

## Innovations in Beer - Ireland - June 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The Irish beer market appears to have had a good year, with reported growth in 2014, however, the Irish market is not out of the woods just yet, with total sales expected to see a slight decrease in 2015. With increased innovation in the beer market, and in particular craft beer, this is expected to fuel future growth for this industry.”

– Emma McGeown, Research Analyst

### This report looks at the following areas:

- What impact has craft beer had on the Irish beer market?
- Is in-home consumption of beer taking over from out-of-home drinking?
- What are Irish consumers' preferences when choosing a beer?
- Is the rise in consumer confidence benefiting the Irish beer market?

With the IoT economy showing signs of higher levels of growth, and with consumer confidence on the rise, Mintel expects that this will filter down to Irish consumers' spending habits – benefiting the Irish beer market.

Indeed, on-trade beer sales were on the rise in 2014 and are forecast to continue an uphill trend in the coming year, increasing beer consumption out of home at the expense of in-home drinking.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Innovations in Beer - Ireland - June 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Introduction

Key themes of the report  
 Definition  
 Data sources  
 Abbreviations

### Executive Summary

#### The market

Figure 1: Estimated total beer market, by segment, Iol, 2015

#### Market factors

Tax on beer cut in NI and capped in RoI for 2015  
 A strong exchange rate could see consumers favouring RoI prices  
 Alcohol consumption decreases in NI, on the rise in RoI  
 The booming craft beer industry

#### Companies and innovations

Figure 2: Number of beer products launched, UK and Ireland, 2010-15  
 Figure 3: Beer products launched, by flavour (excluding plain/unflavoured), UK and Ireland, 2014

#### The consumer

##### Lager voted most popular beer both in home and out of home

Figure 4: Types of beer that consumers have drunk in home (ie their home or another person's) and out of home (in pubs/bars/clubs/restaurants or another location out of home) in the last six months, NI and RoI, May 2015

##### Drinking beer at a bar is more favourable among RoI while NI consumers prefer in-home consumption

Figure 5: Occasions when consumers have drunk beer in the last six months, NI and RoI, May 2015

##### Irish consumers' preference towards beer

Figure 6: Consumers preference towards beer, NI and RoI, May 2015

##### Irish consumers seek more from premium beers

Figure 7: Agreement with statements relating to beer, NI and RoI, May 2015

#### What we think

### Issues and Insights

#### What impact has craft beer had on the Irish beer market?

The facts

The implications

#### Is in-home consumption of beer taking over from out-of-home drinking?

The facts

The implications

#### What are Irish consumers' preferences when choosing a beer?

The facts

The implications

BUY THIS  
 REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Innovations in Beer - Ireland - June 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Is the rise in consumer confidence benefiting the Irish beer market?

The facts

The implications

## Market Overview

Key facts

NI consumers relish the third year of beer tax cuts

Figure 8: UK and RoI excise duty rates for pint of beer (4% ABV), 2008-15

Recent stages of deflation could cause a drop in the price of a pint

Figure 9: Annual percentage change of Consumer Price Index, UK (including NI) and Ireland, September 2014-April 2015

Price of a pint of beer in RoI capped for the third year

Figure 10: Average annual price of beer/stout, RoI, 2008-15

Irish consumers feel financially better off than three months ago

Figure 11: Irish consumers who rated their current financial situation as 'Healthy (I have money left at the end of the month for a few luxuries or to add to my savings)', NI and RoI, January 2014-May 2015

The growing craft beer market in Ireland

Samuel Adams and BrewDog expand beyond the craft beer market

Supermarkets and ice cream brands launching craft beers

Alcohol consumption is down in NI but increasing in RoI

Figure 12: Average alcohol consumption per person, UK (including NI), 2012-14

Figure 13: Average alcohol consumption per person, RoI, 2013 and 2014

## Market Size and Forecast

Key points

Irish beer market gets a 3.1% boost in 2014

Figure 14: Total beer sales, by value, IoI, on-trade and off-trade, 2010-19

Off-trade beer sales are expected to decline in years to come

Figure 15: On-trade and off-trade percentage share of the total beer market, IoI, 2010-17

Figure 16: Indexed total beer sales, by value, on-trade and off-trade, IoI, 2010-19

On-trade beer sales are expected to increase in RoI with off-trade sales growing in NI

Figure 17: Total on-trade beer sales, by value, IoI, NI and RoI, 2010-19

Figure 18: Total off-trade beer sales, by value, IoI, NI and RoI, 2010-19

Craft beer market to expect more growth in 2015

Figure 19: Estimated market value of craft beer market (on-trade and off-trade), RoI, 2012-16

