



Irish Spirits Market Report 2024



drinksireland.ie/spirits



A proud drinks industry at the
heart of the Irish economy.

Pride of Place

Policies for growth, at a time of great challenge

At a time of unprecedented geopolitical and economic instability, the Irish drinks industry has shown its resilience in standing strong in the face of these challenges. We are proud of the communities we support in every town and city in the land, as well as the support we give to farmers and growers whose grain, milk and apples we buy. We are proud too of our world-leading brands, which help put Ireland on the map.

And we are proud of the role we have played, and continue to play, in supporting moderation, as Ireland's attitude to alcohol changes and matures. Per capita alcohol consumption in Ireland has fallen 34% over the last 23 years.

Our place is at the heart of Irish communities – rural and urban, North and South. Our place is beyond Ireland too – our sector exports to over 120 countries globally, with exports valued at €2.1 billion in 2024, despite significant economic headwinds. For many throughout the world, our drinks are synonymous with this country and the great food, drinks, hospitality and conviviality we have to offer. As a new global trading order emerges, it is vital that this connection is maintained through export supports, restoration of tariff-free trading and the right regulation for our operations at home.

Our policies are practical, balanced and considered and will support, in turn, a critical Irish industry.

Key Pillars



GROWING THE RURAL ECONOMY

10,000 people directly employed by the sector and 170,000 employees supported by hospitality jobs throughout Ireland.



DRIVING EXPORTS

Drinks exports were worth €2.1 in billion 2024 and are shipped to over 120 markets around the world.



INSPIRING INNOVATION

Ireland produces hundreds of drinks brands and new innovations like zero alcohol beer and spirits provide consumers with unprecedented choice.



PROMOTING RESPONSIBILITY

An industry committed to promoting moderation. Consumption in Ireland has decreased by 34% in the last 23 years.



EMBRACING SUSTAINABILITY

The industry is committed to mitigating carbon emissions and are leading on the sustainability agenda.



SUPPORTING THE EXPERIENCE ECONOMY

Irish Drinks industry is at the heart of the experience economy, with visitor centres welcoming 2.4 million visitors a year.

Continuing to grow with support:

- Restoration of tariff-free trading with the USA and progress an EU-India trade deal.
- Increased export supports to assist in market development and diversification across established and emerging markets.
- Focus on competitiveness and reduced regulatory burden at national and EU level.
- Evidence-based policy development with a whole-of-society approach to engagement with industry.
- A practical regulatory environment that supports innovation and right to responsible promotion.
- Alignment of excise duty rates on drinks products to European average.

Foreword

As Chair of Drinks Ireland | Spirits, a member organisation representing the spirits industry on the island of Ireland, I would like to welcome you to the ninth edition of the Spirits Market Report, issued by Drinks Ireland.

In last year's report I discussed the return to economic normality experienced in 2023, as the post-pandemic bounce of 2022 was largely reversed with business and consumers grappling with significant economic headwinds. The factors contributing to this performance did not ameliorate in 2024 to the extent that the industry had hoped.

Persistent issues included supply chain pressures with knock-on impacts on the cost of raw materials as well as increases in the costs of operating through higher energy costs and wage inflation. Amongst our hospitality customer base, accessing skilled labour also proved a challenge.

That said, due in no small part to the resilience and innovation that is the hallmark of Irish spirits producers, many of the eighty or so distilleries and spirit drinks producers dotted around the island of Ireland did experience modest volume growth in 2024. Some of our distilleries also found success in other avenues – such as visitor experience centres and distillery tours. In 2024, the Irish Whiskey Association reported that Irish distilleries welcomed 817,000 visitors, an 18% rise versus 2023, boosted by cooperation with Tourism Ireland and a campaign to

promote our 700-year anniversary of distilling in Ireland and its proud history and heritage.

Where does the spirits sector in Ireland stand? 2024 did see sales volume growth of 2.8% across our main spirits drinks and higher value growth, largely reflecting inflation across the supply chain. Medium term, our projections remain toward growth, but the pace of the growth has eased, and trade developments since early 2025 have presented an incredibly challenging business environment.

The outcome of the US election in November 2024 has precipitated a change in business and trade outlook there. The incoming administration followed through on its plans to impose tariffs on almost all imports. This change in trade policy, threatened in 2024 but now a reality in 2025, weighs heavily on our industry.

Given that the US is the destination for 1 in every 3 bottles of spirits produced on the island of Ireland, this has inevitably had an impact on production on the island with many distilleries opting to scale back production to reduce costs.

Exports to the United States – Ireland's number one market for

spirit drinks – now face a 15% tariff, a weaker dollar, and ongoing trade uncertainty. This presents a challenging environment for all exporters. We support the Government and European Commission's continued push for the removal of these new tariffs and a return to zero-for-zero tariff trading. In the face of these export challenges, we emphasise the importance of increased Government investment to support market development and diversification.

Investment in the continued advancement, diversification, and acceleration of export promotion efforts for Irish spirits is more important than ever. It is essential that adequate resources are allocated not only to sustain existing international markets but also to drive strategic expansion in new ones. The conclusion of free trade agreements offer significant opportunities to large and smaller producers alike, allowing us to expand the Irish spirit footprint.

In Ireland, excise rates remain persistently high across the island, placing an unnecessary burden on struggling producers and the hospitality sector. The excise on spirits sold in the Republic of Ireland remains third highest in the European Union and we need to see Government action on moving

excise tax levels closer to European norms. Furthermore, in 2024, the duty on spirits in Northern Ireland increased by 2.7% following a 10.1% rise the previous year. This positions the UK at the fourth highest excise rate on spirits among its EU peer countries. These UK excise hikes have actually led to a demonstrably lower level of excise return for the UK Exchequer, with HMRC data showing a 3.5% decline in excise revenue from spirits, or a loss of approximately £300m¹ in the 12 month period to June 2024 compared to a year earlier.

