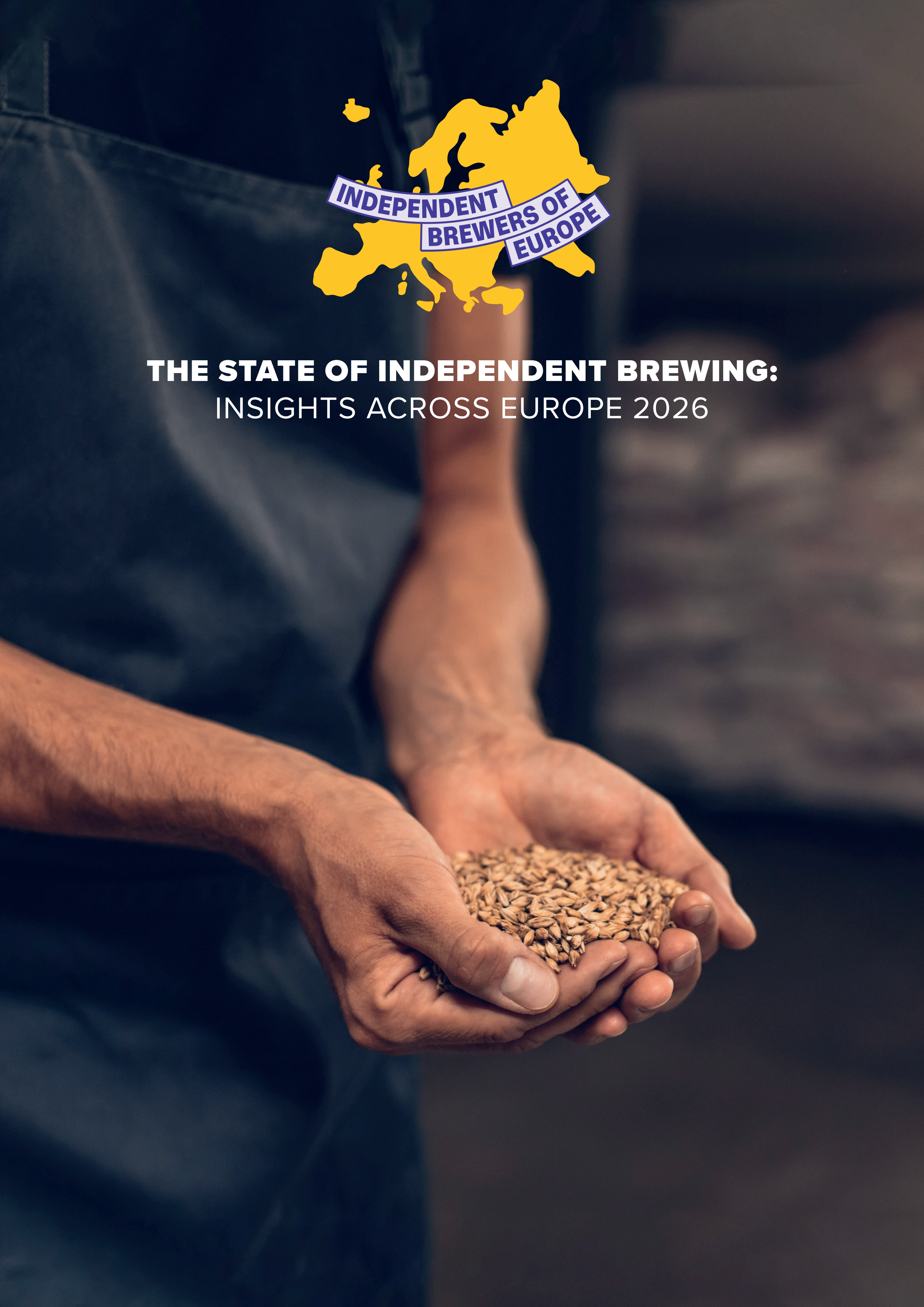
INDEPENDENT BREWERS OF EUROPE

THE STATE OF INDEPENDENT BREWING:
INSIGHTS ACROSS EUROPE 2026



Introduction

Just over two years ago, small brewers from across Europe came together and united to make a stand for authentic, real and truly independent beer. The Independent Brewers of Europe was formed to share this solidarity, to fight for and defend independence and ensure that drinkers can continue to enjoy a great tasting beer wherever they are in Europe.

This first of its kind report gives a detailed picture of the state of independent beer and brewing across 12 European countries. From Spain to Switzerland and Finland to France it demonstrates the importance of authentic beer culture in our local communities. You can see the huge list of unique beer styles on offer across Europe and the ways that independent breweries have set up taprooms, shops and their own pubs and bars to give consumers the chance to taste, to try and to enjoy them.

It also details why this invaluable culture is under threat and why it needs to be defended at all costs. Four out of 10 say they are focusing simply on survival this year with energy price shocks, government red tape and high taxation listed in the top challenges. Half (50%) of IBE brewers expect turnover to decrease or stay the same this year.

Equally, overshadowing the sector is the dominance of global brewers which restrict the routes to market open to independent brewers. Beer consumers can also find themselves falling for an illusion of choice – where the adoption and ownership of local craft brands by global giants can be made to look like independent beer and create confusion.

As you will see there is a lot of good that is covered in this report for us to fight for and defend. This is why we've joined forces and we will continue to promote with pride the independent cause.

Barry Watts
Chair

INDEPENDENT BREWERS OF EUROPE

THANK YOU!

We would like to thank all the Independent Brewers of Europe (IBE) members who took the time to fill out our members' survey. We had 721 responses in total (23%) of the total number of IBE breweries with 555 (18%) providing some data and 506 (16%) completing all questions. This is a high response rate for a members' survey of this kind and gives us a strong statistical basis for this report. Note: UK responses were taken from SIBA's existing 2025 annual members' survey and summer survey combined. It should be noted that the response rate varied per country from 7% in Italy and Spain to 23% in the Czech Republic and Switzerland and 37% in Poland.

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Who are the Independent Brewers of Europe (IBE)?

The IBE was launched in January 2024 and brings together associations that represent independent breweries in countries across Europe to champion authentic beer culture. There are currently 12 member associations, representing over 3,000 independent breweries across Europe.

The IBE's mission:

- We stand for authentic beer culture and fight against the illusion of choice created by global brewers.
- We build awareness of the market situation among consumers and decision makers.
- We promote independence.
- We inspire and empower each other.
- We join forces.

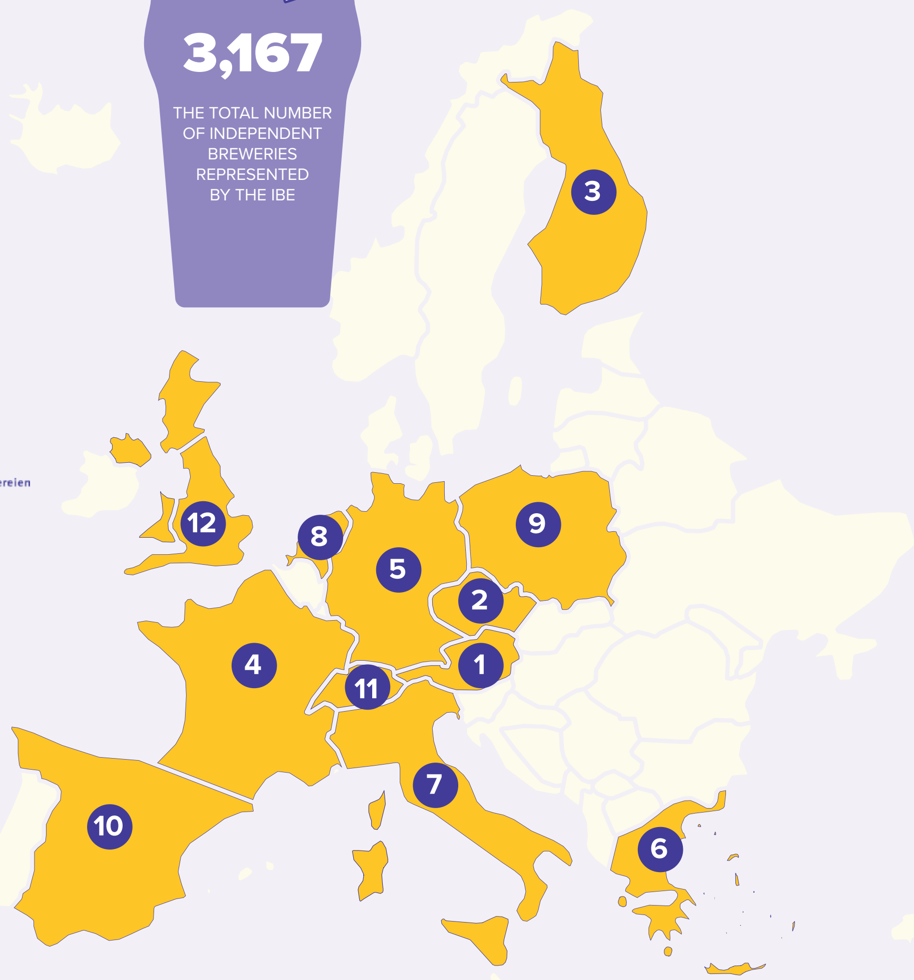
Members of the Independent Brewers of Europe:

1. **AUSTRIA** Privatbrauereien Österreich - **Members: 47**
2. **CZECH REPUBLIC** Ceskomoravsky Svaz Minipivovaru **Members: 160**
3. **FINLAND** Pienpanimoliitto **Members: 70**
4. **FRANCE** Syndicat National des Brasseries Indepéndantes **Members: 850**
5. **GERMANY** Private Brauereien **Members: 600**
6. **GREECE** S.M.A.Z.E - **Members: 36**
7. **ITALY** Unionbirrai Italia **Members: 318**
8. **NETHERLANDS** Craft Brouwers **Members: 194**
9. **POLAND** Polskie Stowarzyszenie Browarów Rzemieślniczych **Members: 30**
10. **SPAIN** AECAI - **Members: 132**
11. **SWITZERLAND** Die Freien Schweizer Brauereien **Members: 30**
12. **UK** The Society of Independent Brewers & Associates (SIBA) **Members: 700**

INDEPENDENT BREWERS OF EUROPE

3,167

THE TOTAL NUMBER OF INDEPENDENT BREWERIES REPRESENTED BY THE IBE



As this report went to press the IBE welcomed its 13th member, the **Independent Brewers of Ireland (IBI)**. The IBI joined after the members' survey had been completed so does not form part of the data and analysis used in this report, but will be included in any future reports.

INDEPENDENT BREWERS OF IRELAND

What is the Independent Brewers of Europe Report?

This report is the first of its kind published by the IBE and offers an in-depth look at the independent beer market across Europe, variations between individual markets, and the key challenges faced by Europe's independent brewers.

The aim of the report is to provide IBE members with insight on trends and performance in the European market that they can take away and consider when making strategic decisions. To make it as comprehensive as possible, as well as analysing the results of the IBE members' survey conducted in Autumn 2025, we have also analysed the most recent industry data available and taken a broader look at the market as it stands in 2026. This report has been written and researched by Caroline Nodder, the author of SIBA's annual Independent Beer Report on the UK market, with input from the wider IBE membership.

The 2025 IBE Members' Survey

Unless otherwise stated, all statistics relating to IBE brewing members in this report are taken from the first ever IBE members' survey as analysed by Professor David Tyrrall, Visiting Professor of Accounting and Policy at Staffordshire University. David also provides expert analysis for the annual SIBA Independent Beer Report on the UK market and has previously provided research to support the successful campaign to introduce Progressive Beer Duty in the UK. The IBE members' survey was completed in Autumn 2025.

Case Studies

Throughout the report we have included case studies from brewers across the IBE network to illustrate the challenges they face individually in their home territories, and highlight their experiences of trading in the current market. We would like to thank all the brewers who contributed to these case studies.

TOP 5 TAKEAWAYS

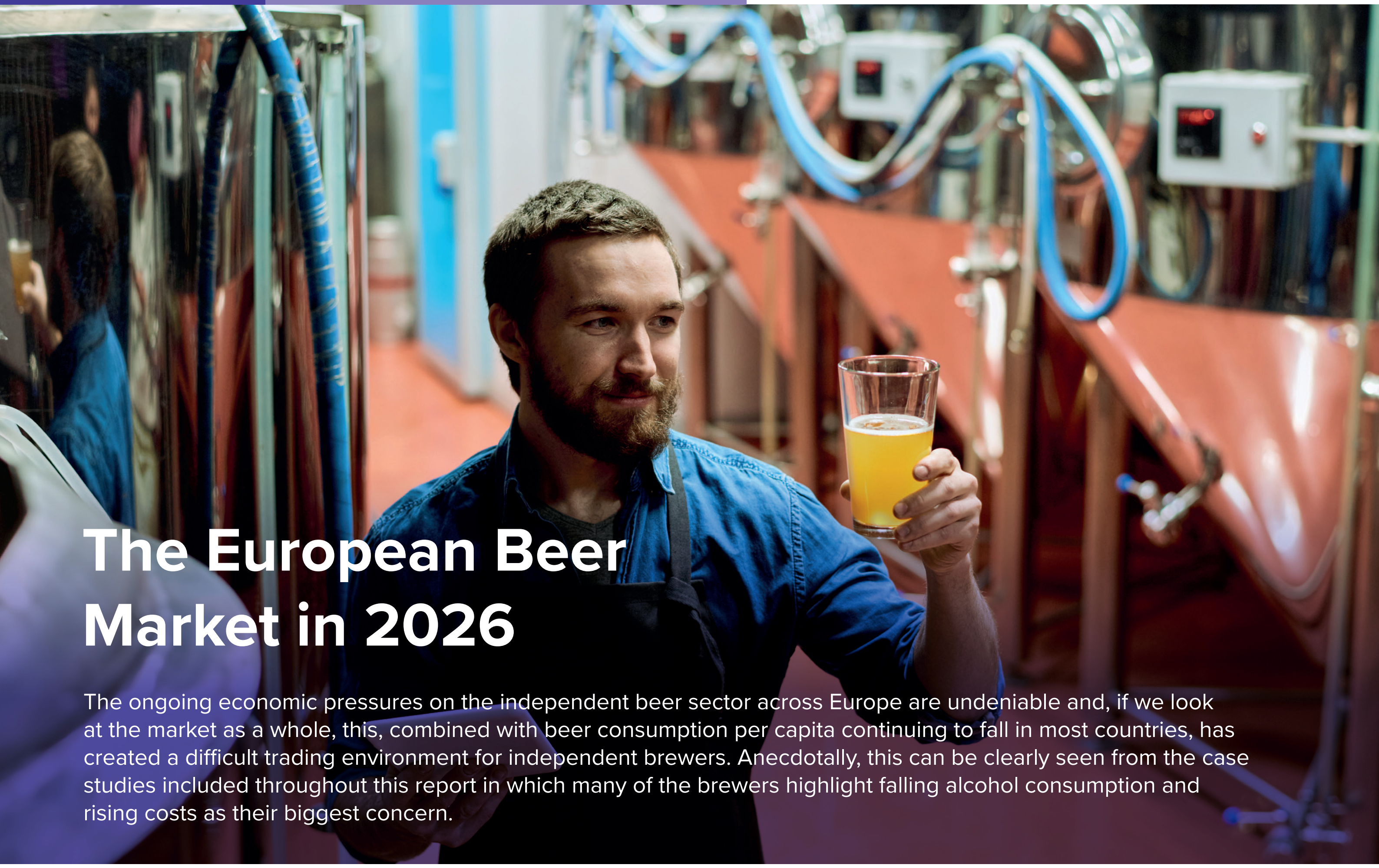
1. **SURVIVAL IS PRIORITY #1:** 43% of independent brewers in Europe say their main priority in 2026 is survival, with energy prices and the dominance of the global brewers their top two challenges. Despite this, 37% intend to focus on improving beer quality and 35% plan to invest in new equipment.

