

Research Report
Endbericht

February 2022

The economic and ecological footprint of the spirits sector in the EU, the UK, Norway and Switzerland

COVID-19 Update

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Study commissioned by
spiritsEUROPE



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Executive Summary

In 2020, a study was conducted to quantify the economic and ecological footprint of the European spirits sector (EU27 + UK + Norway + Switzerland = EU+) for the pre-COVID year 2019. The aim was to estimate the effects of the spirits sector on employment, gross value added (GVA) and fiscal variables in every EU+ country. In addition, it also investigated spirits-related tourism effects and the ecological footprint of the sector.

The COVID-19 crisis starting in 2020 hit many industries very hard; also spirits-related industries, especially the catering sector. The study at hand is supposed to update the results for the year 2020. We find the following:

- European spirits producers' turnover in 2020 is estimated to about 24.2 billion Euros (which was about 8.9 % less than in 2019). At the same time, spirits worth 42.9 billion Euros (including taxes) have been sold in the EU+ which was by about 3.9 % less than pre-COVID.
- The production and consumption of spirits in the EU+ were responsible for about 45.5 billion Euros in GVA in 2020. This was about 24 % less than in 2019. Spirits supported 910,000 jobs in the EU+ which was about 26 % less than pre-COVID.
- Even though spirits production and consumption figures only decreased in the single digits, GVA and employment dropped by about a quarter. The reason is that the on-premise segment collapsed. The largest economic effects (in terms of both employment and GVA) in 2019 came not from spirits production but from consumption, especially from the catering (on-premise) sector. As many COVID-19 countermeasures hit the catering industry particularly hard, it lost half of its spirits-related GVA and employment.
- Governments collected spirits-related taxes and duties of about 38.1 billion Euros (about 19 % less than in 2019). Roughly half of it still came from income, profit and other taxes on economic activity along the value-added chains. The other half came directly from VAT and excise duty imposed on spirits beverages sold in the EU+.
- Emissions of about 17.4 million tonnes of CO₂ equivalents are related to spirits production and consumption in the EU+. As less has been produced, the ecological footprint is now smaller than it was in 2019.

When interpreting the results presented in this report, it must be kept in mind that governments granted extensive relief payments, especially to the catering industry. Such payments have been outside the scope of this study.

1 Introduction

Spirits producers and exporters can be found in every country in the European Union (EU). Not only do they provide employment and value added in, e. g., distilleries, they also have an impact on up- and downstream industries. The European Commission (EC) speaks of 47 regulated categories of spirit drinks and about 240 geographical indications. The EC further assumes that the sector attributes 12 billion Euros in exports and 22.4 billion Euros in excise duties and value added tax (VAT); about one million jobs is said to be connected directly to the spirits sector.¹ A study by Ernst & Young (2010) estimated that spirits provide for about 935,000 jobs in Europe and generate an annual gross value added of 28 billion Euros.

A report (in the following: the *base study*)² commissioned by spiritsEUROPE and conducted by the Institute for Advanced Studies in Vienna estimated about 1.2 million jobs in the EU+ (the EU27 plus UK plus Switzerland and Norway) related to producing, selling and catering spirits drinks in 2019. The production and consumption of spirits in the EU+ were responsible for almost 60 billion Euros in annual GVA. Governments collected spirits-related taxes and duties of about 46.8 billion Euros which was more than a quarter of the annual EU budget. Roughly half of it came from income, profit and other taxes on general economic activity along the value-added chains. The other half came directly from VAT and excise duty imposed on spirits beverages sold in the EU+. The emission of about 20 million tonnes of CO₂ equivalents were related to spirits production and consumption in the EU+; this was about 0.6 % of what the EU+ emitted in total and would have been slightly less than the overall CO₂ eq. emissions of Lithuania.

The COVID-19 crisis starting in 2020 hit many industries very hard. One would assume that the spirits industry was in a rather stable position as was the entire food stuff sector. However, as the catering industry has been shut down all over Europe for several months, it will be interesting to see whether consumers switched from on- to off-premise consumption. In any case, however, spirits related economic effects in the catering industry must have been in decline during the crisis. But also relevant off-trade sales channels have suffered from COVID-19. The European Travel Retail Confederation (ETRC)³ reports a minus of about 70 % in passenger traffic in Europe compared to 2019 that sent sales in airports and duty free shops to historic depths.

This study update is to take a deeper look at the COVID-19 related effects for the EU+ spirits sector. While the year of interest in the *base study* was 2019, we now take the

¹ https://ec.europa.eu/info/food-farming-fisheries/plants-and-plant-products/plant-products/spirits_en

² <https://irihs.ihs.ac.at/id/eprint/5957>

³ <http://www.etrac.org/uploaded/downloads/etrac-white-paper-duty-and-tax-free-on-arrivals-april-2021.pdf>

latest data from 2020 into account and compare it to the *base study*. All methodological aspects remain the same.

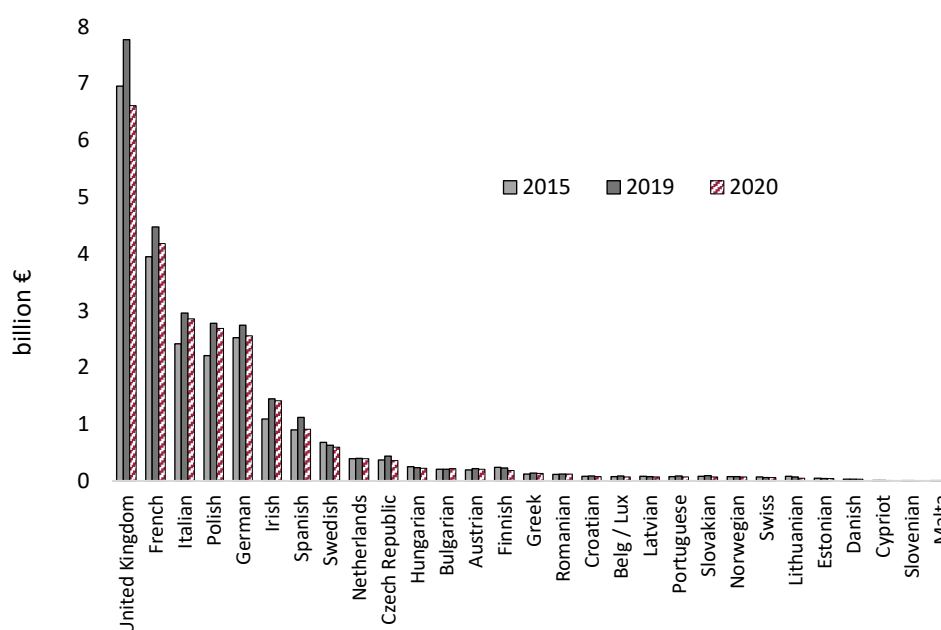
This study update is structured as follows: Section 2 provides the descriptive picture about spirits production and consumption in the EU+ in 2020. The respective legal and statistical definitions of spirits can be looked up in the base study. Section 3 will present and explain the quantitative results; individual factsheets for the 30 countries under observation and for a selection of spirits categories and geographical indications will be shown in the Appendix. The final section 4 will wrap up the study.

2 The European spirits sector

2.1 Spirits production in Europe

The estimated production turnovers for 2020 are presented by country in Figure 1. They amount to 24.2 billion Euros and have dropped by about 8.9 % compared to the last pre-COVID year 2019. The United Kingdom still accounts for the lion's share; even though the UK suffered a considerable setback (-14.9 %). France, Italy, Poland and Germany were much more stable but still follow with a considerable margin. Only two countries managed positive growth rates in 2020 (Romania and Bulgaria).

Figure 1: Spirits production turnovers (in 2020)



Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

Table 1 shows the estimated production turnovers and volumes by category. The latter depict how many litres of spirits originating from one of the EU+ countries have been sold both domestically and worldwide.⁴

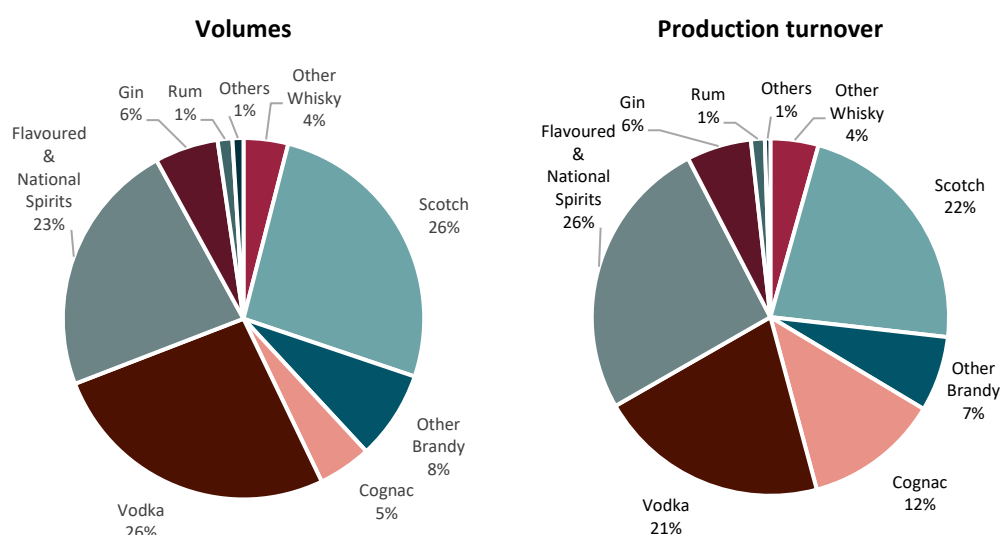
Table 1: Production turnovers and absolute volumes 2020

Category	Production turnovers in bill. Euros (Δ 2019/2020 in parentheses)		Volumes in mill. hectolitres (Δ 2019/2020 in parentheses)	
Flavoured & National Spirits	6.22	(-7.0 %)	6.91	(-9.4 %)
Scotch Whisky	5.44	(-16.9 %)	7.91	(-9.5 %)
Vodka	5.07	(-4.9 %)	7.93	(-4.4 %)
Cognac	2.96	(-6.1 %)	1.44	(-2.5 %)
Other Brandy	1.65	(-8.3 %)	2.40	(-7.3 %)
Gin	1.42	(-7.7 %)	1.72	(-8.5 %)
Other Whisky	1.05	(-4.3 %)	1.21	(-6.4 %)
Rum	0.30	(-6.8 %)	0.40	(-14.7 %)
Others	0.12	(+10.0 %)	0.30	(-3.6 %)
TOTAL	24.23	(-8.9 %)	30.21	(-7.5 %)

Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021).

Figure 2 displays how production turnovers and volumes are composed by categories. We do not see any notable changes compared to the *base study*. More detailed information about the categories will be given further below in Appendix A.

Figure 2: Spirits production by categories (in 2020)



Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021).

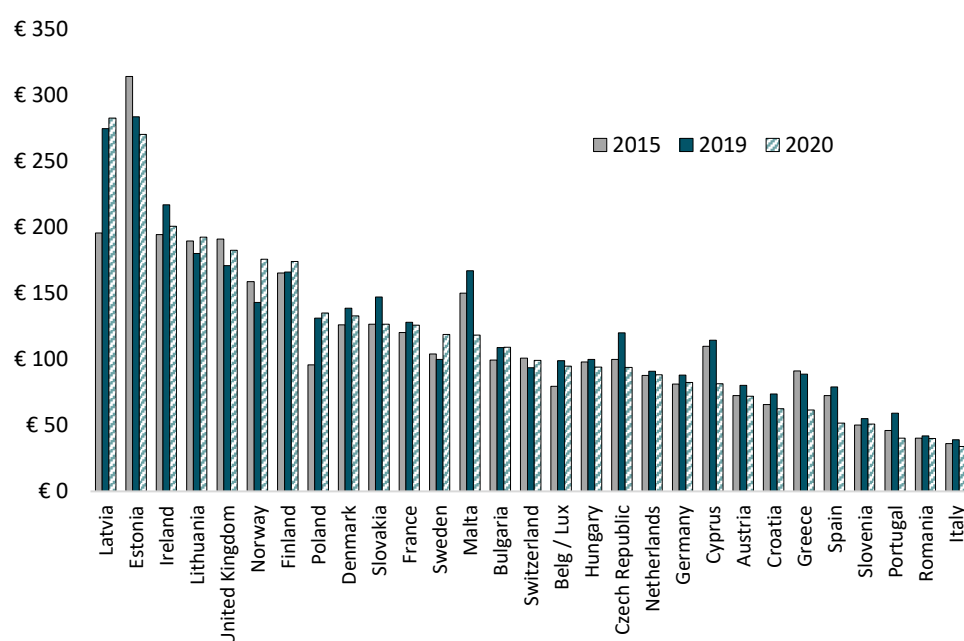
⁴ Note, that those figures can only under critical assumptions (no stock changes, no re-exports etc.) be interpreted as production volumes, but it is still *sales* data in nature. Volumes will not enter our input-output analysis.

2.2 Spirits consumption in Europe

The overall spirits sales value in the EU+ in 2020 amounted to 42.9 billion Euros (including taxes) which was by about 3.9 % less than in the pre-COVID year 2019. As taxes still play a crucial role in the spirits sector (even though VAT rates have been temporarily lowered in many countries in 2020 as an economic relief measure), it might be more interesting to look at sales values *excluding* tax: They add up to about 23.6 billion Euros. Hence, EU+ countries have reduced their excess production quite massively compared to 2019. Now production and consumption figures are almost equal.

Figure 3 shows consumption in per-capita terms by EU+ country (only adults of legal drinking age are considered). We find that spirits sales have not dropped dramatically between 2019 and 2020. Quite a significant north-south divide becomes obvious: Consumers in southern Europe (especially Spain, Greece, Portugal, Cyprus and Malta) have cut spirits purchases by almost a third while consumers in Norway and Sweden even bought about 20 % more. It must be noted, though, that cross-border shopping which accounted for a considerable share of spirits consumption in Scandinavia, became virtually impossible during the pandemic. Hence, spirits consumption may have remained relatively unchanged in Norway and Sweden between 2019 and 2020. Former cross-border shopping now just shows up in domestic sales statistics.

Figure 3: Per-capita consumption (= sales) of spirits beverages (in 2020)



Source: IWSR (2022), including taxes.

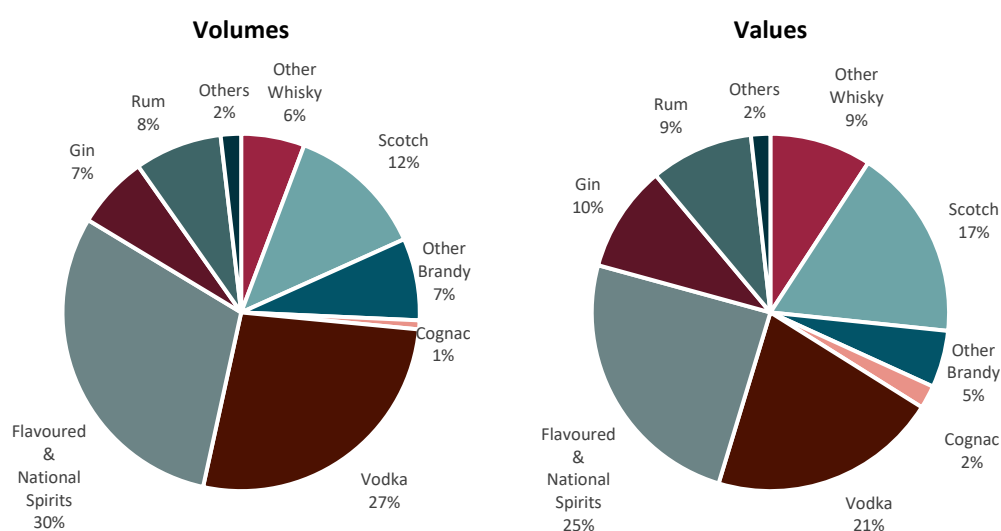
Table 2 shows the estimated consumption values and volumes by category.

