

A graphic of a wheat stalk is positioned above the text. The text 'IRISH BEER MARKET 2013' is written in a large, bold, sans-serif font. The text is contained within a white outline of a mug, with the handle on the right side.

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The Irish Brewers Association 'Irish Beer 2013' report highlights the important role played by the brewing sector in the Irish economy. It is a sector which has continued to show its resilience despite extremely difficult trading conditions in the last 12 months.

The last two years has seen beer duty increase by a staggering 42%. In this time Government has added 28 cent to the price of a pint through duty and VAT increases. These increases have inevitably led to a contraction in consumption levels and as a result production has fallen slightly to meet these new demand levels.

Despite the difficult environment IBA members have continued to invest in their businesses in 2013 and overall employment is up, driven mainly by increases in exports levels which have offset domestic market contraction somewhat. The sector continues to make a huge contribution to the Irish economy both directly and indirectly with beer excise receipts valued at €358 million in 2013.

Beer remains the nation's favourite drink and with encouraging signs of beer renaissance emerging through increasing numbers of breweries in operation, the Government must now support this sector of the economy by reducing the excise burden and allowing these emerging breweries to achieve their huge potential.

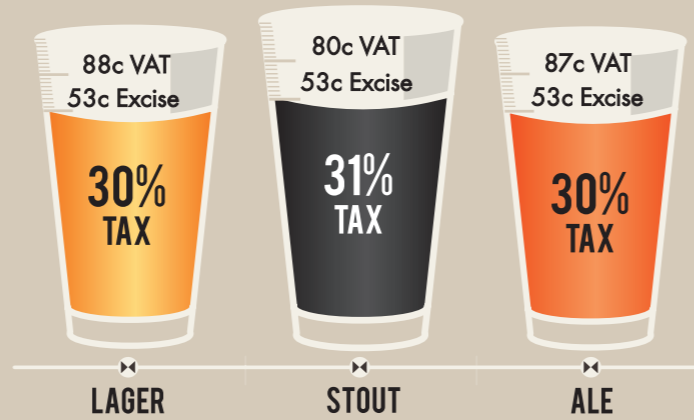
Thomas Burke
Senior Executive

HEADLINES

TOTAL PRODUCTION (1,000 HL) Source: Members	2012 2013	8,195 8,008
TOTAL EMPLOYMENT (Full time employees) Source: Members	2012 2013	1,506 1,934
TOTAL CONSUMPTION (1,000 HL) Source: Revenue Commissioners	2012 2013	4,677 3,978
PER CAPITA CONSUMPTION Source: Calculation based on (3) but at 5% ABV (pan-European benchmark) and CSO population figure at March 2012 of 4,588,252.	2012 2013	85.6 79.2 Litres per capita
% EXPORTS Source: Total Production (1)-Total Consumption (3)	2012 2013	43% 50%

EXCISE DUTY

based on the CSO national average price index



Source: Members

VARIANTS



Source: Members

SALES CHANNEL



Source: Members

ALCOHOL CONSUMPTION BY CATEGORY MIX



Source: DIGI

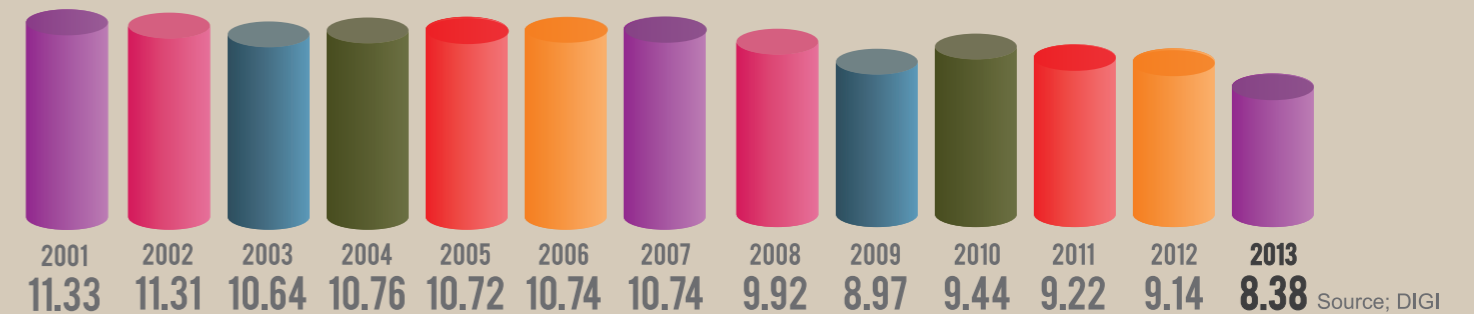
EXCISE RECEIPTS ON ALCOHOL (€M)

	2010	2011	2012	2013
BEER	320	307	308	358
SPIRITS	244	247	264	290
CIDER	44	44	43	52
WINE	219	231	231	302
TOTAL	826	830	846	1002
BEER AS%	39	37	36	36

Source: Revenue Commissioners

ALCOHOL CONSUMPTION PER CAPITA IN IRELAND

in litres of pure alcohol

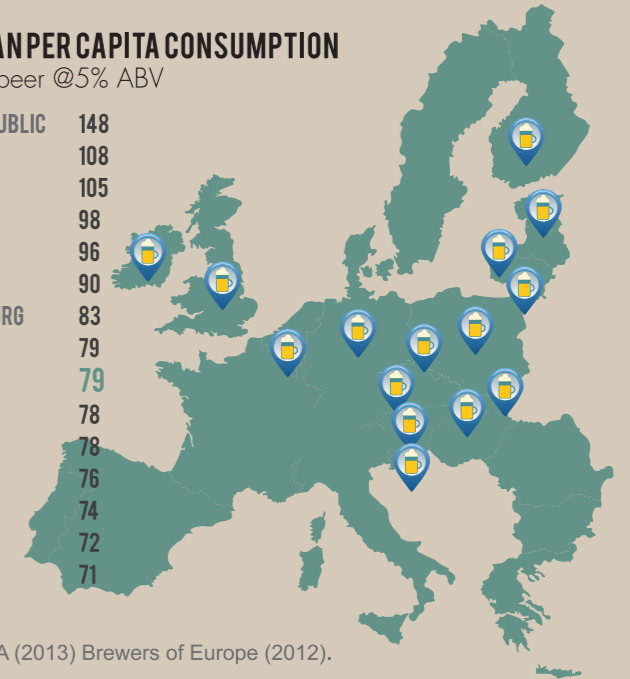


Source: DIGI

EUROPEAN PER CAPITA CONSUMPTION

- litres of beer @5% ABV

CZECH REPUBLIC	148
AUSTRIA	108
GERMANY	105
POLAND	98
LITHUANIA	96
ROMANIA	90
LUXEMBOURG	83
FINLAND	79
IRELAND	79
CROATIA	78
SLOVAKIA	78
LATVIA	76
BELGIUM	74
ESTONIA	72
UK	71



Source: IBA (2013) Brewers of Europe (2012).

EUROPEAN BEER EXCISE RATES

in Euro per hectolitre of pure alcohol

FINLAND	3205	SPAIN	748	LATVIA	310
UK	2353	FRANCE	733	LITHUANIA	270
IRELAND	2255	ESTONIA	628	ITALY	270
SWEDEN	1930	CYPRUS	600	GREECE	260
SLOVENIA	1210	CROATIA	521	AUSTRIA	200
PORTUGAL	943	HUNGARY	515	POLAND	185
NETHERLANDS	759	SLOVAKIA	358	BELGIUM	184
DENMARK	751				

Rates at July 2014.