



# Developments and insights into Italian Beer Market

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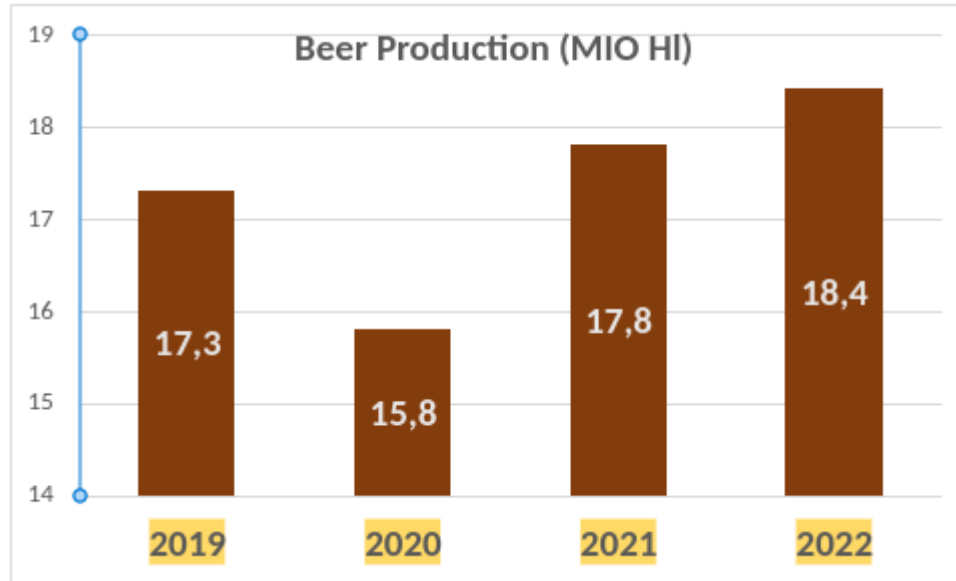


## Overview of the Beer Market in Italy

- ✓ Beer Market and Consumption Trends in Italy
- ✓ Introduction to Independent Craft Beer (Indipendente Artigianale)
- ✓ Craft Beer Market and Consumption Trends
- ✓ Challenges in the Craft Beer Market
- ✓ Conclusion and Future Perspective



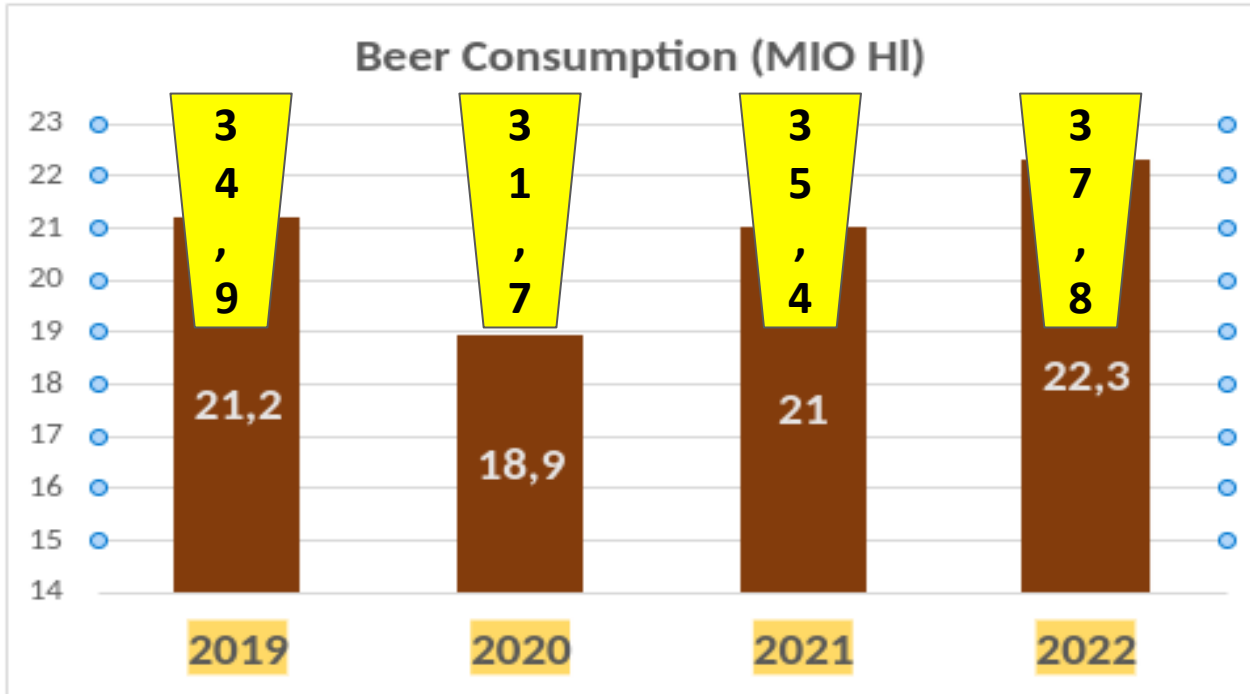
## Beer Market and Consumption Trends in Italy



