Drinks Ireland
Beer





Irish Beer Market Report 2025/26



drinksireland.ie/beer



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

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Production growth and further increase in 0.0% sales evident

Beer remains Ireland's favourite alcohol beverage, representing a 42.1% share of the overall drinks market in 2025, though total domestic beer sales contracted by 2.5% for the second consecutive year. Domestic beer production again demonstrated strong growth, expanding by 8.5% in 2025 with non-alcohol (0.0%) beer experiencing a 32% surge in production.

International trade also grew with Irish beer exports reaching €331 million in 2025, with particularly strong growth in Germany and Canada. High beer excise duties remain a structural constraint, with Ireland's rate ranking as the third highest among the EU-27 and United Kingdom, and standing 11 times higher than Germany and Spain.

Beer continues to hold its position as Ireland's leading alcohol beverage of choice, representing a significant proportion of the total drinks market at 42.1% down slightly on the previous year. Despite its enduring popularity, the broader category faced domestic headwinds with rising input and operational costs and a 2.5% volume contraction in sales in 2025. This volume decline is reflected in consumer moderation trends, with per capita beer consumption in Ireland falling by 4.5% over the year. This shift aligns with a long-term, structural downward trend in national alcohol consumption, which has reduced by 36% over the past 25 years. Current per capita consumption levels now sit in line with the European average, indicating that a substantial majority of Irish consumers are increasingly adopting responsible drinking patterns and moderation.

Across the beer subcategories, lager remains the dominant segment in Ireland, despite its 2025 market share decreasing by 3.5%. For stout, the segment demonstrated a good performance in 2025, expanding its market share by 4.7% while ale's market share fell by 4.5% in 2025. The growth of premium beer across the on- and off-trade was another evident trend, increasing by 8.6% in 2025. Beyond the traditional product categories, growing consumer interest in flavour diversification, most notably with fruit flavoured beer, has emerged as an influential market trend, driving continuous brand-led innovation and new product development to meet emerging consumer preferences.

The hospitality sector remains the primary channel for beer consumption, with nearly 66% of total consumption through the on-trade, encompassing pubs, restaurants, and hotels, an increase of over 3%. The social and cultural importance of this channel is supported by Drinks Ireland research, which reveals that 67% of consumers believe that sharing a drink plays an important role in bringing people together. The research also highlights the vital role the drinks industry plays in sustaining rural and regional economies, with 80% of drinkers surveyed saying that breweries provide important employment at a local or regional level. Protecting these outlets is vital for the future of the category. We welcome the announcement from Government in Budget 2027 of a support package for the rural pub sector. These venues provide an important place for families, friends and neighbours to meet.

The 0.0% beer category remains the fastest-growing segment in the Irish drinks industry, driven by significant producer investment in production capacity to meet growing consumer demand. While overall beer sales were down in 2025, 0.0% beer sales grew by a further 12.5%.

Driven by investment in capacity and innovation, domestic beer production demonstrated strong growth in 2025, expanding by 8.5%. A key driver of this growth was the non-alcohol segment, with the 0.0% beer production expanding by nearly 32% in 2025, reflecting robust consumer demand.

Export performance also remained a vital source of growth and stability for Irish brewers. According to Eurostat data in 2025, Irish beer exports reached €331 million, growing by 11% over the last three years, in the period post pandemic. This highlights the ability of the Irish brewing sector to navigate challenging international trade environments and also the continued growth in popularity of our beers abroad. The United Kingdom maintains its position as the number one export market for Irish beer, followed by the United States, France, Germany, and Canada. Irish beer exports to the U.S still face a 10% tariff. Drinks Ireland continues to advocate for a return to zero-for-zero tariff trading arrangements.

Ireland has some of the highest alcohol excise duties in Europe, ranking as the third-highest beer excise country among the EU-27 and the United Kingdom. Irish beer excise is currently 11 times higher than that of Germany and Spain.

On every pint of lager in Ireland, 55 cents in excise go to the exchequer, and when excise and VAT are combined, it's €1.77. Our alcohol consumption levels have fallen to mid-table in the EU and our excise rates should move towards EU norms also.