Table 2: Sales (in Euros and absolute volumes) 2020

Category	Sales in bill. Euros (Δ 2019/2020 in parentheses)		Sales in mill. hectolitres (Δ 2019/2020 in parentheses)	
Flavoured & National Spirits	10.55	(-6.4 %)	7.02	(-9.1 %)
Vodka	8.91	(-4.7 %)	6.25	(-4.8 %)
Scotch Whisky	7.48	(+0.4 %)	2.91	(-3.9 %)
Gin	4.14	(-5.3 %)	1.53	(-9.8 %)
Rum	4.01	(-4.7 %)	1.84	(-9.7 %)
Other Whisky	3.96	(+1.7 %)	1.33	(-2.4 %)
Other Brandy	2.21	(-4.2 %)	1.73	(-6.2 %)
Cognac	0.90	(-2.2 %)	0.19	(-3.3 %)
Others	0.75	(-15.3 %)	0.43	(-13.4 %)
TOTAL	42.91	(-3.9 %)	23.23	(-6.9 %)

Source: Own calculations on the basis of IWSR (2022), including taxes.

The consumption patterns by category in the EU+ are shown in Figure 4. We do not see notable shifts compared to the *base study* (the same is true for the country level). This is not surprising as consumers' tastes do not change that much within a short period of time, even during a pandemic. More detailed information about the categories will be given further below in Appendix A.

Figure 4: Spirits consumption by categories (in 2020)

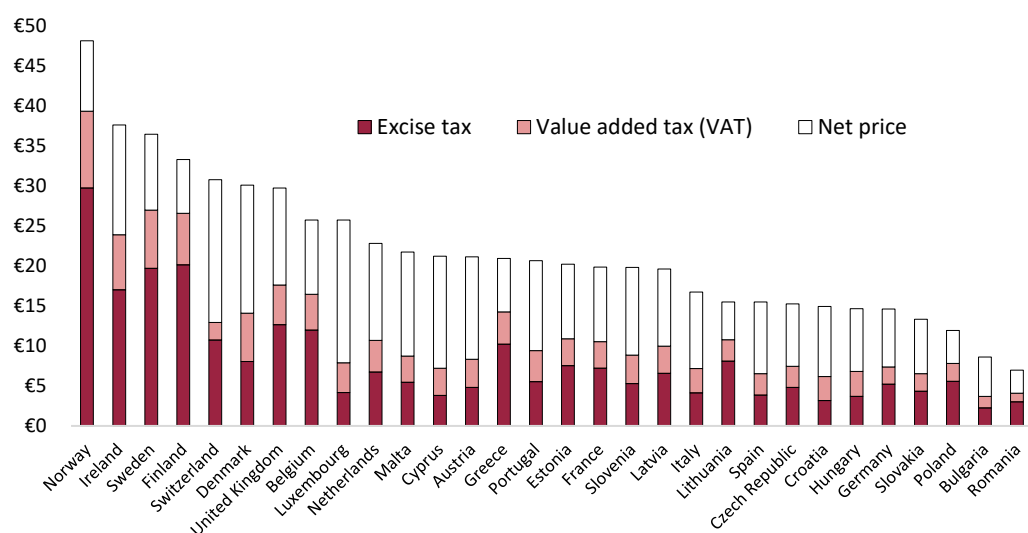
Source: Own calculations on the basis of IWSR (2022), including taxes.

Spirits prices in most countries have the highest tax content among all alcoholic beverages. Basically, spirits are subject to two kinds of taxation instruments: First,

countries impose excise taxes per hectolitre of pure alcohol (HPLA). Excise tax is a considerable if not the largest component of spirits prices in many countries.⁵ After excise tax has been added, the products are subject to the second taxation instrument which is the ordinary value-added tax (VAT) that applies to most products. Hence, excise taxes increase the VAT base.

Little has changed here compared to 2019. Many countries have granted temporary VAT relief measures in 2020 in order to dampen the effects of COVID-19, but most of them (except Germany and Ireland) excluded alcoholic beverages. If we take gross prices per litre as published by IWSR and decompose them roughly into VAT, excise tax and net price, we would yield something like Figure 5. Obviously, taxes are still by far the largest spirits price component in many countries. In 14 EU+ countries, the share of excise tax and VAT in off-premise gross prices for one litre of spirits is more than 50 %.

Figure 5: Price decomposition (for 1 litre of spirits (off-premise), 40% vol.)



Source: Own calculations on the basis of IWSR (2022), EUROPEAN COMMISSION, DG Taxation and Customs Union (2021) and Spirits Europe. Exceptions might apply in some countries. Identical gross prices assumed for Belgium and Luxembourg.

An exercise like this, however, would have to consider that on-premise prices are higher than off-premise prices. Hence, the actually realized average gross prices per litre would be higher, especially in those countries in which on-premise consumption is popular. As a consequence, the VAT share would rise and the excise share would fall, as the latter is a fixed amount per unit of pure alcohol that does not change regardless whether a drink is consumed in a bar or at home. If we build on IWSR net prices, and then take into account that on-premise consumption increases prices and VAT (but not excise), we

⁵ Excise revenues are published by European Commission, DG Taxation and Customs Union (2021): https://ec.europa.eu/taxation_customs/business/excise-duties-alcohol-tobacco-energy/excise-duties-alcohol_en.

estimate the combined amount of VAT and excise duty revenue in 2020 to about 21.5 billion Euros which is about 15 % less than in 2019. It is especially the decline in on-premise consumption during COVID-19 lockdowns in many countries over long periods of time that has depressed the tax numbers.

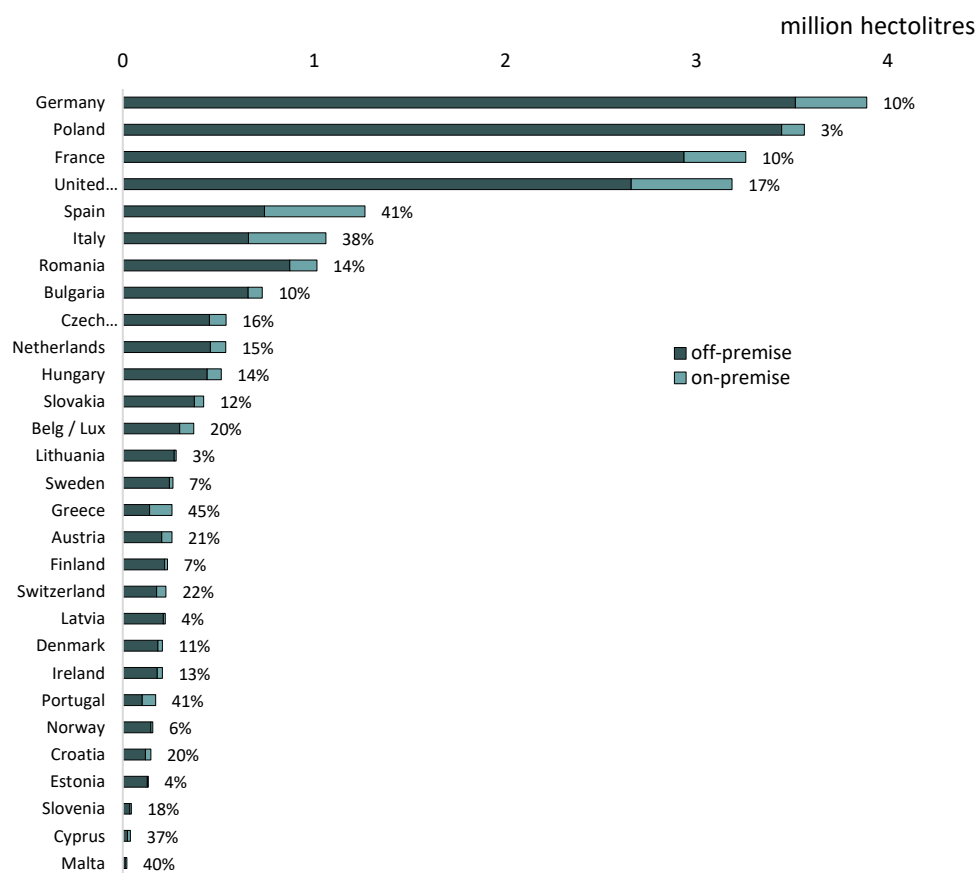
The distribution of on-/off-premise sales is shown in Figure 6 and Figure 7.⁶

We have already noted that per-capita spirits sales developed very differently during the COVID-19 crisis. They did not decrease dramatically for the overall EU+ but dropped considerably in southern Europe and even increased in Scandinavia.⁷ The on- vs. off-premise analysis can contribute to find the reasons: The on-premise shares dropped everywhere due to restaurants and bars being closed for several months in most countries. Next to nothing was consumed on-premise in the Baltics and Scandinavia even before COVID-19 hit. Hence, the loss in terms of spirits sales was not too big there and was easily compensated by increased off-premise sales. In southern Europe, however, the dropping on-premise shares meant much larger decreases in terms of overall sales; and they were not compensated by off-premise sales as shown in Figure 8.

⁶ Figure 6 is sorted by 2020 consumption volumes; Figure 7 sorts countries by their 2020 on-premise volume shares.

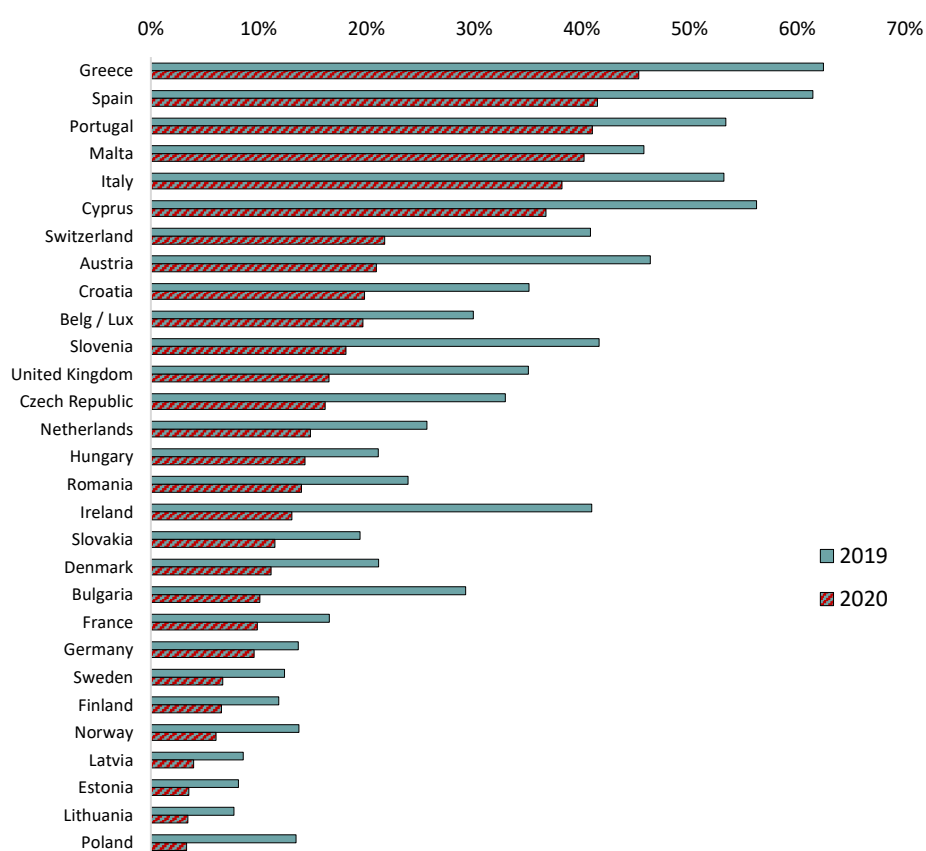
⁷ Again, cross-border shopping must be mentioned for the latter, since this source of consumption was not open for many months.

Figure 6: On- vs. off-premise sales (in 2020)



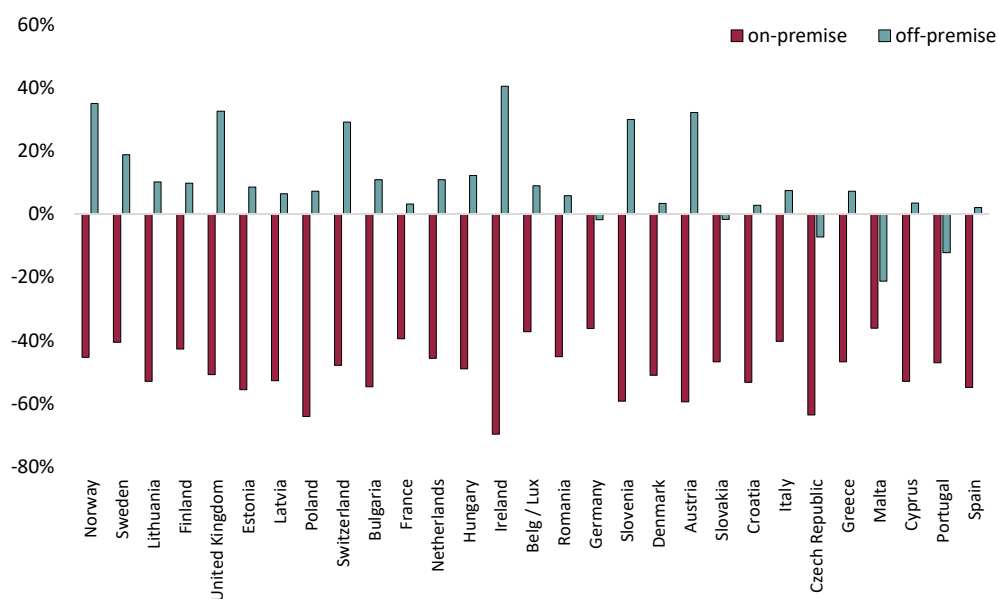
Source: IWSR (2022).

Figure 7: On-premise shares 2019 vs. 2020 (volumes)



Source: IWSR (2022).

Figure 8: On- vs. off-premise development between 2019 and 2020 (volumes)



Source: IWSR (2022).