Finally, at the domestic level, supporting the continued viability of the spirits industry in Ireland requires a commitment to ensuring a fair and balanced regulatory environment in which Irish producers can operate effectively and have the confidence to invest and innovate. Policy development should be grounded in evidence, with education and public awareness serving as the primary drivers of further moderation – particularly in a society that now consumes a third less alcohol than it did a little over two decades ago. We should seek to reduce the tariff and non-tariff barriers our drinks producers face, rather than impose or introduce new ones.

Despite – or perhaps in the face of – all these challenges, I am immensely proud of this industry in Ireland, of its resilience, its collegiality, and its optimism. Our export value in 2024 was €2.1 billion and our high-quality drinks offerings are enjoyed by millions of consumers across the world. Our iconic brands are often the first touchstone for many with the island of Ireland, and we continue to celebrate and promote our history and our culture.

Distillers and spirits producers, located throughout both urban and rural communities across the island of Ireland, are ambitious for growth. Alongside this ambition, there is a strong sense of optimism and confidence in our collective ability to overcome current challenges and pursue opportunity, job creation, tourism growth and economic vitality. While spirits have been distilled in Ireland since the 1300s, the industry cannot be taken for granted. We do more than just make spirits – we help drive tourism, support local, rural economies, and act as a vital partner for much of the island's farming community. But continued growth will require strategic focus, determination, and sustained support to be fully realised.

Every year when we produce this Spirits Report, we rely on the cooperation and goodwill of members and non-members to supply us with information and data to help compile the only data estimate created for Irish Poitín. This is an important part of our report and Drinks Ireland is grateful to producers for making this information available to it.

David Boyd-Armstrong
Chair, Drinks Ireland | Spirits
& Rademon Estate Distillery



¹ HMRC Receipts, Aug 2023 to Jun 2024 vs Aug 2022 to Jun 2023.

Introduction

This report uses data compiled for the year 2024 on Irish Spirits' performance covering both the Irish market and export sales to over 120 other countries. *Despite the positive numbers, they hide the drastic changes to the trading and export landscape since the beginning of 2025 and the challenges currently faced by Irish spirit producers.*

The reality is that in 2025 the Irish spirits industry faces significant challenges, and changes to the trading environment have already impacted the viability of some producers' businesses. Many producers have introduced temporary contingency measures (including pauses in production) in 2025, as they wait for this environment to return to a more favourable position.

The potential loss in 2025 of the zero-for-zero tariff trading position between the US and EU on spirits will have a significant impact on demand and sales in our most important export market. Our spirits exports, and indeed all drinks exports, to the US now attract a 15% tariff (10% for NI producers). This inevitably leads to increased cost-of-doing-business, pressure on demand, and a serious challenge for listing of new products in the US which is particularly important for our many emerging producers and distillers. Higher retail prices to be borne by consumers are a consequence of these new tariffs which impacts the competitiveness of Irish drinks products in the US, particularly as domestic US product and spirits from Canada and Mexico are not impacted

by tariffs. We need to see a reversal of these new tariffs as soon as possible in order to preserve the viability of many producers in Ireland.

Key features of 2024 included:

- Spirit drinks exports volumes recovering somewhat in 2024 when compared to the flat performance of 2023. The volume of Irish spirit exports in 2024 increased by 2.8%¹.
- However, unlike 2023, the value of those exports exceeded the volume growth. In 2024, the value of Irish Spirits exports increased by 11.8%², largely reflecting price inflation in the supply chain.
- The United States remained the biggest export market for Irish spirits globally, accounting for 30% of total export volume and valued at just over €628m in 2024³. However, more and more countries are developing a taste for Irish spirits with the EU, Africa and India growing impressively in recent years.
- On the domestic front, spirits' share of alcohol sales in Ireland eased slightly, by 1.8%, and in 2024, represented 22.3% of overall alcohol sales in Ireland by volume.
- Global Irish Whiskey values increased in 2024 and at a slightly higher rate than was recorded in 2023.
- While the value of Irish Whiskey exports increased by 13% in 2024, volumes increased by 3.6%. This volume increase is an improvement on 2023 when Irish whiskey grew by only 2.6%. While the higher value growth is impacted by supply chain cost increases, it is also an encouraging signal of consumer willingness to explore the premium end of the Irish whiskey category.
- Irish Whiskey's biggest market is the United States. It accounts for 40% of total Irish Whiskey exports by value⁴ and almost 34% by volume. Sales to the US in 2024 declined by 3.5% and exports to Canada also ended the year down by 3.6%. While the US market remains critical, Irish Whiskey continues to diversify

and broaden market range. In the Spirits Report 2023 we remarked upon the huge growth in Poland of 16% in 2023. Despite a decline of 4.4% in 2024, Poland remains the number two market for Irish whiskey globally. Just behind is Germany, which saw sales increase by 12.6% to move from fifth to third largest market for Irish whiskey. However, the biggest growth came in India in 2024. Sales grew by a phenomenal 57.5%, which saw India leapfrog the United Kingdom into fifth place in the market rankings for Irish whiskey, just behind Ireland whose volume grew by just 0.8% in 2024. The success in India is most promising as this is a market Irish Whiskey is just beginning to explore, and the opportunities here are many. The Irish Whiskey Association has expressed concern, however, that from 2026, whiskey exports from both the UK and US will face a lower tariff than EU products in India. The recently concluded UK-India Free Trade Agreement will see an immediate halving of tariff levels for the UK. Furthermore, the Indian government announced earlier this year a reduction in the tariff for US Bourbon to 100%. Irish Whiskey and Irish Cream are among the EU products which will still face a 150% tariff. This would present a significant competitiveness challenge for Irish and EU exports to India. Drinks Ireland and the Irish Whiskey Association continues to press the European Commission to prioritise the conclusion of a free trade agreement with India, to maintain our competitiveness and support our development in this important market.