Additionally, legislative adjustments are required to support the scaling of independent craft breweries. Currently, the Alcohol Products Tax relief scheme provides a 50% excise relief for qualifying breweries producing up to 75,000 hectolitres (hl) annually but caps the relief on the first 30,000 hl. This 30,000 hl limit acts as an artificial ceiling that restricts smaller breweries from transitioning into medium-sized enterprises. Drinks Ireland has requested that this 50% excise relief threshold be extended to 50,000 hl. This policy shift would release vital working capital, enabling small breweries to invest in access to international export markets, innovation and tourism initiatives.

The long-term viability of the Irish brewing sector relies on a balanced combination of industry-led innovation and supportive domestic policy. While brewers continue to successfully navigate economic headwinds by expanding international trade and spearheading the growth of non-alcohol alternatives, the domestic tax regime remains a challenge to sustainable growth. Addressing high operational costs and structural constraints specifically through targeted excise rate reductions and raising relief thresholds for growing brewers is essential to secure the future of brewing industry across Ireland.

Two-thirds of beer sales in Ireland is in the on-trade. Pubs and hospitality venues remain key settings for beer consumption, acting as important spaces for social interaction, community life and cultural experience.



Cormac Healy
Director of Drinks Ireland



Jennifer Wallace
Director of Drinks Ireland | Beer

Beer market highlights

Total production (1000HL)		
2025	2024	% Difference
9,844	9,074	+8.5%

Source: Drinks Ireland Beer Members

Total consumption (1000HL)		
2025	2024	% Difference
3,493	3,587	-2.6%

Source: Revenue

Per capita consumption		
2025	2024	% Difference
64.0	67.0	-4.5%

Source: Calculation based on consumption at 5% ABV (pan-European benchmark) and CSO population figure of Census 2025 and April 2024

Export value		
2025	2024	% Difference
€331m	€330m	0.3%

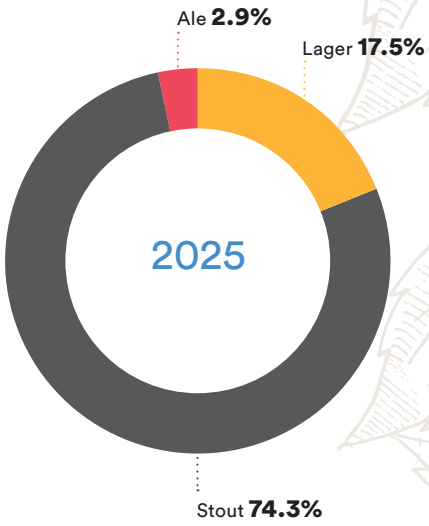
Source: Eurostat

Export destinations

Rank	Country	€
1	United Kingdom	€129m
2	USA	€50m
3	France	€34m
4	Germany	€24m
5	Canada	€19m

Source: Eurostat

Production share by beer type



Source: Drinks Ireland Beer Members

Growing beer exports remain an important outlet for the sector. Export value has grown by 11% over the last three years, post pandemic.

Demand for 0.0% beer continues to grow

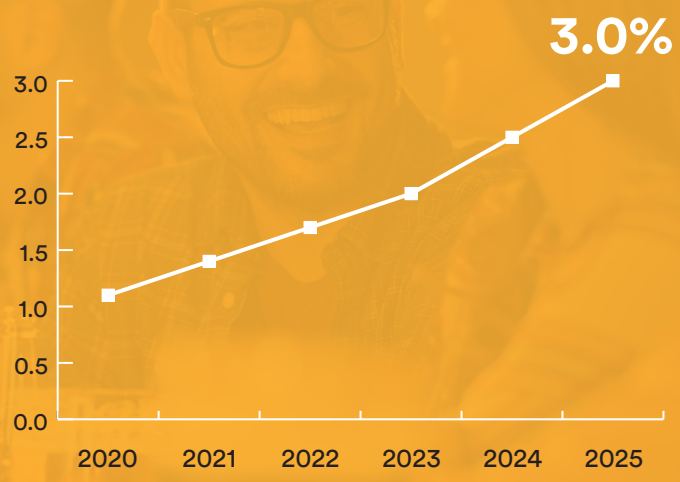
Non-alcohol alternatives represent the fastest-growing category across the broader drinks industry in Ireland, increasing by 12.5% in 2025 according to Drinks Ireland | Beer member data. In response to rising consumer demand, an increasing number of companies are innovating and investing in non-alcohol product lines, expanding consumer choice and supporting moderation. The market share for 0.0% beers now stands at approximately 3%. While the category remains in its early growth phase, it is primed for further expansion. Across the European Union, the average market share for 0.0% beer stands at 8.5%, with some markets (e.g Poland, Spain) reporting double-digit market share for 0.0% beer. Drinks Ireland | Beer emphasises that realising the full potential of the 0.0% beer sector depends on a practical regulatory environment, one that safeguards the right to grow the category through responsible promotion and advertising to enhance consumer awareness regarding the availability and choice of these products.