2. **REVENUE AT RISK:** Nearly a third of independent brewers in Europe (30%) expect turnover to fall this year and a further 20% expect it to stay the same. 45% believe their turnover will increase in the current year.

3. **SMALL BUT MIGHTY:** The average independent brewery in Europe is a small business. 80% of the brewers surveyed produce less than 4,500 hectolitres (hl) per year, with a median volume of 950hl, and over 60% have an annual turnover of less than €500,000.

4. **ADAPT OR FADE:** Non-alcoholic beer is now a significant part of independent brewers' production in Europe, with 8% of brewers saying it is now in their top three most produced styles, and a significant 43% now produce another drink, the majority of these are producing soft drinks.

5. **COMMUNITY POWERED:** More than a quarter (28%) of the beer produced by Europe's independent brewers is sold direct to consumers via their own taprooms, bars, shops and pubs, and brewers are very embedded within their local communities, with 75% actively supporting local good causes.



The European Beer Market in 2026

The ongoing economic pressures on the independent beer sector across Europe are undeniable and, if we look at the market as a whole, this, combined with beer consumption per capita continuing to fall in most countries, has created a difficult trading environment for independent brewers. Anecdotally, this can be clearly seen from the case studies included throughout this report in which many of the brewers highlight falling alcohol consumption and rising costs as their biggest concern.

Changing consumption

Over the last five years there has been a steady decline in beer production across Europe. The Brewers of Europe puts this figure at -6% over the period from 2019 to 2024, although this figure will vary quite significantly by country, and covers all beer, not just independent beer which is some countries has seen growth over this period. But if we look at the latest numbers for IBE member territories we can see that the majority did see a decline in consumption per head between 2023 and 2024, with Spain seeing the worst drop at over -5%. On the other end of the scale Greece actually saw an increase of almost +8% in average consumption, and this reflects the growth in bars and wet-led venues in the Greek market which is newer and less developed than in other territories. Greece is also seeing growth in on-trade consumption as the traditionally food-focussed market moves to become more wet-led.

14,420,186HL

THE TOTAL VOLUME OF BEER PRODUCTION REPORTED BY IBE BREWERS IN OUR SURVEY

Change in average beer consumption per head 2023 to 2024 (litres)*

SPAIN	-5.4%
SWITZERLAND	-3.9%
UK	-3%
ITALY	-2.7%
CZECH REPUBLIC	-1.6%
FINLAND	-1.6%
POLAND	-1.1%
AUSTRIA	-1%
FRANCE	0%
NETHERLANDS	0%
GERMANY	0%
GREECE	+7.9%

*Brewers of Europe, European Beer Trends report 2025

-6%

OVERALL BEER PRODUCTION IN EUROPE FELL -6% BETWEEN 2019 AND 2024 FROM 412M HL TO 387M HL*

*Brewers of Europe Statistics Report 2025

Consumption per country

The Czech Republic remains the highest consumer of beer per head of all our IBE territories (128 litres per capita) with an innate beer culture going back centuries, albeit this number has still declined over time. At the other end of the scale we see France, with only slightly more than a quarter (33 litres per capita) of that figure, with a culture very much focussed on wine. However, French beer consumption has remained stable to 2024, demonstrating perhaps that consumer interest in the new wave of independent breweries has bolstered beer consumption.

Average annual beer consumption per head (litres)*

*BBPA Statistical Handbook 2025

71%*

OF EUROPEAN CONSUMERS HAVE CUT THEIR ALCOHOL CONSUMPTION

25%*

OF 25-35-YEAR-OLDS IN EUROPE HAVE STOPPED BUYING ALCOHOL

*Circana report for Beverage Forum Europe 2025

CASE STUDY: Austria

Name of brewery: Schloss Eggenberg Brewery

Location: Vorchdorf, Upper Austria

Year founded: 1681

Production size: 120,000 HL beer

Best selling beer: Hopfenkönig Pils

Number of staff: 120

Number of taproom/pub/bar sites: One on site

What is the ethos behind your brewery/beers?
"We maintain our independence in order to preserve our unique characteristics: a modern brewery located in a historic premise, locally sourced ingredients and strong ties to our region."

Where are you seeing the biggest growth as a business?
"Alcohol free beers, brewed with our own special yeast."

What are the major challenges in your market currently?
"A multinational brewer controlling the market."

Where are you investing in your business this year?
"In a new efficient cooling system for the cellars."

Who are your target consumers?
"Quality conscious beers drinkers, 50 miles around the brewery."

What inspires you most about the independent beer market?
"The recurring success stories of brewers that are able to find new paths in a traditional industry."

Opening opportunities

Changing consumer behaviour does, however, offer opportunities for independent brewers. The independent beer sector in Europe is predicted to grow significantly between 2024 and 2029 according to forecasting by Technavio, and this likely reflects growing consumer interest in provenance, more interesting beer styles and seeking out premium products. According to recent research by The Oxford Partnership, consumers are going out for shorter periods but spending more – so drinking less, but better – and this plays into the hands of independent brewers whose beers are generally considered more premium. There are also opportunities to capitalise on growing consumer demand for local products, and a move towards weekday socialising, especially in larger towns and cities when independent brewers can tap into new occasions to reach consumers.

€16.2 BILLION*

PREDICTED VALUE GROWTH FOR EUROPEAN INDEPENDENT CRAFT BEER BETWEEN 2024 AND 2029

*Technavio forecasting

Consumer trends impacting hospitality in Europe*

1 Weekday socialising has become the driving force for growth and consumers focus on shorter, higher-value visits

2 Monday and Tuesday visits rose by up to five percentage points in Warsaw, Copenhagen and Amsterdam

3 Thursdays have become a new social highlight, with growth of more than three per cent in London, Rome and Stockholm

4 Average spend per head rose to €21.69, up 7.5 per cent since June 2025

5 Dwell times fell by 2.8 per cent to average 126 minutes

6 Dublin recorded the strongest spending rise at 21.3 per cent, followed by Copenhagen (10.5 per cent), Oslo (9.5 per cent) and London (7.9 per cent)

7 Bern, Copenhagen and London remain Europe's highest-spend capitals

8 Saturday remains the hospitality week's commercial cornerstone. Across Europe, the 6 to 9 pm period delivers the highest occupancy and spend, peaking around 8 pm before easing into late night.

*Quarter Three 2025 European Capital Cities Hospitality Report, The Oxford Partnership (data from 95K hospitality venues across 17 capital cities)

CASE STUDY:
Czech Republic

Name of brewery: Břevnov Monastic Brewery

Location: Prague, Czech Republic

Introduction: Břevnov monastery, the oldest male monastery in Bohemia, has been closely associated with beer brewing since its foundation in 993. In fact, the first written mention of beer production in the Czech Republic is attached to the monastery. The brewery operated semi-continuously on the site until the year 1889. This long tradition has now been revived by a new brewery built in 2011. The new brewery is located in a baroque building of the former stables. The brewery also has a permanent exhibition of beer glasses and a small brewery museum, and in front of the brewery building is a small hop field.

The modern brewery: Up to 40 different types of beer are brewed annually in the brewery, including traditional Czech beers and various foreign beer styles. Some of the beers are also matured in wooden barrels. The maximum annual output is 4,000 hl of both draught and bottled beer. The draught beer is mostly available in Prague restaurants.

Beer Production: The brewery's most popular beer is typical Czech pilsner style lager called Benedict. This beer makes up about 55% of overall production. After that is Hoppy Benedict – lager with US hops. Around 85 % of production is kegged, and most of this is sold in Prague. The brewery produces sours in the traditional Belgian way – with one year fermentation in wooden barrel using brettanomyces with wine grape juice. In the last year, the brewery has focused on producing non-alcoholic beers, as their consumption is growing significantly. The brewery has seven employees.

The Monastic Granary: In 2017 the brewery taproom opened in the monastery in an area called the Monastic Granary. Here it is possible to taste up to eight types of draught beer, sit in the beautiful space of the former granary or outside in the garden with a wonderful view of St Margaret's Church. Opposite the Granary is the restaurant Klášterní šenk, where Benedict beer can be enjoyed with traditional Czech cuisine.

Independent Beer Production in Europe

If we examine the average production figures from the IBE survey, the mean average of more than 10,000HL may seem high in a market largely made up of very small operators. However, this figure must be looked at in context as it is skewed significantly by a very small number of respondents who operate at a much larger scale. In fact, 80% of surveyed brewers produce less than 4,500HL, and 50% of the reported total production volume can be accounted for by just 2% of the respondents (9 breweries).

Mean, median and mode

Looking at the median (the middle value from the survey) is therefore more useful as an average, and at 950HL is more representative of the average size of IBE member breweries. The mode (most commonly stated) figure is perhaps even more interesting, as it shows that the largest number of brewers from the survey fall into the smallest production size. In conclusion, this demonstrates a sector largely made up of very small microbreweries, with some much larger outliers in certain markets where independents have been able to gain market share against global players.

60%

PRODUCE LESS THAN 1,500HL

80%

PRODUCE LESS THAN 4,500HL

2%

9 BREWERIES PRODUCE MORE THAN 110,000HL, ACCOUNTING FOR 50% OF THE TOTAL SURVEYED PRODUCTION

10,086HL

THE AVERAGE (MEAN) ANNUAL PRODUCTION ACROSS ALL BREWERIES

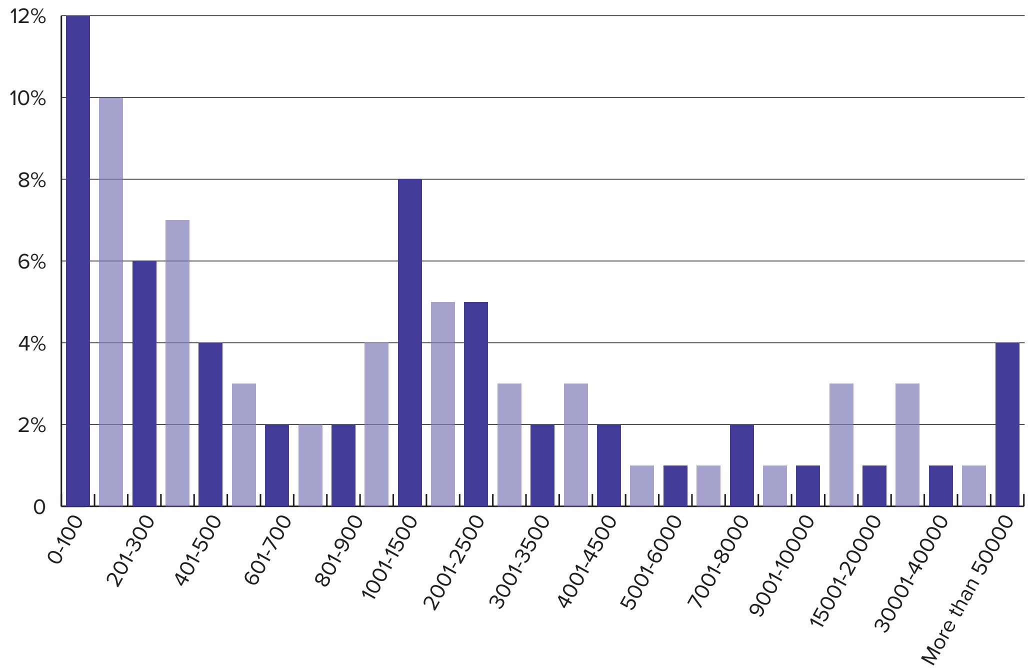
950HL

THE AVERAGE (MEDIAN) ANNUAL PRODUCTION ACROSS ALL BREWERIES

0-100HL

THE AVERAGE (MODE) ANNUAL PRODUCTION ACROSS ALL BREWERIES

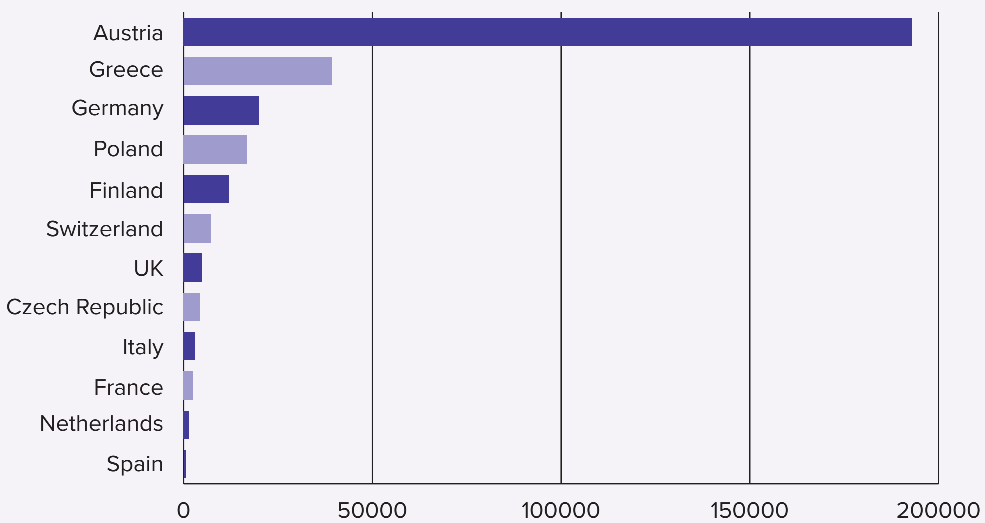
Overall percentage of breweries at different production levels