- **Irish Cream** returned to growth in 2024 after a difficult 2023. In 2024, the value of Irish Cream sales grew by 5% to €380m⁵, with volume growing by 1.5% delivering total volume sales of just over 9.65m 9-ltr cases. North America remains the most important export destination accounting for 30% of

global sales, with the US responsible for 23% and Canada coming in at 7%. Sales to the United Kingdom grew by 3.5% maintaining it as the second biggest export market for the Irish Cream category. In fact, all the top five markets remain the same as in 2023, with Germany in third, Canada fourth and Global Travel Retail in fifth place. Indeed, the highlight of Irish Cream numbers for 2024 must be the 28.5% growth in Global Travel Retail. Volumes through this channel reached 616,000 9-ltr cases, just off the pre-pandemic levels. These positive numbers are driven by flavour innovation by the leading brands and extending usage occasions beyond after-dinner and outside of winter.

- **Global Travel Retail** growth was not limited to Irish Cream. After a poor 2023, where sales fell by almost 5% through this channel, Irish spirits sales have recovered and grown by 18.9%, with Irish whiskey up 11.5% versus 2023. For Irish Spirits, Global Travel Retail has regained the volume it had lost and returned to pre-pandemic levels of sales in 2024. Indeed, with the International Air Transport Association (IATA) reporting that in 2024 global passenger traffic grew 10.4% and 8% expected in 2025, the opportunity for Irish Spirits through this channel remains high.
- While the sales of **Irish Poitín**, the third and smallest by some distance of the three Irish Geographical Indication (GI) spirits, grew again in 2024 by an estimated 8%, progress remains slow and further work is needed to support the category. Drinks Ireland estimates that approx. 5,300 case equivalents (6 × 70cl) were sold in 2024. While the year-on-year volume growth is a sign that both consumers and customers who are introduced to Irish Poitín clearly like the product and the history that accompanies the category, there is a need for significant further investment in the category to

accelerate consumer awareness. Drinks Ireland, together with members, continues to work with Bord Bia and Invest NI to develop the opportunity that exists for Irish Poitín.

Irish Market performance

- Overall, spirits' share of the Irish alcohol drinks market fell slightly in 2024 to account for 22.3% of sales.
- Irish Whiskey sales at home stabilised in 2024, up slightly by 0.8%, an improvement on the 2.0% decline in the previous 12 months. Scotch Whisky, which accounts for just 4.1% of the volume in the Whiskey market in Ireland, had a steep decline of 20.5% in 2024. US whiskey declined too in 2024, by 9.9%. The positive for US whiskey is that consumers focussed on the premium end of the market, which accounted for 68% of volume.
- Irish Cream sales growth performance continues to outpace the wider spirits category. In 2024, sales volumes increased 12.3% vs 2023 in Ireland. Value brands of Irish Cream grew by 17.1%, and even more encouragingly, growth in premium priced Irish Cream grew by 10.0%.
- **Gin** sales accounted for 11.4% of the total spirits market, which reflects some decline in volume. In line with many other categories, Gin sales actually increased at the premium end of the market. In 2024, Super Premium Gins in Ireland increased by +11.5% while Standard gins decreased by -9.5%.
- The **Vodka** category retains the largest share of the Irish spirits market accounting for a 29% share, just ahead of whiskey, at 27%. Overall Vodka sales declined 2.5% but premium-priced brands did fare better with Super Premium brands of Vodka increasing sales by 24.8% in 2024.

- **Ready to Drink (RTDs)** grew 14.8% and were the second fastest growing category in Ireland, their convenience and taste obviously appealing to the time-pressed consumers. Within RTDs, Flavoured Alcoholic Beverages (FABs) account for 47% of the market and grew by a healthy 10.4% in 2024. Cocktail & Long Drinks account for just over a quarter of the market in volume but only grew by a relatively modest 5.1% in 2024. Wine Spritzers & Coolers command 17% of the volumes sold in RTDs and grew by an impressive 30.1%. However, it was the smallest sub-category of RTDs, launched in Ireland in 2020, Hard Seltzers, which grew the most in 2024 adding 47.2% to the category size.

The spirits sector is resilient and resourceful, however, 2025 is bringing unprecedented challenges – the new 15% tariff on exports to the US since August, stubbornly high costs, a weaker dollar, and all set against a backdrop of global trade and geopolitical uncertainty. Support is needed for spirits producers to be able to survive these turbulent times and sustain an industry that delivers an export value of approx. €1.4bn per annum, all while supporting thousands of jobs across rural and farming communities throughout Ireland.

Aengus King
Director, Drinks Ireland | Spirits

- **Tequila** was again the fastest growing spirits category in Ireland in 2024, growing by 22.8% in 2024. However, it is worth remembering that Agave-based spirits, such as Tequila, account for just 1.4% of the Irish Spirits market. The appetite for premium brands was evident here as Super-Premium Tequila brands grew by 107.8% and Ultra-Premium by 29.6% in 2024, albeit off small bases.
- **Excise tax** levels for Spirits in Ireland remain third highest across Europe. Given lower overall alcohol consumption, excise revenue from spirits sales was down 4.1% in 2024 at €397.3m. Total excise tax on alcohol was down 2.6% for 2024 at €1.2bn.



After modest volume growth in 2024, the spirits sector in Ireland is facing unprecedented challenges in 2025.



