
| <b>Total EU 28</b>   | <b>3,280</b> | <b>3,468</b> | <b>3,742</b> | <b>4,383</b> | <b>5,057</b> | <b>5,665</b> |
| <b>Total All</b>   | <b>3,580</b> | <b>3,781</b> | <b>4,111</b> | <b>4,787</b> | <b>5,483</b> | <b>6,137</b> |

\* Number of microbreweries unknown  
Source: National brewers' associations

# 10

## MICROBREWERIES 2013
































- Less than 100
- From 100 to 500
- From 501 to 1,000
- From 1,001 to 1,500
- N/A





## 10

MICROBREWERIES  
2008 - 2013

| Country  | 2008         | 2009         | 2010         | 2011         | 2012         | 2013         |
|--|--------------|--------------|--------------|--------------|--------------|--------------|
|  Austria          | 104          | 103          | 101          | 97           | 92           | 109          |
|  Belgium          | N/A          | N/A          | N/A          | N/A          | N/A          | N/A          |
|  Bulgaria         | 3            | 3            | 4            | 5            | 5            | 5            |
|  Croatia          | N/A          | N/A          | N/A          | N/A          | N/A          | N/A          |
|  Cyprus           | N/A          | N/A          | N/A          | N/A          | N/A          | N/A          |
|  Czech Republic   | 57           | 51           | 65           | 90           | 20           | 67           |
|  Denmark*         | N/A          | N/A          | N/A          | N/A          | N/A          | 100          |
|  Estonia          | 3            | 3            | 3            | 3            | 4            | 7            |
|  Finland          | 13           | 14           | 22           | 22           | 27           | 27           |
|  France           | N/A          | 263          | 322          | 373          | 293          | 345          |
|  Germany          | 594          | 628          | 646          | 659          | 665          | 668          |
|  Greece           | N/A          | N/A          | N/A          | N/A          | N/A          | N/A          |
|  Hungary          | N/A          | N/A          | N/A          | 20           | 46           | 46           |
|  Ireland          | N/A          | N/A          | N/A          | N/A          | N/A          | N/A          |
|  Italy            | 206          | 242          | 294          | 336          | 407          | 491          |
|  Latvia           | N/A          | N/A          | N/A          | N/A          | N/A          | 20           |
|  Lithuania        | N/A          | N/A          | N/A          | N/A          | N/A          | 30           |
|  Luxembourg       | 2            | 3            | 4            | 4            | 2            | 2            |
|  Malta            | 0            | 0            | 0            | 0            | 0            | 0            |
|  Netherlands      | N/A          | N/A          | N/A          | N/A          | N/A          | N/A          |
|  Norway          | 10           | 13           | 21           | 24           | 31           | 42           |
|  Poland         | 39           | 42           | 55           | N/A          | 50           | N/A          |
|  Portugal       | 0            | 0            | 0            | 1            | 3            | 12           |
|  Romania        | 0            | 0            | 0            | 2            | 2            | 2            |
|  Slovakia       | 7            | 9            | 14           | 20           | 26           | 34           |
|  Slovenia       | 20           | 20           | 20           | 20           | 28           | 28           |
|  Spain          | 21           | 27           | 46           | 70           | 114          | 203          |
|  Sweden         | 15           | 21           | 33           | 50           | 60           | 80           |
|  Switzerland    | 222          | 232          | 280          | 313          | 328          | 363          |
|  Turkey         | 5            | 5            | 5            | 5            | 5            | 3            |
|  United Kingdom | 671          | 694          | 778          | 898          | 1,250        | 1,440        |
| <b>Total EU 28</b>   | <b>1,755</b> | <b>2,123</b> | <b>2,407</b> | <b>2,670</b> | <b>3,094</b> | <b>3,616</b> |
| <b>Total All</b>   | <b>1,992</b> | <b>2,373</b> | <b>2,713</b> | <b>3,012</b> | <b>3,458</b> | <b>4,024</b> |

