

# Beer in Germany

June 2023

Table of Contents

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Full reopening of on-trade channel leads to rebound in total volume sales

Imported lager and non alcoholic beer resilient but price pressure creates challenges

Brands see performances affected by on-trade rebound and higher price sensitivity

#### PROSPECTS AND OPPORTUNITIES

Non alcoholic beer expected to see continued growth

Challenges for brewers may lead to price increases and consolidation

Craft beer set to remain a niche, while still generating interest from consumers and retailers

#### CATEGORY BACKGROUND

Lager price band methodology

Summary 1 - Lager by Price Band 2022

Table 1 - Number of Breweries 2017-2022

#### CATEGORY DATA

Table 2 - Sales of Beer by Category: Total Volume 2017-2022

Table 3 - Sales of Beer by Category: Total Value 2017-2022

Table 4 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 5 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 6 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 7 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 8 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 9 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 10 - Sales of Beer by Craft vs Standard 2017-2022

Table 11 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 12 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 13 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 14 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 15 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 16 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 17 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

## Alcoholic Drinks in Germany - Industry Overview

### EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

### MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Table 18 - Number of On-trade Establishments by Type 2017-2022

## TAXATION AND DUTY LEVIES

Summary 2 - Taxation and Duty Levies on Alcoholic Drinks 2022

## OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

## KEY NEW PRODUCT LAUNCHES

Outlook

## MARKET INDICATORS

Table 19 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

## MARKET DATA

Table 20 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Table 21 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022

Table 22 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

Table 23 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

Table 24 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 25 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 26 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 27 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 28 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 29 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 30 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 31 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Table 32 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 33 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 34 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

## DISCLAIMER

## SOURCES

Summary 3 - Research Sources

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/beer-in-germany/report](http://www.euromonitor.com/beer-in-germany/report).