¹ Source: IWSR, 2024

² Source: EUROSTAT

³ Source: EUROSTAT

⁴ Source: Bord Bia, Export Performance and Prospects Report 2024 — 2025, Page 67

⁵ Source: Bord Bia, Export Performance and Prospects Report 2024 — 2025, Page 68

Ireland’s protected spirits

Irish Whiskey, Irish Cream and Poitín are protected by EU Geographical Indications (GIs). This means that, to be described as such, legally they can only be produced on the island of Ireland in line with an approved Product Specification (Technical File)⁵.

Value Change
+11.8%

Value of spirits exports – Republic of Ireland

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024 v 2023
€ million	758.9	804.9	916.1	1,009.9	1,178.9	990.6	1,267.9	1,460.2	1,318.8	1,474.0	+11.8%

Source: Eurostat

Volume Change
+2.8%

Overall volume of global Irish GI Spirits sales

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024 v 2023
Volume (Million 9-litre cases)	15.0	16.0	17.4	18.8	20.4	19.7	23.8	25.2	25.1	25.8	+2.8%

Source: The IWSR



Growth in the value of
Irish Spirits sales in 2024
was largely driven by
supply chain inflation.

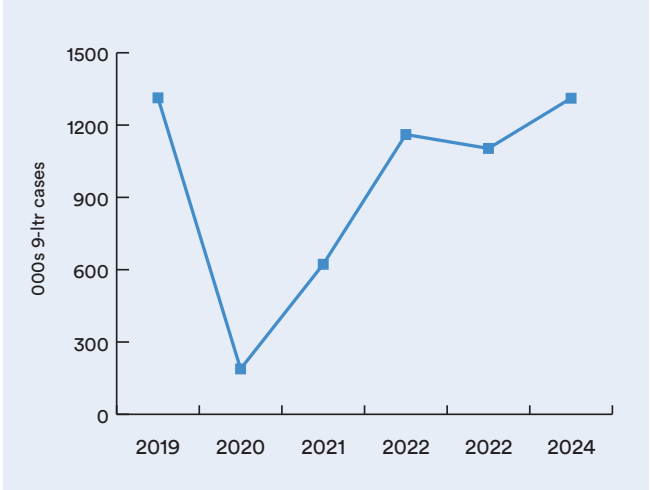
⁵ <https://www.agriculture.gov.ie/gi/geographicalindications-protectedspiritnames/>

Top 5 markets for Irish Spirits 2024

Rank	Country	000s 9-ltr cases
1	United States	7,759.4
2	United Kingdom	2,623.4
3	Germany	1,445.7
4	GTR	1,311.4
5	Canada	1,050.1

Source: The IWSR

Global Travel Retail (GTR) sales of Irish Spirits



Source: The IWSR

Commentary: Global Travel Retail sales are returning to pre-pandemic levels as international travel numbers surpass those of 2019. GTR areas in departure ports are benefiting from improved facilities and infrastructure, and the growth in premiumisation.



Irish Whiskey

Volume of global Irish Whiskey sales 2024



Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024 v 2023
Volume (Million 9-litre cases)	7.8	8.7	9.7	10.6	11.9	11.4	14.0	15.2	15.6	16.1	+3.6%

Source: The IWSR

Top 5 Irish Whiskey markets 2024

Rank	Country	000s 9-ltr cases
1	United States	5,473.3
2	Poland	718.8
3	Germany	715.0
4	Ireland	707.2
5	India	700.1

Source: The IWSR

Spotlight on markets



India – 5th biggest Irish Whiskey market

“India’s volume grew by a phenomenal +57.5% in 2024 and continues to be the key emerging market for Irish whiskey. Due to the growing affluent population in key regions, demand for imported spirits continues to grow with consumers trying new spirits categories such as Irish whiskey.”

– Bord Bia



In South Africa, sales of Irish Whiskey have almost doubled in four years.

“While outside the Top 5, South Africa continued its strong growth as a key emerging market for Irish Whiskey. Since 2020, case sales have grown from below 350k 9l cases to nearing 600k cases in 2024. Irish whiskey sits within the ‘premium and above’ price bands within the market with consumers choosing Irish Whiskey for gifting as well as a trade-up in terms of purchasing for their own consumption.”

– Bord Bia

Irish Cream

Volume of global Irish Cream sales 2024

Volume Change
+1.5%

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024 v 2023
Volume (Million 9-litre cases)	7.1	7.3	7.8	8.2	8.5	8.3	9.8	9.9	9.5	9.6	+1.5%

Source: The IWSR

Top 5 Irish Cream markets 2024

Rank	Country	000s 9-ltr cases
1	United States	2,286.1
2	United Kingdom	1,925.4
3	Germany	730.7
4	Canada	642.9
5	GTR	616.3

Source: The IWSR

Commentary: Irish cream continued to perform well in the UK market in 2024 with case sales +3.5% vs 2023 and reaching over 1.9m 9l cases. This is being driven by strong brand performances particularly in retail.



Irish Poitín

Volume of Irish Poitín sales 2024

Volume Change
+8.1%

Year	2017	2018	2019	2020	2021	2022	2023	2024	2024 v 2023
Volume* (6 × 70cl cases)	5,800	3,890	3,750	2,486	4,827	4,075	4,922	5,323	+8.1%

*Estimated figures

Source: Industry

US Whiskey and Bourbon exports to Ireland

Value (excl Tax)	2018*	2019*	2020*	2021	2022	2023	2024
€m	4.431	3.693	2.236	2.808	3.578	5.357	7.716
% change on previous year	+23.0%**	+16.6%	-39.5%	+25.6%	+27.4%	+49.7%	+37.7%

Source: EUROSTAT

* EU tariffs of 25% were applied to American Whiskey and Bourbon imports in July 2018 in retaliation for US tariffs applied to European steel and aluminium products. In July 2021, these tariffs were due to automatically rise to 50%. In November 2021 the EU and the US reached an agreement (an armistice) in this dispute temporarily postponing further tariffs on American Whiskey and Bourbon imports in exchange for increased quotas for European steel and aluminium products.

