

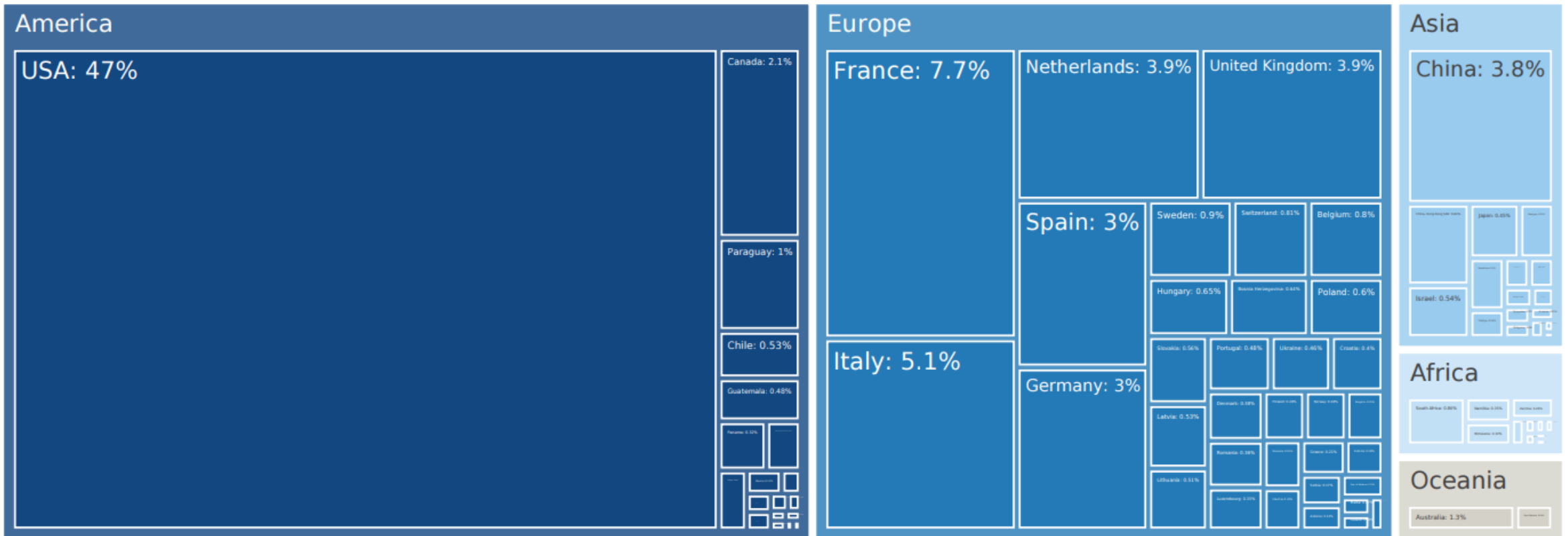
# Imported Beer Market in Europe

## Specifics of cross-country trade flows

June, 2024

# LARGEST IMPORTERS IN 2023

***Top-15 European import markets of beer constitute about 32.5% of total global imports of the product in 2023, with six countries – France, Italy, the Netherlands, United Kingdom, Spain, and Germany – accountable for 23.6%.***



*\* Ireland and Austria are not included in the report*

# KEY TRENDS IN THE LARGEST BEER IMPORT MARKETS

**Top-6 European beer markets are in a declining trend in terms of physical volumes of imports. Prices inflation appears to be the major driver of imports supplies growth in US \$-terms.**

- Total imports of top-6 beer markets amounted to more than 4 bn US \$ in 2023 and stayed at the same level in LTM.
- Belgium is the largest supplier to these markets in 2023 in US \$ terms, followed by Germany and the Netherlands.
- Despite the decrease of physical volumes of imports in most of these countries (except the Netherlands and Spain), such countries as Germany (+25,7 kt), Hungary (+15.7 kt), Spain (+10.6 kt), Poland (+6.9 kt), Ireland (+5.5 kt), Romania (+2.9 kt), together with some minor increase of supplies from Japan, Luxembourg, Serbia, Latvia, and Ukraine succeeded in growing their supplies.