13,3 MIO HI in 2012

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# Beer Market and consumption trends in Italy



Consumption per  
capita/y

In 2011 29,8 l/per  
capita/y

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## ANALISI DELLA STAGIONALITÀ DELLA BIRRA

Analysis of beer sales by season

	2019		2020		2021		2022	
	hl	%	hl	%	hl	%	hl	%
Gennaio/Jan.	1.212.149,95	5,77	1.277.369,19	6,75	1.123.915,59	5,36	1.234.515,85	5,54
Febbraio/Feb.	1.185.836,80	5,64	1.306.236,26	6,90	1.183.831,39	5,65	1.350.584,62	6,06
Marzo/Mar.	1.549.199,73	7,37	1.094.568,81	5,78	1.384.779,39	6,60	1.700.643,61	7,63
Aprile/Apr.	1.689.968,69	8,04	1.062.749,16	5,62	1.628.591,61	7,77	1.672.039,94	7,50
Maggio/May	2.104.787,18	10,01	1.519.746,05	8,03	2.119.295,32	10,11	2.257.852,39	10,13
Giugno/Jun.	2.497.962,86	11,88	2.369.326,04	12,52	2.661.507,21	12,69	2.807.436,32	12,59
Luglio/Jul.	2.666.790,52	12,68	2.846.539,72	15,04	2.754.128,02	13,13	2.846.970,07	12,77
Agosto/Aug.	2.407.122,72	11,45	2.426.048,56	12,82	2.391.300,57	11,40	2.624.169,38	11,77
Sett./Sept.	1.776.714,17	8,45	1.832.693,50	9,69	1.878.211,20	8,96	1.897.222,63	8,51
Ottobre/Oct.	1.330.062,71	6,33	1.204.915,86	6,37	1.294.329,18	6,17	1.262.204,28	5,66
Novembre/Nov.	1.249.750,26	5,94	913.248,64	4,83	1.260.045,81	6,01	1.267.411,99	5,68
Dicembre/Dec.	1.354.654,43	6,44	1.067.558,21	5,64	1.291.064,71	6,16	1.376.948,92	6,18
<b>TOTALE / Total</b>	<b>21.025.000,00</b>	<b>100,0</b>	<b>18.921.000,00</b>	<b>100,0</b>	<b>20.971.000,00</b>	<b>100,0</b>	<b>22.298.000,00</b>	<b>100,0</b>

### Concentrazione stagionale/Season sales

(maggio-agosto/May-August)

		46,02	48,42	47,33	47,25
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### Concen. primi 2 mesi anno/Sales first two months of the year

(gennaio-febbraio/Jan-Feb.)