According to the Healthy Ireland Survey 2025[1], 25% of the population report drinking 0.0% beer, wine, or spirits. That figure rises to 31% among individuals aged 25 to 34 and 32% within the 35-to-44 age cohort. Furthermore, independent research conducted by Opinions[2] on behalf of Drinks Ireland found that 61% of consumers believe the availability of non-alcohol alternatives actively encourages more responsible drinking. Maintaining and accelerating this positive trajectory towards moderation requires that consumers remain informed regarding both the availability and brewing quality of non-alcohol options.

The market share for 0.0% beers now stands at approx. 3%.



Market share of non-alcohol beer



Source: Drinks Ireland Beer Members

Key trends in 0.0% beer

Familiar, trusted brands have played a central role in driving the adoption of 0.0% beer. A European Commission study[3] on low- and no-alcohol beverages found that brand loyalty remains 'very important' within the category, mirroring consumer behaviour in the traditional alcohol sector where nearly three-quarters of drinkers cite brand recognition as a key driver of choice. The Commission report also highlighted that Irish consumers are among the most receptive in Europe to non-alcohol beverages, identifying Ireland as the market where an increase in low- and no-alcohol consumption is 'most probable'. Currently, one in four adults considers selecting a 0.0% product, with brand familiarity acting as a major catalyst for initial trial and sustained uptake.

Independent research conducted in February 2026 demonstrates that, on average, 94% of consumers who choose a 0.0% product also consume alcohol, utilising these options to substitute and balance their overall intake.

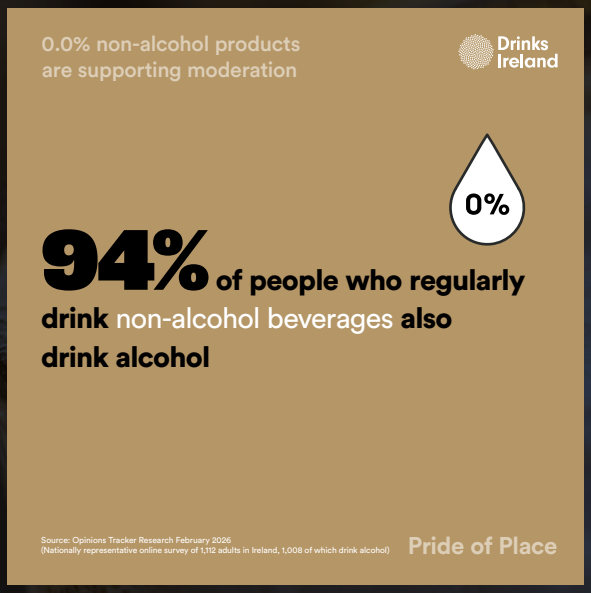
Alongside expanding their portfolio offerings, brewing companies are investing significantly to increase availability and heighten consumer awareness. These commercial initiatives align closely with public attitudes: more than half of Irish adults (56%) agree that the visible availability and advertising of 0.0% products effectively encourage more responsible consumption.

[1] Healthy Ireland Survey 2025: https://assets.gov.ie/static/documents/2b9f909b/Healthy_Ireland_Summary_Report_2025_Web_07.11.2025.pdf

[2] The research was carried out by Opinions in February 2026 through an online national survey of n=932 alcohol consumers. The margin of error associated with this sample is 3.3%. This study forms the eighth wave of ongoing tracking research, following earlier waves conducted throughout 2023, 2024, and 2025.

[3] European Commission: Study on low/no alcohol beverages https://op.europa.eu/en/publication-detail/-/publication/bc7b29d4-b7e7-11ed-8912-01aa75ed71a1

Drinks Ireland | Beer strongly believes that the potential of the 0.0% beer sector is dependent on a practical environment that supports the right to grow this sector through responsible promotion and advertising, to increase consumer awareness of the availability and choice of these products.