This agreement came into effect in January 2022 and was further extended to run until March 2025, maintaining a zero-tariff position on the spirits trade between the EU and the US.

** American exporters frontloaded Whiskey and Bourbon exports into Ireland in the six months prior to EU tariffs being applied in July 2018 resulting in a +75.11% increase of exports compared to the same six-month period the previous year.

With significant turmoil and uncertainty in the trading environment between the EU and the US, we now have a situation where US spirits can enter the EU tariff-free, while our spirits exports to the US are faced with a new 15% tariff since August 2025 (10% tariff rate for NI spirits). We continue to push negotiators to secure a return to the zero-for-zero tariff trading position for our trade with the US.

As regards the trade for US Whiskies and Bourbon to Ireland, the table above shows significant growth in recent years, in particular since the removal of tariffs on US spirits in 2022.



Ireland’s most popular spirits categories 2024

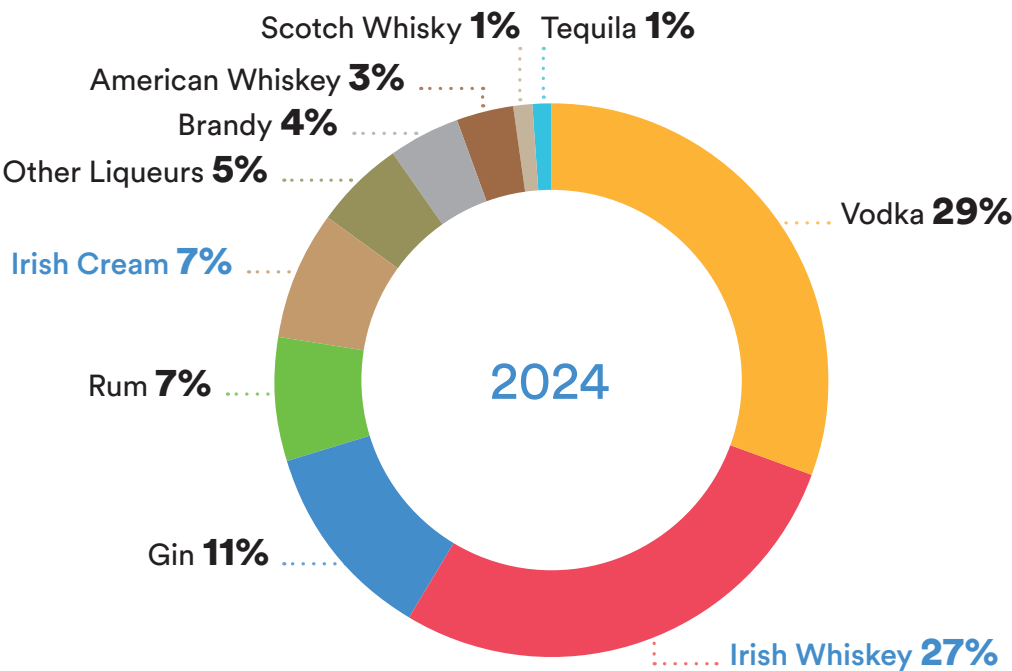
Spirit sales in Ireland by category

Spirit Category 000s 9-ltr cases	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024 v 2023
Vodka	743.8	751.0	750.0	786.0	791.0	710.7	740.0	791.5	782.5	763.0	-2.5%
Irish Whiskey	504.3	521.8	548.3	584.8	590.5	591.0	620.0	687.5	701.5	707.2	0.8%
Gin (incl. Irish Gin)	125.5	171.3	245.7	329.0	348.5	331.5	357.2	346.8	323.3	294.3	-9.0%
Rum	179.3	176.5	175.5	185.0	185.8	178.5	203.9	199.6	189.1	176.3	-6.8%
Irish Cream	93.3	95.2	84.5	95.4	89.4	113.1	141.4	158.3	172.0	193.1	12.3%
Other Liqueurs	104.5	109.7	111.7	112.9	113.6	116.2	144.8	143.0	124.0	121.2	-2.3%
Brandy	111.8	118.0	117.3	119.0	117.0	107.7	113.7	116.3	117.0	115.3	-1.5%
American Whiskey	55.8	58.0	56.5	84.3	81.0	84.5	84.3	85.6	83.8	75.5	-9.9%
Tequila	15.8	16.0	15.8	17.0	18.0	14.0	20.9	26.8	28.5	35.0	22.8%
Scotch Whisky	67.5	61.8	55.8	51.5	42.5	47.0	42.5	42.5	42.5	33.8	-20.5%
Others	63.4	73.5	91.9	37.9	41.2	59.5	71.4	93.0	85.0	77.3	-9.1%
Total	2,065.0	2,152.8	2,253.0	2,402.8	2,418.5	2,353.7	2,540.1	2,690.9	2,649.2	2,592.0	-2.2%

Source: The IWSR

Commentary: 2024 was the second successive year of decline in spirit volumes sold in Ireland. However, driven by the long-term trend of premiumisation, the category is still over 25% bigger in volume since 2015, with Irish whiskey 40% bigger, Irish Cream increasing by 85%, and volume sales of Gin (including Irish Gin) swelling by over 130%. This makes Irish spirits a meaningful industry to defend in these challenging times and not let all the hard gains be unnecessarily put at risk.