Market variation

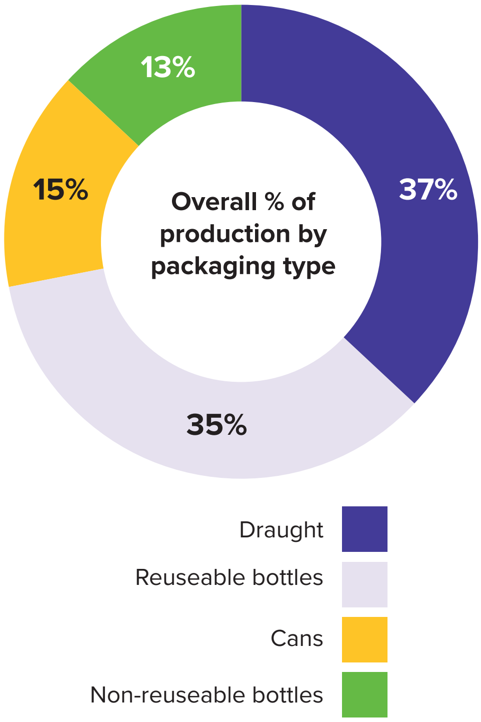
If we look at the average size of IBE breweries per country, Austria is obviously the outlier. This can be explained by the high number of larger breweries that responded to the survey. The association, Unabhängige Privatbrauereien Österreichs, reported that the average is closer to 57,000hl rather than the 192,000hl found in this survey. Nevertheless, this is still a higher average than other countries captured in the survey. The Austrian beer market has many established independent brewers operating at significant scale often for decades or even centuries. This gives Austria a much higher average production figure. At the same time global brewers in Austria are very dominant and account for around two thirds of the market.

Average size of brewery per country



Packaging proportions

There are major differences between IBE member countries when it comes to how they package their beers, and these are driven largely by regulatory and structural differences in the markets. Overall, 37% of the beer from our surveyed IBE members is served on draught, just 2% above the 35% sold in reuseable bottles, with 15% in cans and 13% in non-reuseable bottles.



Packaging by country

Breaking this down by country, draught beer is much more prevalent in countries with a strong historical pub/bar trade, so the Czech Republic (85%) and the UK (81%) come out top here. In Finland, 90% of independent beer from our surveyed brewers goes into can. Finland has a national deposit system where a consumer pays a small deposit on drink containers and gets it back when they return them for recycling. Cans are crushed and the aluminium reused, which is more efficient than driving heavy glass bottles back and forth across a geographically large country. This makes cans attractive for breweries compared with refillable glass bottles.

This is combined with very high taxation which has driven off-trade sales over on-trade and makes cans the package of choice in this market. The market for reusable and non-reusable bottles generally varies according to how advanced the circular economy is in each country, with Germany, which has a strong engrained culture of recycling and reusing, topping the chart for reuseable bottles (73%). Meanwhile, Poland (56%) uses the most non-recyclable bottles and, although this is now being looked at by Government, has historically had no centralised return scheme and infrastructure enabling brewers, especially smaller brewers, to efficiently reuse bottles.

Top producing countries by packaging type

Draught beer

1 CZECH REPUBLIC **85%**
2 UK **81%**
3 GREECE **64%**

Cans

1 FINLAND **90%**
2 NETHERLANDS **51%**
3 AUSTRIA **22%**

Reusable bottles

1 GERMANY **73%**
2 AUSTRIA **46%**
3 SWITZERLAND **36%**

Non-Reuseable bottles

1 POLAND **56%**
2 FRANCE **44%**
3 ITALY **41%**

CASE STUDY: Finland

Name of brewery: Olutmylly

Location: Forssa, Finland

Year founded: 2018

What do you produce? "So far just craft beers, about 50,000 litres every year. We have been thinking about other products as well, but we just have not had the time to amplify the production!"

Best selling beer: "Lagers and pils have been the best selling since the beginning."

Number of staff: "Just me and my husband, and helping hands when we organise events. Then we outsource some services, and our kids help out as well."

Number of taproom/pub/bar sites: "One taproom, and a sauna and a meeting facility."

What is the ethos behind your brewery/beers? "Beer brings people together."

Where are you seeing the biggest growth as a business? "At the moment, it is very difficult to get growth in anything, but lager and pils sell well. A growing trend is for special batches using local ingredients, many times in collaboration with other local businesses."

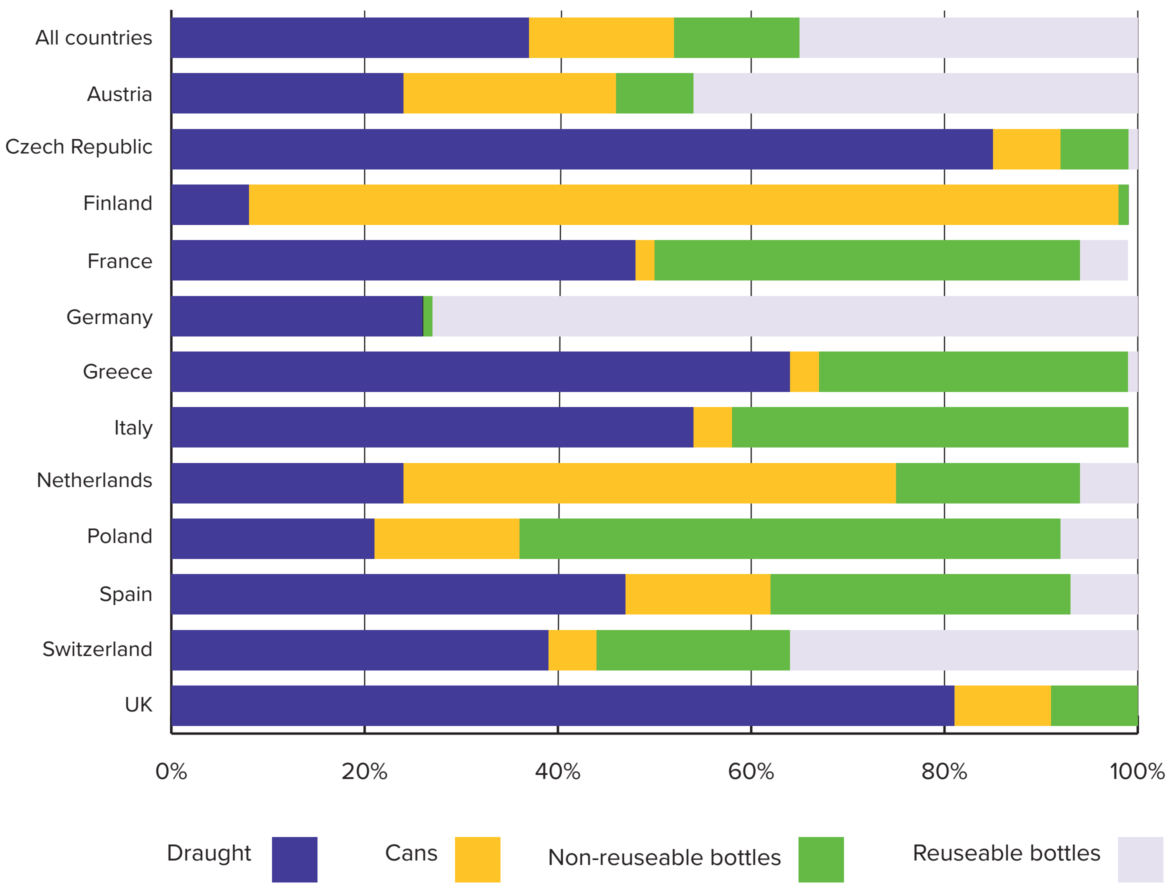
What are the major challenges in your market currently? "The economic situation. In general, time and money. Also availability of ingredients and equipment can be a challenge, and you have to buy what is available at a price that cannot be negotiated."

Where are you investing in your business this year? "We have installed two new tanks. But at the moment we cannot invest more before we hire another person in production."

Who are your target consumers? "There is no specific age, but people above 18 who enjoy good quality lager and pils beers. In addition, a big client group are companies, NGOs, event organisers and different groups who order beers with their own labels."

What inspires you most about the independent beer market? "The people, they inspire us to do more and find special products with new local ingredients. I am also inspired by the social and environmental responsibility aspect and I spend a lot of time in that. It is inspiring to get reasons to get inspired every day, there are no boring days."

Packaging volumes per country



Strength in numbers

If we look at the average strength of the beers being produced by IBE members it sits just above 5% ABV. However, this number varies quite significantly by country, and this variation is generally a result of both the beer culture and climate in that territory, and the tax framework in place. The highest average strength can be found in the Netherlands (6.4% ABV) where the culture is built around a preference for more complex styles like bock, dubbel and tripel. While the Dutch Government did introduce a higher duty rate on beers over 8% ABV in 2024, this is less restrictive than in other markets where the threshold is lower. At the lower end of the ABV scale is the UK, with an average ABV of only 4.2%. This is the result not only of a UK consumer trend towards lower ABV products sparked by the wellness movement and changing drinking occasions, but also the recent introduction of a staggered duty system which has led to brewers lowering the ABV of their beers to cut costs. Elsewhere, Spain is also at the top end of our ABV scale at 6%, and this might reflect the local market, dominated by national lager brands, and independent brewers competing with this by producing something much more complex as a point of difference.

Average beer strength by country

COUNTRY	AVERAGE ABV %
NETHERLANDS	**6.4**
SPAIN	**6.0**
FRANCE	**5.6**
FINLAND	**5.4**
POLAND	**5.4**
GREECE	**5.1**
ITALY	**5.1**
SWITZERLAND	**5.0**
CZECH REPUBLIC	**4.9**
GERMANY	**4.9**
AUSTRIA	**4.8**
UK	**4.2**
ALL COUNTRIES	**5.1**

Beer strength by country: The highs and lows

6.4%

THE NETHERLANDS HAS THE HIGHEST AVERAGE ABV

6%

SPAIN HAS THE SECOND HIGHEST AVERAGE ABV

4.2%

THE UK HAS THE LOWEST AVERAGE ABV

4.8%

AUSTRIA HAS THE SECOND LOWEST AVERAGE ABV

5.1%

THE OVERALL AVERAGE ABV ACROSS ALL COUNTRIES IS JUST OVER 5%

CASE STUDY:
France

"We offer high-quality products at reasonable prices, making them accessible to a wide range of people."

What is the name of the brewery? Parisis

Where is it located? Combs-la-Ville, near Paris, France

When was the brewery founded? 2012

What do you produce? Production is around 5,000hL per year, packaged in to 33cl and 75cl bottles, and 30L kegs

What is your best-selling beer? Parisis Blonde

How many employees do you have? 6

How many retail customers (bars, pubs, etc.) do you have? 1,000 – 2,000

What is the philosophy of your brewery/beers? "Quality, consistency, and the continuous improvement of both product and process."

Where are you seeing the strongest growth? "In kegs (draught beer)."

What are the main challenges in your market currently? "The general decline in consumption and changing consumer habits."

Where are you investing this year? "No investments are planned; major investments were already made in 2022."

Who are your target consumers? "No specific target; we offer high-quality products at reasonable prices, making them accessible to a wide range of people."

What inspires you the most in the craft beer market? "The possibility of creating an infinite variety of products."

Beer Styles

Pale ales are the most popular style overall among IBE brewers surveyed, with 45% saying pale ales are in their top three most produced styles, and IPAs not far behind at 42%. The third most popular style overall is pale lager (which includes Helles, Marzen and Ležák), at 28%.

Styles per country

The range of styles is very dependent on the individual country, with consumer tastes and brewing tradition very influential in the most popular styles produced. If we look at Switzerland, 100% of the brewers surveyed say pale lager is their most popular style, with over 80% of Austrian and German brewers saying the same, reflecting the brewing tradition in the region using bottom fermenting techniques. Whereas in the Czech Republic, 79% of brewers say pilsner, a style which the country is known for globally, is their most produced. Elsewhere, brewers in countries like France and Spain, where the independent brewing community is less established, say IPAs are their most popular style, likely reflective of the newer craft beer consumer favouring the more recent wave of American style IPAs.