Source: Opinions Tracker Research 2026
(Online nationally representative survey of 1000 adults 18+ in ROI)

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Beer sales

Sales share by beer type

	2025	2024	% Difference
Lager	55.2%	57.2%	-3.5%
Stout	37.6%	35.9%	4.7%
Ale	4.2%	4.4%	-4.5%
Non-alcohol	3.0%	2.5%	20.0%

Source: Drinks Ireland Beer Members

On vs off trade performance

	2025	2024	% Difference
On-Trade	65.8%	63.7%	3.3%
Off-Trade	34.2%	36.3%	-5.8%

Source: Drinks Ireland Beer Members

Sales share by beer type in on and off trade

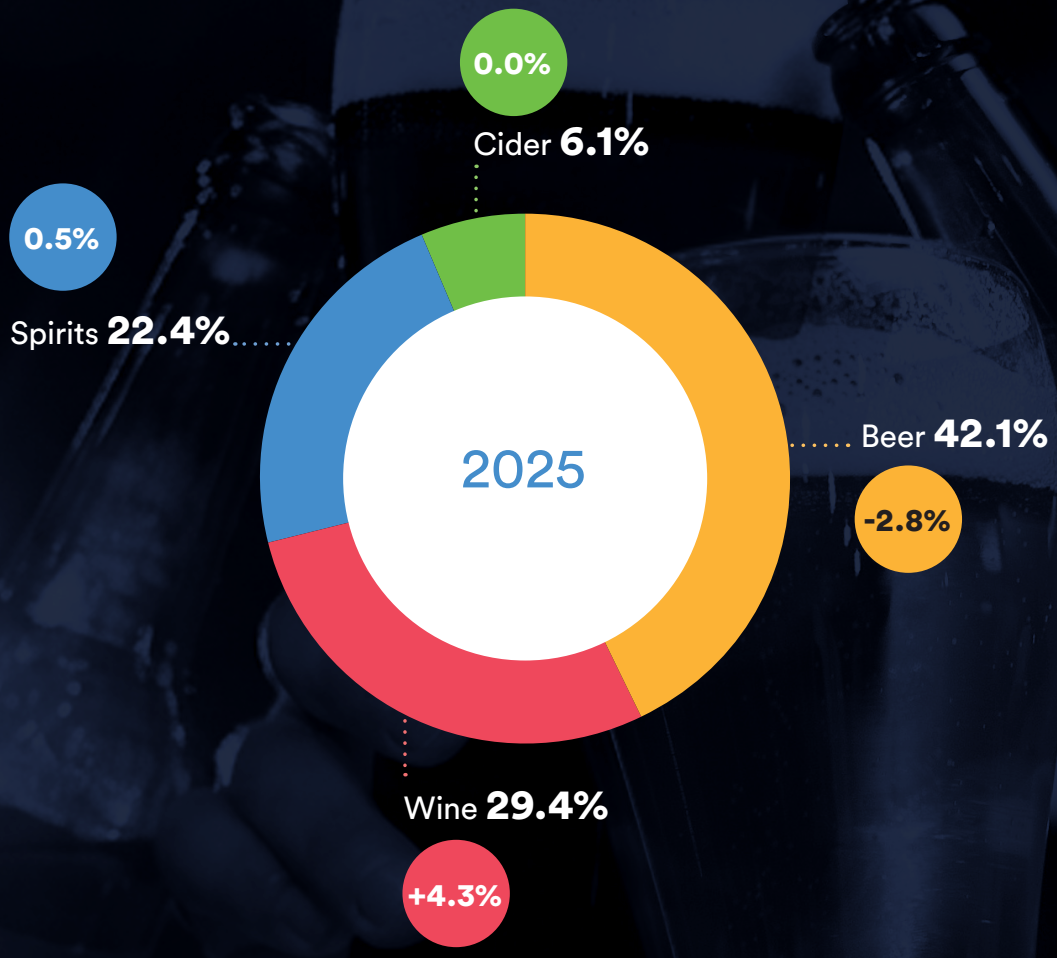
	2025 on trade	2025 off-trade
Lager	57.9%	42.1%
Stout	77.6%	22.4%
Ale	74.8%	25.2%
Non-alcohol	45.0%	55.0%