Breakdown of spirit sales in Ireland 2024



Source: IWSR

Volume Change
-2.2%

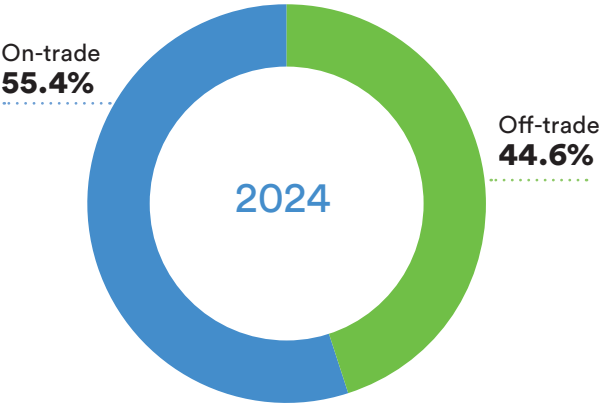
Overall spirits sales in Ireland 2024

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024 v 2023
Volume (Million 9-litre cases)	2.07	2.15	2.25	2.40	2.42	2.35	2.54	2.69	2.65	2.59	-2.2%

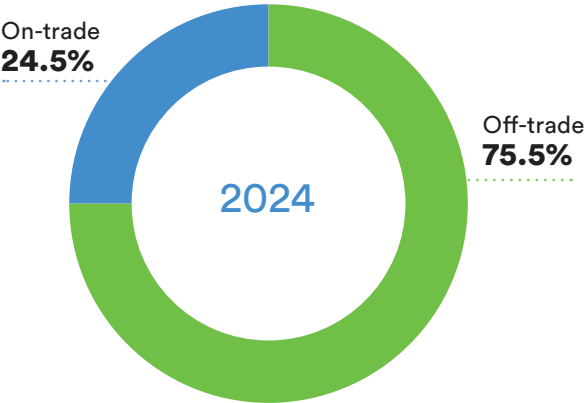
Source: The IWSR

On-Trade vs Off-Trade sales by Channel – Ireland

Value



Volume



Other spirits drinks

Ready to drink (RTD) sales in Ireland

RTD category 000s 9-Ltr cases	2019	2020	2021	2022	2023	2024	2024 v 2023
FABs*	369.0	407.4	517.0	500.0	534.5	590.0	+10.4%
Cocktails & Long Drinks	106.5	176.0	283.9	319.5	308.3	324.0	+5.1%
Wine Spritzer & Coolers	110.6	113.5	124.8	131.8	166.0	216.0	+30.1%
Hard Seltzer**	NA	102.5	150.0	127.6	86.3	127.0	+47.2%
TOTAL	586.1	799.4	1,075.7	1,078.9	1,095.1	1,257.0	+14.8%