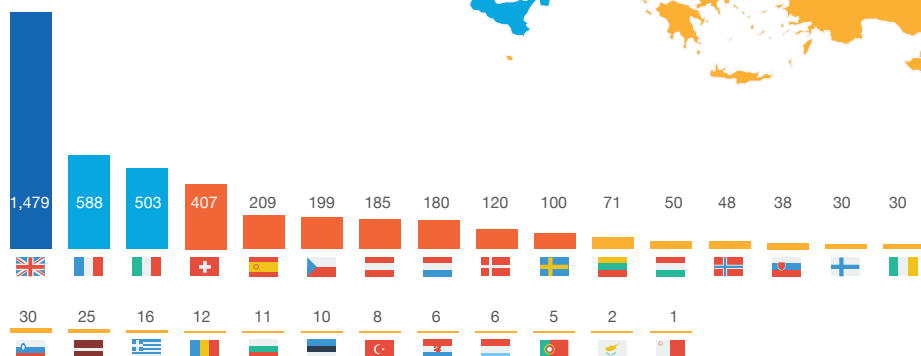
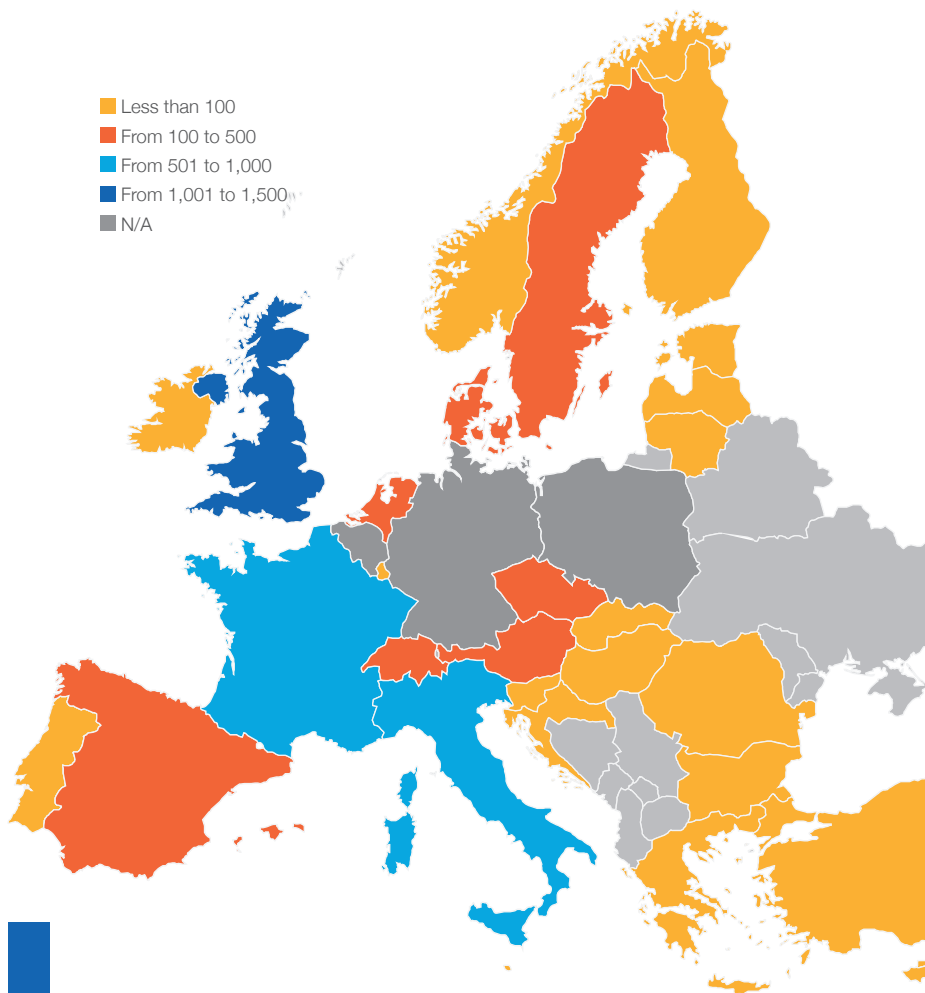
\* Estimate