3 Results

3.1 Economic effects

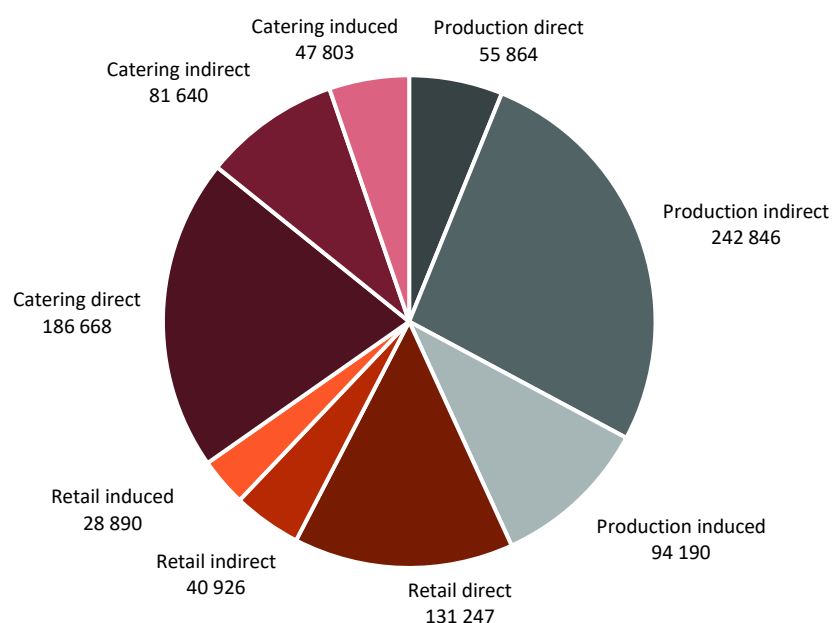
In total, spirits production and consumption activities supported about 910,000 jobs in the EU+ in 2020; this is a minus of about 26 % compared to the pre-COVID-19 year. When this figure was comparable to the entire work force of Lithuania in the base study, it is now rather the work force of Slovenia.⁸

Figure 9 shows where these jobs are: We find that employment in the spirits production activities have changed only mildly. About 56,000 jobs (-9 %) still fall upon the actual production of spirits; those are called *direct* effects of production (see the dark grey slice in Figure 9). Another 243,000 jobs (-6 %) are supported in an *indirect* manner at producers of intermediate products, including agriculture, malting etc. Another 94,000 jobs (-13 %) are *induced* by the direct and indirect activities as employees will spend their income on consumption and will thereby trigger additional effects all across the value-added chain. The orange slices in Figure 9 depict the employment results for the retail sector. We see here that the numbers have even increased compared to the pre-COVID year. Spirits now support almost 131,000 jobs (+29 %) directly in retail trade. As this sector does not require a lot of intermediate goods, the shares of indirect and induced effects are smaller than for production (together about 70,000 (+23 %)). Finally, the pink slices represent the catering sector which has suffered dramatically compared to pre-COVID. While it accounted for more than half of all employment triggered by spirits in the EU+ in 2019, it is now little more than a third. Only about 187,000 jobs (-57 %) are still supported directly at bars or restaurants; another 129,000 jobs (-39 %) are added catering-related in an indirect or induced manner.

In terms of gross value added (GVA), the spirits sector was responsible for about 45.5 billion Euros in 2020; this is a loss of about 24 % compared to 2019. As all countries have been hit by COVID-19, the distribution by country as shown in Figure 10 has hardly changed compared to the base study.

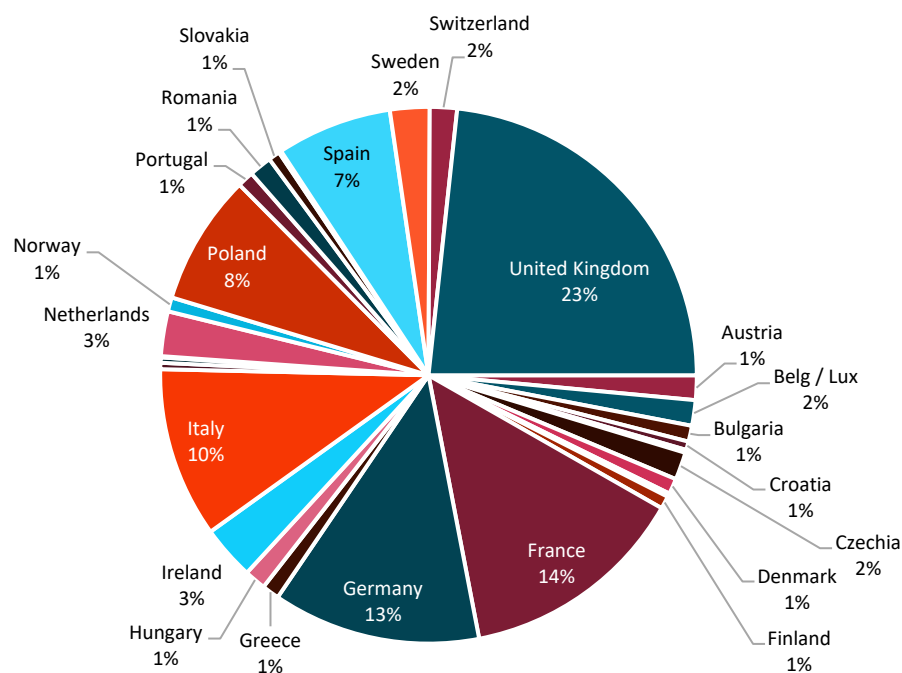
⁸ See Eurostat (2022b) for overall employment numbers.

Figure 9: Employment results by type of effect in the EU+



Source: IHS (2022).

Figure 10: GVA effects by EU+ country



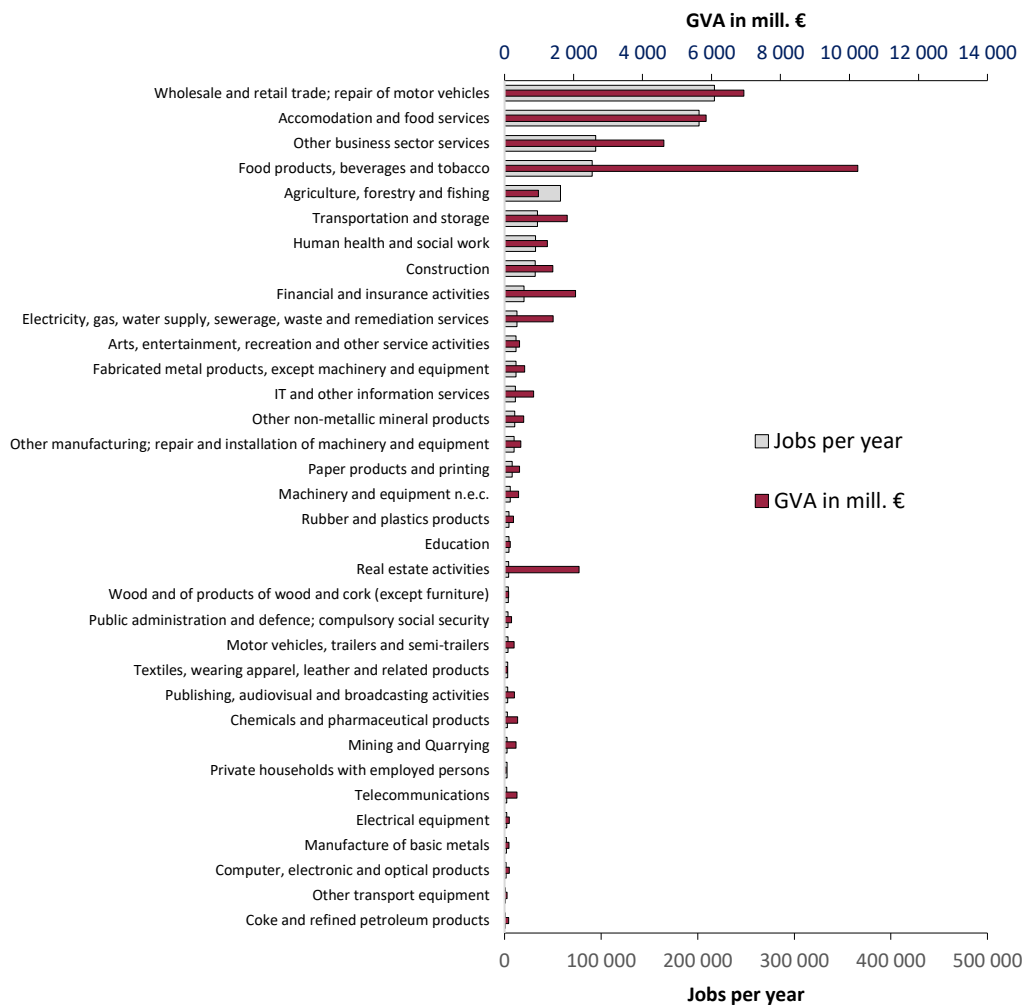
Source: IHS (2022).

The fiscal effects in 2020 amounted to 16.6 billion Euros (-23 % compared to 2019). This number includes for example income and profit taxes paid in all industries influenced by spirits production and consumption. What the standard input-output model can not capture, however, is the amount of value added tax (VAT) and excise duties for the actual spirits products. We have estimated them to about 21.5 billion Euros (-15 % compared to 2019) in subsection 2.2 based on IWSR data and assumptions concerning on- and off-premise consumption. If we add both numbers, we yield the overall fiscal effect of spirits of 38.1 billion Euros (-19 % compared to 2019).

The GVA and employment effects by industry are – sorted by jobs per year – presented in Figure 11. The red bars represent the respective gross value added effects (plotted on the top axis in million Euros); the grey ones represent the employment effects (plotted on the bottom axis).

Unsurprisingly, the sector *accommodation and food services* (which relates to the pink areas in Figure 9), has lost its leading position from 2019. On the other hand, *wholesale and retail trade* (see the orange slices in Figure 9) has gained since 2019 so that these two sectors have switched positions. This clearly reflects the phenomenon of a shift from on-premise to off-premise during the COVID-19 pandemic. The manufacturing sector *food products, beverages and tobacco* that distilleries belong to (see the grey slices in Figure 9) has not changed much.

Figure 11: GVA and employment effects by industry in the EU+



Source: IHS (2022). The axes are chosen as in the base study for the sake of quick comparability.

The overall economic effects (employment, gross value added and fiscal effects) are summarized again in Table 3. The tables on the subsequent pages show the detailed results for production as well as for on-premise consumption (i. e. the catering sector) and off-premise consumption (i. e. retail trade).

Table 3: Overall economic effects of spirits in the EU+ (including production, retail trade and catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
United Kingdom	10 599	5 106	3 387	8 492	2 107	126 283	56 336	44 342	100 678	25 605	3 587	1 550	1 128	2 678	909
France	6 248	2 127	2 911	5 037	1 211	85 578	31 020	39 141	70 161	15 417	3 180	975	1 448	2 422	758
Germany	5 702	1 589	2 634	4 222	1 479	106 758	42 506	42 037	84 543	22 215	2 159	551	967	1 518	641
Italy	4 673	1 593	2 186	3 779	895	75 152	24 475	35 764	60 239	14 912	1 825	553	865	1 419	406
Poland	3 584	974	2 000	2 973	611	143 854	43 148	77 701	120 849	23 005	1 093	258	568	826	268
Spain	3 164	1 256	1 172	2 428	736	62 669	26 907	22 447	49 354	13 315	1 116	390	407	797	319
Ireland	1 483	862	435	1 297	185	11 869	6 603	3 423	10 026	1 843	328	169	97	266	62
Netherlands	1 226	365	583	948	278	21 028	9 609	7 649	17 258	3 770	335	86	153	240	96
Sweden	1 085	453	405	858	227	12 361	5 629	4 271	9 900	2 461	448	148	176	324	124
Czechia	756	295	306	601	155	26 261	11 904	9 551	21 455	4 806	237	83	93	175	62
Switzerland	746	219	290	510	237	9 143	4 545	2 512	7 057	2 086	171	41	68	109	62
Belg/Lux	700	163	362	525	174	9 381	3 409	4 045	7 454	1 927	298	66	151	217	81
Austria	675	264	266	530	145	9 933	4 545	3 551	8 097	1 836	260	89	106	195	65
Romania	619	226	241	467	152	37 617	15 572	13 704	29 275	8 341	130	44	42	86	44
Hungary	589	231	238	469	120	31 571	16 588	9 982	26 570	5 001	208	67	79	145	63
Greece	475	199	197	396	79	14 977	7 056	5 571	12 627	2 351	142	53	58	111	31
Portugal	445	189	148	337	108	14 150	6 268	4 730	10 998	3 152	148	54	49	102	45
Bulgaria	437	162	186	347	89	46 851	23 811	15 919	39 730	7 122	106	35	34	69	38
Denmark	427	151	177	328	99	8 053	4 664	2 233	6 897	1 155	183	53	80	133	51
Norway	388	67	206	273	115	3 175	1 175	1 188	2 364	812	148	24	73	97	50
Finland	349	105	162	267	82	5 246	1 948	2 203	4 150	1 095	130	36	56	92	37
Slovakia	316	117	124	241	75	14 065	8 245	3 711	11 956	2 109	91	32	33	64	27
Croatia	232	110	68	178	54	10 489	5 394	2 865	8 258	2 230	68	26	17	43	25
Latvia	174	72	62	134	40	8 043	4 224	2 307	6 531	1 512	47	16	16	32	15
Lithuania	146	63	52	115	31	5 821	2 935	1 787	4 721	1 100	33	12	11	23	10
Estonia	96	37	38	76	21	3 993	2 240	1 106	3 346	647	28	10	10	19	9
Cyprus	82	41	25	66	16	2 716	1 710	598	2 308	407	23	8	8	16	7
Slovenia	67	20	28	48	20	2 181	833	814	1 646	535	24	6	10	16	8
Malta	34	17	11	29	5	858	482	261	743	115	9	4	3	7	2
EU+	45 517	17 074	18 899	35 972	9 545	910 074	373 780	365 412	739 192	170 883	16 556	5 438	6 805	12 243	4 313

Source: IHS (2022).

Table 4: Economic effects of spirits production in the EU+ sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
United Kingdom	7 103	3 493	2 324	5 817	1 286	58 253	12 561	29 949	42 509	15 744	2 364	1 119	699	1 818	546
France	4 116	1 183	2 166	3 349	767	46 811	7 867	29 186	37 053	9 758	2 069	563	1 025	1 587	482
Germany	3 214	546	1 831	2 377	837	46 410	4 645	29 203	33 848	12 562	1 170	182	628	811	359
Italy	3 037	836	1 606	2 442	595	41 153	4 848	26 370	31 218	9 935	1 155	284	604	887	268
Poland	2 333	305	1 612	1 916	417	83 785	5 008	63 139	68 148	15 637	699	81	436	518	181
Ireland	1 234	746	356	1 102	132	6 802	2 684	2 767	5 451	1 351	259	139	76	214	45
Spain	1 222	287	611	898	324	20 141	2 786	11 457	14 243	5 897	416	87	192	280	136
Sweden	682	261	283	543	139	6 224	1 742	2 971	4 714	1 510	275	87	113	200	75
Netherlands	620	102	366	468	152	7 333	643	4 631	5 274	2 059	162	24	88	111	51
Czechia	395	130	181	311	84	10 272	2 006	5 652	7 658	2 614	117	35	49	84	33
Belg/Lux	311	11	210	221	90	3 464	160	2 316	2 476	988	123	4	78	83	41
Austria	307	75	158	232	74	3 855	822	2 095	2 917	938	115	25	57	82	33
Switzerland	243	21	125	146	97	2 042	182	1 029	1 212	830	56	4	27	31	24
Norway	233	20	145	166	68	1 438	170	789	959	480	86	7	49	57	29
Finland	216	50	115	165	51	2 757	511	1 562	2 073	684	76	17	36	53	23
Hungary	211	59	105	165	46	7 818	1 513	4 369	5 882	1 936	64	14	28	42	22
Romania	176	44	83	127	49	8 801	1 521	4 594	6 115	2 686	36	9	14	23	14
Bulgaria	164	22	108	129	34	14 065	2 161	9 155	11 317	2 748	38	5	20	24	14
Greece	148	38	80	118	30	3 879	686	2 320	3 006	873	45	11	22	33	12
Denmark	122	12	71	83	39	1 464	135	876	1 011	453	46	4	24	28	18
Portugal	114	21	58	80	35	3 336	410	1 888	2 298	1 038	35	6	16	22	14
Slovakia	106	15	60	75	31	3 283	661	1 738	2 399	883	28	4	14	18	10
Croatia	82	31	32	63	19	2 768	659	1 326	1 984	784	23	7	8	15	8
Latvia	70	21	32	52	17	2 517	630	1 231	1 860	656	17	4	6	10	6
Lithuania	63	16	33	48	14	2 081	442	1 126	1 569	513	14	3	6	9	5
Estonia	41	11	20	31	10	1 208	338	557	895	312	12	3	4	7	4
Slovenia	21	1	12	13	8	573	17	343	360	213	7	0	4	4	3
Cyprus	11	2	7	8	3	285	52	154	207	78	3	0	2	2	1
Malta	4	0	2	3	1	83	5	49	54	29	1	0	0	1	0
EU+	26 597	8 360	12 789	21 149	5 448	392 900	55 864	242 846	298 710	94 190	9 511	2 729	4 326	7 055	2 456

Source: IHS (2022).