100%

OF SWISS BREWERS, **83%** OF AUSTRIAN BREWERS AND **81%** OF GERMAN BREWERS SAID PALE LAGER WAS THEIR MOST POPULAR STYLE

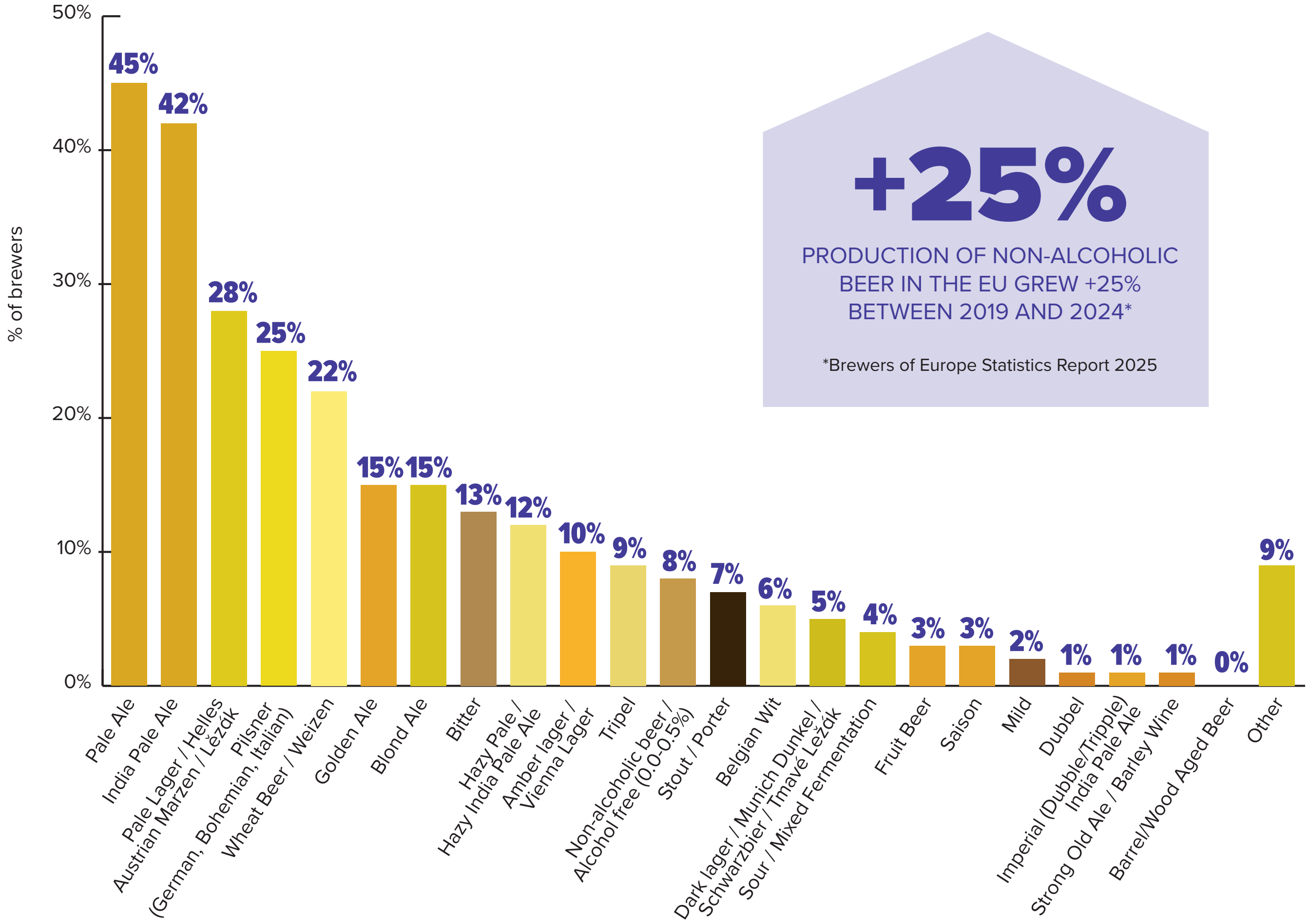
79%

OF CZECH BREWERS SAID PILSNER WAS THEIR MOST POPULAR STYLE

67%

OF FRENCH BREWERS AND **60%** OF SPANISH BREWERS SAID IPAs WERE THEIR MOST POPULAR STYLE

Most produced styles of beer across all countries*



+25%

PRODUCTION OF NON-ALCOHOLIC BEER IN THE EU GREW +25% BETWEEN 2019 AND 2024*

*Brewers of Europe Statistics Report 2025

*Note: Brewers were asked to list their 3 most produced styles

Non-alcoholic beer growth

Interestingly, the results of our survey show the growing significance of non-alcoholic beer in the independent beer market in Europe – something that is supported anecdotally by our case studies, many of which highlight consumer interest in no and low beers as influencing their range. Overall, 8% of the brewers we surveyed said non-alcoholic beer was already in their top three most produced styles – a significant number when you consider it is still an emerging category globally. Some markets are seeing a huge rise in popularity in this area, with 43% of Swiss brewers and 40% of Greek brewers listing non-alcoholic beer in their top three most produced styles. Although in other markets it remains less popular, with no Finnish brewers and only 1% of French brewers putting it in their top three. With Brewers of Europe data showing a 25% increase in overall non-alcoholic beer production in Europe since 2019 this is a category likely to continue to grow significantly in the coming years. With overall alcohol consumption dropping, and more younger drinkers eschewing alcohol altogether, and the technology behind non-alcoholic beer production now more established, independent brewers would be wise to consider broadening their portfolio even further when it comes to no and low products.

8%

OF ALL IBE BREWERS SURVEYED SAID NON-ALCOHOLIC BEER WAS AMONG THEIR THREE MOST PRODUCED STYLES

43%

OF SWISS BREWERS AND **40%** OF GREEK BREWERS SAID NON-ALCOHOLIC BEER WAS IN THEIR TOP THREE MOST PRODUCED STYLES

0%

OF FINNISH BREWERS AND ONLY **1%** OF FRENCH BREWERS SAID NON-ALCOHOLIC BEER WAS IN THEIR THREE MOST PRODUCED STYLES

TOP THREE STYLES BY COUNTRY

	1ST	2ND	3RD
Austria	PALE LAGER	PILSNER	AMBER LAGER, NON-ALC BEER
Czech Republic	PILSNER	PALE ALE	IPA
Finland	PALE LAGER	IPA	PILSNER
France	IPA	PALE ALE	WHEAT BEER
Germany	PALE LAGER	PILSNER	WHEAT BEER
Greece	PALE LAGER, PALE ALE	GOLDEN ALE, AMBER LAGER, NON-ALC BEER	IPA, PILSNER, BLOND ALE
Italy	IPA	PALE LAGER	PILSNER
Netherlands	TRIPEL	BLONDE ALE	WHEAT BEER
Poland	HAZY PALE	IPA, PALE LAGER	PILSNER
Spain	IPA	FRUIT BEER	PILSNER, GOLDEN ALE
Switzerland	PALE LAGER	AMBER LAGER	NON-ALC BEER, WHEAT BEER
UK	PALE ALE	BITTER	GOLDEN ALE

CASE STUDY:
Germany

Name of brewery: Brauerei Karg

Location: Murnau am Staffelsee, Upper Bavaria

Year founded: 1912

What do you produce? “Around 8.000hl of beer per year including 5 different types of wheat beer and organic Helles.”

Best selling beer: Karg Weißbier Hell

Number of staff: 6 FTE’s, 2 apprentices and 4 part-time employees

Number of taproom/pub/bar sites: circa 60 retail customer sites delivered to and the brewery’s own brewery restaurant

What is the ethos behind your brewery/beers? “Preserving and maintaining the Upper Bavarian tradition of bottle fermentation with an open mind and eyes on the future.”

Where are you seeing the biggest growth as a business? “Non-alcoholic beers/beer mixes in organic quality.”

What are the major challenges in your market currently? “Declining alcohol consumption.”

Where are you investing in your business this year? “Energy supply.”

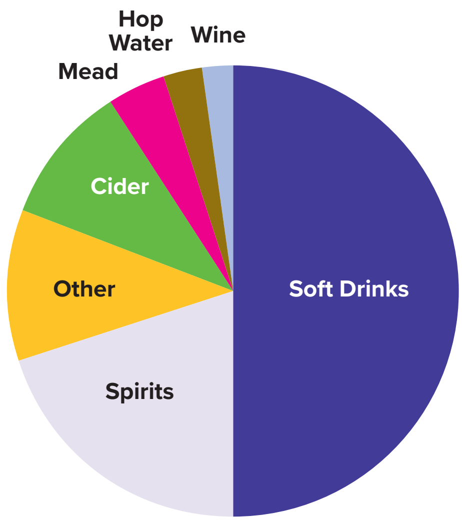
Who are your target consumers? “People who appreciate regional specialities.”

What inspires you most about the independent beer market? “That such a wide variety of special beers can be created from just four raw materials, and that in what I consider to be the best job in the world.”

Production of other drinks

One of the more interesting findings in this report is the number of European independent brewers that have branched out into production of other drinks outside of beer. While over half (57%) only produce beer, a very large minority (43%) are producing other drinks, with half of these being soft drinks and sodas. This undoubtedly reflects the growth in consumer demand for non-alcoholic products, especially among younger consumers. It also shows how the tough market conditions have led many independent brewers to consider widening their income streams by broadening their product range, and is another sign of the sector’s ability to pivot and innovate as the market evolves.

What other drinks breweries are producing



Variation by country

Production of other drinks does vary considerably by country. Almost 8 out of 10 (78%) of brewers from Finland that responded to our survey said they produced something other than beer, although interestingly only 28% of these are making a soft drink or soda, with 50% reporting ‘other’ as the product category. This is likely explained by the production of *long drink*, popular ready-to-drink gin-based cocktails that many independent breweries produce. In Austria, we see the same high number (77%) of brewers producing other drinks, but in this case 70% of that number are making soft drinks. And in Germany, while the number making products outside the beer category is lower, at just under half (48%) of brewers, almost 9 out of 10 (89%) of these have gone into soft drink/soda production. This likely reflects the long tradition among German brewers of producing Carbonated Soft Drinks (CSDs) in order to supply a wider portfolio of drinks to pubs. The production methods for CSDs are also widely taught as part of drinks production courses in the country, and the trend has been boosted by the growing popularity of ‘Spezi’, a cola and orange soda drink, which is popular in Germany and the surrounding regions.
In contrast, Spanish independents are least likely to be making another product, with only just over 10% in our survey, and all of those are producing mead. This again likely reflects the comparatively small size of the average Spanish independent surveyed, with capacity therefore more limited to expand to other drinks categories.

+7%

SOFT DRINK SALES IN THE TOP 10 EUROPEAN COUNTRIES ARE SET TO RISE +7%* BY 2028

*Euromonitor data 2024

57%

OVER HALF OF BREWERS SURVEYED DON’T MAKE ANY OTHER DRINKS

43%

MORE THAN 4 IN 10 BREWERS NOW PRODUCE AT LEAST ONE OTHER DRINK PRODUCT

50%

OF THOSE THAT PRODUCE ANOTHER PRODUCT, HALF ARE MAKING A SOFT DRINK/SODA

20%

A FIFTH OF THOSE MAKING ANOTHER PRODUCT ARE PRODUCING A DISTILLED SPIRIT

78%

A LARGE PROPORTION OF FINNISH BREWERS MAKE ANOTHER DRINK PRODUCT

77%

OVER THREE-QUARTERS OF AUSTRIAN BREWERS MAKE ANOTHER DRINK PRODUCT

11%

ONLY A SMALL PROPORTION OF SPANISH BREWERS MAKE ANOTHER DRINK OUTSIDE OF BEER

CASE STUDY:
France

"Upcoming challenges: the quality of locally produced malt, with barley sensitive to climate change. I don't think I am concerned by quality water supply yet, but I think it is an issue that will affect breweries soon."

What is the name of the brewery? Le Grand Bison

Where is it located? Lavelanet, Ariège, France

When was the brewery founded? 2014

What do you produce? "Top-fermented beers in 33cl and 75cl bottles and 20-liter kegs. Some aluminium cans, but very few and 20-liter lemonade kegs."

What is your best-selling beer? Light Blonde (4% ABV)

How many employees do you have? 4

How many taprooms/pubs/bars do you have? "In direct sales, only one point of sale, at the brewery."

What is the philosophy of your brewery/beers? "Producing beers with a strong social and environmental commitment. Environmentally: purchasing organic and local raw materials as much as possible, using returnable kegs and bottles, minimising plastic, and ultra-selective waste sorting. Socially: purchasing organic and local raw materials, mutual aid, individualised consideration of employee needs, and sponsorship for associations."

Where are you seeing the strongest growth? "We haven't observed strong growth for a long time!"

What are the main challenges in your market currently? "The reduction in demand and the need to find new customers. Upcoming challenges: the quality of locally produced malt, with barley sensitive to climate change. I don't think I am concerned by quality water supply yet, but I think is an issue that will affect breweries soon."

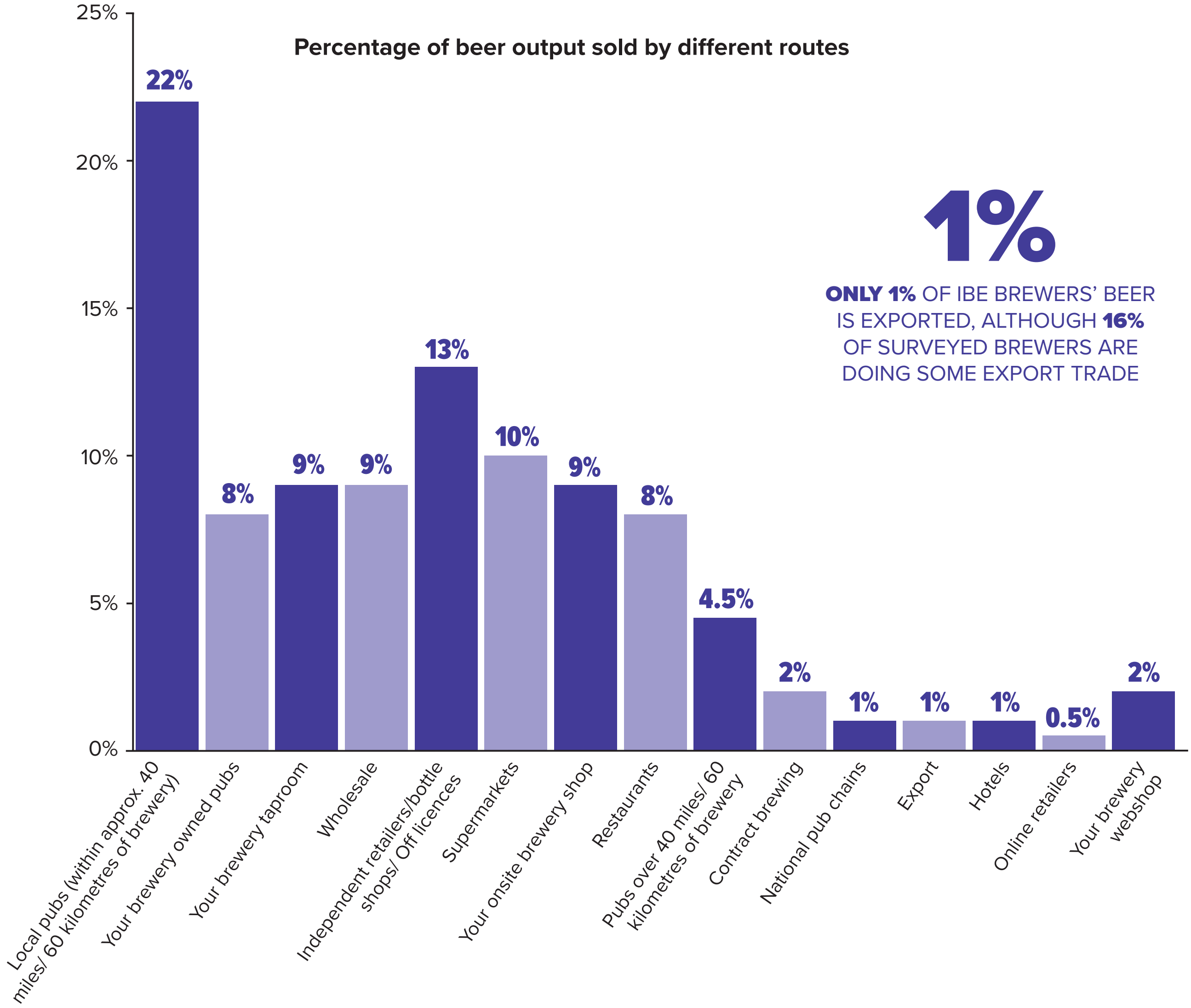
Where are you investing this year? "In ergonomics and communication."