Source: National brewers' associations

# 11

## NUMBER OF ACTIVE BREWING COMPANIES 2013

- Less than 100
- From 100 to 500
- From 501 to 1,000
- From 1,001 to 1,500
- N/A



## 11

# NUMBER OF ACTIVE BREWING COMPANIES 2008 - 2013

| Country  | 2008         | 2009         | 2010         | 2011         | 2012         | 2013         |
|--|--------------|--------------|--------------|--------------|--------------|--------------|
|  Austria          | 164          | 163          | 163          | 161          | 164          | 185          |
|  Belgium          | N/A          | N/A          | N/A          | N/A          | 60           | N/A          |
|  Bulgaria         | 9            | 9            | 10           | 11           | 11           | 11           |
|  Croatia          | 7            | 7            | 7            | 7            | 6            | 6            |
|  Cyprus           | 2            | 2            | 2            | 2            | 2            | 2            |
|  Czech Republic   | 115          | 116          | 135          | 177          | 197          | 199          |
|  Denmark          | 120          | 120          | 120          | 120          | 120          | 120          |
|  Estonia          | 6            | 6            | 6            | 6            | 7            | 10           |
|  Finland          | 18           | 18           | 25           | 25           | 30           | 30           |
|  France           | 130          | 320          | 385          | 440          | 501          | 588          |
|  Germany          | N/A          | N/A          | N/A          | N/A          | N/A          | N/A          |
|  Greece           | 9            | 9            | 9            | 15           | 16           | 16           |
|  Hungary          | N/A          | N/A          | N/A          | 24           | 50           | 50           |
|  Ireland          | 24           | 24           | 24           | 24           | 24           | 30           |
|  Italy            | 214          | 250          | 302          | 344          | 415          | 503          |
|  Latvia           | 17           | 17           | 15           | 16           | 16           | 25           |
|  Lithuania        | 54           | 48           | 42           | 73           | 73           | 71           |
|  Luxembourg       | 5            | 6            | 7            | 7            | 6            | 6            |
|  Malta            | 1            | 1            | 1            | 1            | 1            | 1            |
|  Netherlands     | 68           | N/A          | N/A          | 120          | 160          | 180          |
|  Norway         | 16           | 19           | 27           | 30           | 37           | 48           |
|  Poland         | 43           | N/A          | 69           | N/A          | 87           | N/A          |
|  Portugal*      | 6            | 6            | 6            | 6            | 6            | 5            |
|  Romania        | 13           | 13           | 13           | 12           | 12           | 12           |
|  Slovakia       | 13           | 15           | 19           | 25           | 30           | 38           |
|  Slovenia       | 22           | 22           | 22           | 22           | 30           | 30           |
|  Spain          | 27           | 33           | 52           | 76           | 120          | 209          |
|  Sweden         | 20           | 30           | 45           | 66           | 75           | 100          |
|  Switzerland    | 267          | 277          | 325          | 358          | 373          | 407          |
|  Turkey         | 7            | 7            | 7            | 7            | 7            | 8            |
|  United Kingdom | 711          | 733          | 817          | 937          | 1289         | 1,479        |
| <b>Total EU 28</b>   | <b>1,818</b> | <b>1,968</b> | <b>2,296</b> | <b>2,717</b> | <b>3,508</b> | <b>3,906</b> |
| <b>Total All</b>   | <b>2,108</b> | <b>2,271</b> | <b>2,655</b> | <b>3,112</b> | <b>3,925</b> | <b>4,369</b> |

