

Craft Beer in Ireland Onwards and Upwards

September 2016

Denise Murphy

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Economic Impact Statement

Independent Craft Brewers of
Ireland



International Context

In 2011, craft's share was 5.2%
In 2015, achieved 12.2%
Overall market ↓.2%

In UK, growing at 23% yoy
Share was 1.4% in 2012, 2.5% in 2015
Overall market static

And here in Ireland.....



And Ireland – Then and Now

	2012	2016
No of Breweries	15	62
No of Brands	20	90
Export Ready	5%	22%

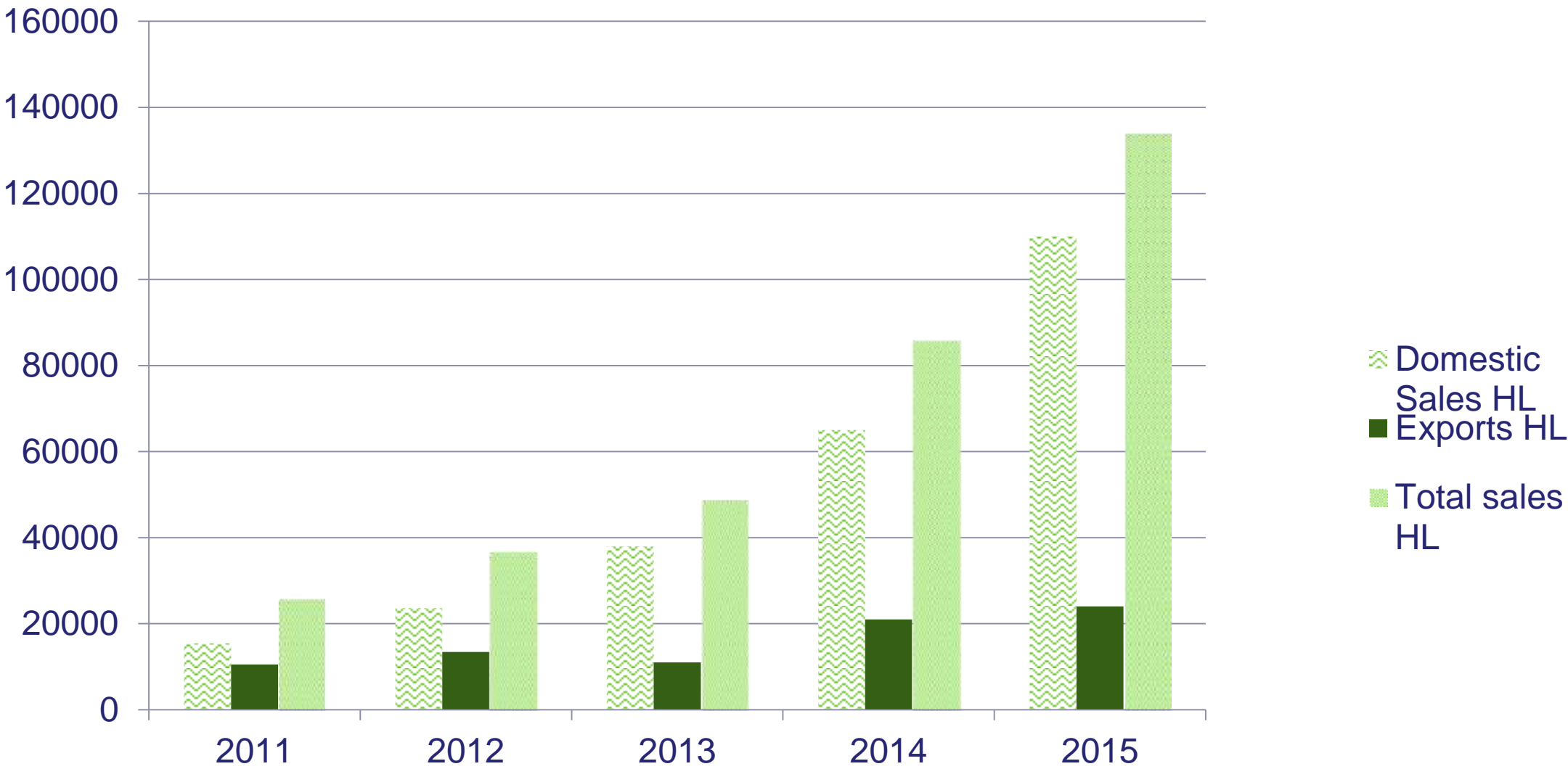


And Ireland – Then and Now

	2014	2016
Production Market Share	1.2%	2.5%
Consumption Market Share	1.4%	3.4%
Turnover	€24m	€59m



The Export Story



Year/Channel	Domestic	Export
2011	15.4k HL	10.5k HL
2012	23.6.0k HL	13.4k HL
2013	38.0k HL	11.0k HL
2014	65.0k HL	21.0k HL
2015	110.0k HL	24.0k HL

The Export Story

UK



France



Australia



USA



Canada



Italy



S. Korea



Germany



Russia



Denmark



Belgium



Netherlands



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Trends.....