Volume of beer sales forecast to decrease in the years to come

Figure 20: Total beer sales, by volume, on-trade and off-trade, IoI, 2008-17

Volume of pure alcohol sales projected to fall

Figure 21: Total beer sales, by volume of pure alcohol, RoI, 2012-17

## Market Segmentation

Key points

Lager accounts for the largest segment of the Irish beer market

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Innovations in Beer - Ireland - June 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 22: Estimated total beer market, by segment, IoI, 2015

Figure 25: Total lager sales, by value, IoI, off-trade and on-trade, 2010-19

On-trade stout sales peaked in 2014

Figure 26: Total stout sales, by value, IoI, off-trade and on-trade, 2010-19

The Irish on-trade ale market reached its peak in 2014

Figure 27: Total ale sales, by value, IoI, off-trade and on-trade, 2010-19

## Strengths and Weaknesses

Strengths

Weaknesses

## Who's Innovating?

Key points

Innovations

NPD reached its peak in 2014 within the beer category

Figure 23: Number of beer products launched, UK and Ireland, 2010-15

Environmentally friendly packaging still dominates the market in terms of claims

Figure 24: Beer products launched, by top five claims, UK and Ireland, 2009-15

Plain or unflavoured beer remains the preferred variant among consumers

Figure 25: Beer products launched, by flavour (excluding plain/unflavoured), UK and Ireland, 2014

Bottled beer continues to witness the most growth in terms of NPD

Figure 26: Beer products launched, by packaging type, UK and Ireland, 2009-15

Figure 27: Beer products launched, by packaging size, UK and Ireland, 2014

Figure 28: Beer products launched, by packaging type, UK and Ireland, 2014 and 2015

## Companies and Brands

AB InBev

Key facts

Product range

Brand NPD

Recent developments

Diageo

Key facts

Product range

Brand NPD

Recent developments

Heineken Ireland

Key facts

Product range

Brand NPD

Recent developments

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Innovations in Beer - Ireland - June 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Molson Coors Brewing Company

Key facts

Product range

Brand NPD

Recent developments

SABMiller

Key facts

Product range

Brand NPD

Recent developments

The Cantrell and Cochrane Group (C&C Group)

Key facts

Product range

Recent developments

Bo Bristle Brewery

Key facts

Product range

Recent developments

Carlow Brewing

Key facts

Product range

Brand NPD

Recent developments

Dungarvan Brewing Company

Key facts

Product range

Brand NPD

Recent developments

Porterhouse Brewing Company

Key facts

Product range

Brand NPD

Recent developments

Whitewater Brewery

Key facts

Product range

Recent developments

Hilden Brewery

Key facts

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Innovations in Beer - Ireland - June 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Product range

Recent developments

## The Consumer – Usage of Beer

Key points

**Lager dominates the Irish market**

Figure 29: Types of beer that consumers have drunk in home (ie their home or another person's) and out of home (in pubs/bars/clubs/ restaurants or another location out of home) in the last six months, NI and RoI, May 2015

Figure 30: Irish consumers who have drunk lager (eg Harp, Heineken) in home (ie their home or another person's) in the last six months, by gender, NI and RoI, May 2015

**Stout preferred among Irish men**

Figure 31: Irish consumers who have drunk stout (eg Guinness, Murphy's) in home (ie their home or another person's) or out of home (in pubs/bars/clubs/ restaurants or another location out of home) in the last six months, by gender, NI and RoI, May 2015

**Craft beer usage peaks among younger consumers**

Figure 32: Irish consumers who have drunk any beer made by a small producer (ie craft beer eg Galway Bay) out of home (in pubs/ bars/clubs/ restaurants or another location out of home) in the last six months, by age, NI and RoI, May 2015

**ABC1 consumers show strongest usage of craft beer**

Figure 33: Irish consumers who have drunk any beer made by a small producer (ie craft beer eg Galway Bay) out of home (in pubs/ bars/clubs/ restaurants or another location out of home) in the last six months, by social class, NI and RoI, May 2015

**'Speers' growing demand among 18-24s**

## The Consumer – Occasions for Drinking Beer

Key points

**At the pub/bar is the most popular occasion for drinking beer in RoI**

Figure 34: Occasions when consumers have drunk beer in the last six months, NI and RoI, May 2015

Figure 35: Irish consumers who have drunk beer in the last six months at pub/bar, by age of children in the household, NI and RoI, May 2015

**At-home consumption more favourable in NI than RoI**

Figure 36: Irish consumers who have drunk beer in the last six months at home (relaxing while watching TV), by gender, NI and RoI, May 2015

Figure 37: Irish consumers who have drunk beer in the last six months at home before going on a night out and at a nightclub, by age, NI and RoI, May 2015

**Beer and watching sports on TV or live more favourable among men**

Figure 38: Irish consumers who have drunk beer in the last six months watching a live sport or watching a sporting event on TV, by gender, NI and RoI, May 2015