## Long-term Imports Trends

Importing Country	Last month reported	Imports in 2023, M US \$	Imports in 2023, Ktons	Average Proxy Imports Price in 2023, K US \$ per 1 ton	Share in Global Imports in 2023	CAGR (5 years), t	CAGR (5 years), US \$	CAGR (5 years), prices level
France	Feb 2024	1 178,14	879,34	1,34	7,71%	-2,12%	3,72%	5,97%
Italy	Jan 2024	784,42	718,80	1,09	5,10%	-0,14%	3,79%	3,93%
Netherlands	Mar 2024	594,44	557,63	1,07	3,87%	-1,28%	6,74%	8,12%
United Kingdom	Mar 2024	592,45	824,02	0,72	3,85%	-4,89%	-2,80%	2,20%
Spain	Mar 2024	462,54	555,47	0,83	3,03%	3,26%	8,70%	5,27%
Germany	Mar 2024	458,79	556,77	0,82	2,96%	-6,72%	-3,24%	3,73%

## Short-term Imports Trends

Importing Country	Imports in LTM, in US \$ terms	Growth of Imports in LTM, in US \$ terms	Growth of Imports in last 6 month, in US \$ terms	24-months trend, in US \$ terms, annualized	Imports in LTM, in Ktons	Growth of Imports in LTM, in tons	Growth of Imports in last 6 month, in tons	24-months monthly trend, in tons	24-months trend, prices level, annualized
France	1 182,37	15,20%	3,97%	1,71%	879,77	-5,97%	-11,65%	-1,27%	18,41%
Italy	783,56	11,44%	32,78%	7,19%	717,84	-6,92%	7,01%	-0,62%	13,29%
Netherlands	603,67	16,71%	8,26%	6,18%	556,75	7,66%	-6,30%	0,05%	4,13%
United Kingdom	594,23	3,87%	2,63%	-5,75%	818,25	-6,17%	-6,17%	-0,84%	4,05%
Spain	468,59	15,71%	8,42%	9,30%	554,53	0,12%	-1,56%	-0,22%	12,21%
Germany	456,54	0,22%	-8,39%	-11,09%	548,03	-14,94%	-19,23%	-2,12%	13,98%

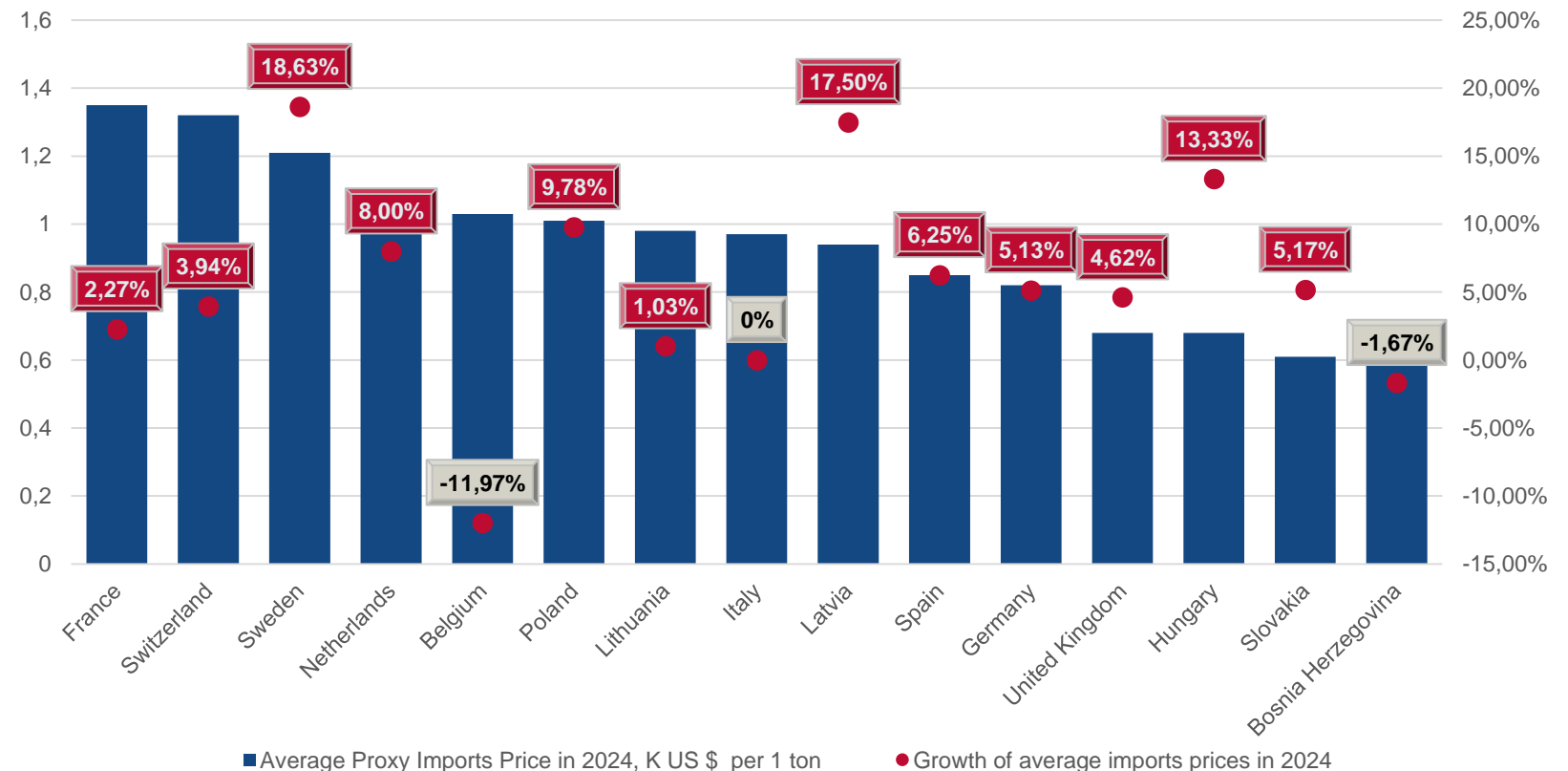
\* - Last 12 months period in majority of cases is the period starting March / April 2023 ending February / March 2024