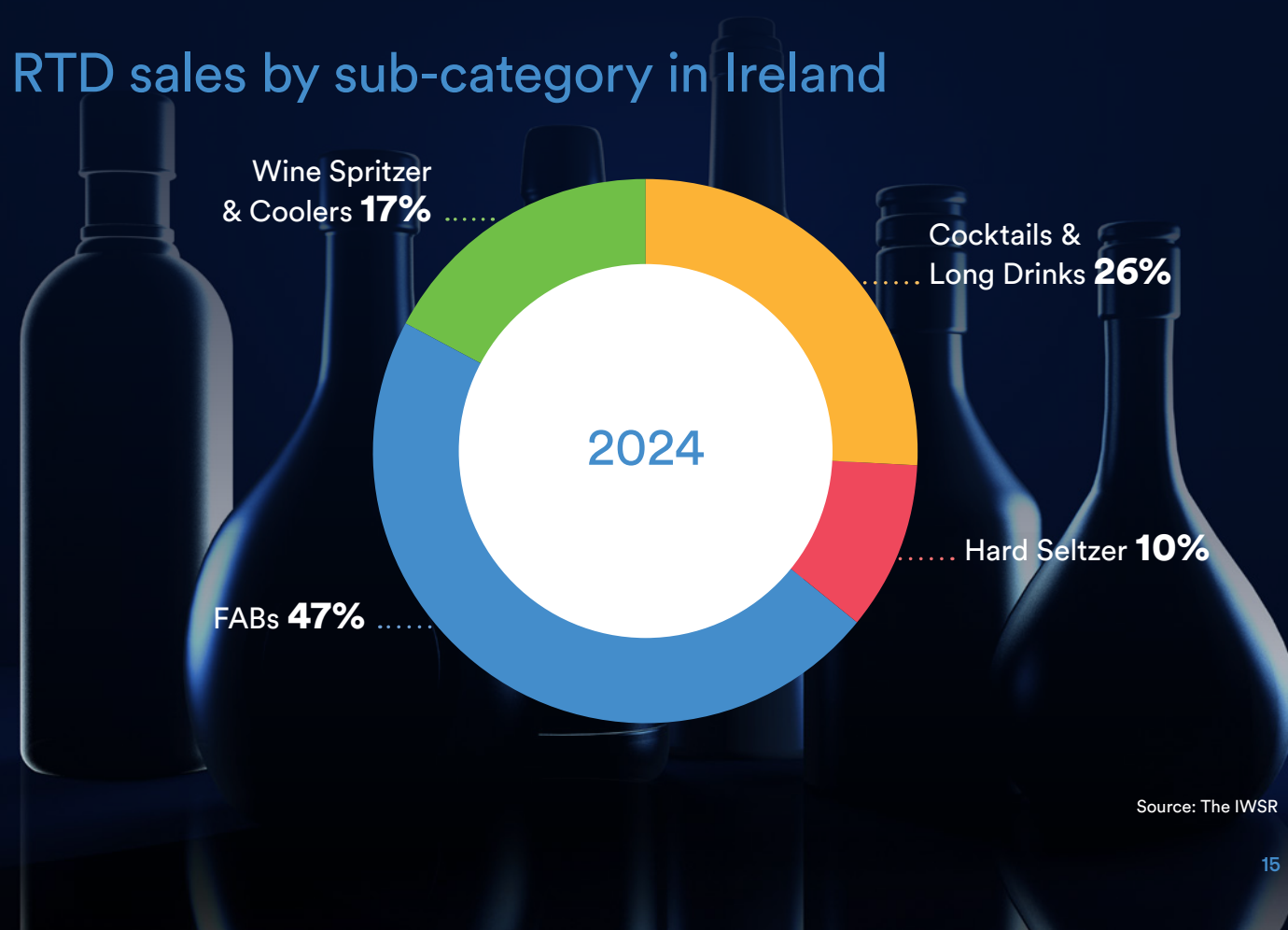
Source: The IWSR

With a growth rate of +14.8%, RTDs are bucking the trend versus Total Spirits sales in Ireland as consumers seem willing to pay a premium for convenient solutions to portability and consistency of serve.

* Flavoured Alcoholic Beverages.

** A Hard Seltzer can be made with a malt or spirit base. In the EU excise rates on Hard Seltzer products are dictated by the final characteristics of the product rather than what alcohol base is used. Since the final characteristics of Hard Seltzer resemble a spirit, rather than a beer product, Hard Seltzer has been classified as a 'spirit' drink in the EU.

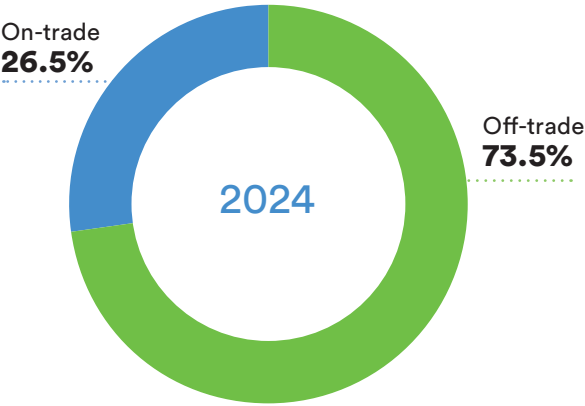
RTD sales by sub-category in Ireland



Source: The IWSR

RTD sales channel

On-trade vs off-trade – Volume split by sector



Local vs imported RTD

Origin 000s 9-Ltr cases	2021	2022	2023	2024	2024 v 2023
Irish RTD products	115.7	181.0	192.0	240.8	+25.4%
Imported RTD products	905.4	891.8	888.3	1016.3	+14.7%

Source: The IWSR

Irish-made RTDs accelerating share of the RTD category, with 2024 growth faster than the +6.1% experienced in 2023.

Non-alcohol spirits

No & Low Alcohol 000s 9-Ltr cases	2020	2021	2022	2023	2024	2024 v 2023
Spirits (No alcohol)	2.0	7.3	10.5	11.5	10.5	-8.7%

Source: The IWSR



Excise receipts 2024

Alcohols – net excise receipts

Spirits €m	2019	2020	2021	2022	2023	2024
Q1	80.5	83.1	83.6	84	81	77.4
Q2	89.2	87.5	84.0	94.2	94.4	83.5
Q3	85.3	84.7	91.5	103.6	97	109.4
Q4	118.4	119.0	129.6	137.9	138.5	123.8
Total	373.4 m	374.3 m	388.7 m	419.7 m	410.1 m	394.1 m

Source: Revenue Commissioners

Quantities of spirits upon which net duties paid

Spirits 000s Ltrs of Pure Alc	2019	2020	2021	2022	2023	2024
Q1	1,551.1	1,769.7	1,620.5	1,973.2	1,902.1	1,818.2
Q2	2,023.0	1,826.0	1,967.2	2,213.5	2,217.1	1,960.4
Q3	2,133.9	2,040.0	2,074.4	2,435.0	2,277.4	2,570.1
Q4	3,113.2	3,247.6	3,328.9	3,238.3	3,254.9	2,907.9
Total	8,821.1	8,883.3	8,991.0	9,860.0	9,651.5	9,256.6