		11,41	13,65	11,00	11,59
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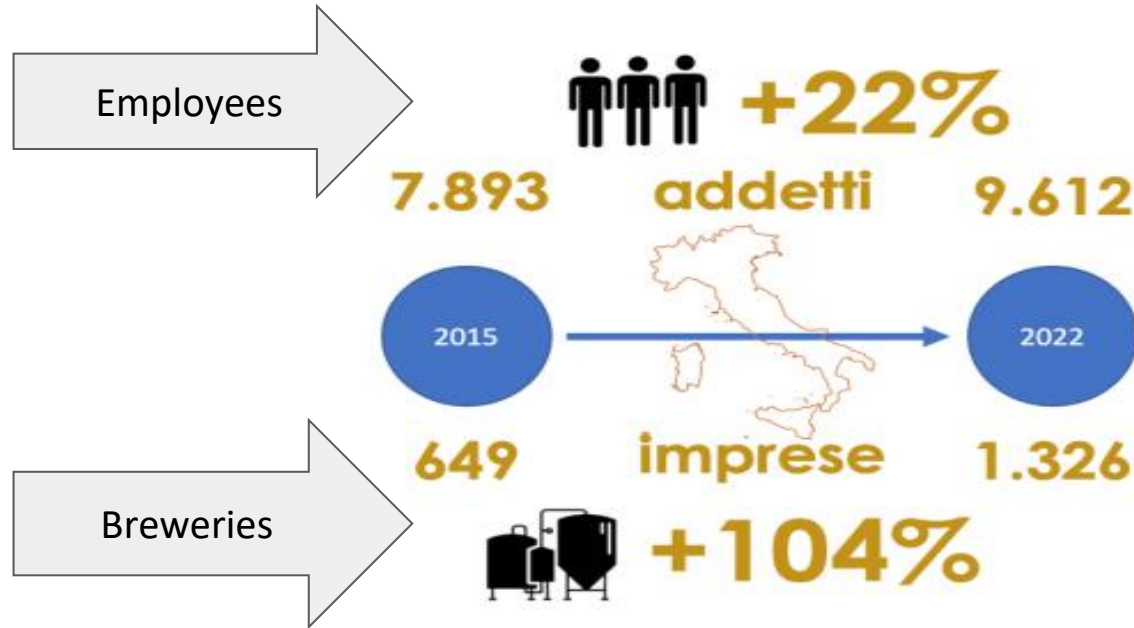
Over 47% of sales in May-August

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## Breweries and Employees

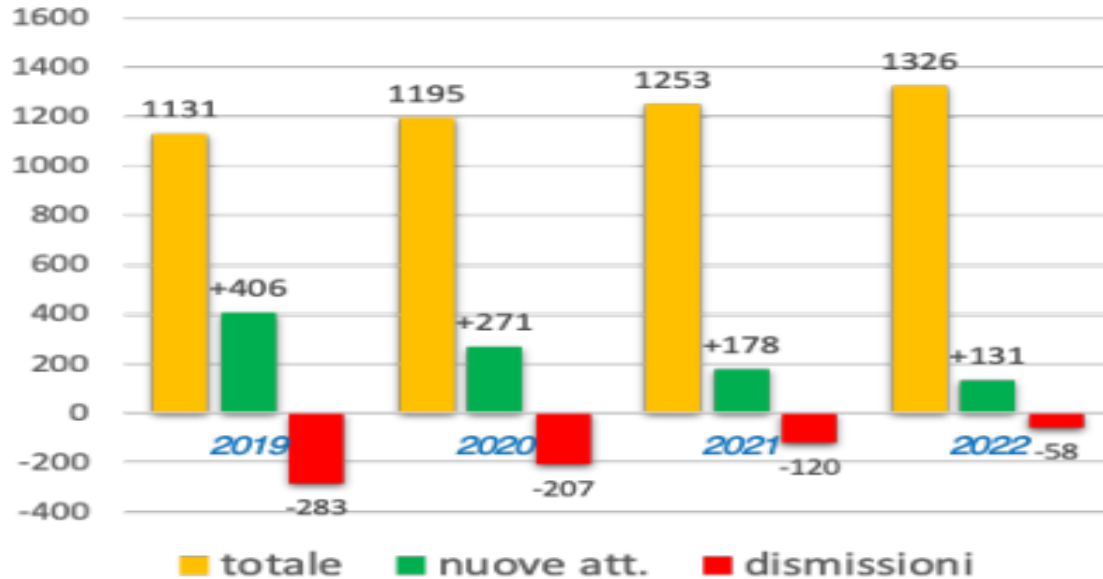


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# Breweries in Italy 2019-2022



Numero di imprese nel periodo 2019-2022



N.of Breweries

New openings

Closures

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# Introduction to Independent Craft Beer - Birra Indipendente Artigianale



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## Definition of Craft Beer in Italy (Birra Artigianale)

Craft beer is defined as the beer produced by **small independent breweries and not subjected, during the phase of production, to pasteurization and microfiltration processes.**

At purposes of this paragraph it is intended by small brewery independent brewery that is legally and economically independent of any other brewery, that uses systems physically distinct from those of any other brewery, which does not operates under license and whose **annual production does not exceed 200,000 hectoliters, including in this quantity the quantity of beer produced for account of third parties** (Dir UE 92/83).