Table 5: Economic effects of spirits consumption in the EU+ (here: off-premise, i.e. retail) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
United Kingdom	1 227	573	367	940	288	22 786	14 499	4 827	19 326	3 460	427	154	146	300	127
Germany	1 162	533	349	882	280	26 132	16 710	5 194	21 904	4 228	443	187	131	319	124
France	1 009	451	347	798	212	19 722	12 607	4 408	17 015	2 706	509	194	183	377	132
Poland	882	526	238	764	118	39 900	27 408	8 027	35 434	4 466	268	137	77	214	54
Spain	281	119	85	204	78	8 313	5 316	1 590	6 906	1 407	102	39	30	69	33
Italy	277	111	103	214	64	4 983	2 349	1 581	3 929	1 053	109	39	42	81	28
Sweden	236	128	61	188	47	3 453	2 311	629	2 940	513	96	41	28	69	27
Netherlands	218	107	65	172	46	5 298	3 753	917	4 670	628	59	25	18	43	16
Romania	149	53	57	110	39	10 510	5 994	2 347	8 341	2 169	35	12	11	23	12
Denmark	146	71	48	119	27	3 183	2 244	620	2 863	320	59	25	19	43	15
Switzerland	144	55	46	101	43	1 654	899	376	1 275	379	32	10	11	21	11
Hungary	141	73	41	114	27	8 888	6 134	1 639	7 773	1 115	51	21	15	36	15
Belg/Lux	127	49	49	98	30	1 982	1 102	552	1 654	328	54	20	21	40	14
Czechia	126	55	44	99	27	5 470	3 274	1 372	4 646	824	41	16	14	31	11
Bulgaria	116	62	33	96	20	13 347	9 569	2 176	11 745	1 603	28	12	7	19	9
Austria	110	48	37	85	25	2 054	1 266	471	1 737	317	43	17	15	31	11
Ireland	87	45	23	69	18	1 650	1 263	224	1 487	163	22	10	6	16	6
Slovakia	85	43	25	68	17	3 560	2 333	753	3 086	474	24	11	7	18	6
Norway	78	30	26	56	22	1 014	669	182	851	163	32	11	11	21	10
Finland	72	33	23	56	16	1 365	843	311	1 155	210	28	11	9	20	7
Latvia	69	35	20	55	14	3 680	2 478	674	3 152	528	18	8	5	13	5
Lithuania	52	32	11	42	9	2 231	1 569	327	1 896	335	11	6	2	8	3
Portugal	48	22	13	35	12	1 819	1 084	371	1 454	364	16	6	4	11	5
Croatia	44	21	12	34	11	2 806	1 867	497	2 364	442	14	5	3	8	5
Greece	44	19	15	34	10	2 214	1 653	272	1 926	288	15	6	5	11	4
Estonia	40	20	13	33	7	2 004	1 410	375	1 786	219	11	4	3	8	3
Slovenia	16	7	5	12	4	494	247	139	385	109	6	2	2	4	2
Cyprus	12	7	3	9	2	404	287	55	342	62	3	1	1	2	1
Malta	5	3	1	4	1	147	112	19	132	16	1	1	0	1	0
EU+	7 002	3 329	2 159	5 488	1 514	201 063	131 247	40 926	172 173	28 890	2 557	1 031	827	1 859	698

Source: IHS (2022).

Table 6: Economic effects of spirits consumption in the EU+ (here: on-premise, i.e. catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
United Kingdom	2 269	1 040	696	1 736	533	45 244	29 276	9 566	38 842	6 401	796	277	283	560	236
Spain	1 661	850	477	1 327	334	34 215	18 804	9 400	28 205	6 011	598	264	184	448	149
Italy	1 359	646	477	1 123	236	29 016	17 278	7 814	25 092	3 924	561	231	219	451	110
Germany	1 325	509	454	963	362	34 216	21 151	7 640	28 791	5 425	546	181	207	388	158
France	1 123	493	398	891	232	19 046	10 546	5 547	16 093	2 953	602	218	240	458	144
Netherlands	388	156	153	309	80	8 396	5 214	2 100	7 314	1 082	114	37	48	85	28
Poland	370	143	150	293	77	20 169	10 732	6 535	17 267	2 901	126	39	55	94	32
Switzerland	360	143	119	263	97	5 447	3 464	1 106	4 570	877	82	27	30	56	26
Romania	293	129	101	230	63	18 306	8 057	6 762	14 819	3 487	59	23	17	40	19
Greece	284	142	103	244	40	8 884	4 717	2 978	7 695	1 189	83	36	31	67	16
Portugal	283	145	77	223	61	8 995	4 774	2 472	7 246	1 750	96	41	28	70	27
Belg/Lux	262	104	103	207	55	3 935	2 147	1 177	3 324	611	121	42	52	94	27
Austria	258	141	71	212	46	4 024	2 458	985	3 443	581	102	47	34	81	21
Hungary	236	99	91	190	47	14 865	8 942	3 973	12 915	1 950	94	32	36	68	26
Czechia	235	110	81	190	44	10 518	6 625	2 526	9 150	1 368	79	32	29	61	18
Sweden	167	64	62	126	41	2 684	1 575	671	2 246	438	77	21	35	55	22
Ireland	162	71	56	127	36	3 417	2 656	432	3 088	329	47	20	16	36	12
Denmark	159	69	57	126	33	3 405	2 286	737	3 023	382	79	24	37	61	18
Bulgaria	157	78	45	122	35	19 439	12 080	4 588	16 668	2 771	40	17	7	25	15
Slovakia	125	59	39	98	27	7 223	5 251	1 220	6 471	752	39	16	12	28	10
Croatia	106	58	24	82	25	4 914	2 869	1 042	3 910	1 004	31	14	6	20	11
Norway	77	17	34	52	25	723	336	217	554	169	31	6	13	20	11
Finland	61	22	24	45	15	1 124	594	329	923	201	26	8	11	19	7
Cyprus	59	33	16	48	10	2 027	1 371	389	1 760	267	16	6	5	12	5
Latvia	36	16	11	27	9	1 847	1 117	402	1 518	328	13	4	5	9	3
Lithuania	32	15	9	24	7	1 509	923	333	1 257	252	8	3	3	6	2
Slovenia	31	12	10	23	8	1 114	569	332	901	213	12	4	4	8	3
Malta	25	14	8	22	3	628	365	192	557	71	6	3	2	5	1
Estonia	16	7	6	13	4	781	491	174	665	116	6	2	2	4	2
EU+	11 917	5 384	3 951	9 335	2 583	316 111	186 668	81 640	268 308	47 803	4 488	1 677	1 652	3 329	1 159

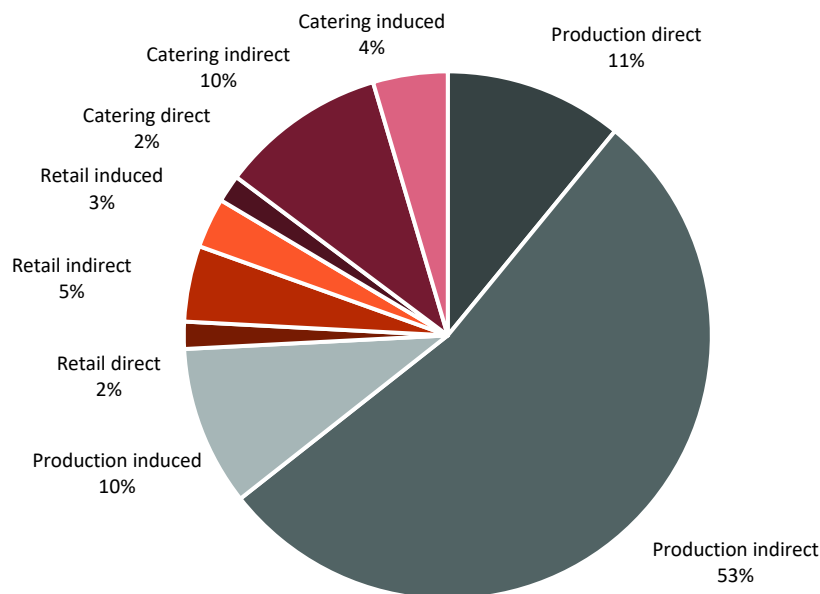
Source: IHS (2022).

3.2 Environmental results

As many economic activities around spirits production and consumption have been decreased during the first phase of the COVID-19 pandemic in 2020, the related “footprint”, i. e. the amount of greenhouse gases (GHG) released into the atmosphere and the amount of land reserved for agricultural activities related to spirits, has also decreased. Overall, we now estimate spirits production and consumption in the EU+ to be responsible for about 17.4 million tonnes of CO₂ equivalents in the EU+. This is about 11 % less than in 2019.

The reason that GVA and employment went down by about a quarter but CO₂ by only 11 % is due to the fact that the catering industry, which suffered the largest losses, only accounts for a small share of spirits-related emissions. Figure 12 presents the emission distribution by activities. Only little has changed here. Only the catering shares (the pink slices) are even smaller than in 2019. As before, the production activities produce far more GHG emissions than retail and catering together.

Figure 12: CO₂ equivalent emissions by type of activity

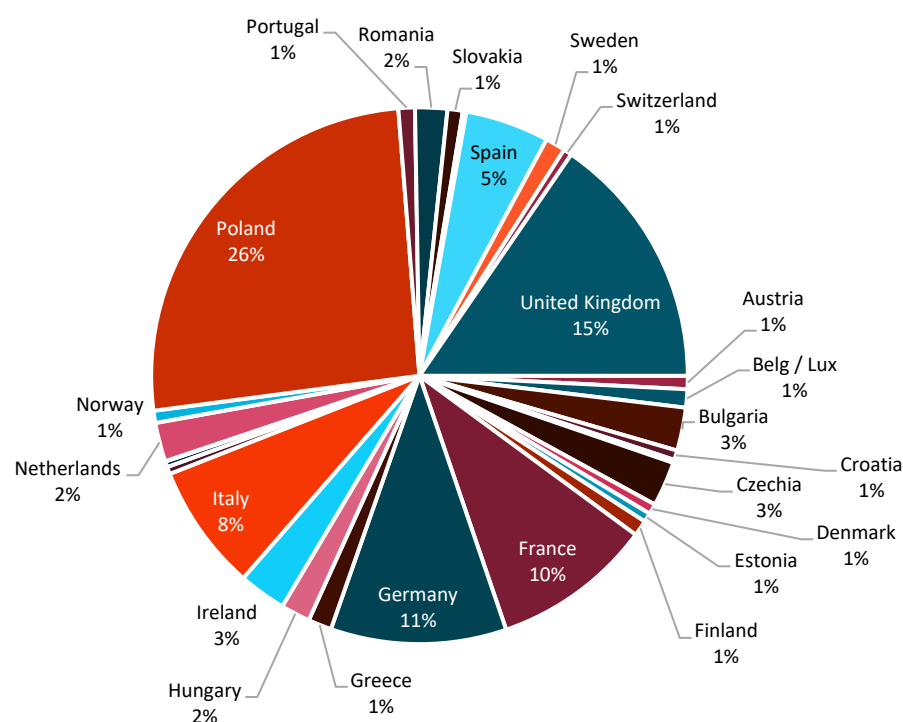


Source: IHS (2022).

Figure 13 presents the distribution of CO₂ equivalents by country. As production activities are the most polluting spirits-related activity, countries that produce large amounts of spirits report large GHG emissions (Poland catches the eye just like in the base study). Hence, the fact that the catering industry suffered the most from COVID-19

and that the intensity of COVID-related measures differed between countries, does hardly play a role for how CO₂ emissions were distributed across countries. Only production activities matter.

Figure 13: CO₂ equivalent emissions by country



Source: IHS (2022).

The environmental results are summarised in Table 7. As we have already shown in Figure 12 that production activities are accountable for most ecological effects, we show the environmental results for production only in Table 8.

Table 7: Environmental effects of spirits in the EU+ (including production, on- and off-trade consumption)

	CO ₂ equivalents (in 1,000 tonnes)					Land use (in hectares)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir.+ind.	induced
Poland	4 490	251	3 562	3 813	677	122 370	0	102 129	102 129	20 241
UK	2 683	887	1 402	2 288	395	122 435	0	101 205	101 205	21 230
Germany	1 842	197	1 263	1 460	382	49 811	0	42 553	42 553	7 258
France	1 682	351	1 110	1 461	221	135 878	0	116 390	116 390	19 487
Italy	1 327	232	910	1 141	186	48 237	0	42 671	42 671	5 566
Spain	880	60	622	683	198	80 135	0	65 419	65 419	14 715
Ireland	498	112	340	452	47	15 663	0	13 464	13 464	2 199
Czechia	470	43	318	361	108	25 720	0	21 066	21 066	4 654
Bulgaria	452	23	325	348	103	36 455	0	28 351	28 351	8 104
Netherlands	408	50	277	327	81	8 034	0	6 504	6 504	1 530
Romania	337	18	214	232	105	36 426	0	25 637	25 637	10 790
Hungary	308	47	196	243	64	34 368	0	27 595	27 595	6 773
Greece	247	11	190	201	46	14 560	0	12 525	12 525	2 035
Sweden	209	44	129	173	36	18 083	0	14 775	14 775	3 308
Belg/Lux	191	16	132	148	43	5 175	0	4 386	4 386	789
Portugal	173	21	109	129	43	8 871	0	6 605	6 605	2 266
Finland	166	6	128	134	32	19 814	0	15 901	15 901	3 913
Slovakia	160	24	92	116	44	18 950	0	14 680	14 680	4 270
Austria	140	19	89	108	32	7 399	0	6 037	6 037	1 362
Norway	127	4	94	98	30	7 979	0	6 769	6 769	1 210
Denmark	109	8	75	84	25	6 929	0	5 628	5 628	1 301
Croatia	101	10	59	69	32	6 934	0	4 384	4 384	2 549
Estonia	96	9	63	72	23	9 272	0	6 711	6 711	2 561
Switzerland	90	12	53	65	24	3 596	0	2 946	2 946	650
Latvia	76	11	45	56	20	11 830	0	7 957	7 957	3 873
Lithuania	60	6	39	45	15	10 330	0	7 389	7 389	2 941
Slovenia	36	4	22	25	11	1 693	0	1 266	1 266	428
Cyprus	33	3	20	24	9	1 326	0	1 064	1 064	262
Malta	3	0	2	3	1	66	0	58	58	8
EU+	17 391	2 479	11 880	14 359	3 032	868 337	0	712 063	712 063	156 275

Source: IHS (2022).