## The Consumer – Preference towards Beer

Key points

**Irish men prefer high alcohol content in beer**

Figure 39: Consumers' preference towards beer NI and RoI, May 2015

**No preference may be due to a lack of knowledge among Irish consumers**

**Light beer is more favourable than dark beer in IoI**

Figure 40: If consumers prefer light beer or dark beer, NI and RoI, May 2015

**Branding is a strong preference among Irish consumers**

Figure 41: If consumers prefer beers that are made by a well-known brand or made by a smaller brand, NI and RoI, May 2015

**Irish consumers prefer bottled beer to cans**

Figure 42: If consumers prefer bottled beer or canned beer, NI and RoI, May 2015

Figure 43: Size of bottle/can that consumers would prefer when buying beer, NI and RoI, May 2015

## The Consumer – Attitudes towards Beer

Key points

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Innovations in Beer - Ireland - June 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Irish consumers seek more from premium beers

Figure 44: Agreement with statements relating to beer, NI and RoI, May 2015

Figure 45: Agreement with the statement 'I would be interested in trying a beer aged in an oak barrel', by social class, NI and RoI, May 2015

## The demand for alcohol content information on beer has never been higher

Figure 46: Agreement with the statement 'I would be interested in more information on how many alcoholic units are contained in specific beer brands', by gender, NI and RoI, May 2015

## Women significantly more interested in low-calorie beers

Figure 47: Agreement with the statement 'I would be interested in beers with lower calories', by gender, NI and RoI, May 2015

## Appendix

### NI Toluna tables

Figure 48: Types of beer that consumers have drunk in pubs/bars/clubs/ restaurants or another location out of home in the last six months, by demographics, NI, May 2015

Figure 49: Types of beer that consumers have drunk in pubs/bars/clubs/ restaurants or another location out of home in the last six months, by demographics, NI, May 2015 (continued)

Figure 50: Types of beer that consumers have drunk in home (ie their home or another person's) in the last six months, by demographics, NI, May 2015

Figure 51: Types of beer that consumers have drunk in home (ie their home or another person's) in the last six months, by demographics, NI, May 2015 (continued)

Figure 52: Types of beer that consumers have not drunk in home or out of home in the last six months, by demographics, NI, May 2015

Figure 53: Types of beer that consumers have not drunk in home or out of home in the last six months, by demographics, NI, May 2015 (continued)

Figure 54: Occasions when consumers have drunk beer in the last six months, by demographics, NI, May 2015

Figure 55: Occasions when consumers have drunk beer in the last six months, by demographics, NI, May 2015 (continued)

Figure 56: Occasions when consumers have drunk beer in the last six months, by demographics, NI, May 2015 (continued)

Figure 57: If consumers prefer light beer or dark beer, by demographics, NI, May 2015

Figure 58: If consumers prefer high-alcohol or low-alcohol beers, by demographics, NI, May 2015

Figure 59: If consumers prefer glass bottles or cans when drinking beer, by demographics, NI, May 2015

Figure 60: If consumers prefer beers that are made by a well-known brand or made by a smaller brand, by demographics, NI, May 2015

Figure 61: If consumers prefer lower-priced or higher-priced (eg premium) beers, by demographics, NI, May 2015

Figure 62: If consumers prefer high hop or low hop content in beers, by demographics, NI, May 2015

Figure 63: If consumers prefer flavoured or unflavoured beers, by demographics, NI, May 2015

Figure 64: If consumers prefer beers to be brewed in NI/RoI or beers that have been brewed abroad, by demographics, NI, May 2015

Figure 65: If consumers prefer beers to be highly carbonated or lowly carbonated, by demographics, NI, May 2015

Figure 66: Size of bottle that consumers would prefer when buying beer, by demographics, NI, May 2015

Figure 67: Size of can that consumers would prefer when buying beer, by demographics, NI, May 2015

Figure 68: Agreement with the statement 'I am unsure what the term 'craft beer' means', by demographics, NI, May 2015

Figure 69: Agreement with the statement 'I am prepared to pay more for craft beers (ie made by a small-scale brewer)', by demographics, NI, May 2015

Figure 70: Agreement with the statement 'I would be interested in trying beer mixed with whiskey', by demographics, NI, May 2015

Figure 71: Agreement with the statement 'I think beer is becoming a more sophisticated drink', by demographics, NI, May 2015

Figure 72: Agreement with the statement 'I am more likely to try a new brand/type of beer at home rather than in a pub', by demographics, NI, May 2015

Figure 73: Agreement with the statement 'I'm only willing to pay more for beer if I can easily taste the difference from cheaper equivalents', by demographics, NI, May 2015

Figure 74: Agreement with the statement 'I would be interested in trying a beer aged in an oak barrel', by demographics, NI, May 2015