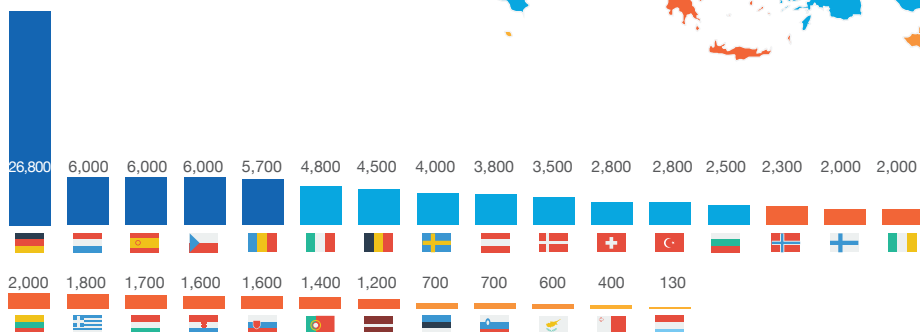
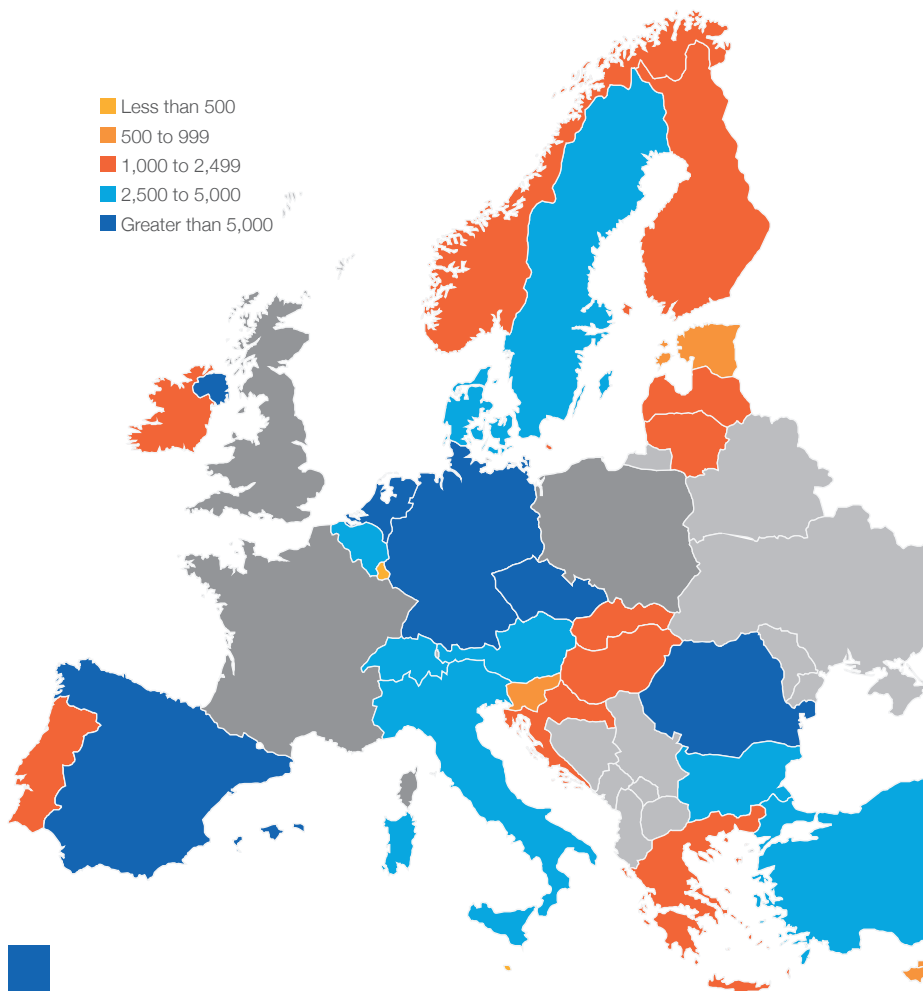
\* Excluding microbreweries

Source: National brewers' associations

# 12

## DIRECT EMPLOYMENT 2013

- Less than 500
- 500 to 999
- 1,000 to 2,499
- 2,500 to 5,000
- Greater than 5,000