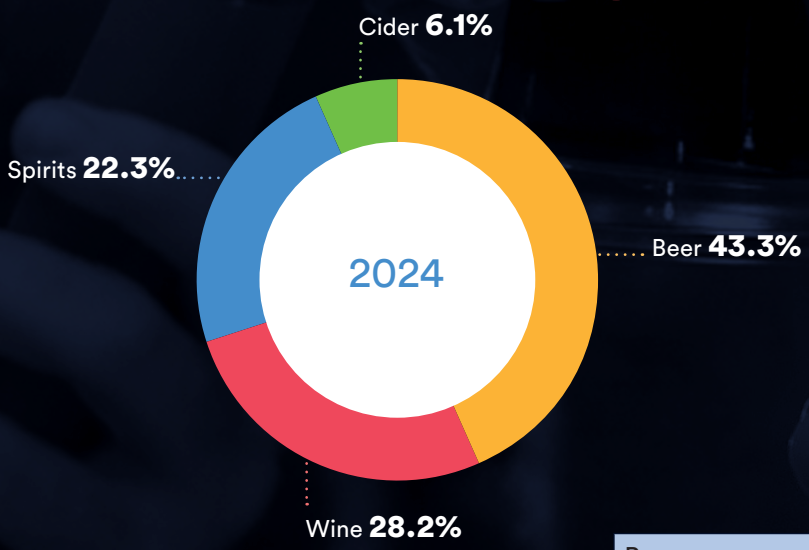
Source: Drinks Ireland Beer Members

	2024 on trade	2024 off-trade
Lager	55.1%	44.9%
Stout	78.3%	21.7%
Ale	69.5%	30.5%
Non-alcohol	37.0%	63.0%

Source: Drinks Ireland Beer Members

Alcohol consumption by category mix





	2025	2024	% Difference
Beer	42.1%	43.3%	-2.8%
Wine	29.4%	28.2%	4.3%
Spirits	22.4%	22.3%	0.5%
Cider	6.1%	6.1%	0.0%