# EUROPEAN MARKETS WITH THE HIGHEST PRICE PREMIUMS

***France, Switzerland, and Sweden are among European markets with the highest price premium on imported beer, with France also being the largest European importer in terms of imports in US \$-terms. On the contrary, the average imports proxy prices are the lowest in Hungary, Slovakia, and Bosnia and Herzegovina.***

- The highest average imports proxy prices are fixed for France, Switzerland, and Sweden in 2024. The Netherlands is the largest country contributing to the growth of imports in these countries, being also a top-ranked supplying country based on multiple market parameters estimated.
- Second-tier European markets in terms of average imports proxy prices include: the Netherlands, Belgium, Poland, Lithuania, Italy, Latvia, Spain, Germany, with most of them being also among the major beer producers.

**Average Imports Proxy Price on Beer in first 2-3 months of 2024 and the growth rate compared to the same period of 2023**



# STRONGEST COMPETITORS IN THE MARKET

**Germany, the Netherlands, and Belgium dominate the European beer markets – these countries are among the strongest competitors in all major beer markets. Czechia, Poland, and France are following the leaders, increasing their shares in some notable markets like the Netherlands, Italy, Spain, Germany, and the UK.**

- Germany, the Netherlands, and Belgium are remaining the strongest competitors in the European markets of beer dominating in almost all of the countries reviewed.
- However, it can be noted that Poland is on top of competition in a couple of markets, including the largest ones of Germany and Italy.

Importing Country	Last month reported	Change of Imports in LTM, in tons	Change of Imports in LTM, in K US \$	TOP-5 ranked competitors				
				Supplier 1	Supplier 2	Supplier 3	Supplier 4	Supplier 5
France	Feb 2024	-55 813,39	155 964,64	Netherlands	Spain	Belgium	Germany	Portugal
Switzerland	Mar 2024	-8 981,45	8 999,45	Netherlands	Germany	Italy	Portugal	France
Sweden	Mar 2024	-13 666,44	6 318,42	Czechia	Netherlands	Belgium	Italy	Germany
Netherlands	Mar 2024	39 635,51	86 441,81	Belgium	Germany	Poland	France	United Kingdom
Belgium	Feb 2024	-14 192,74	-4 042,10	Netherlands	Qatar	Ireland	Germany	Luxembourg
Poland	Mar 2024	-13 046,32	10 390,15	Germany	Czechia	Belgium	Lithuania	Ukraine
Lithuania	Mar 2024	-6 652,46	9 849,40	Netherlands	Czechia	Spain	Germany	Latvia
Italy	Jan 2024	-53 381,14	80 443,43	Germany	Poland	France	Belgium	Netherlands
Latvia	Mar 2024	-15 450,24	11 766,60	Belgium	Finland	Netherlands	Mexico	Estonia
Spain	Mar 2024	640,21	63 610,18	Belgium	France	Netherlands	Portugal	Germany
Germany	Mar 2024	-96 276,32	1 020,05	Poland	Hungary	Denmark	Austria	Czechia
United Kingdom	Mar 2024	-53 803,11	22 119,62	Ireland	France	Italy	Netherlands	Germany
Hungary	Feb 2024	-36 755,81	6 233,97	Serbia	Poland	Italy	Czechia	Romania
Slovakia	Feb 2024	-7 277,62	14 039,79	Poland	Slovenia	Czechia	Mexico	Germany
Bosnia Herzegovina	Mar 2024	-1 268,56	17 976,17	Serbia	Croatia	Greece	Austria	Germany