(LAW 28 July 2016, n. 154 (in Official Gazette 10/08/2016, n.186))



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# Introduction to Independent Craft Beer - Birra Indipendente Artigianale

## Breweries and employees

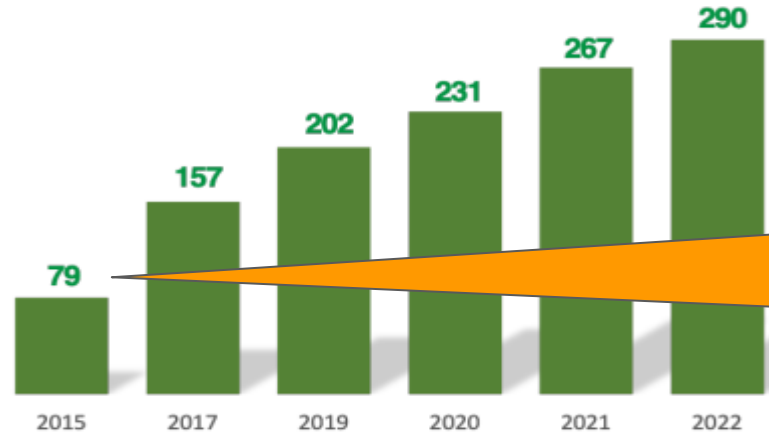
	n. imprese	n. addetti	% imprese	% addetti
Imprese individuali	673	673	51%	7%
Piccoli (2-5 addetti)	409	1.186	31%	12%
Medio-piccoli (6-10)	112	808	8%	8%
Medio-grandi ((11-50)	109	2.061	8%	21%
Grandi >50	23	4.884	2%	51%
Totale	1.326	9.612	100%	100%

**Microbreweries  
= 82%/total**

**Employees  
= 19%/total**

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**Agricultural breweries  
(breweries producing at least 51% of raw materials)**



**2015-2022**

**+267%**

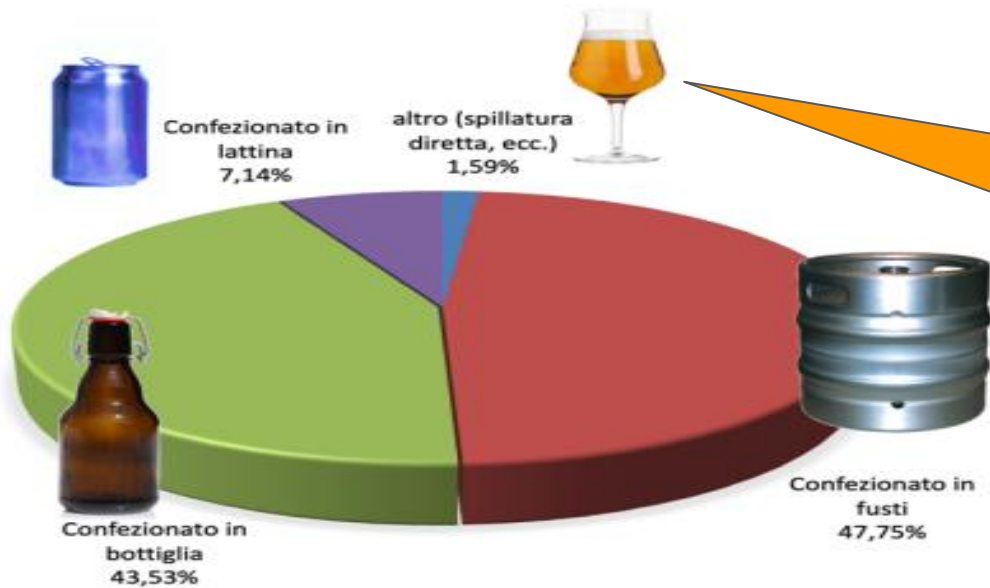
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What styles do independent breweries in Italy produce?