Who are your target consumers? "People aged 30-50 who are concerned with eating well."

What inspires you the most in the craft beer market? "The benevolence between different partners: breweries, suppliers, customers…"

Sales of Independent Beer in Europe

Route to market for independent brewers varies depending on the structure of each country's retail sector, but overall the sector relies heavily on direct routes to market via brewers' own taprooms, pubs and shops, making up 28% of total volume sold. This is followed by sales to local pubs (22% of total volume), with almost three-quarters of our surveyed brewers (73%) selling some beer through this route. Meanwhile, only 1% of the beer produced by IBE brewers is exported, although 16% of our survey are selling some amount through export.



1%

ONLY 1% OF IBE BREWERS' BEER IS EXPORTED, ALTHOUGH **16%** OF SURVEYED BREWERS ARE DOING SOME EXPORT TRADE

CASE STUDY: Switzerland

Name of brewery: Liechtensteiner Brauhaus

Location: Schaan, Principality of Liechtenstein

Year founded: 2007

What do you produce? “Approximately 3,000 hl, including 9 different beer styles, top and bottom fermented, filtered and unfiltered beers, partly barrel-aged, packaged in bottles, cans and kegs.”

Best selling beer: Lager/Helles - Alpagold

Number of staff: 8

Number of taproom/pub/bar sites: 1

What is the ethos behind your brewery/ beers? “Tradition meets innovation, high quality characterful beers from the last monarchy in the alps.”

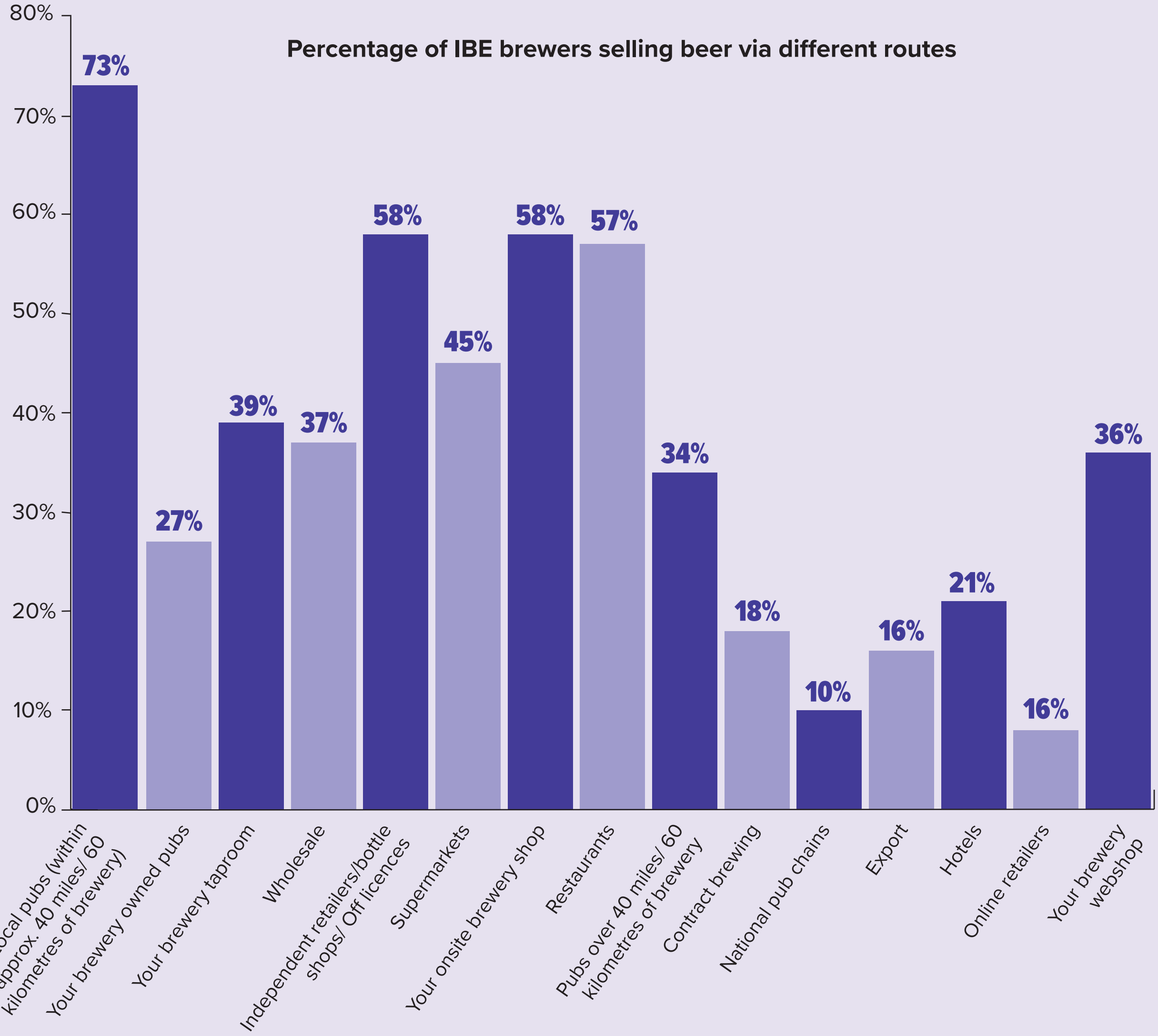
Where are you seeing the biggest growth as a business? “Alcohol-free beers and alcohol free beer mix.”

What are the major challenges in your market currently? “Overall decrease of alcoholic beers, the economic problems of restaurants/pubs due to a changed consumer behaviour since Covid, low price beers from international players.”

Where are you investing in your business this year? “Flexible bottle and can filling line, personally customised for batches starting 360 bottles/cans.”

Who are your target consumers? “Consumers around Liechtenstein and Swiss region, but also defined export markets as we are the only beer from Liechtenstein.”

What inspires you most about the independent beer market? “What we all have in common: Producing and investing in a real domestic product and market, hand crafted with individual touch.”



Routes to market by country

Routes to market are quite territory specific, so for example almost half (47%) of the beer produced by Greek independent brewers goes into restaurants, reflecting their food-led hospitality tradition, whereas only 2% of the UK production volume is going to restaurants where pub culture is predominant. Overall, 45% of brewers sell through supermarkets, but this figure is only 11% in Italy and 17% in the UK where access to supermarkets is expensive and difficult logistically and the large retail market is dominated by the big global players. In contrast, in Finland 86% of independent brewers are selling through supermarkets as the country has a dominant off-trade, with high taxes and employment costs pushing on-trade prices up and making visits a 'treat' rather than an everyday activity for consumers.

ONLY 3% OF BEER PRODUCED BY GREEK INDEPENDENT BREWERS IS SOLD IN LOCAL PUBS, COMPARED TO **41%** OF UK BEER

47% OF INDEPENDENT BEER PRODUCED IN GREECE IS SOLD IN RESTAURANTS, COMPARED TO **ONLY 2%** OF UK BEER

OVER HALF (52%) OF THE BEER MADE BY CZECH INDEPENDENT BREWERS IS SOLD DIRECT THROUGH THEIR OWN PUBS/TAPROOMS/SHOPS. THAT FIGURE IS **ZERO (0%)** IN GREECE.

SUPERMARKETS TAKE ONLY **10%** OF THE OVERALL BEER PRODUCTION ACROSS EUROPE, BUT **100%** OF SWISS INDEPENDENT BREWERS SELL THROUGH THEM, COMPARED TO **ONLY 11%** OF BREWERS IN ITALY.

Direct routes to market

Selling direct to the consumer is generally more profitable for independent brewers, especially through on-site shops and taprooms where packaging and transport costs can be avoided. It is no surprise, then, that 58% of our survey have an on-site shop, almost 40% have their own taproom, and more than a quarter (27%) own their own pub or bar. Direct routes to market are easier in some countries that others, of course, with licensing restriction and less of an on-trade culture in markets such as Greece (which reported 0% sold direct) and Finland (0% own bars and only 4% have a taproom) making it more expensive and less attractive to operate your own retail sites.

39%

OF IBE BREWERS HAVE A TAPROOM

27%

OWN THEIR OWN PUB

58%

HAVE AN ON-SITE BREWERY SHOP

36%

SELL THROUGH THEIR OWN WEBSHOP

CASE STUDY: Czech Republic

Name of brewery: Chateau Zábřeh

Location: Ostrava, Czech Republic

Overview: A historic hotel, restaurant and wellness centre with its own brewery

Year founded: Established 1574, reopened/restored 2007

Production size: Production is around 730 hl/year and includes Czech lager, dark lager, IPA, APA, NE IPA, wheat beer and specials by season

Best selling beer: The most popular (around 70% of production) is Czech lager

Number of staff: 24 over the whole operation, but 2 dedicated staff at the brewery

Number of taproom/pub/bar sites: 90% of brewery production is sold in the on-site restaurant, the rest is sold in another cooperated restaurant in the city (draught beer).

What is the ethos behind your brewery/beers? "The brewery and beer brewing, is at the heart of our business... that means respect to tradition, history, and to the guests. Connection of historical building, historical interiors and modern technologies with traditional – craft beer brewing with a connection with good local cuisine, that's what we want to keep going for future generations."

Where are you seeing the biggest growth as a business? "Our business can achieve growth through touristic traffic – Ostrava city has been very popular over the last 10 years through its industrial monuments and also many cultural and sporting events (eg Colours of Ostrav – one of the most popular multi genres music festivals in Europe). And of course we also need for growth a good economic situation and stable tax environment."

What are the major challenges in your market currently? "As always, we have many challenges ahead of us, but what we see as the priority now, is to attract and reach the younger generation – in the restaurant and also the brewery – with new type of beers, new styles, mostly with lower alcohol content."

Where are you investing in your business this year? "This year and for the near future we will invest mostly in new technologies (at the brewery and hotel) and in our employees."

Who are your target consumers? "Our target group is very broad, because we have a wide range of services. That means local guest, corporate visitors, tourists, and visitors to Ostrava's sporting and cultural events."

What inspires you most about the independent beer market? "We are inspired by many of our colleagues in independent breweries - local, wider region and from abroad...but especially by freedom - of our and their production, ideas, thoughts and actions."

The European Independent Beer Workforce

A total workforce of 4,313 was reported across all 482 brewery businesses who responded to this question in our survey, which gives us an average employee number of 9. This is likely to be much higher than the number working at an average IBE member brewery, as the mean average will have been affected by the small number of much larger brewers who responded to the survey. In fact, a large proportion of IBE members fall into the smallest size category, so if we therefore look at the median average instead (the middle figure from our survey, removing outliers) this is only 4 employees, likely a better representation of the average IBE brewery size. And looking further, the mode average (the most commonly quoted by respondents) is just 1 employee, which reflects the fact that a large proportion of the IBE membership is made up of very small owner-operated breweries with just 1 or 2 extra staff.

Diversity in the workforce

Overall, almost three-quarters (72%) of the workforce is male, with 28% female and less than 1% gender diverse. But although male workers are dominant in all markets, this does vary somewhat by country, with Finland showing the most diversity with 36% female and 2% gender diverse. In contrast, the Netherlands has a workforce that is 87% male. Compared to the latest figures from the World Bank, which show an overall percentage of female workers in the EU in 2024 of over 46%, this puts the European independent brewing sector significantly behind the curve when it comes to gender diversity.

72%

ALMOST THREE-QUARTERS OF EMPLOYEES ARE MALE

28%

LESS THAN A THIRD OF THE WORKFORCE IS FEMALE

<1%

LESS THAN 1% OF THE WORKFORCE IS GENDER DIVERSE

CASE STUDY: Finland

Name of brewery: Lammin Sahti

Location: Lammi, Finland

Year founded: 1987

What do you produce? "Sahti [traditional Finnish farmhouse ale] and different beers. Our biggest 'product' is the Great Beers – Small Breweries series of events every summer, which is the largest event for microbreweries in Finland. Production is less than 50,000 litres yearly."

Best selling beer: "As a single product, Sahti is the most popular, and our juniper pils is the second."

Number of staff: "Besides family members, we have one extra person all year, and in the summer months around 10."

Number of taproom/pub/bar sites: "We have one shop with pub rights, and some people enjoy beers there every now and then."

What is the ethos behind your brewery/beers? "We have started with Sahti, so we hold national ingredients and local production in high regard. Continuing the Sahti traditions is a big ethos for us."

Where are you seeing the biggest growth as a business? "At the moment, there is no growth and we are happy that some products sell. We are mainly a summertime producer, and we have started the beer production along with Sahti to have sales all year round."