\* Countries in the table are listed from the country with the highest average imports price in 2024 to the one with the lowest. The largest markets are marked bright blue color.

# WHERE DO THE CHEAPEST IMPORTS SUPPLIES COME FROM

***Beer from Ukraine, France, Ireland, Germany, Serbia, Poland, and Czechia is most often supplied at the average proxy prices lower compared to markets average.***

- The average imports proxy price on beer originated from Ukraine is most often the lowest compared to other countries.
- Price factor may also contribute to the success of supplies from Poland, France, Czechia, and Germany to the major European countries.

Importing Country	Last month reported	Change of Imports in LTM, in tons	Change of Imports in LTM, in K US \$	Suppliers winning competition due to lower prices				
				Supplier 1	Supplier 2	Supplier 3	Supplier 4	Supplier 5
France	Feb 2024	-55 813,39	155 964,64	Suriname	China	Czechia	Denmark	Poland
Italy	Jan 2024	-53 381,14	80 443,43	Lithuania	Serbia	Poland	Germany	
Netherlands	Mar 2024	39 635,51	86 441,81	Germany	Belgium			
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Latvia	Mar 2024	-15 450,24	11 766,60	Italy	Ireland	Cyprus	Russia	France
Lithuania	Mar 2024	-6 652,46	9 849,40	Slovakia	Finland	Spain		

\* Countries in the table are listed from the country with highest share in total global imports in 2023 to the one with the lowest.

# IMPORTS GROWTH IN LTM

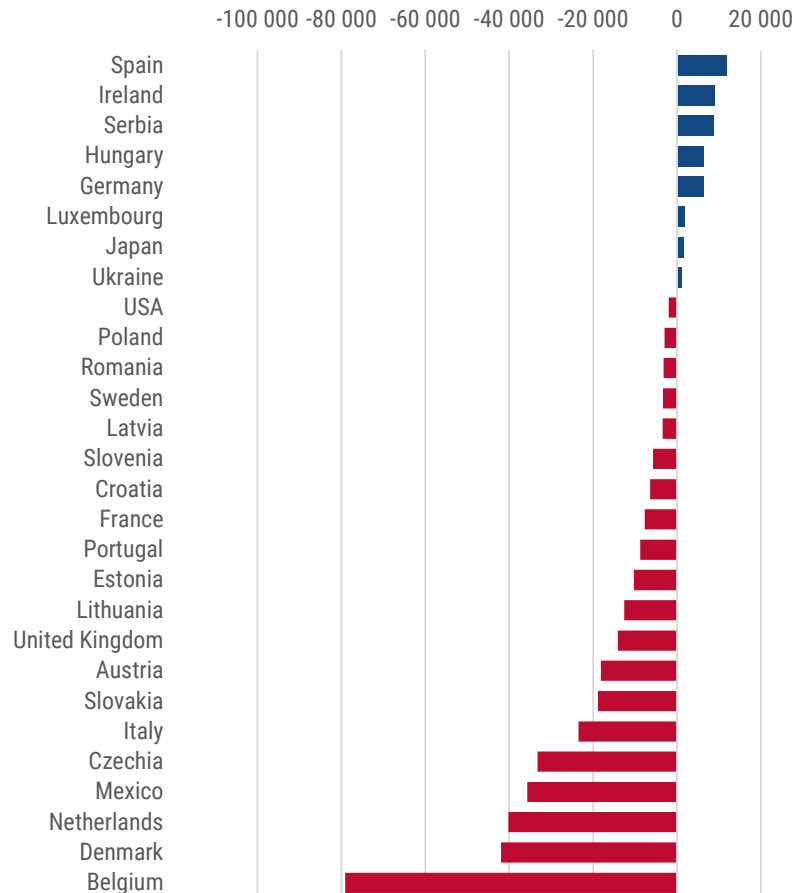
***While beer supplies from Belgium in physical terms are declining sharply in LTM, the country has shown the greatest growth in US \$-terms, with + 200 mn US \$ of supplies to top-15 European markets, which indicates considerable price growth on beer originated from Belgium.***