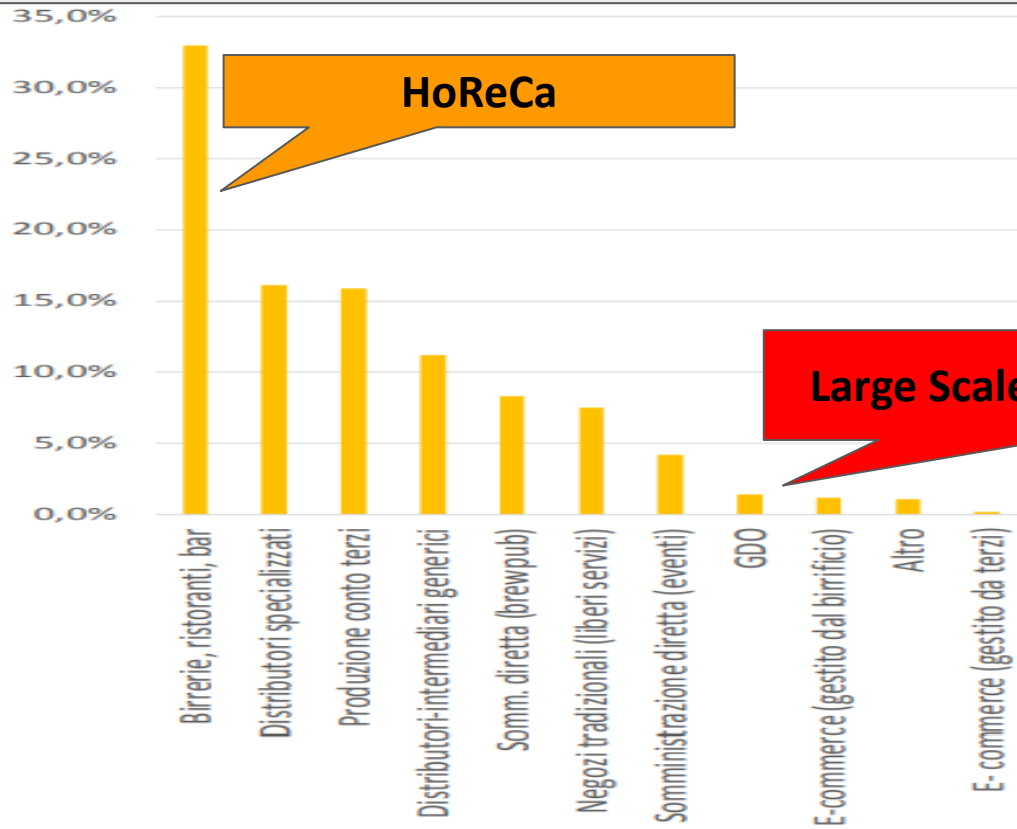
Avg  
15 labels/brewery

## Packaging



**BrewPubs and  
Tap Room**

## Sales Channels

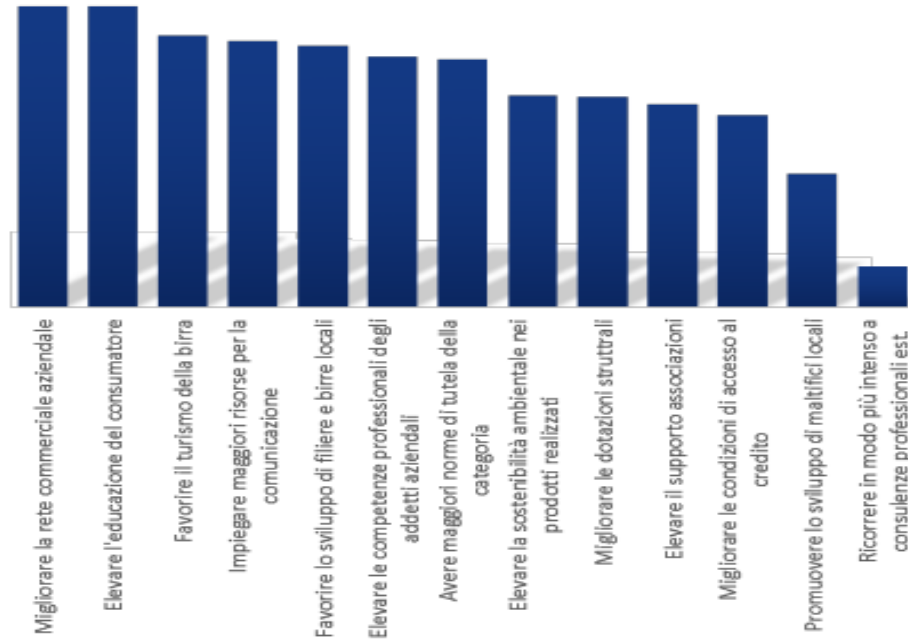


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# Challenges in the Craft Beer Market and Future Perspective



1. Improve presence in stores
1. Elevating consumer beer culture
1. Increase beer tourism opportunities
1. Invest more in communication



Thank you for your attention...

**Salute!**



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