Source: Revenue

Excise duty on a pint of lager



Excise contribution in decade
€4.0 billion

Excise duty on a pint of stout

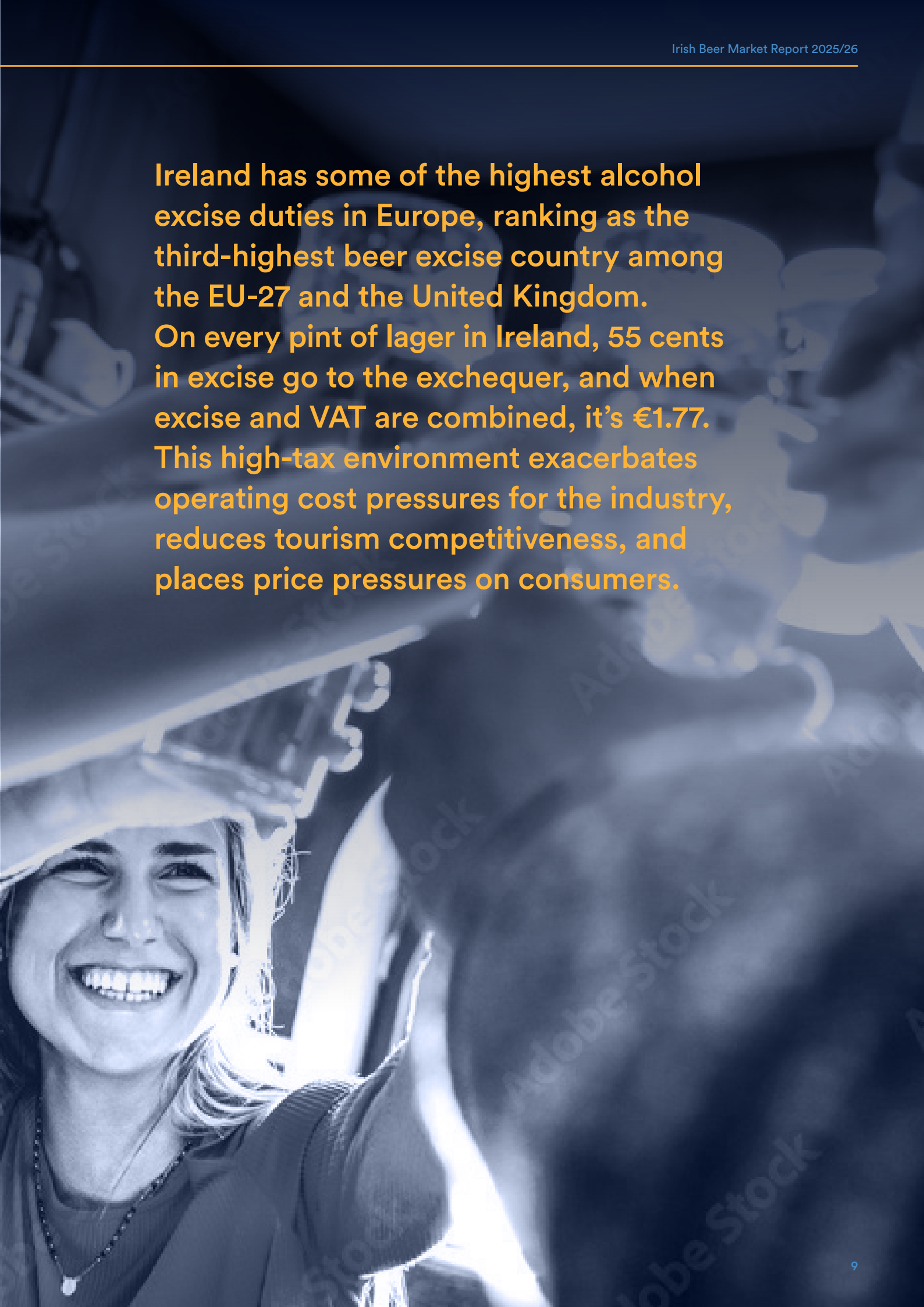


Source: CSO

Excise receipts (€ million)

Year	Beer	Wine	Spirits	Cider	Total	Beer as %
2016	€430	€380	€338	€59	€1,207	36%
2017	€424	€382	€353	€61	€1,220	35%
2018	€430	€376	€372	€61	€1,239	35%
2019	€421	€362	€375	€60	€1,218	35%
2020	€347	€415	€378	€50	€1,190	29%
2021	€347	€377	€401	€54	€1,179	29%
2022	€413	€381	€420	€53	€1,267	33%
2023	€403	€374	€411	€50	€1,238	33%
2024	€397	€367	€394	€47	€1,205	33%
2025	**€387**	**€377**	**€395**	**€48**	**€1,207**	**32%**

