

Press Release

BarthHaas Report 2022/2023

World beer market achieves growth in challenging times

Nuremberg, July 25, 2023. The international beer market developed better than forecast in 2022. Despite the economic crisis being felt around the world, output rose by 1.3 percent to 1.89 billion hectoliters. With the outbreak of war in Ukraine, industry experts had expected output to fall. Despite the slightly positive development last year, output failed to return to the level recorded in the last pre-pandemic year 2019 (1.91bn hl). This is one of the facts contained in the BarthHaas Report 2022/2023 that the world's leading hop specialist presented during an online press conference on July 25.

“One year ago, we were expecting the world beer market to contract, as approximately five percent of world beer volume is produced in Russia and Ukraine. Against this background we can be very pleased with this slightly positive result”, says Peter Hintermeier, Managing Director of BarthHaas, commenting on the market development.

German brewers back in the growth lane

Germany outperformed the international average: After a difficult previous year, many German breweries rallied strongly in 2022; in total, output rose by 2.8 percent to 87.8 million hectoliters. “In the world rankings, Germany remains in fifth place”, explains Heinrich Meier, the author of the BarthHaas Report. “The undisputed leaders in the first four places are China, the USA, Brazil, and Mexico. Together, these five largest producer countries account for almost half (49 percent) of all the beer brewed.”

The European market managed only slim growth: It remained virtually unchanged, rising by 0.6 percent to 516 million hectoliters. Things looked better in the European Union which saw growth of +2.8 percent. Here, Germany (+2.4m hl) and, above all, Spain (+3m hl) provided for significant growth. In the rest of Europe, output fell by 3.9 percent, with dwindling volume in Ukraine (-4.8m hl) weighing particularly heavily on the result.

Slight growth in net terms in the Americas

The Americas exhibited a modest upward trend of +1.0 percent, bringing total output to 622 million hectoliters; developments in 2022 varied greatly from country to country, however. There was strong growth in South America (+5.3 %), where Brazil was the country with the most significant increase (+4.4m hl).

In North America, Mexico (+6.3m hl) was unable to compensate for the sharp decline in the USA (-10.1m hl). In total, output here decreased by 1.2 percent. The Central America/Caribbean region posted an even greater decline. Beer output there fell by 6.9 percent in total, albeit from a low level.

In Asia, China had by far the highest share of beer output, with 62 percent. As in the previous year, production there came to roughly 360 million hectoliters. The Asian countries with the highest growth in absolute terms in 2022 were India (+3.5m hl), Thailand (+2.6m hl), South Korea (+2.3m hl), the Philippines (+1.5m hl) and Japan (+1.3m hl). Despite falling output in Vietnam and Cambodia (each -3m hl), there was a volume increase of 1.5 percent in Asia as a whole last year, bringing total output to 579 million hectoliters.

Up-and-coming beer market in Africa

In an intercontinental comparison, the highest growth in beer output in percentage terms was in Africa, with 4.6 percent. The main contributors to this growth were South Africa (+2.8m hl), Ethiopia (+1.5m hl) and Angola (+1m hl). Total output in Africa in 2022 amounted to 151 million hectoliters.

It is difficult to produce a forecast for the world beer market in 2023. The consequences of the war in Ukraine are still being painfully felt in the brewing industry. “The costs of energy, raw materials, and labor have soared and remain at a high level, with no major relief in sight”, says BarthHaas Managing Director Peter Hintermeier. “Nevertheless, we expect slight growth, which ought to bring us back roughly to the level last seen in the pre-pandemic year 2019.”

Please note the photo credit: BarthHaas

About BarthHaas

BarthHaas is one of the world’s leading suppliers of hop products and hop-related services. The family-owned company specialises in the creative and efficient use of hops and hop products. As visionaries, instigators and implementers of ideas, BarthHaas has been shaping the market surrounding a unique raw material for over 225 years.

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