What are the major challenges in your market currently? "The market environment in general is a problem, consumers are saving their money. Exports have also been challenging, but we are working on that, both on our own products and of some other breweries as well."

Where are you investing in your business this year? "We invested a lot in production last year, so this year we are still absorbing those costs."

Who are your target consumers? "Beer and Sahti lovers. The age range is higher than with most breweries. There are some young Sahti enthusiasts, but mostly its middle-aged or older people."

What inspires you most about the independent beer market? "I would say it is Sahti, first learning to brew it and then getting deeper and deeper into it. Now I have repurposed a 100-year-old barn for malting barley in a traditional way, on top of the ceiling of a traditional smoke sauna. That has been a 20-year dream and making it a reality has been very inspiring."

87%

OF THE WORKFORCE IN INDEPENDENT BREWERIES IN THE NETHERLANDS IS MALE

36%

OF THE WORKFORCE IN INDEPENDENT BREWERIES IN FINLAND IS FEMALE

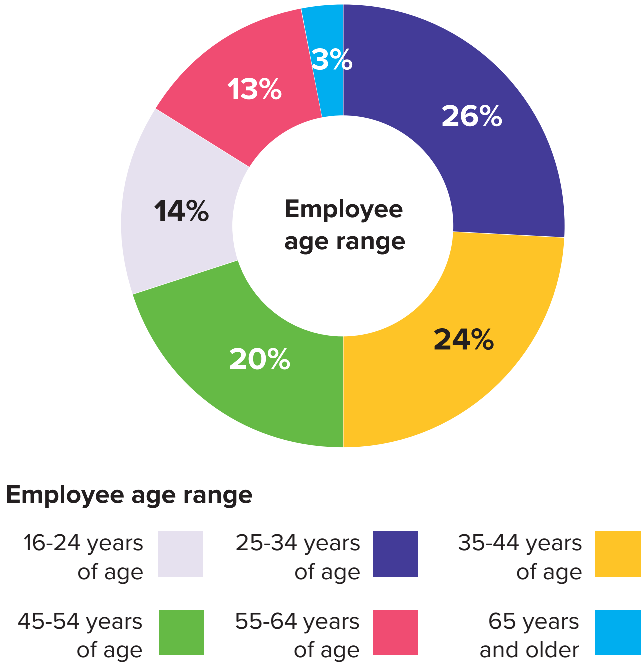
46.3%*

OF THE OVERALL WORKFORCE IN THE EU IS FEMALE

*World Bank figure for 2024

Age range in the workforce

Looking at the age range across all IBE brewers, the average age is skewed towards the younger age groups, and 40% overall are below 34 years old, with France reporting the youngest workforce with more than half (53%) aged under 34. Only 5% of the Polish workforce is over 55. In contrast, more than a quarter (26%) of the workforce in the Netherlands is over the age of 55, which reflects the country's policy shift to fill gaps in the labour market by raising retirement age and incentivising both employers and retirees to keep people in work longer. Meanwhile, 45% of the workforce in Spain is 35 to 44 years old and there is no one reported under 24. This could be another reflection of the generally smaller size of the Spanish brewers, many of whom will be owner-operated.



53%

OF THE WORKFORCE IN FRANCE IS UNDER 34

26%

OF THE WORKFORCE IN THE NETHERLANDS IS OVER 55

45%

OF THE WORKFORCE IN SPAIN IS 35 TO 44 YEARS OLD

ONLY 5%

OF THE WORKFORCE IN POLAND IS OVER 55

CASE STUDY: Poland

Name of brewery: Browar Grodzisk

Location: Grodzisk Wielkopolski

Year founded: 1880, closed in 1994, revived in 2015

What do you produce? "We brew around 20,000hl of beer on a 100hl brewing system. The whole portfolio is fermented using our house culture used for historical piwo grodziskie for decades. Our whole production is based on open fermentation vats and consists of a core range (5 beers) and one or two single brew releases each year."

Best selling beer: Grodziska White IPA

Number of staff: 5

Number of taproom/pub/bar sites: None

What is the ethos behind your brewery/beers? "One of our main goals is to preserve piwo grodziskie, the only beer style of Polish origin, known since at least 1601, when the guild of brewers was formed in the city. Apart of brewing this unique style back in its original location, we offer modern ales and focus on using as much locally sourced ingredients as possible. To bond with local community we sponsor a yearly festival of the city and the beer style visited by several thousands of people."

Where are you seeing the biggest growth as a business? "We are a part of the non-alcoholic beer surge in Poland, we see big growth of this category in our portfolio and will develop it further. The second way to gain some new customers is offering good quality, craft replacements of most popular beer styles brewed by macro brewers, which we also do."

What are the major challenges in your market currently? "The decline in beer consumption in general might be a threat to the industry, but the shift towards non-alcoholic beer rather than soft drinks and consumer awareness about high quality products makes those changes a bit easier for brands known for their approach to quality."

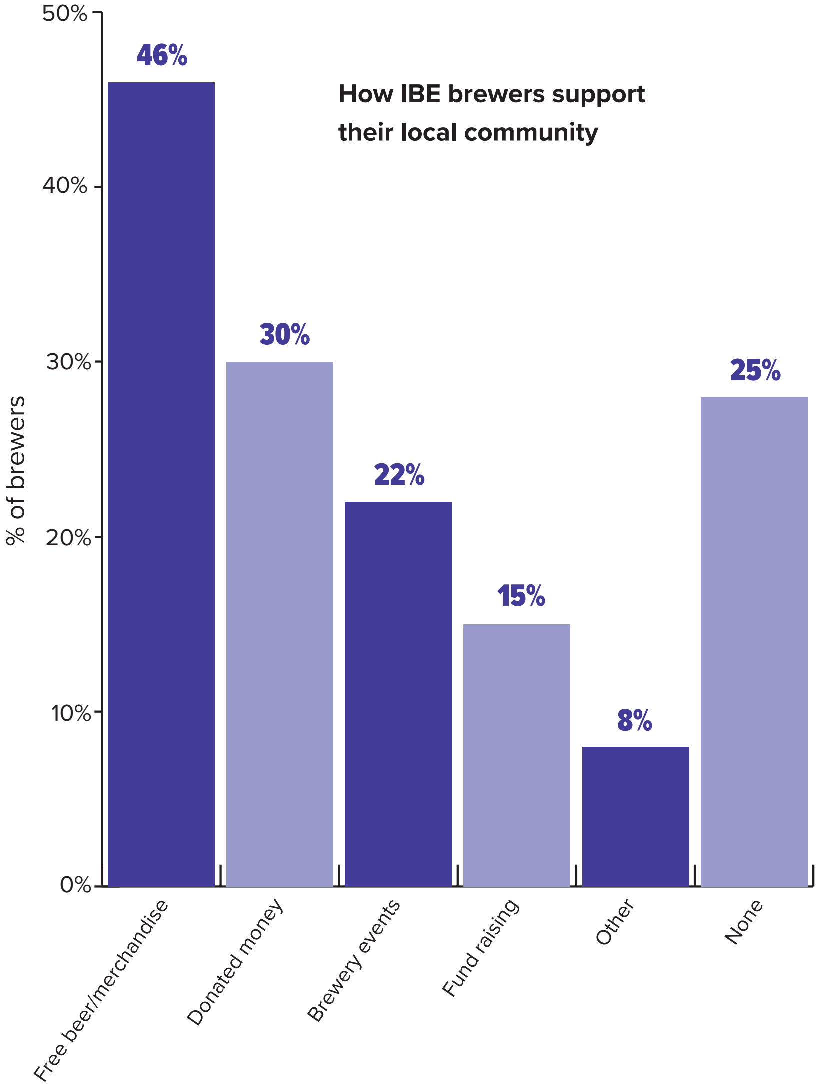
Where are you investing in your business this year? "As always, we choose quality improvements over volume increase. We invest in new laboratory equipment, upgrades to our brewing system and automation, which is helping our team to brew with less physical effort."

Who are your target consumers? "Our consumers vary, we offer beers both for very advanced beer geeks and people searching for something more interesting than their usual mass market lager. But for all of them we always aim to offer beers that are (for such small brewery) widely distributed and available on the market for at least a few years. It is easier to maintain high quality and consumer retention with smaller portfolio."

What inspires you most about the independent beer market? "The biggest value of the smallest chunk of the beer market is constant flow of information. As small brewers we know most of our 'competitors' (not real competitors in most cases) by name and quite often reach out to each other to solve problems together. Because improving the quality of small independent beer in general will help us all to make this small chunk just a bit bigger."

Charity and community

As independent businesses, IBE brewers generally have a strong connection to their local community, charities and volunteering groups, with three quarters (75%) saying they contribute by giving back to local groups in some way. Of these, almost half (46%) offer free beer and merchandise to support local activities and charity raising events and, despite the tough economic environment, 30% give money through donations to local causes and 37% run brewery events for their community or take part in fundraising initiatives. Despite this, a quarter (25%) say they have no involvement with local charities or groups, possibly the result of the tough trading environment, their remote location, or less reliance on their particular local market for sales.



75%

OF IBE BREWERS SUPPORT LOCAL GOOD CAUSES

46%

OFFER FREE BEER OR MERCHANDISE TO LOCAL CHARITIES AND GROUPS

37%

RUN COMMUNITY EVENTS OR TAKE PART IN LOCAL FUNDRAISERS

30%

DONATE MONEY TO LOCAL GOOD CAUSES

CASE STUDY: Germany

"Freedom through independence. Responsibility for the region and tradition. Unique diversity and creative brewing. Highest quality. Clean environment. Real tradition."

Name of brewery: Brauerei Rittmayer

Location: Franconia, Germany

Year founded: 1422

What do you produce? Beer, around 28.000Hl per year, and non-alcoholic drinks, around 3.000Hl per year including a hops soda.

Best selling beer: Landbier (Franconian Helles)

Number of staff: 45 FTE'S (including contract manufacturing)

Number of taproom/pub/bar sites: 5 beer gardens, 8 restaurants and 3 pubs

What is the ethos behind your brewery/beers? "Freedom through independence. Responsibility for the region and tradition. Unique diversity and creative brewing. Highest quality. Clean environment. Real tradition."

Where are you seeing the biggest growth as a business? "Non-alcoholic beverages – whether beer or soft drinks with or without sugar."

What are the major challenges in your market currently? "Costs. Costs. Costs. The battle against cheap beers advertised on radio and television."

Where are you investing in your business this year? "Investments are not possible this year (multiple investments in the past, e.g. new brewhouse, new canning line, energy supply). Reason: cost pressure."

Who are your target consumers? "Trade and end customers, as well as contract brewing and contract bottling."

What inspires you most about the independent beer?

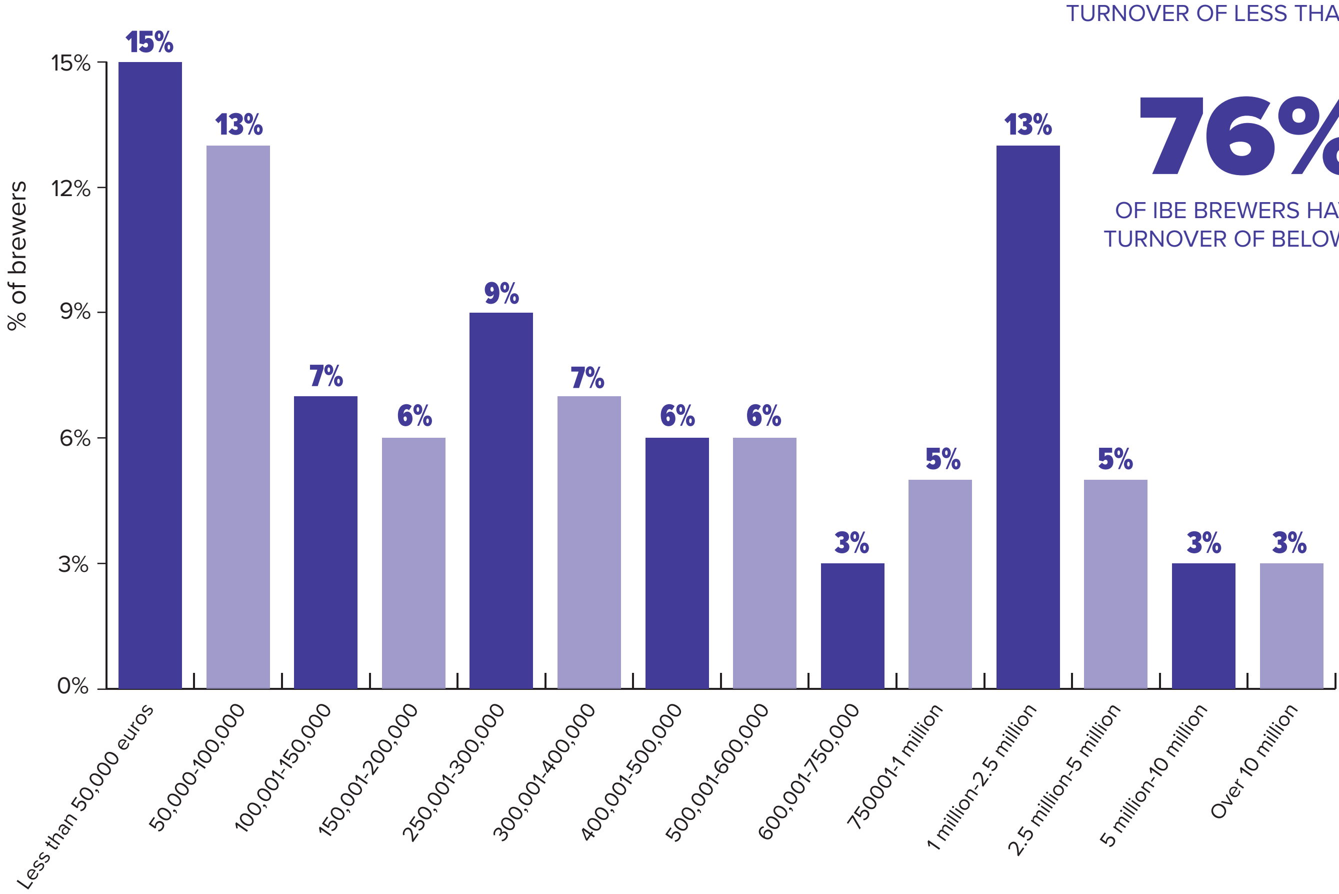
"What inspires me:

- The centuries-old tradition and individuality of independent, family-run breweries, which is reflected in their products.
- That I can preserve over 600 years of tradition and pass on my enthusiasm for it to the next generation.
- That breweries are cultural assets. Family breweries are often the social hub of their local community. When a brewery and its associated restaurant closes, conviviality, exchange and THE meeting place in the village are lost.
- The great innovative power in our industry – contributing our own beer styles and creativity – not only in the breweries, but also in the associated supply companies (hop and barley farmers, machine and tank manufacturers, etc.).
- The diversity of beers and recipes for 'honest' and high-quality beers
- The individual brewing craftsmanship of family-run businesses and thus the preservation of brewing history (different production facilities) – no industrial production."