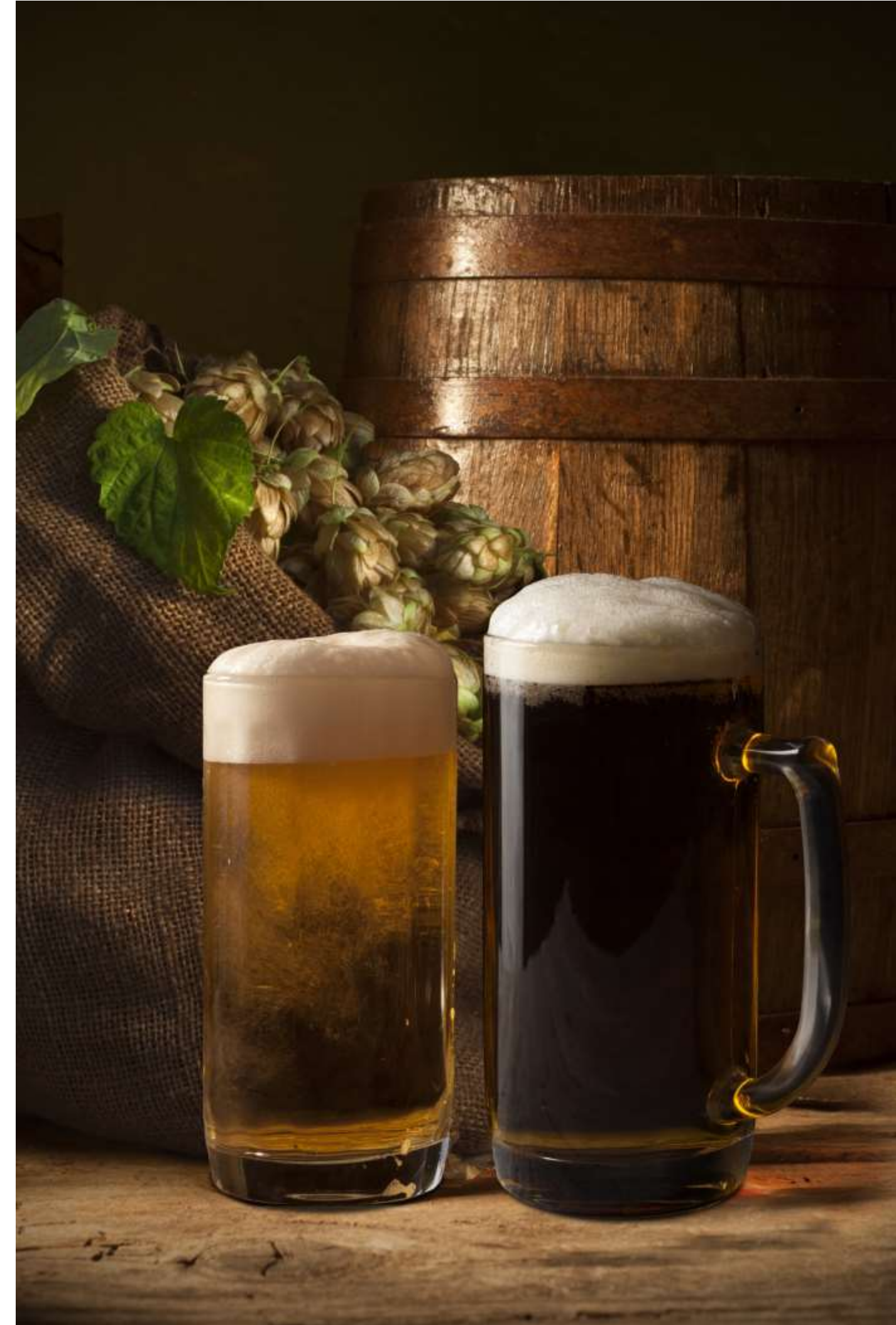
Movement towards local, authentic, artisanal and innovative.

Mergers & acquisitions

Supplier collaborations

Food Pairings

Visitor Experiences



The Future

Growth to continue

Greater involvement of larger companies
and MNCs

Greater investment

Health and wellness concerns

Minimum pricing

Continued Innovation



Economic Impact

	2012	2016
Direct Employment	67	439
Indirect Employment	60	392
Ingredient Sourcing	50%	50%
Excise Duties	€1.24m	€8.52m



Economic Impact continued

Urban/Rural spread

Brewery size

Increase in turnover

Growth in Market Share



What have Bord Bia done so far?.....