Table 8: Environmental effects of spirits in the EU+ (only production)

	CO ₂ equivalents (in 1,000 tonnes)					Land use (in hectares)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir.+ind.	induced
Poland	3 688	130	3 104	3 234	454	100 164	0	86 856	86 856	13 308
UK	2 140	787	1 115	1 901	239	92 873	0	80 382	80 382	12 490
Germany	1 358	123	1 021	1 143	215	34 897	0	30 964	30 964	3 933
France	1 345	290	917	1 207	138	102 000	0	89 928	89 928	12 072
Italy	1 047	191	735	926	121	33 891	0	30 432	30 432	3 458
Spain	536	47	400	446	89	38 970	0	32 513	32 513	6 457
Ireland	452	104	315	419	33	13 072	0	11 658	11 658	1 414
Czechia	317	39	219	258	59	14 894	0	12 521	12 521	2 373
Netherlands	285	32	209	241	44	5 426	0	4 597	4 597	829
Bulgaria	275	12	224	235	39	19 003	0	15 991	15 991	3 012
Sweden	165	39	104	143	22	13 798	0	11 827	11 827	1 971
Hungary	152	23	104	128	24	13 861	0	11 483	11 483	2 378
Romania	130	6	90	96	34	12 238	0	8 961	8 961	3 277
Finland	126	4	103	107	19	15 071	0	12 683	12 683	2 388
Greece	116	4	94	98	18	5 329	0	4 526	4 526	803
Belg/Lux	114	3	88	91	22	2 856	0	2 457	2 457	399
Austria	92	14	62	75	17	4 378	0	3 699	3 699	679
Norway	90	2	71	73	17	5 739	0	5 051	5 051	688
Slovakia	85	13	52	66	19	8 378	0	6 692	6 692	1 687
Portugal	75	6	55	60	15	3 335	0	2 603	2 603	732
Denmark	62	4	47	51	11	4 014	0	3 425	3 425	588
Estonia	61	7	43	50	11	5 619	0	4 398	4 398	1 221
Croatia	48	6	30	36	11	2 880	0	2 009	2 009	871
Latvia	44	6	29	35	9	7 054	0	5 374	5 374	1 680
Lithuania	40	4	29	33	7	6 518	0	5 182	5 182	1 336
Switzerland	34	2	22	24	10	1 067	0	820	820	248
Slovenia	15	0	10	10	4	577	0	416	416	161
Cyprus	10	1	8	9	2	368	0	310	310	58
Malta	0	0	0	0	0	12	0	10	10	2
EU+	12 900	1 898	9 299	11 197	1 703	568 279	0	487 766	487 766	80 513

Source: IHS (2022).

If we relate our results to the sold spirits volumes (as reported by IWSR), we conclude that the production of one litre of spirits in the EU+ causes on average 3.71 kg CO₂ eq.⁹ This figure is (unsurprisingly) almost the same as in the base study. The average consumption of spirits in the EU+ has slightly decreased to 5.4 litres per capita in 2020 (-8 % compared to the base study) according to our calculations based on IWSR (2022). This means that the average yearly consumption of spirits per adult inhabitant in the EU+ is responsible for 19.9 kg CO₂ eq. which is about 7 % less than pre-COVID.

⁹ Referring to direct and indirect emission effects.

4 Conclusion

The aim of a study commissioned by spiritsEUROPE and conducted by the Institute for Advanced Studies in 2020 was to estimate the effects of the spirits sector on employment, gross value added (GVA) and fiscal effects in every EU+ country in 2019. In addition, it also investigated spirits-related tourism effects and the ecological footprint of the sector. We found that the production and consumption of spirits were responsible for almost 60 billion Euros in GVA in 2019. All in all, spirits supported 1.2 million jobs in the EU+. Governments collected spirits-related taxes and duties of about 46.8 billion Euros. About 20 million tonnes of CO₂ equivalents were linked to spirits production and consumption in the EU+.

Undoubtedly though, COVID-19 has hit hard in 2020 and did not spare spirits-related activities. The study at hand is therefore supposed to update the results for the COVID-year of 2020: We find that spirits production and consumption were pretty stable; at least much more stable than in other industries. We estimate European spirits producers' turnovers in 2020 about 24.2 billion Euros (which was about 8.9 % less than in 2019). At the same time, spirits worth 42.9 billion Euros (including taxes) have been sold in the EU+ which was by about 3.9 % less than pre-COVID.

Even though spirits production and consumption figures only decreased slightly, GVA and employment in the EU+ dropped by about a quarter. Spirits production and consumption were responsible for about 45.5 billion Euros in GVA which was about 24 % less than in 2019; this was enough to support 910,000 jobs in the EU+ which was about 26 % less than pre-COVID. The reason for these sharp declines is that the on-premise segment collapsed which was crucial for the economic effects from 2019. The largest economic effects in 2019 came not from spirits production but from consumption, especially from the catering sector. As many COVID-19 measures hit that sector in particular, the catering industry lost half of its spirits-related GVA and employment. Even though consumers switched from on- to off-premise consumption, the lucrative sales margins were lost.

Governments collected spirits-related taxes and duties of about 38.1 billion Euros which was about 19 % less than 2019. Roughly half of it still came from income, profit and other taxes on general economic activity along the value-added chains. The other half came from VAT and excise duty imposed on spirits sold in the EU+. Emissions of about 17.4 million tonnes of CO₂ equivalents are related to spirits in the EU+.

When interpreting the results presented in this report, it must be kept in mind that governments granted extensive relief payments, especially to the catering industry. Such payments have been outside the scope of this study.

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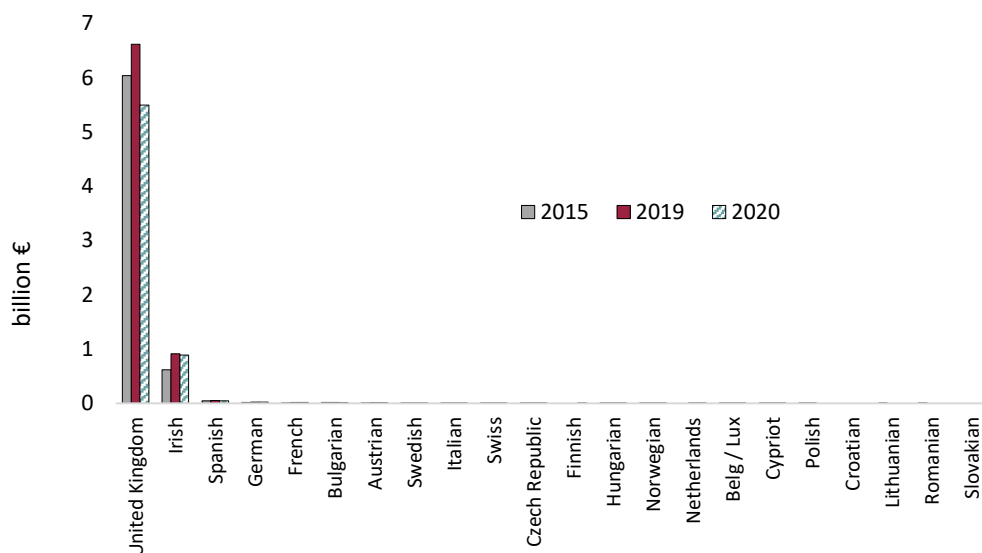
6 Appendix A: Analyses for individual categories or geographical indications

6.1 Whisk(e)y (including Scotch whisky & Irish whiskey)

6.1.1 Descriptives about whisk(e)y production and consumption

Whisky production turnovers for 2015, 2019 and the COVID-year 2020 are shown in Figure 14. Most whisky made in the EU+ comes from the United Kingdom; by far most of it is Scotch whisky. The UK production turnovers amount to 5.5 billion Euros in 2020. They have fallen severely from 6.6 billion Euros in 2019 but are even lower now than in 2015. Irish whiskey production is rather constant as about 0.9 billion Euros.

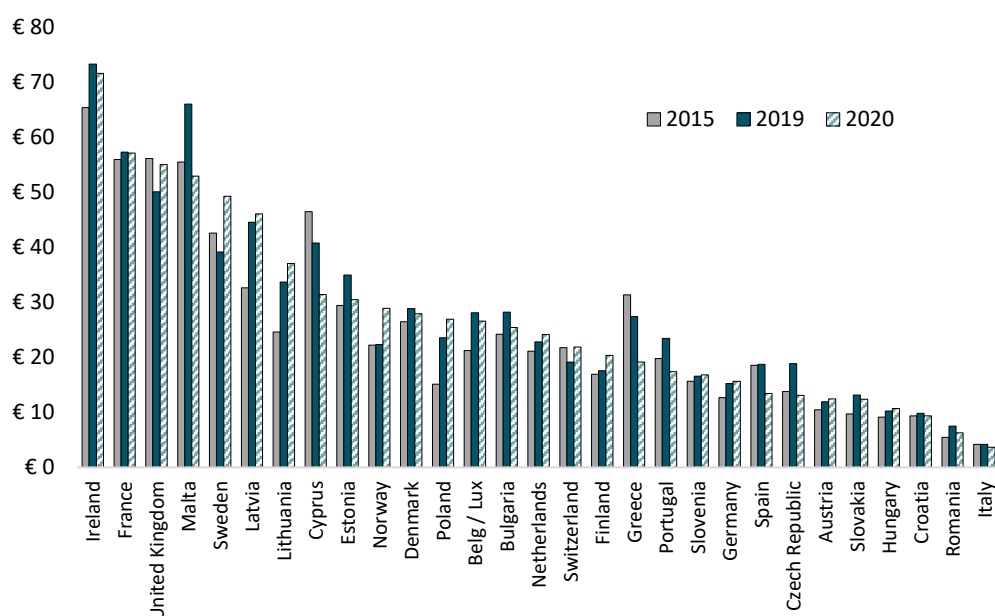
Figure 14: Production turnovers of whisky (2015/2019/2020, estimated)



Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

About 9.1 million hectoliters of whisky made in the EU+ have been sold in 2020 (about 0.9 million less than in 2019). Almost 90 % of whisky sales was Scotch (by far most of it *blended*); virtually the rest came from Ireland.

The consumption pattern is shown in Figure 15. It is not surprising that there is a strong preference for whisky in countries where it is produced. Still, France catches the eye: French per-capita whisky consumption has been stable during the COVID-19 crisis and now even ranks second in the EU+.

Figure 15: Annual whisky consumption per capita (only adults)

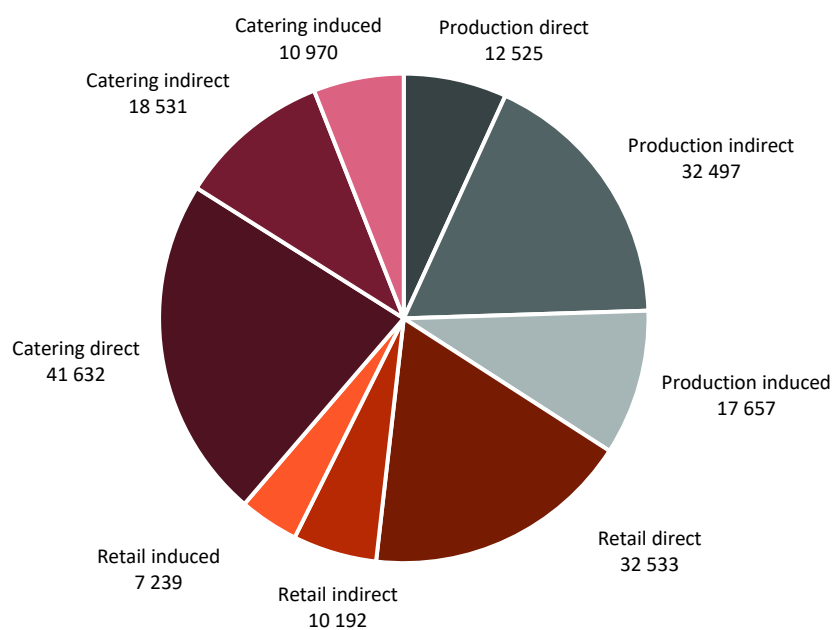
Source: IWSR (2022), including taxes.

6.1.2 Results

Whisky production and consumption in the EU+ can be associated with a gross value added (GVA) effect of about 11.7 billion Euros in 2020 (-25 % compared to pre-COVID) which corresponds to 184,000 supported jobs (-30 %). The fiscal effects are now estimated to 4.1 billion Euros (-25 %) in income and profit taxes etc. from all kinds of activities related to whisky production and consumption plus another 5.6 billion Euros (-6 %) in value added tax (VAT) and excise duties on the actual consumption of whisky.

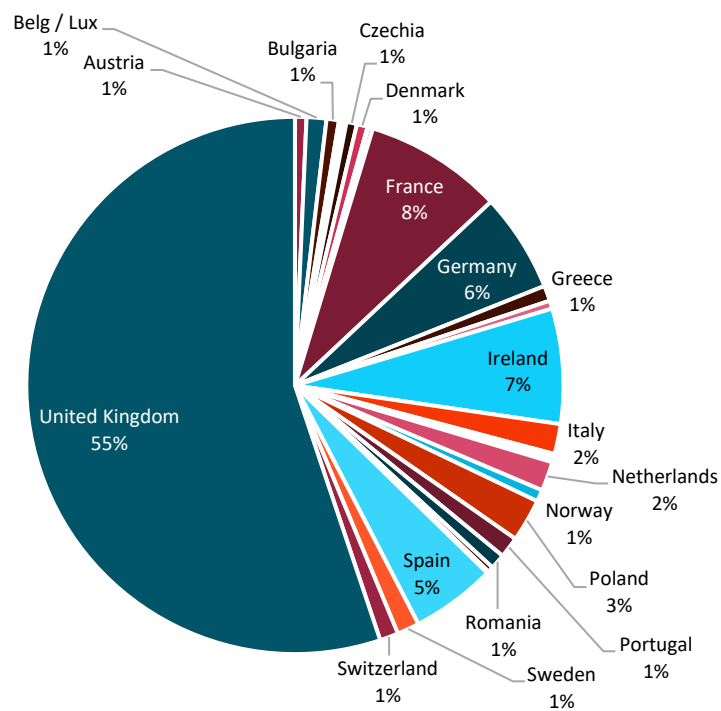
Figure 16 illustrates the different kinds of activities that the whisky employment effects come from. Figure 17 shows the GVA decomposition by country. The overall economic results for whisky are summarised in Table 9.

Figure 16: Employment results by type of effect (for whisky)



Source: IHS (2022).