The only countries which managed to increase supplies of beer to top-15 European markets in LTM both in physical volumes and in US \$ terms were Spain, Ireland, Serbia, Hungary, and Germany, with some minor growth also in supplies from Luxembourg, Japan, and Ukraine.

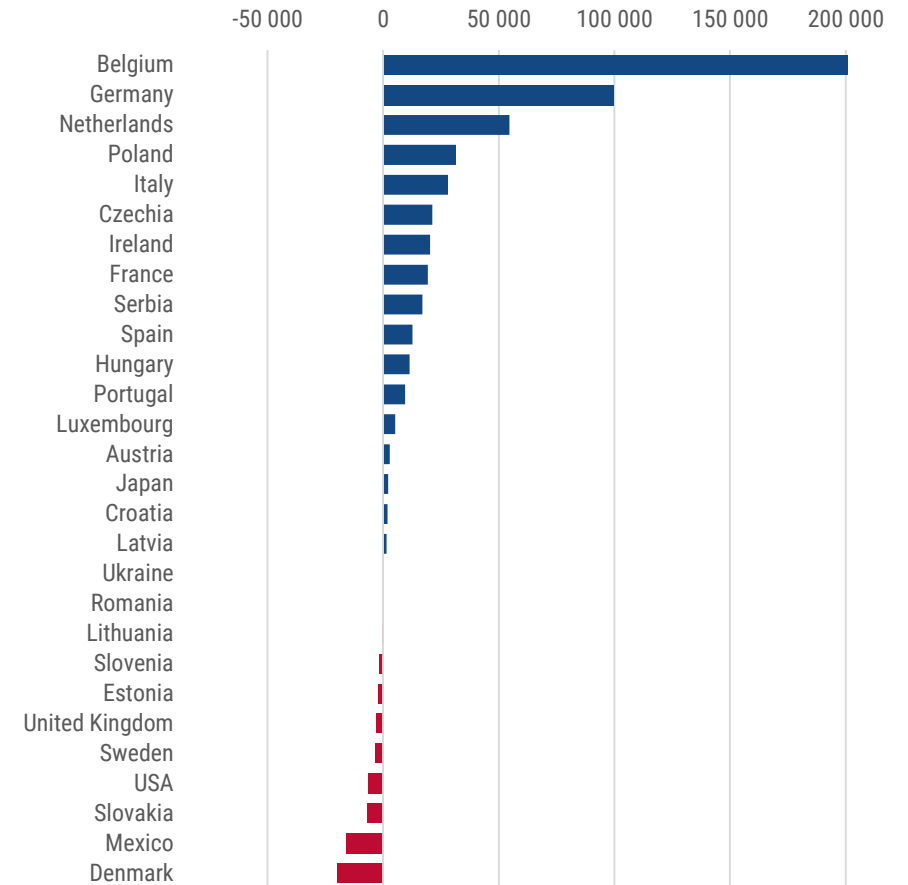
Growth of supplies in US \$ terms from most countries is related to price inflation rather than the increase of physical volumes of imports.

Beer from Denmark, Mexico, Slovakia, USA, Sweden, United Kingdom, Lithuania, Estonia, and Slovenia is in declining trend both in physical volumes and in US \$ terms.

**Increase of Imports by key markets in LTM, in tons  
(origin of imports)**



**Increase of Imports by key markets in LTM, in K US \$  
(origin of imports)**





*For more information on beer markets in Europe we encourage you to visit <https://gtaic.ai/>, where you can download up-to-date market research reports on 700,000 specific goods markets.*

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