On a global scale – Origin Green

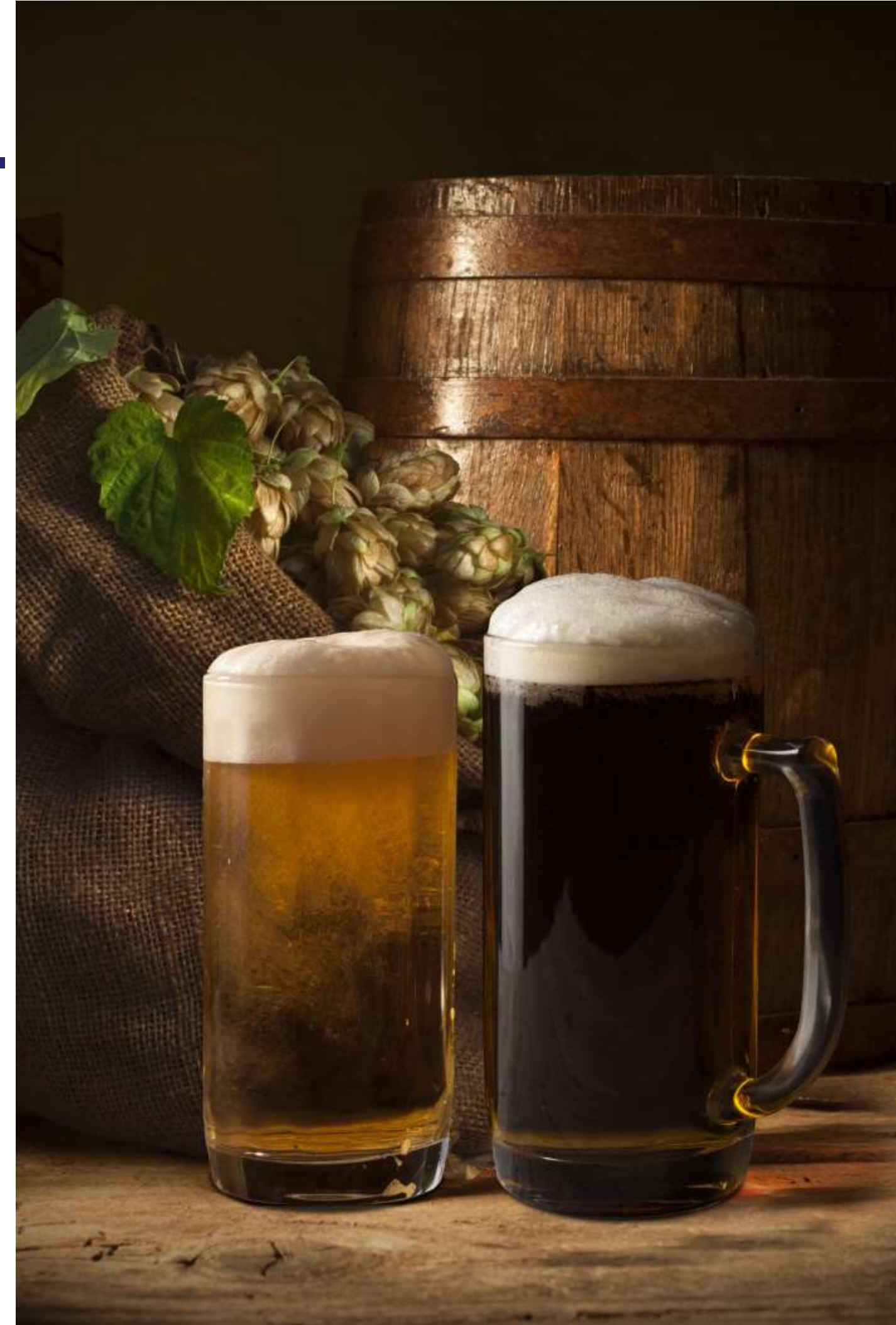
International network

Domestically - Annual update on economic
impact of the sector on the Irish economy

Foodworks program for entrepreneurship

Bloom Inn

‘Starting a Premium Craft Drinks Business ‘





What have we done so far?.....

Export Driven

North America Research

Navigating the US market

What are we doing next?.....

Upskilling and Market Entry Program for 2016

MSV Warsaw September 2016

MSV Stockholm December 2016

Other supports available.....

Local Enterprise Office

Local Leader Group



Craft Beer in Ireland

Questions?

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