Figure 17: GVA effects by country (for whisky)



Source: IHS (2022).

Table 9: Overall economic effects of whisky in the EU+ (including production, retail trade and catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
United Kingdom	6 466	3 316	2 009	5 325	1 141	61 546	21 511	26 117	47 629	13 917	2 167	1 041	632	1 672	494
France	976	399	363	763	213	17 411	9 851	4 845	14 696	2 715	506	174	200	374	131
Ireland	812	512	218	730	82	5 694	3 101	1 734	4 836	858	175	98	48	146	29
Germany	698	205	271	477	221	14 879	7 332	4 277	11 609	3 270	271	73	105	178	93
Spain	598	258	198	456	142	12 642	6 231	3 845	10 076	2 566	213	81	72	152	61
Poland	303	144	104	248	55	14 485	8 381	4 020	12 401	2 083	96	38	34	72	23
Italy	212	52	95	147	65	3 936	1 303	1 557	2 860	1 076	85	18	38	57	28
Netherlands	207	61	93	154	53	4 061	2 106	1 240	3 347	714	57	15	25	40	18
Sweden	157	68	52	120	37	2 231	1 288	548	1 836	395	66	22	24	46	20
Portugal	148	73	42	114	33	4 819	2 532	1 319	3 851	968	50	21	15	36	14
Belg/Lux	140	35	68	102	37	1 894	743	743	1 486	408	59	14	28	42	17
Switzerland	131	38	50	87	44	1 602	807	413	1 220	382	30	7	12	19	11
Greece	109	52	40	92	17	3 762	2 160	1 088	3 248	515	33	14	12	26	7
Romania	107	43	38	81	26	6 820	3 044	2 357	5 402	1 419	22	8	7	15	7
Bulgaria	87	41	29	69	18	10 186	6 237	2 518	8 755	1 430	22	9	5	14	8
Norway	83	7	48	55	28	507	153	178	331	176	31	3	17	20	12
Austria	81	32	29	61	20	1 248	615	384	999	249	31	11	12	23	9
Denmark	76	26	32	57	19	1 448	826	404	1 230	218	32	9	14	23	9
Czechia	74	28	28	56	18	3 127	1 683	873	2 556	571	24	8	9	17	7
Hungary	57	21	22	43	14	3 365	1 859	940	2 799	566	21	7	8	14	7
Slovakia	39	16	13	29	10	1 993	1 317	397	1 714	279	12	4	4	8	4
Finland	30	7	14	21	9	492	182	185	368	124	11	2	5	7	4
Croatia	27	14	7	20	6	1 328	779	283	1 062	266	8	3	2	5	3
Cyprus	26	14	7	22	5	907	610	172	782	126	7	3	2	5	2
Lithuania	26	14	7	21	5	1 188	765	229	994	194	6	3	2	4	2
Latvia	20	9	6	15	5	1 044	624	234	858	185	6	2	2	4	2
Slovenia	13	5	5	10	3	453	226	134	360	93	5	2	2	4	1
Malta	13	7	4	11	2	321	190	91	281	40	3	2	1	2	1
Estonia	8	3	3	6	2	388	232	92	324	63	2	1	1	2	1
EU+	11 726	5 500	3 894	9 394	2 332	183 776	86 690	61 220	147 910	35 866	4 053	1 690	1 338	3 028	1 025

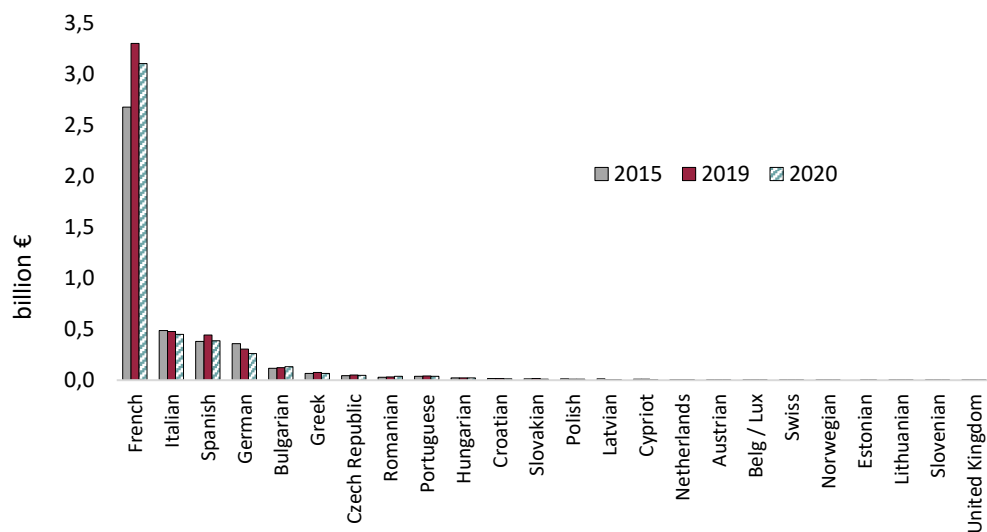
Source: IHS (2022).

6.2 Brandy (including Cognac & Brandy de Jerez)

6.2.1 Descriptives about brandy production and consumption

The brandy production turnovers are shown in Figure 18. Obviously, France has maintained its dominant role in terms of brandy production. The estimated production turnover of 3.1 billion Euros in 2020 (which was slightly less than in 2019: 3.3 billion Euros) comes almost entirely from Cognac production.

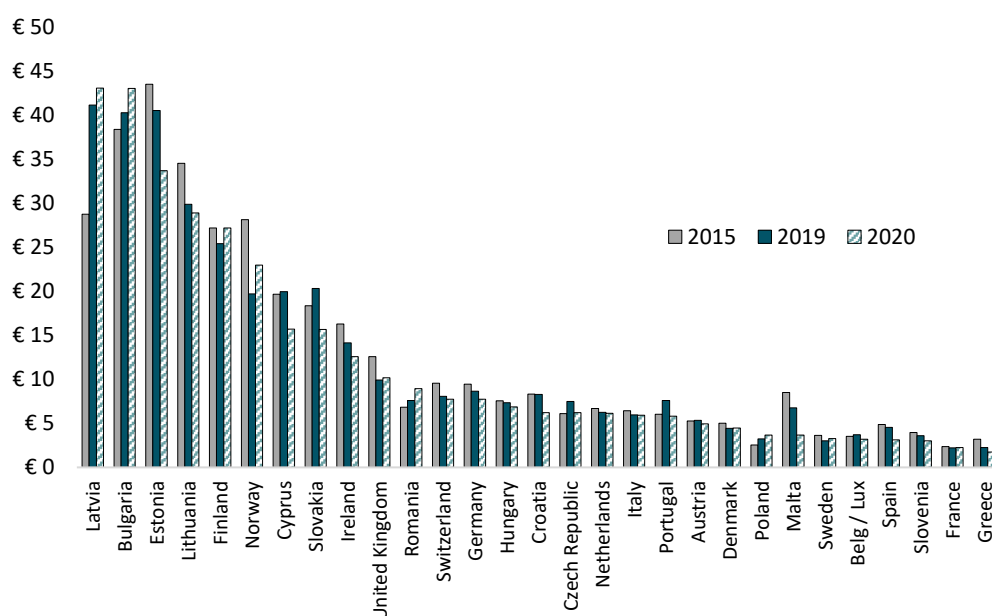
Figure 18: Production turnovers of brandy (2015/2019/2020, estimated)



Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

The composition of produced brandy in the EU+ by subcategory has not changed substantially since 2019. More than a third of it is Cognac but the lion's share consists of the different kinds of grape brandy produced in Spain, Italy or Bulgaria.

The consumption pattern for brandy is shown in Figure 19. French consumers rank now second to last in terms of brandy consumption per capita, even though their country is by far the largest European producer in this category. Nonetheless, they still have a strong preference for whiskies (as shown above in section 6.1). Also other brandy producing countries, like Greece or Italy, do not consume large quantities per capita and seem to favor other categories instead. The largest brandy consumption per capita in 2020 was reported in Latvia, Bulgaria and Estonia.

Figure 19: Annual brandy consumption per capita (only adults)

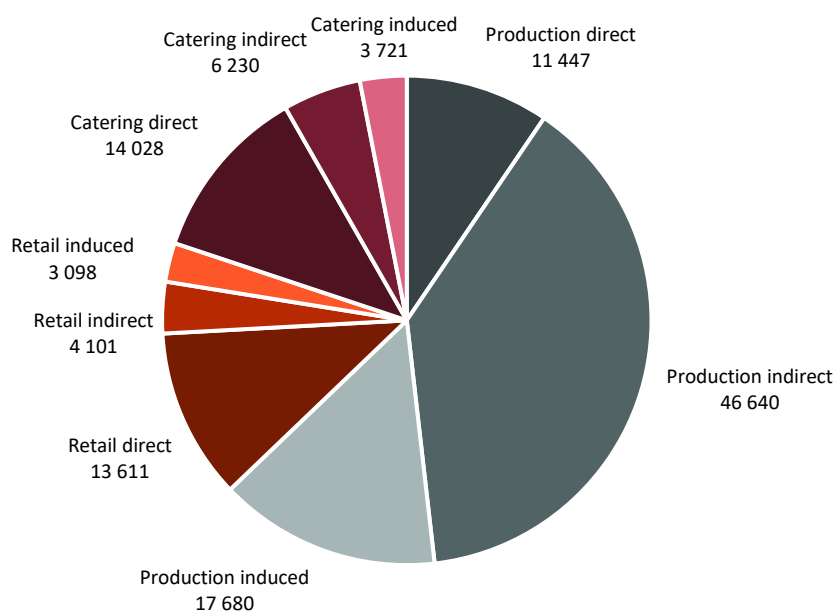
Source: IWSR (2022), including taxes.

6.2.2 Results

We estimate brandy production and consumption in the EU+ to generate a gross value added (GVA) effect of about 6.4 billion Euros in 2020 (-16 % compared to 2019) which would support about 121,000 jobs (-17 % compared to 2019). The fiscal effects are estimated to 2.6 billion Euros (-16 %) in income and profit taxes etc. from all kinds of activities related to brandy production and consumption plus another 1.4 billion Euros (-17 %) in value added tax (VAT) and excise duties for the actual consumption of brandy.

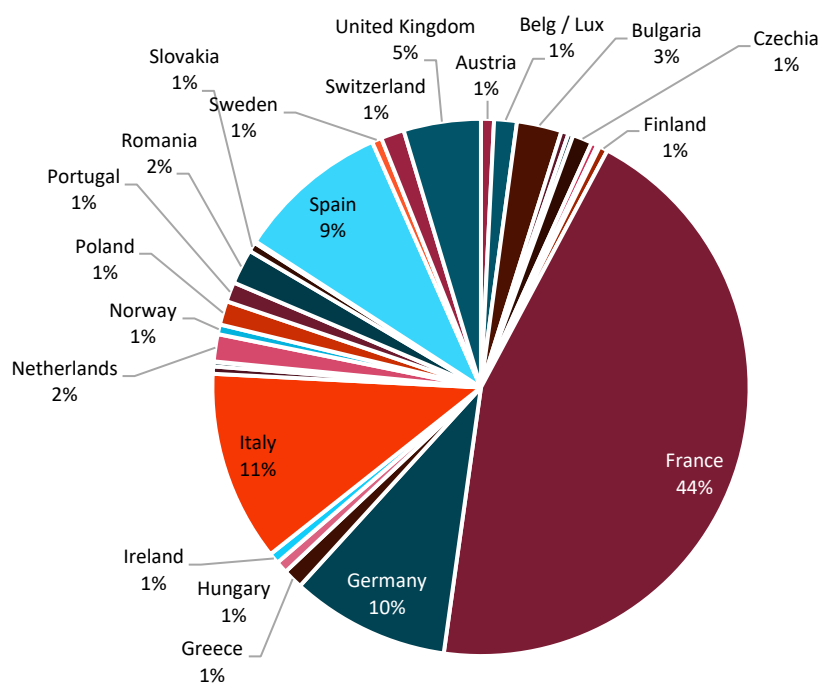
Figure 20 shows the different kinds of activities that the brandy employment effects result from. We find that production activities dominate while those related to on- and off-premise consumption are rather small (as in the base study). Figure 21 shows the GVA decomposition by country. Not surprisingly, France takes the first rank, i. a. due to Cognac production. The overall economic results for brandy are summarised in Table 10.

Figure 20: Employment results by type of effect (for brandy)



Source: IHS (2022).

Figure 21: GVA effects by country (for brandy)



Source: IHS (2022).

Table 10: Overall economic effects of brandy in the EU+ (including production, retail trade and catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
France	2 835	900	1 461	2 361	474	32 035	6 365	19 643	26 008	6 027	1 426	427	693	1 120	306
Italy	732	239	352	592	141	11 601	3 500	5 756	9 257	2 345	285	83	139	221	64
Germany	610	133	307	440	170	10 540	3 159	4 836	7 995	2 545	228	46	109	155	73
Spain	588	179	267	446	142	10 171	2 588	5 008	7 597	2 574	202	55	87	142	61
United Kingdom	297	85	122	207	89	4 981	2 289	1 603	3 891	1 089	102	23	42	65	37
Bulgaria	172	55	84	139	33	17 355	7 811	6 944	14 755	2 600	42	12	16	27	14
Romania	134	48	54	102	32	7 997	3 244	2 981	6 225	1 772	28	9	10	19	9
Netherlands	104	20	56	76	28	1 738	624	731	1 355	383	28	5	14	19	9
Poland	91	24	44	68	24	4 024	1 382	1 750	3 132	891	28	6	13	19	9
Switzerland	89	19	40	59	30	1 029	423	340	764	265	21	4	9	13	8
Belg/Lux	87	7	56	63	24	1 047	142	634	776	271	36	3	22	24	11
Greece	77	23	39	62	15	2 054	509	1 114	1 623	430	23	7	11	18	6
Portugal	76	25	31	57	19	2 301	753	995	1 748	554	24	7	9	16	8
Czech Republic	75	27	32	59	16	2 351	836	1 002	1 838	514	23	7	9	17	6
Austria	50	12	24	35	14	720	227	311	538	182	19	4	9	13	6
Hungary	46	15	20	35	11	2 197	913	835	1 748	448	15	4	6	10	5
Ireland	41	8	22	30	12	530	259	167	426	104	10	2	5	7	3
Sweden	38	5	19	25	13	445	110	201	311	134	16	2	8	10	6
Norway	37	6	20	26	11	327	136	113	249	79	14	2	7	9	5
Slovak Republic	36	13	15	27	9	1 504	829	430	1 259	245	10	3	4	7	3
Finland	33	11	14	25	8	574	290	180	470	104	13	4	5	9	4
Latvia	28	13	9	22	6	1 357	788	337	1 125	232	8	3	3	6	2
Croatia	28	13	9	21	7	1 210	577	365	942	268	8	3	2	5	3
Denmark	23	4	12	16	7	366	130	152	282	84	9	1	5	6	3
Cyprus	19	9	6	15	4	614	369	152	520	94	5	2	2	4	2
Lithuania	17	9	5	14	4	758	455	173	628	130	4	2	1	3	1
Estonia	10	4	4	8	2	491	311	113	424	67	3	1	1	2	1
Slovenia	7	1	3	4	2	200	50	90	139	61	2	0	1	1	1
Malta	2	1	1	1	0	40	17	15	32	8	0	0	0	0	0
EU+	6 383	1 907	3 129	5 036	1 346	120 556	39 086	56 970	96 057	24 500	2 636	727	1 242	1 969	666

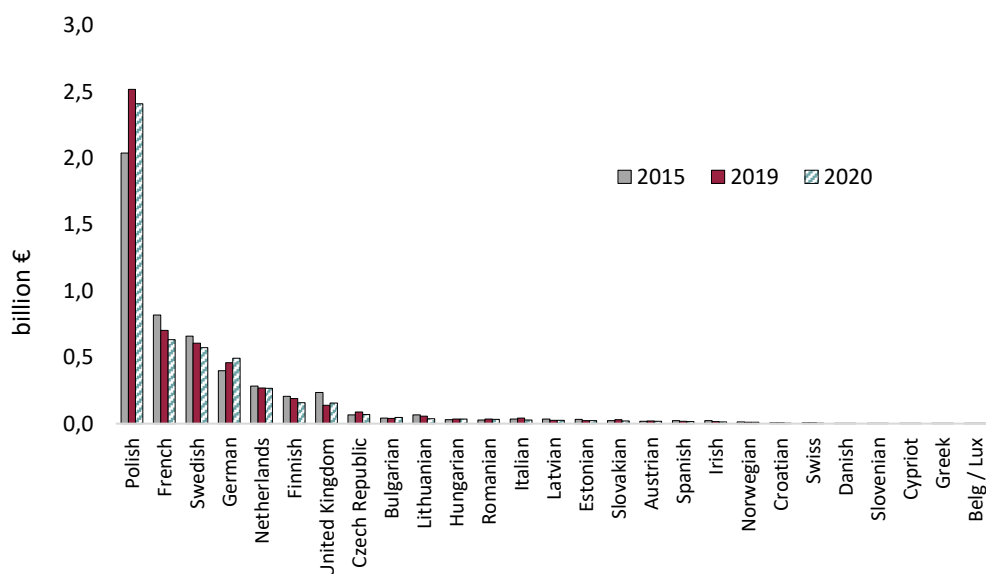
Source: IHS (2022).