Figure 75: Agreement with the statement 'I would be interested in seeing more gluten-free varieties of beers', by demographics, NI, May 2015

Figure 76: Agreement with the statement 'I would be interested in buying beers with resealable lids/ closures', by demographics, NI, May 2015

Figure 77: Agreement with the statement 'I would be interested in trying beer products designed for mixing with other drinks (eg with juice/ carbonated drinks or other alcoholic drinks)', by demographics, NI, May 2015

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Innovations in Beer - Ireland - June 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 78: Agreement with the statement 'I would be interested in more information on how many alcoholic units are contained in specific beer brands', by demographics, NI, May 2015

Figure 79: Agreement with the statement 'I would be interested in beers with lower calories', by demographics, NI, May 2015

## RoI Toluna tables

Figure 80: Types of beer that consumers have drunk in pubs/bars/clubs/ restaurants or another location out of home in the last six months, by demographics, RoI, May 2015

Figure 81: Types of beer that consumers have drunk in pubs/bars/clubs/ restaurants or another location out of home in the last six months, by demographics, RoI, May 2015 (continued)

Figure 82: Types of beer that consumers have drunk in home (ie their home or another person's) in the last six months, by demographics, RoI, May 2015

Figure 83: Types of beer that consumers have drunk in home (ie their home or another person's) in the last six months, by demographics, RoI, May 2015 (continued)

Figure 84: Types of beer that consumers have not drunk in home or out of home in the last six months, by demographics, RoI, May 2015

Figure 85: Types of beer that consumers have not drunk in home or out of home in the last six months, by demographics, RoI, May 2015 (continued)

Figure 86: Occasions when consumers have drunk beer in the last six months, by demographics, RoI, May 2015

Figure 87: Occasions when consumers have drunk beer in the last six months, by demographics, RoI, May 2015 (continued)

Figure 88: Occasions when consumers have drunk beer in the last six months, by demographics, RoI, May 2015 (continued)

Figure 89: If consumers prefer light beer or dark beer, by demographics, RoI, May 2015

Figure 90: If consumers prefer high-alcohol or low-alcohol beers, by demographics, RoI, May 2015

Figure 91: If consumers prefer glass bottles or cans when drinking beer, by demographics, RoI, May 2015

Figure 92: If consumers prefer beers that are made by a well-known brand or made by a smaller brand, by demographics, RoI, May 2015

Figure 93: If consumers prefer lower-priced or higher-priced (eg premium) beers, by demographics, RoI, May 2015

Figure 94: If consumers prefer high hop or low hop content in beers, by demographics, RoI, May 2015

Figure 95: If consumers prefer flavoured or unflavoured beers, by demographics, RoI, May 2015

Figure 96: If consumers prefer beers to be brewed in NI/RoI or beers that have been brewed abroad, by demographics, RoI, May 2015

Figure 97: If consumers prefer beers to be highly carbonated or lowly carbonated, by demographics, RoI, May 2015

Figure 98: Size of bottle that consumers would prefer when buying beer, by demographics, RoI, May 2015

Figure 99: Size of can that consumers would prefer when buying beer, by demographics, RoI, May 2015

Figure 100: Agreement with the statement 'I am unsure what the term 'craft beer' means', by demographics, RoI, May 2015

Figure 101: Agreement with the statement 'I am prepared to pay more for craft beers (ie made by a small-scale brewer)', by demographics, RoI, May 2015

Figure 102: Agreement with the statement 'I would be interested in trying beer mixed with whiskey', by demographics, RoI, May 2015

Figure 103: Agreement with the statement 'I think beer is becoming a more sophisticated drink', by demographics, RoI, May 2015

Figure 104: Agreement with the statement 'I am more likely to try a new brand/type of beer at home rather than in a pub', by demographics, RoI, May 2015

Figure 105: Agreement with the statement 'I'm only willing to pay more for beer if I can easily taste the difference from cheaper equivalents', by demographics, RoI, May 2015

Figure 106: Agreement with the statement 'I would be interested in trying a beer aged in an oak barrel', by demographics, RoI, May 2015

Figure 107: Agreement with the statement 'I would be interested in seeing more gluten-free varieties of beers', by demographics, RoI, May 2015

Figure 108: Agreement with the statement 'I would be interested in buying beers with resealable lids/ closures', by demographics, RoI, May 2015

Figure 109: Agreement with the statement 'I would be interested in trying beer products designed for mixing with other drinks (eg with juice/ carbonated drinks or other alcoholic drinks)', by demographics, RoI, May 2015

Figure 110: Agreement with the statement 'I would be interested in more information on how many alcoholic units are contained in specific beer brands', by demographics, RoI, May 2015

Figure 111: Agreement with the statement 'I would be interested in beers with lower calories', by demographics, RoI, May 2015

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)