## 12

DIRECT EMPLOYMENT  
2008 - 2013

| Country  | 2008   | 2009   | 2010   | 2011   | 2012   | 2013   |
|--|--------|--------|--------|--------|--------|--------|
|  Austria          | 4,000  | N/A    | 3,900  | 3,800  | 3,800  | 3,800  |
|  Belgium          | 5,700  | N/A    | 5,100  | 5,000  | 4,500  | 4,500  |
|  Bulgaria         | 2,400  | 3,100  | 2,800  | 2,900  | 2,500  | 2,500  |
|  Croatia          | 2,300  | 1,700  | 1,600  | 1,600  | 1,600  | 1,600  |
|  Cyprus           | 800    | 800    | 800    | 700    | 600    | 600    |
|  Czech Republic   | 7,400  | 6,300  | 7,000  | 6,800  | 7,000  | 6,000  |
|  Denmark          | 3,900  | N/A    | 3,900  | N/A    | 3,500  | 3,500  |
|  Estonia          | 900    | 700    | 600    | 700    | 700    | 700    |
|  Finland          | 2,400  | 2,400  | 2,300  | 2,300  | 2,100  | 2,000  |
|  France           | 3,600  | N/A    | 3,700  | 3,600  | 3,900  | N/A    |
|  Germany          | 30,700 | 28,400 | 27,600 | 27,400 | 26,900 | 26,800 |
|  Greece           | 1,800  | 1,900  | 1,900  | 1,900  | 1,800  | 1,800  |
|  Hungary          | 2,100  | 2,000  | 2,000  | 1,700  | 1,600  | 1,700  |
|  Ireland          | 1,800  | 1,600  | 1,400  | 1,600  | 1,500  | 2,000  |
|  Italy            | 3,900  | 2,300  | 4,000  | 4,500  | 4,700  | 4,800  |
|  Latvia           | 1,100  | N/A    | 1,100  | N/A    | 1,100  | 1,200  |
|  Lithuania        | 2,800  | 2,000  | 2,000  | 2,000  | 2,000  | 2,000  |
|  Luxembourg       | 200    | N/A    | N/A    | 130    | 130    | 130    |
|  Malta            | 500    | N/A    | 500    | 300    | 400    | 400    |
|  Netherlands      | 6,800  | 6,800  | 6,800  | 6,800  | 6,300  | 6,000  |
|  Norway          | 2,700  | N/A    | 2,600  | 2,500  | 2,200  | 2,300  |
|  Poland         | 15,000 | N/A    | 15,000 | N/A    | 16,000 | N/A    |
|  Portugal       | 1,500  | 1,500  | 1,500  | 1,500  | 1,400  | 1,400  |
|  Romania        | 6,700  | 6,700  | 4,200  | 5,900  | 5,900  | 5,700  |
|  Slovakia       | 2,200  | 1,900  | 1,800  | 1,700  | 1,700  | 1,600  |
|  Slovenia       | 700    | 700    | 700    | 700    | 700    | 700    |
|  Spain          | 8,200  | 6,800  | 6,800  | 6,000  | 6,000  | 6,000  |
|  Sweden         | 3,200  | 3,600  | 4,000  | 4,000  | 4,100  | 4,000  |
|  Switzerland    | 2,300  | 2,300  | 2,300  | 2,800  | 2,800  | 2,800  |
|  Turkey         | 2,300  | 2,300  | 2,400  | 2,300  | 2,400  | 2,800  |
|  United Kingdom | 15,000 | N/A    | 15,000 | 14,000 | 13,500 | N/A    |