6.3 Vodka

6.3.1 Descriptives about vodka production and consumption

Vodka accounts for about a quarter of both production and consumption in Europe. It is produced mainly in Poland and Sweden but also in France or Germany. The EU+ produces more vodka than it consumes per year. Production turnovers were at about 5.1 billion Euros in the EU+ in 2020 (down from 5.3 billion Euros in 2019). The estimated vodka production numbers by country are displayed in Figure 22.

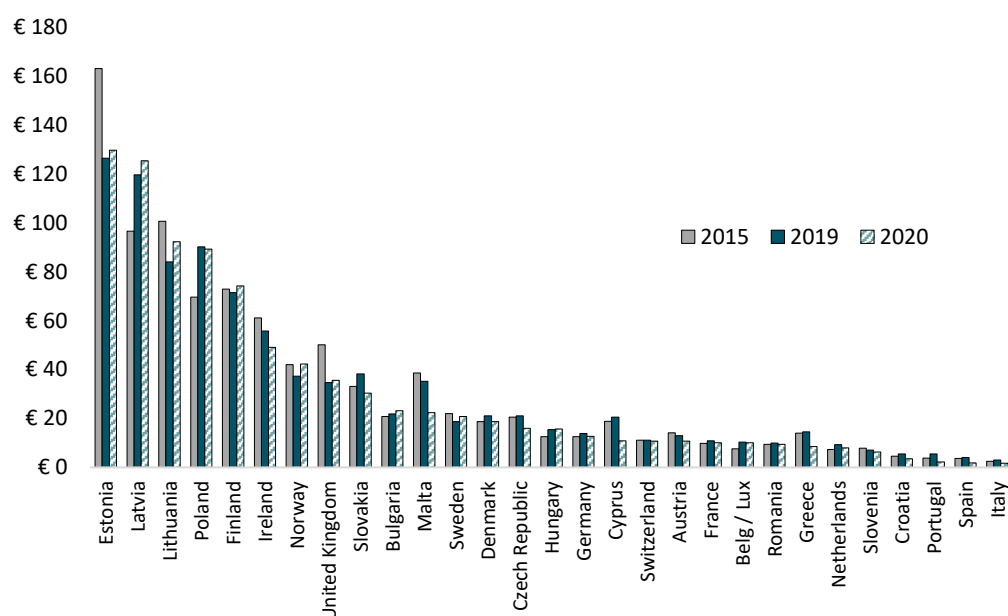
Figure 22: Production turnovers of vodka (2015/2019/2020, estimated)



Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

Most vodka produced in the EU+ is considered *traditional vodka*; only 18 % is *flavoured* (according to IWSR). The largest vodka producers in the EU+ are Poland, France and Sweden. Poland clearly stands out; the estimated turnovers of Polish vodka producers in 2020 amounted to 2.4 billion Euros and were very stable during COVID-19. Poland still accounts for almost half the total EU+ vodka production.

In terms of per-capita consumption, however, there are a few countries ahead of Poland (see Figure 23). Adult consumers in Estonia and Latvia have purchased vodka worth more than 120 Euros in 2020 and even increased their consumption during the pandemic. Vodka is still famous with consumers in Scandinavia and the Baltics while almost none is sold in many countries in southern European countries.

Figure 23: Annual vodka consumption per capita (only adults)

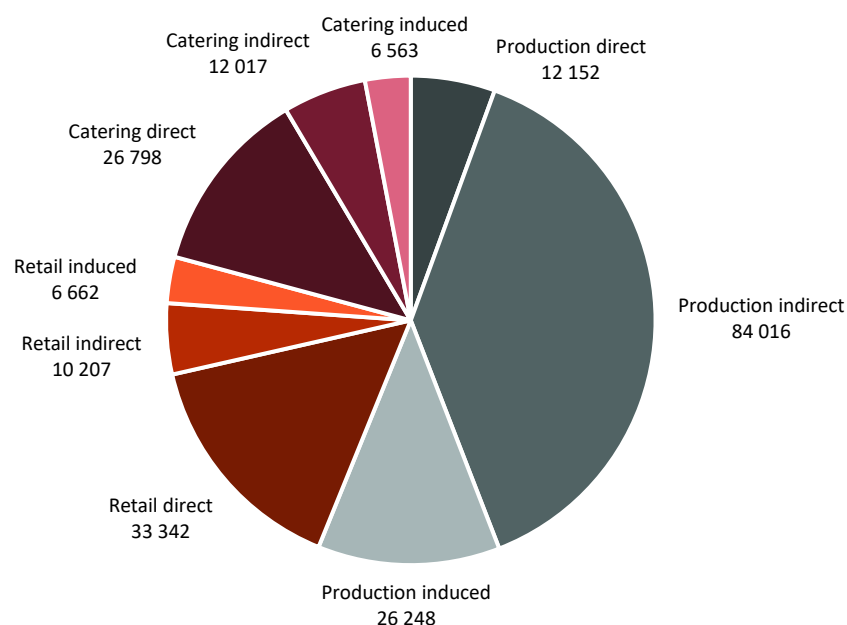
Source: IWSR (2022), including taxes.

6.3.2 Results

Vodka in the EU+ generated a gross value added (GVA) effect of about 8.4 billion Euros (-18 % compared to 2019) in 2020 and supported 218,000 jobs per year (-18 % compared to 2019). The fiscal effects from income and profit taxes etc. on economic activities related to vodka production and consumption are estimated to 2.9 billion Euros (-20 %); value added tax (VAT) and excise duties for the consumption of vodka amount to another 4.6 billion Euros (-25 %).

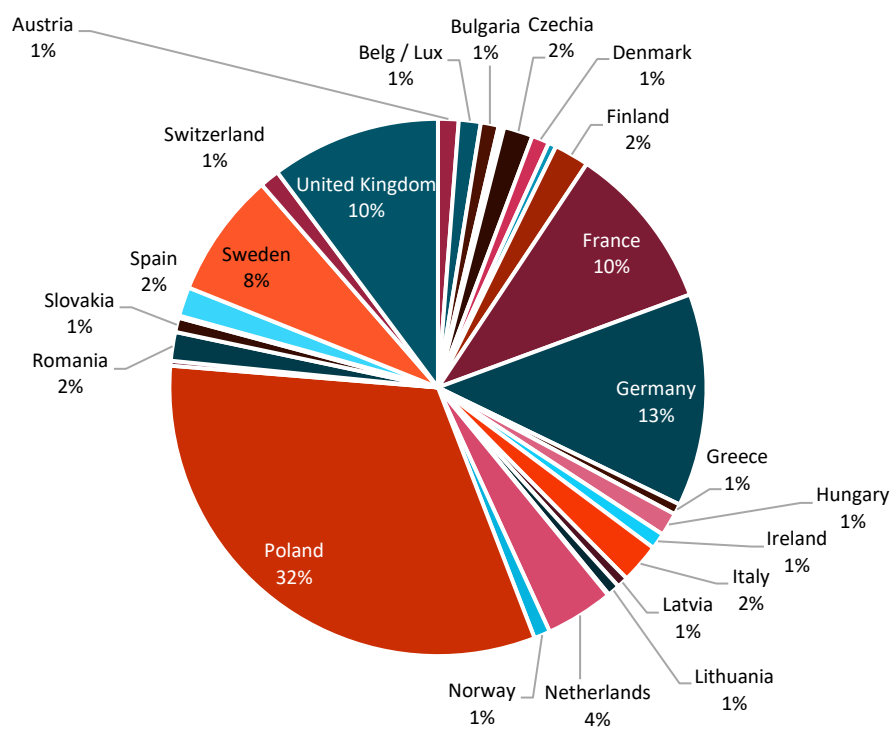
Figure 24 illustrates the different kinds of activities that the vodka employment effects come from. Figure 25 shows the GVA decomposition by country. The overall economic results for whisky are summarised in Table 11.

Figure 24: Employment results by type of effect (for vodka)



Source: IHS (2022).

Figure 25: GVA effects by country (for vodka)



Source: IHS (2022).

Table 11: Overall economic effects of vodka in the EU+ (including production, retail trade and catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
Poland	2 695	691	1 581	2 272	423	105 038	27 949	61 196	89 145	15 893	818	183	444	627	191
Germany	1 073	233	541	774	299	18 527	5 431	8 611	14 042	4 484	401	80	193	273	128
United Kingdom	855	355	291	646	210	14 128	7 748	3 846	11 594	2 534	295	99	106	205	90
France	841	258	412	670	171	10 819	3 093	5 546	8 639	2 180	426	119	201	320	106
Sweden	632	283	236	519	113	6 053	2 316	2 493	4 810	1 244	254	94	97	190	63
Netherlands	343	93	178	271	72	4 513	1 249	2 283	3 532	981	91	22	44	66	25
Italy	202	34	103	138	64	3 473	714	1 705	2 419	1 054	80	12	40	53	27
Finland	176	52	86	138	38	2 366	673	1 186	1 859	506	63	18	28	45	18
Spain	147	28	69	98	49	2 916	665	1 353	2 018	898	51	9	22	31	20
Czech Republic	147	43	69	112	34	4 668	1 470	2 132	3 602	1 066	45	12	20	32	13
Romania	145	54	56	110	35	8 691	3 655	3 127	6 782	1 908	31	11	10	20	10
Hungary	117	43	49	92	25	6 323	3 234	2 059	5 293	1 030	42	13	16	29	13
Belg/Lux	111	15	64	80	31	1 400	324	731	1 055	345	46	6	26	32	14
Austria	104	29	48	77	27	1 496	532	624	1 156	340	40	10	19	28	12
Switzerland	99	21	43	64	36	1 117	446	360	806	311	23	4	10	14	9
Bulgaria	90	33	39	72	18	9 608	4 798	3 341	8 139	1 469	22	7	7	14	8
Denmark	88	22	43	65	23	1 511	710	531	1 240	271	37	8	18	26	11
Norway	82	8	48	57	25	673	143	341	484	189	30	3	16	19	11
Ireland	81	26	36	61	20	1 098	647	277	924	174	20	6	8	14	6
Slovak Republic	73	22	32	54	18	2 942	1 473	959	2 432	511	20	6	8	14	6
Lithuania	62	25	25	50	12	2 299	1 005	849	1 853	446	14	5	5	10	4
Latvia	57	23	21	44	13	2 571	1 298	782	2 080	491	15	5	5	10	5
Greece	54	23	21	44	10	1 826	924	607	1 532	295	16	6	6	12	4
Estonia	40	15	16	32	8	1 572	837	472	1 308	263	11	4	4	8	4
Portugal	24	6	10	16	8	796	228	334	561	235	8	2	3	5	3
Croatia	16	6	5	11	4	710	311	220	531	179	5	1	1	3	2
Cyprus	12	6	4	10	3	399	234	100	333	66	4	1	1	2	1
Slovenia	11	3	5	7	3	338	109	135	245	93	4	1	2	2	1
Malta	5	3	2	5	1	136	77	40	118	18	1	1	0	1	0
EU+	8 382	2 453	4 135	6 589	1 793	218 007	72 292	106 240	178 533	39 474	2 912	747	1 361	2 107	805

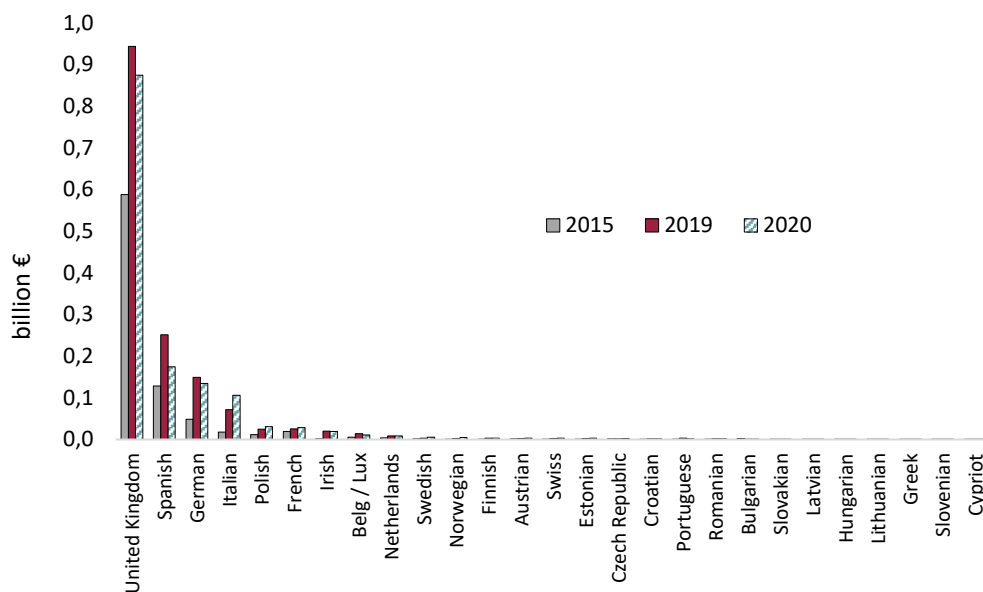
Source: IHS (2022).