Source: Revenue



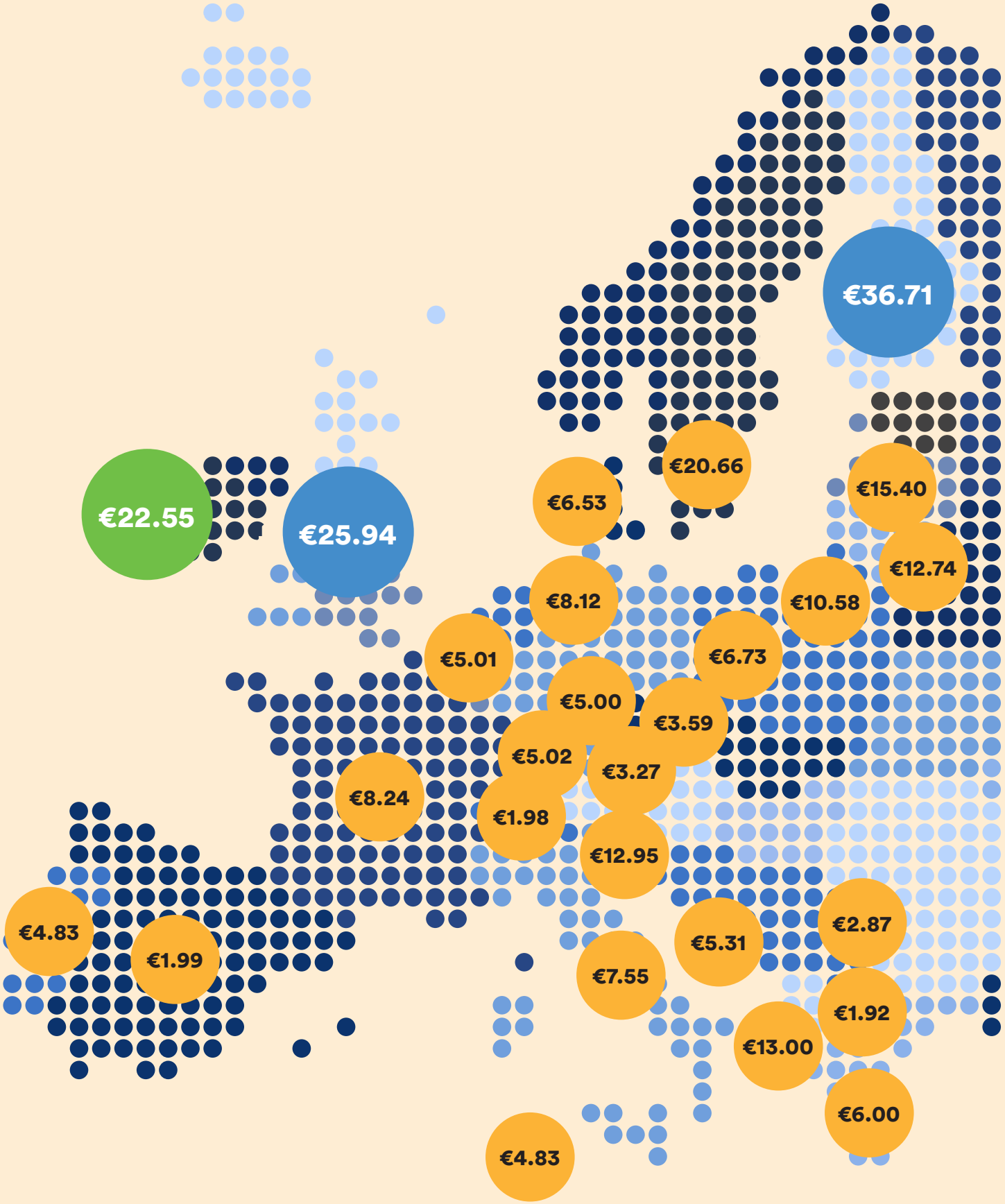
Ireland has some of the highest alcohol excise duties in Europe, ranking as the third-highest beer excise country among the EU-27 and the United Kingdom.
On every pint of lager in Ireland, 55 cents in excise go to the exchequer, and when excise and VAT are combined, it's €1.77.
This high-tax environment exacerbates operating cost pressures for the industry, reduces tourism competitiveness, and places price pressures on consumers.

EU (& UK) Beer excise rates 2025 (€/hl)

Rank	Country	Euro per HL
1	Finland	€36.71
2	United Kingdom	€25.94
3	Ireland	€22.55
4	Sweden	€20.66
5	Estonia	€15.40
6	Greece	€13.00
7	Slovenia	€12.95
8	Lithuania	€12.74
9	Latvia	€10.58
10	France	€8.24
11	Netherlands	€8.12
12	Italy	€7.55
13	Poland	€6.73
14	Denmark	€6.53
15	Cyprus	€6.00
16	Croatia	€5.31
17	Hungary	€5.02
18	Belgium	€5.01
19	Austria	€5.00
20	Malta	€4.83
21	Portugal	€4.83
22	Slovakia	€3.59
23	Czech Republic	€3.27
24	Romania	€2.87
25	Spain	€1.99
26	Luxembourg	€1.98
27	Germany	€1.97
28	Bulgaria	€1.92

Rates in 2025
Source: European Commission

EU (& UK) Beer excise rates 2025 (€/hl)



Drinks Ireland | Beer is the representative voice for the brewing industry in Ireland. Today over 90% of all beer sold in Ireland is manufactured or distributed by members of the association. The success of the Irish brewing industry is demonstrated by the fact that premium Irish beers are now enjoyed the world over. The role of Drinks Ireland | Beer is to promote the beer category and highlight its huge contribution to Ireland economically, culturally and socially.

Drinks Ireland | Beer is a part of Drinks Ireland.

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

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

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





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