Business Operations

The average (mean) annual turnover for the last financial year among IBE brewers in our survey was €1,238,486. But it is useful again to look at the context behind this, since the figure is far higher than the turnover we would expect from an average IBE member, skewed by a small number of much larger brewers within the group. If we look at the median average (the middle figure from our survey, which takes out the outliers) this is much lower, at €307,500, perhaps more representative of the sector as a whole. And delving further, the mode average (the most commonly reported number) is only €25,000, which reflects the fact that a large proportion of IBE members are very small owner-operated businesses. In fact, 61% of those surveyed have a turnover of below €500,000 and more than three-quarters (76%) fall below the €1,000,000 mark.

Turnover among IBE brewer for the last financial year



61%

OF IBE BREWERS HAVE A TURNOVER OF LESS THAN €500K

76%

OF IBE BREWERS HAVE A TURNOVER OF BELOW €1M

CASE STUDY:
Spain

Name of brewery: Cerveza SanFrutos

Location: Segovia, Castilla y León, Spain

Year founded: 2013

What do you produce? 2,300Hl/Year, 25 Hl/Batch, including Pilsner, Hazy IPA, DIPA, and NA Beer

Best selling beer: German Pils

Number of staff: 6

Number of taproom/pub/bar sites: None

What is the ethos behind your brewery/beers? "Our land, symbols, traditions, environment."

Where are you seeing the biggest growth as a business? "Non-Alcoholic beers."

What are the major challenges in your market currently? "To reach the new trends."

Where are you investing in your business this year? "Nitrogen generator. New chilling system."

Who are your target consumers? "We have two different production lines. Our core range beers are bottled in 33 cl. bottles and are focused on consumers with a higher level of knowledge about beers than commercial beer. Our new releases are beers canned in 44 cl. cans that we only brew once and never repeat again and which are focused on beer geeks."

What inspires you most about the independent beer market? "The creativity, diversity, tradition."

Business confidence

There is slightly more positive news from our survey than might have been expected in the current market, with more brewers (45%) expecting turnover to rise this year, than the 30% who expect it to shrink. However, this is still 30% who expect to see revenue drop at a time when rising costs are showing no sign of abating, which is concerning. For those that do expect turnover to rise the vast majority are only expecting a modest increase of up to 10%, and it remains to be seen if that will enable them to keep up with inflationary cost increases, utility price rises and rising employment costs. A fifth of our survey (20%) expect no change in turnover, which in the current market means they will likely see profit cut by rising overheads.

45%

OF IBE BREWERS EXPECT TURNOVER TO INCREASE THIS YEAR, BUT 26% OF THESE ARE ONLY EXPECTING A MODEST INCREASE OF 1-10%

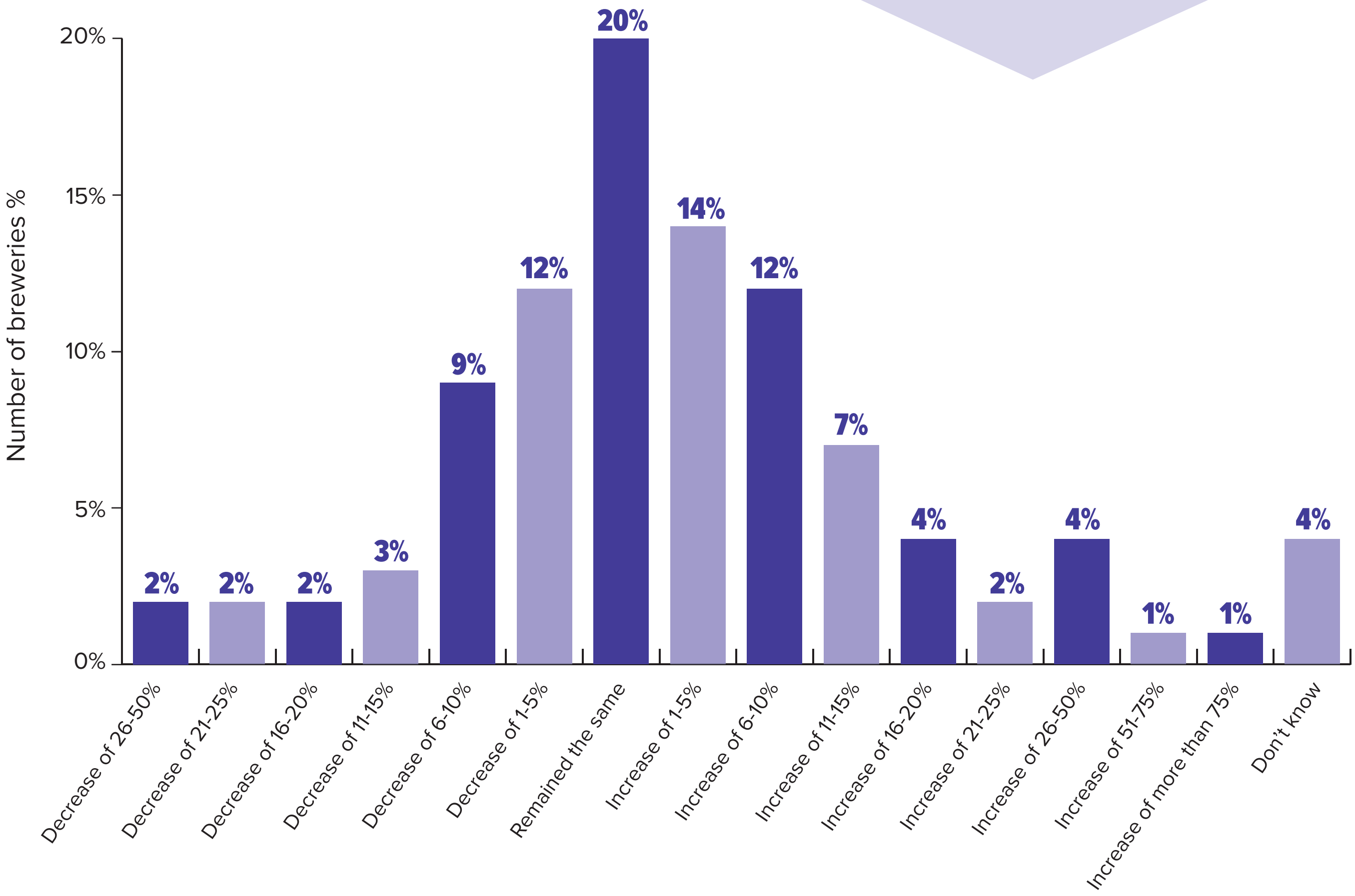
20%

OF IBE BREWERS EXPECT TURNOVER THIS YEAR TO STAY THE SAME

30%

OF IBE BREWERS EXPECT TURNOVER TO DECREASE THIS YEAR

Estimated change in turnover for the current financial year



CASE STUDY: Poland

Name of brewery: Za Miastem

Location: Rumianek (near Poznań), Poland

Year founded: 2016

What do you produce? "Wide range of both new wave beers as well as classics (including pilsner, wheat or stout). Average of 30 different beers on offer. Production of around 9,000hl a year."

Best selling beer: Święt Spokój (peace of mind) – an American IPA with earl grey tea and lemon grass

Number of staff: 14

Number of taproom/pub/bar sites: 1

What is the ethos behind your brewery/beers? "Beer is much more than lager (largely dominant in Poland). With our broad offer of widely acceptable beers we invite consumers to explore this captivating world."

Where are you seeing the biggest growth as a business? "Expanding off-premise distribution of craft non-alco beers."

What are the major challenges in your market currently? "Legislation/increasing regulations. Growing negative sentiment toward alcohol beverages. And demography – decreasing number of consumers."

Where are you investing in your business this year? "Production capacity – new unitanks and tunnel pasteuriser."

Who are your target consumers? "Current eurolagers drinkers looking for more interesting beers."

What inspires you most about the independent beer market? "Constant change (trends, consumer preferences) and the resulting opportunities."

Business priorities

43%

OF BREWERS SAID SURVIVAL WAS THEIR TOP PRIORITY

37%

OF BREWERS ARE INVESTING IN BEER QUALITY IMPROVEMENTS

35%

OF BREWERS WILL BE INVESTING IN NEW EQUIPMENT

28%

OF BREWERS ARE EXPANDING THEIR BREWERY IN 2026

23%

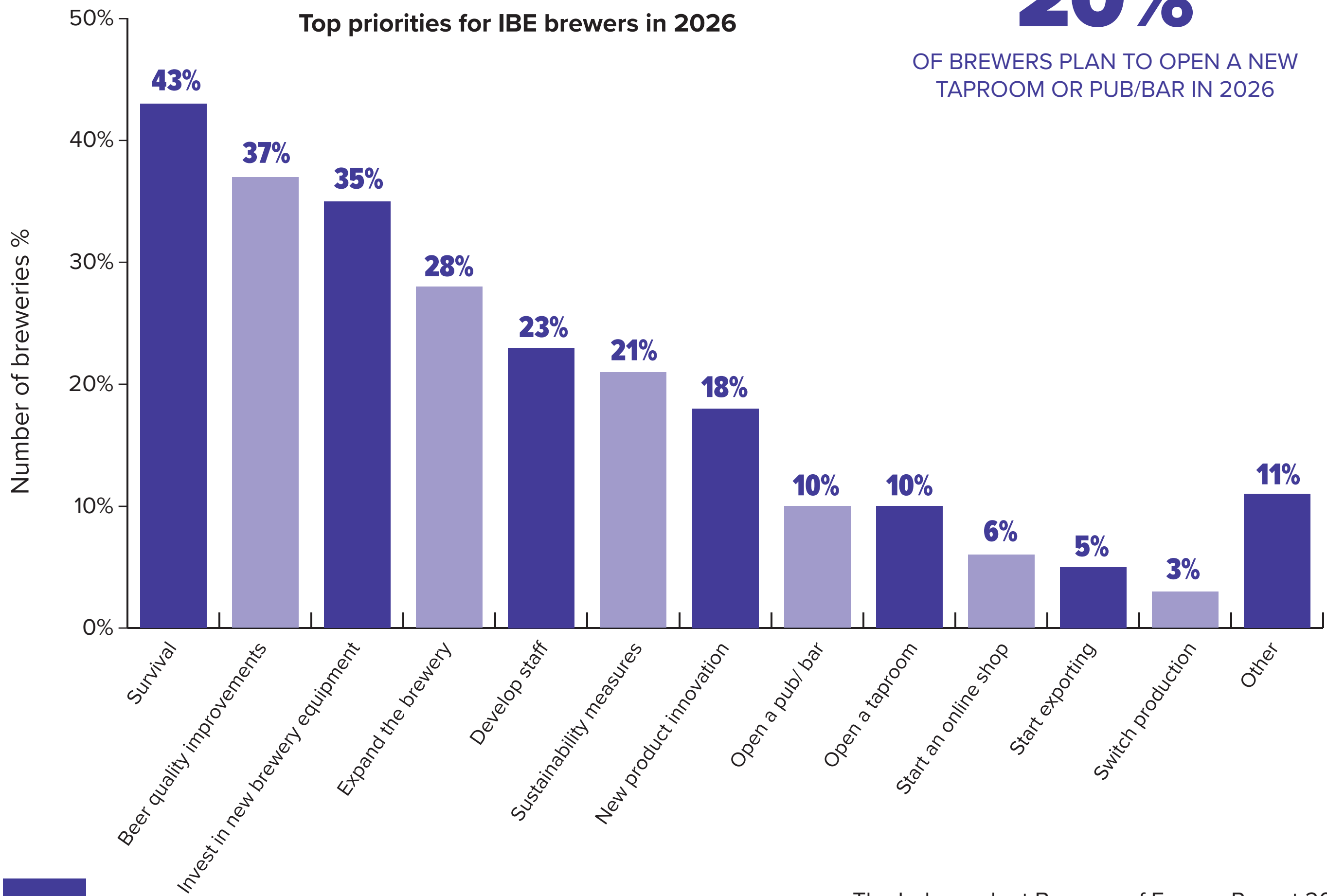
OF BREWERS ARE INVESTING IN THEIR EMPLOYEES

20%

OF BREWERS PLAN TO OPEN A NEW TAPROOM OR PUB/BAR IN 2026

Focussing on survival

Perhaps unsurprisingly with the current headwinds, the top priority for more than 4 out of 10 IBE brewers (43%) in our survey was survival. But there is better news overall, with 37% focussed on improving quality – essential in order to compete for falling consumer spend – and 35% investing in new brewery equipment. A positive 28% are also planning on expanding their brewery this year with a fifth (20%) adding a new direct retail site (taproom, bar or pub) which shows a necessary focus on more profitable routes to market. Almost a quarter (23%) will also be investing in staff – a positive sign at a time when cost cutting can lead to neglect when it comes to issues such as staff training, for example.



CASE STUDY:
Spain

"The dynamics and innovation within both new beer styles and new products are what inspire us most about the independent beer market."

Name of brewery: Sáez & Son

Location: Valencia, Spain

Year founded: 2019

What do you produce? "We operate as a keg-only brewery, specialising in IPAs, sours, and stouts. We do not have core beers, producing approximately 4 to 6 different beers each month. Our annual production for 2025 is estimated at 60,000 litres."