Rounded to units of 100

Source: National brewers' associations

## 13

# EXCISE DUTY REVENUES RELATED TO BEER 2008 - 2013

(in million Euro)

| Country  | 2008             | 2009            | 2010             | 2011            | 2012             | 2013             |
|--|------------------|-----------------|------------------|-----------------|------------------|------------------|
|  Austria          | 189.58           | 193.40          | 197.60           | 190.00          | 191.30           | 196.80           |
|  Belgium          | 185.32           | 183.97          | 187.76           | 183.78          | 180.80           | 183.36           |
|  Bulgaria         | 43.36            | 39.87           | 38.33            | 39.35           | 41.15            | 40.00            |
|  Croatia          | 110.00           | N/A             | 91.00            | N/A             | 88.00            | 81.00            |
|  Cyprus           | 10.98            | 10.49           | 11.06            | 10.81           | 10.88            | 13.00            |
|  Czech Republic   | 135.18           | 128.20          | 163.48           | 178.93          | 182.55           | 174.94           |
|  Denmark          | 138.06           | 127.56          | 121.00           | 118.59          | 138.73           | 131.50           |
|  Estonia          | 30.55            | 32.47           | 35.18            | 36.98           | 38.97            | 42.03            |
|  Finland          | 431.37           | 484.19          | 528.10           | 530.23          | 581.23           | 575.00           |
|  France           | 303.00           | 306.00          | 304.24           | 295.25          | 307.83           | 670.00           |
|  Germany          | 736.47           | 728.82          | 711.63           | 702.26          | 697.00           | 669.00           |
|  Greece           | 61.18            | 68.09           | 116.77           | 115.45          | 110.24           | 113.49           |
|  Hungary          | 150.20           | 135.28          | 139.21           | 140.74          | 130.17           | 133.29           |
|  Ireland          | 427.13           | 404.30          | 320.11           | 307.30          | 308.00           | 358.00           |
|  Italy            | 466.00           | 445.25          | 439.00           | 462.73          | 483.00           | 481.00           |
|  Latvia           | 14.65            | 19.73           | 25.22            | 26.35           | 25.88            | 24.43            |
|  Lithuania        | 40.06            | 40.86           | 43.54            | 46.60           | 46.15            | 38.70            |
|  Luxembourg       | 2.69             | 3.65            | 3.70             | 3.71            | 3.85             | 3.85             |
|  Malta            | 1.15             | 1.06            | 1.16             | 2.29            | 2.29             | 2.30             |
|  Netherlands      | 317.62           | 388.16          | 387.98           | 381.97          | 387.00           | 412.00           |
|  Norway          | 514.00           | N/A             | 570.00           | N/A             | 600.00           | 613.00           |
|  Poland         | 828.64           | 762.81          | 803.88           | 765.07          | 878.90           | 843.05           |
|  Portugal       | 84.52            | 78.05           | 76.15            | 73.09           | 65.78            | 67.51            |
|  Romania        | 155.87           | 129.50          | 130.65           | 133.92          | 141.67           | N/A              |
|  Slovakia       | 58.00            | 59.14           | 55.83            | 54.83           | 56.08            | 55.20            |
|  Slovenia       | 62.20            | 69.05           | 70.17            | 74.28           | 72.80            | 76.00            |
|  Spain          | 311.45           | 301.09          | 304.80           | 305.52          | 309.57           | 300.60           |
|  Sweden         | 321.00           | 301.68          | 339.00           | 338.01          | 374.00           | 377.43           |
|  Switzerland    | 67.00            | N/A             | 94.00            | N/A             | 93.00            | 92.72            |
|  Turkey         | 619.00           | N/A             | 824.00           | N/A             | 1,295.00         | 1,191.13         |
|  United Kingdom | 4,592.00         | 3,270.55        | 3,670.63         | 3,973.02        | 4,229.73         | 3,888.69         |
| <b>Total EU 28</b>   | <b>10,208.23</b> | <b>8,713.22</b> | <b>9,317.18</b>  | <b>9,491.06</b> | <b>10,083.55</b> | <b>9,952.17</b>  |
| <b>Total All</b>   | <b>11,408.23</b> | <b>8,713.22</b> | <b>10,805.18</b> | <b>9,491.06</b> | <b>12,071.55</b> | <b>11,849.02</b> |

Source: European Commission and National brewers' associations

**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 generated directly by the brewing sector.

**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 2014 edition were mainly collated via the national brewers' associations through surveys carried out by The Brewers of Europe from 2009 until 2014.

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.

# 16

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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.

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

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