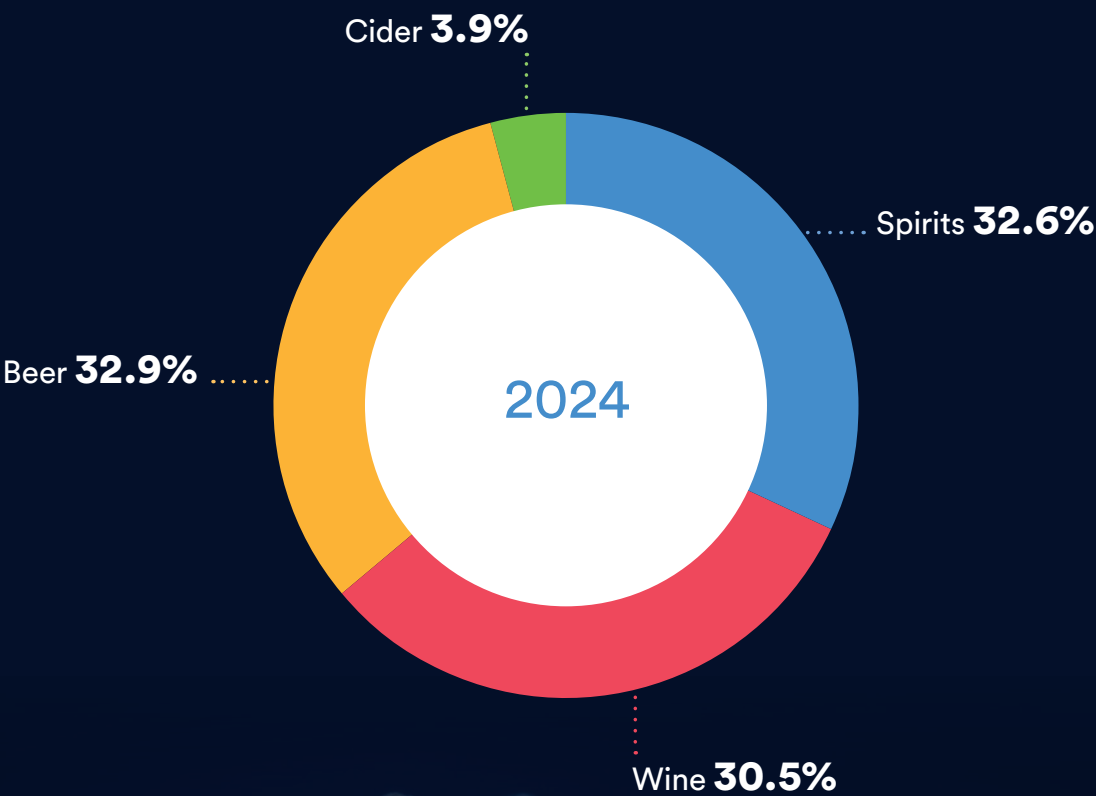
Source: Revenue Commissioners

Excise receipts for all categories (€m)

Year	Beer	Spirits	Wine	Cider	Total	% change
2010	320.1	243.5	218.8	44.0	862.0	-10.9%
2011	307.3	247.3	231.0	44.0	830.0	-3.7%
2012	308.0	263.9	231.4	42.8	846.0	1.9%
2013	358.0	290.3	302.1	51.6	1,002.0	18.4%
2014	424.8	301.8	354.6	58.5	1,139.8	13.7%
2015	417.0	311.0	355.0	54.0	1,137.0	-0.2%
2016	430.0	338.0	380.0	59.0	1,207.0	6.2%
2017	424.0	353.0	382.0	61.0	1,220.0	1.1%
2018	430.1	372.2	376.4	61.2	1,239.9	1.6%
2019	421.4	373.4	377.9	59.8	1,232.5	-0.6%
2020	351.1	373.3	424.8	53.1	1,202.3	-2.4%
2021	351.2	388.7	384.6	51.4	1,175.9	-2.2%
2022	392.0	410.9	375.0	51.8	1,229.7	+4.6%
2023	404.1	410.1	395.4	50.0	1,260.1	+2.5%
2024	397.8	394.1	392.2	47.3	1,235.4	-2.0%

Source: Revenue Commissioners

Share of alcohol excise by category



% Share of Total Excise Duty Paid	2019	2020	2021	2022	2023	2024
Spirits	34.5	30.2	30.4	33.4	32.5	32.6
Wine	31	34.3	30	30.1	31.4	30.5
Beer	32.9	27.4	27.4	31.8	32	32.9
Cider	4.9	4.3	4.2	4.2	4.0	3.9

Source: Revenue Commissioners



European spirits excise rates 2024

Alcohol Tax/Excise duty € per hectolitre of alcohol (HLA)

Rank	Member State	Alcohol Tax/ Excise duty
1	Finland	€5,550
2	Sweden	€4,657*
3	Ireland	€4,257
4	UK incl. Northern Ireland	€3,941*
5	Greece	€3,548
6	Belgium	€2,993
7	Lithuania	€2,778
8	Estonia	€2,074
9	Denmark	€2,011*
10	Latvia	€1,955
11	France	€1,899
12	Poland	€1,865*
13	Netherlands	€1,827
14	Portugal	€1,603
15	Czech Republic	€1,547
16	Slovakia	€1,490
17	Hungary	€1,481
18	Malta	€1,360
19	Slovenia	€1,320
20	Germany	€1,303
21	Austria	€1,200
22	Luxembourg	€1,123
23	Italy	€1,036
24	Romania	€971*
25	Spain	€959
26	Cyprus	€957
27	Croatia	€796
28	Bulgaria	€562*

* based on exchange rates on 01/10/2024

Source: spiritsEUROPE



Ireland continues to have the 3rd highest rate of excise on Spirits in Europe, and the 2nd highest overall on alcohol.

European spirits excise rates 2024





Drinks Ireland | Spirits and the Irish Whiskey Association exist to promote the interests of the Irish spirits industry in Ireland and internationally. We provide a strong and effective voice at the national, EU and global levels on issues such as taxation, labelling, trade and the ongoing international protection of Ireland's three Geographical Indications (GIs) for spirits i.e. Irish Whiskey, Irish Cream and Irish Poitín.

Our objective is to ensure that the best international trading conditions exist for the Irish spirits industry. Membership is open to all branded spirits manufacturers and suppliers. The association offers information, representation, and advice to its members, and provides a forum for members to network, share best practice and collaborate on issues that impact the industry.

Drinks Ireland | Spirits and the **Irish Whiskey Association** are a part of **Drinks Ireland**.



Drinks Ireland is the Ibec sector that represents the interests of alcohol drinks manufacturers and suppliers on the island of Ireland. Drinks Ireland is globally unique as it represents all categories of alcohol products in one umbrella organisation through its various trade associations.

Drinks Ireland | Beer
Drinks Ireland | Cider
Drinks Ireland | Spirits
Drinks Ireland | Wine
Irish Whiskey Association

Drinks Ireland aims to ensure that the business environment on the island of Ireland is conducive to drinks enterprise. Through our activity we aim to ensure that the industry is recognised for the positive contribution it makes to the economic and cultural landscape.





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