Best-selling beer: Hazy IPAs & Smoothie Sours

Number of staff: 2

Number of taproom/pub/bar sites: None

What is the ethos behind your brewery/beers? "Our ethos blends classic and modern brewing philosophies, which results in surprising, balanced, and flavourful beers. We consistently aim to pleasantly surprise our consumers."

Where are you seeing the biggest growth as a business? "We observe a significant trend in beers that feature prominent flavours beyond the typical hop, yeast and malt profiles. These distinct flavours are nevertheless always balanced with the more traditional beer flavours."

What are the major challenges in your market currently? "A primary challenge in our market is the professionalisation of the Spanish independent beer sector. There is a current lack of specialised education and professionalism in brewing within Spain, as no general professional brewing education is available. Most craft beer brands in Spain originated as hobbies with minimal to no formal education, requiring founders to learn the business organically."

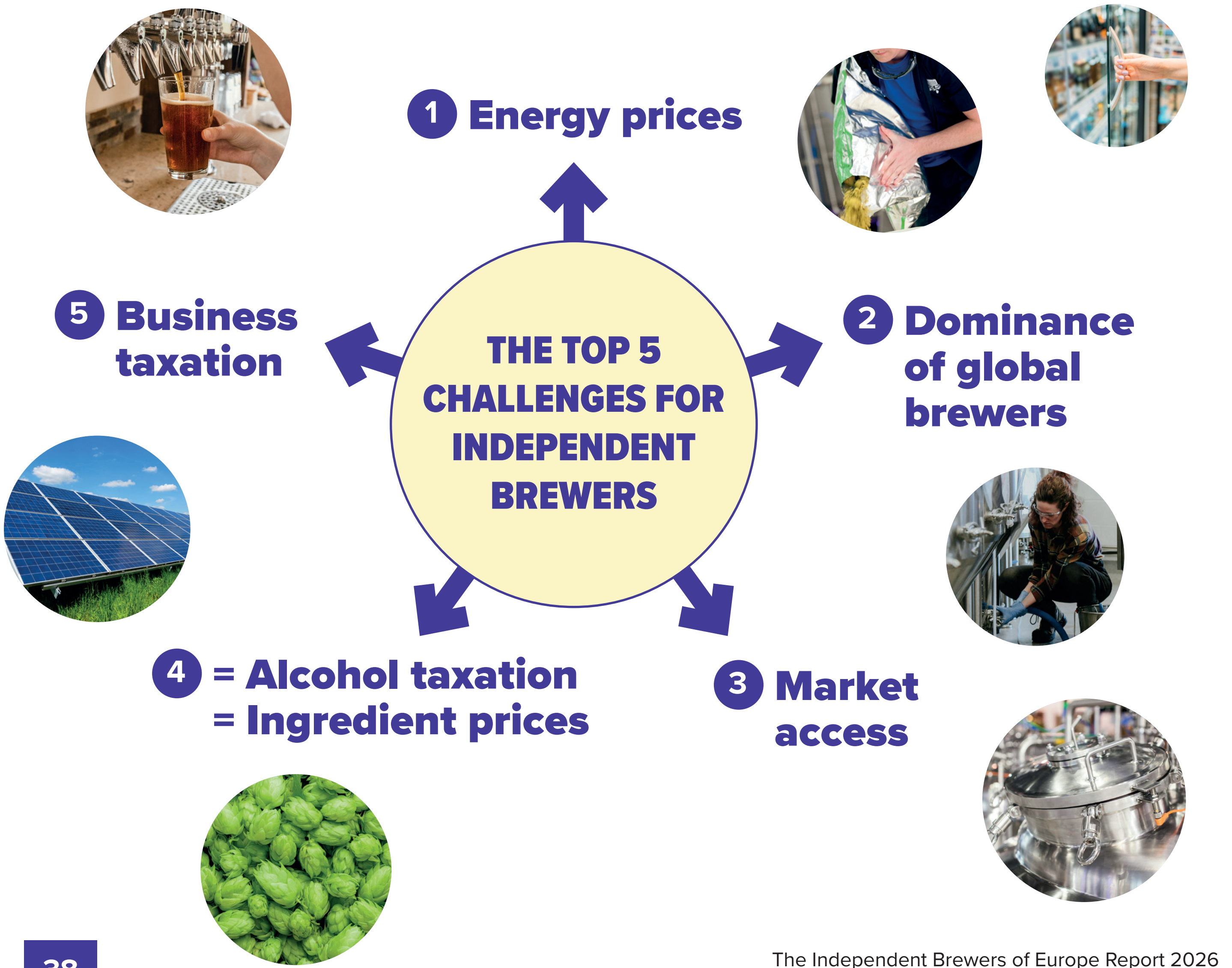
Where are you investing in your business this year? "We believe that craft beer is significantly about the people behind the product. Therefore, we are investing what we can in visiting bars, doing events, and participating in international festivals to enhance engagement with our clients and recognition."

Who are your target consumers? "We primarily brew for specialised craft beer bars. Our consumers in these venues are already immersed in craft beer culture and are well-informed about their preferences."

What inspires you most about the independent beer market? "The dynamics and innovation within both new beer styles and new products are what inspire us most about the independent beer market."

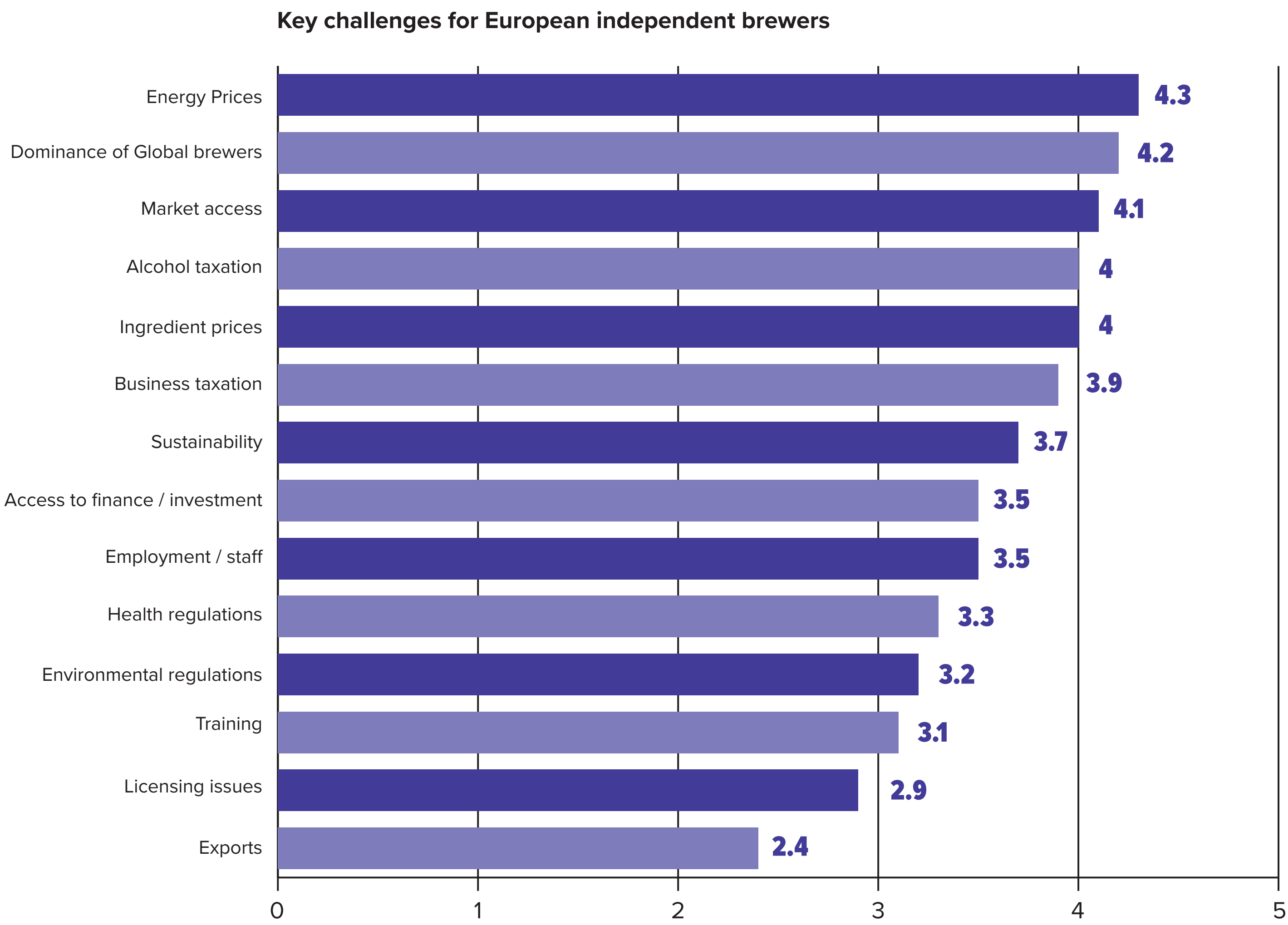
Market Challenges

There is no shortage of challenges facing Europe's independent brewers in 2026, as can be seen by the comparatively high priority given to all the areas of concern in our graph below. These are also the same challenges that span all 12 countries in our survey – showing that there are some universal issues affecting all IBE members regardless of where they are in Europe.



Challenging times

Rising energy prices top the list of challenges for IBE brewers in 2026, and despite variations across different countries, prices remain volatile and subject to sudden increases as supply is affected by the war in Ukraine and supply chain upheaval. With energy costs making up a large proportion of a brewery overhead, many brewers are already investing where they can in energy saving measures and more efficient equipment to offset this. The threat posed by the market dominance of the global brewers, and associated access to market challenges, are next on the list of key challenges shared by IBE brewers. With consumer spend squeezed, independent brewers must compete harder than ever for space on the bar/shelves and to achieve the premium price point they need. And of course, rising prices and the cost to business of increases in taxation, both in terms of alcohol taxation and rising taxes on business and employment, complete the top 5 challenges for this year.



Conclusion

This is the first report of its kind commissioned by the Independent Brewers of Europe (IBE), designed to examine and compare the independent beer market across all 12* of the countries covered by the association's members. The report is based on data from a survey of brewers from within the IBE membership carried out in Autumn 2025.

The report shows the IBE is largely made up of very small businesses, with eight out of 10 brewers surveyed producing less than 4,500HL of beer per year in total, and over 60% having a turnover below €500K. This doesn't mean there are not variations by country, and indeed in territories where there is a longer established independent beer sector, or a strong tradition of beer drinking, such as Austria and Germany, there tend to be a greater number of larger operators in the mix.

There are other interesting variations in the findings by country, driven by a range of factors including consumer habits, tax and regulatory systems, the structure of the retail market, the dominance of large global brewers and even climate.

Most notably, the average strength (ABV) of beer varies quite widely from a low of 4.2% in the UK – where duty rates are high and strength dependent and consumers are increasingly choosing lower strength products – to 6.4% in the Netherlands where there is a tradition of drinking stronger beer styles.

There is also significant variation in routes to market across the various countries, with some territories very focussed on pubs (the UK for example), as opposed to those like Greece where restaurant culture is prevalent, or Finland where there is higher taxation and therefore much more of an emphasis on the off-trade.

However, despite the various differences between countries, what the report demonstrates overall is how many factors unite all independent brewers, wherever they are operating in Europe.

The current global financial situation, and Europe-wide pressure on independent brewers from rising costs – in particular utility costs – is impacting brewers in every market and more than four in 10 of our surveyed brewers said their main focus this year is simply survival. In fact, half of our survey said they did not expect turnover to rise in the current financial year, with 30% expecting it to fall.

Concern over the dominance of the global brewers is also a theme that runs across all IBE member territories, coming in at number two on the overall list of biggest concerns, just below energy prices.

But the report also found that independent brewers across all markets are facing these challenges in a similar way, by maximising the opportunities available to them as small, nimble businesses able to adapt and innovate. For example, reacting to growing consumer demand for no and low products, a significant number of IBE brewers now count non-alcoholic beer as being among their most produced styles. And many brewers have branched out into producing other products to widen their income streams – most notably making soft drinks.

In conclusion, this report highlights the fact that independent brewers across Europe are all facing a very similar set of challenges in the current market, albeit nuanced by conditions and structure in their particular country. But regardless of where they are based, brewers are united in facing these challenges boldly, through innovation and adaptation to a rapidly changing financial and consumer market.

*Note that since the report was produced a 13th member has joined from Ireland.

TOP 10: REPORT HIGHLIGHTS

1 **SURVIVAL IS PRIORITY #1:** 43% of independent brewers in Europe say their main priority in 2026 is survival, with energy prices and the dominance of the global brewers their top two challenges

2 **REVENUE AT RISK:** 30% of independent brewers in Europe expect their turnover to fall in the current year, and a further 20% expect it to stay the same

3 **SMALL BUT MIGHTY:** the average independent brewery in Europe is a small business, with eight out of 10 brewers surveyed producing less than 4,500HL of beer per year

4 **ADAPT OR FADE:** non-alcoholic beer makes up a growing proportion of independent brewer's production in Europe, with 8% of brewers saying non-alcoholic beer was now in their top 3 most produced styles

5 **ON TAP:** draught beer accounts for the largest proportion of independent brewers' production at 37%, ahead of reusable bottles at 35%

6 **STRENGTH IN NUMBERS:** the average strength of independent brewer's beer in Europe varies widely by country, according to climate, consumer preferences and taxation

7 **KEEPING IT LOCAL:** only 1% of the beer from independent brewers in Europe is exported

8 **COMMUNITY MINDED:** 75% of independent brewers said they actively supported a local good cause

9 **DEALING DIRECT:** more than a quarter (28%) of the beer produced by Europe's independent brewers is sold direct to consumers via their own taprooms, bars, shops and pubs

10 **MIND THE GENDER GAP:** almost three-quarters (72%) of the independent beer workforce in Europe is male, 28% are female and less than 1% is gender diverse

Sources

The following statistics and analysis formed part of the research for this report:
The Quarter Three 2025 European Capital Cities Hospitality Report by The Oxford Partnership, The Brewers of Europe European Beer Trends Statistics Report 2025, Technavio European Craft Market forecasting, Euromonitor soft drinks report, World Bank data on employment in the EU, Circana report for Beverage Forum Europe 2025 and The BBPA Statistical Handbook 2025.

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