6.4 Gin

6.4.1 Descriptives about gin production and consumption

Gin is one of the booming categories and has gained immensely in consumers' appreciation in recent years. The majority of gin produced in the EU+ stems from the United Kingdom; another hotspot in Europe is certainly Spain. Gin worth more than 1.4 billion Euros was produced in the EU+ in 2020 (compared to 1.5 billion Euros in 2019). Our estimated gin production turnovers are shown by EU+ country in Figure 26.

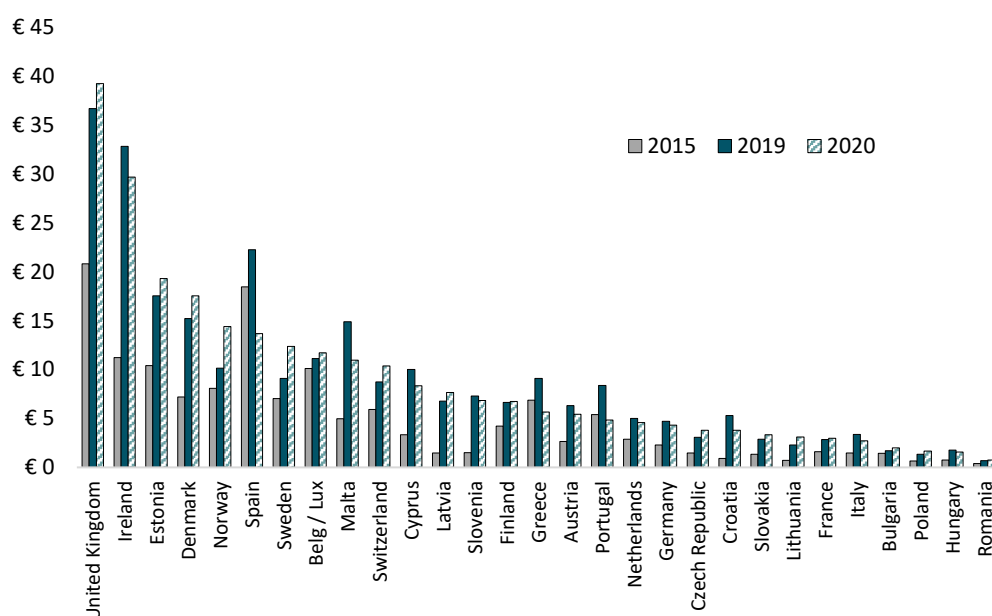
Figure 26: Production turnovers of gin (2015/2019/2020, estimated)



Source: Own calculations on the basis of IWSR (2021) and Eurostat (2021); excluding taxes.

The United Kingdom is still by far the largest gin producer in the EU+. Gin turnovers have increased strongly since 2015 and, hence, have increased much stronger than all other spirits categories. Nonetheless, gin producers' turnovers in the EU+ have not exceeded 1.4 billion Euros in 2020 and therefore still represent less than 6 % of total spirits production. Most gin produced in Europe is considered *traditional* gin; only 14 % are *flavoured* or *pink* gin (according to IWSR).

The strong increase in production has, of course, been induced by an increase in terms of gin consumption. Per-capita sales are displayed in Figure 27. Especially the UK and Ireland have seen massive increases in gin consumption since 2015. There are many countries where Gin sales kept increasing during the pandemic. Overall consumption in the EU+ was at 4.1 billion Euros in 2020 (including taxes, compared to 4.4 billion Euros in 2019).

Figure 27: Annual gin consumption per capita (only adults)

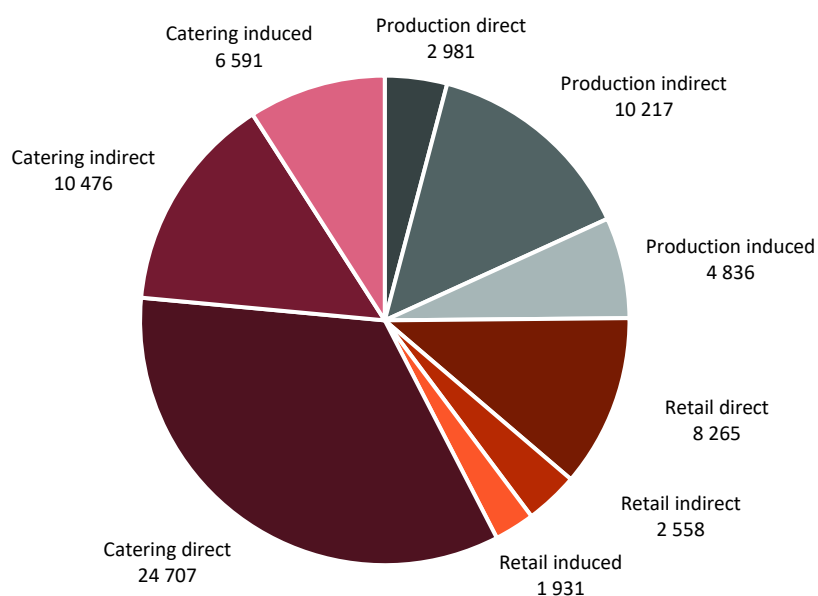
Source: IWSR (2021), including taxes.

6.4.2 Results

The production and consumption of gin in the EU+ generated a gross value added (GVA) effect of about 4.0 billion Euros in 2020 (-37 % compared to 2019). This was enough to support 73,000 jobs per year (-41 % compared to 2019). The fiscal effects from income and profit taxes etc. on economic activities related to gin production and consumption are estimated to about 1.4 billion Euros (-33 %); value added tax (VAT) and excise duties for the consumption of gin amount to another 2.4 billion Euros (-10 %).

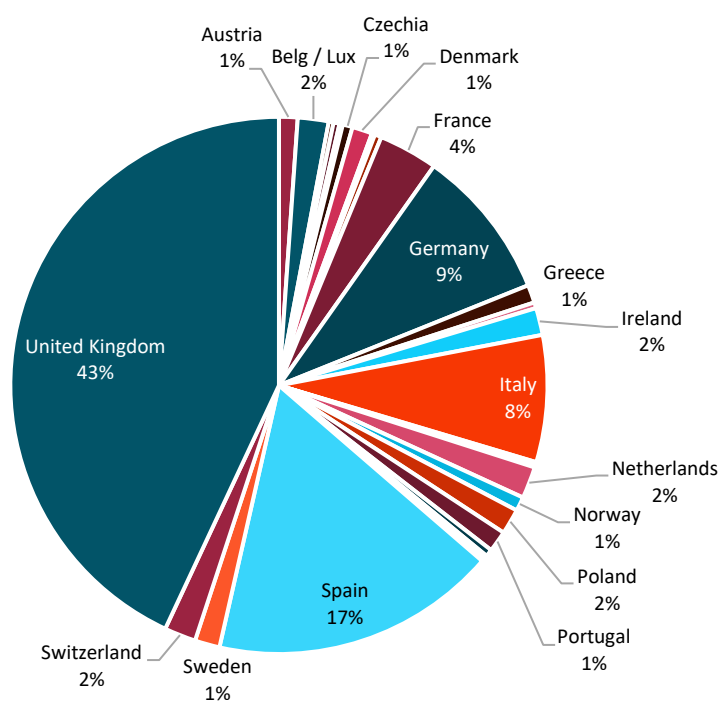
Figure 28 illustrates the different kinds of activities that the gin employment effects come from. Figure 29 shows the GVA decomposition by country; the United Kingdom and Spain as the major gin producers in the EU+ stand out. The overall economic results for gin are summarised in Table 12.

Figure 28: Employment results by type of effect (for gin)



Source: IHS (2022).

Figure 29: GVA effects by country (for gin)



Source: IHS (2022).

Table 12: Overall economic effects of gin in the EU+ (including production, retail trade and catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
United Kingdom	1 725	863	525	1 388	337	23 690	12 654	6 959	19 614	4 076	589	255	185	441	149
Spain	690	318	229	547	143	14 038	7 081	4 381	11 462	2 576	246	99	83	182	64
Germany	366	108	158	266	100	7 258	3 234	2 530	5 764	1 495	140	38	60	97	43
Italy	306	119	129	247	59	5 572	2 490	2 107	4 597	975	122	42	54	95	27
France	143	33	68	101	42	2 130	656	935	1 590	540	73	15	34	49	24
Netherlands	77	22	35	57	19	1 414	689	464	1 152	261	21	5	10	15	6
Switzerland	76	27	27	54	22	1 034	600	235	835	198	17	5	6	12	6
Belg/Lux	74	26	32	58	16	1 079	540	360	901	179	33	10	15	25	8
Ireland	66	28	24	53	13	968	648	198	846	122	16	7	6	12	4
Poland	61	14	33	47	15	2 531	667	1 309	1 976	555	19	4	9	13	6
Sweden	60	25	21	46	14	866	493	222	715	150	26	8	10	18	8
Portugal	51	23	15	39	12	1 652	796	498	1 294	359	17	7	5	12	5
Denmark	48	21	18	38	10	1 021	679	226	905	116	22	7	9	17	5
Austria	45	21	15	36	9	703	390	198	588	115	18	7	6	13	4
Greece	43	21	16	37	6	1 419	776	450	1 226	193	13	5	5	10	3
Norway	34	6	17	23	11	276	117	88	205	71	13	2	6	9	5
Czech Republic	24	8	9	18	6	952	466	290	757	195	8	2	3	5	2
Romania	17	6	7	12	5	1 101	381	437	818	283	4	1	1	2	1
Finland	16	5	7	12	4	266	111	97	208	58	6	2	3	4	2
Croatia	14	7	4	11	3	682	382	160	542	140	4	2	1	3	2
Hungary	14	4	6	10	4	773	365	249	614	159	5	1	2	3	2
Bulgaria	12	5	4	9	3	1 362	744	393	1 137	225	3	1	1	2	1
Slovak Republic	9	3	3	6	3	394	213	102	315	79	3	1	1	2	1
Cyprus	8	4	2	7	1	276	184	54	238	38	2	1	1	2	1
Estonia	8	3	3	6	2	333	202	82	284	49	2	1	1	2	1
Slovenia	7	3	2	5	2	243	126	72	198	45	3	1	1	2	1
Latvia	5	2	2	4	1	259	138	68	206	53	2	0	1	1	0
Lithuania	4	2	2	3	1	185	81	61	142	43	1	0	0	1	0
Malta	3	2	1	3	1	86	48	26	74	12	1	0	0	1	0
EU+	4 009	1 730	1 413	3 143	866	72 561	35 953	23 250	59 203	13 358	1 429	530	519	1 049	380

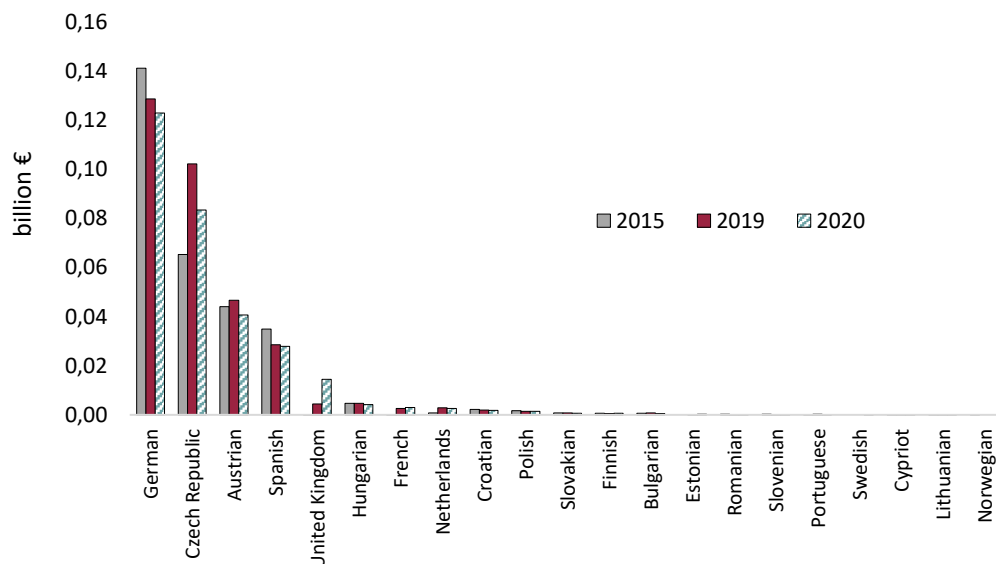
Source: IHS (2022).

6.5 Rum

6.5.1 Descriptives about rum production and consumption

Even though rum has become more and more popular with European consumers in recent years, there is still only little rum production in Europe. While raw materials for all other categories covered in this report can be cultivated to a sufficient extent in EU+ countries (mostly grapes and all kinds of cereals), the cultivation of sugar cane is hardly profitable outside tropical or subtropical regions. Even though, rum is hardly produced anywhere in the EU+, our estimated production turnovers are presented in Figure 30.

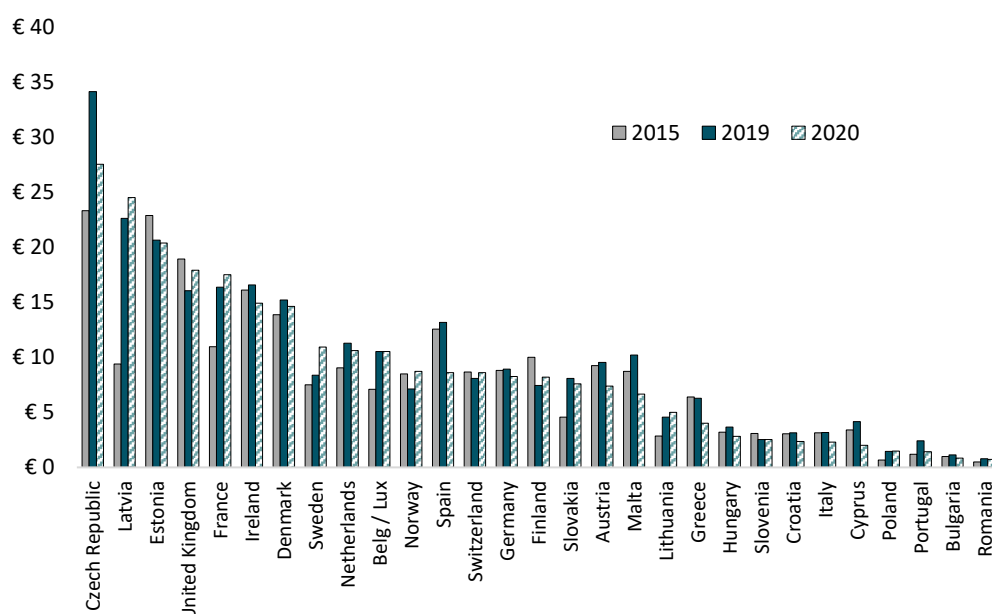
Figure 30: Production turnovers of rum (2015/2019/2020, estimated)



Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

A couple of countries produce beverages that IWSR lists under rum. It remains open whether those products comply with the EU legislation. IWSR considers about three quarters of European rum production *gold rum*; the remaining fraction consists of *white* and *black rum* as well as *flavoured* or *spiced rum* or *Verschnitt*. In any case, rum production turnovers are only at about 300 million Euros and therefore represent only a small fraction of total EU+ spirits production.

In terms of consumption, however, rum is among the categories that gained most in terms of customers' attention. The per-capita sales are presented in Figure 31. Rum represents almost a tenth of total spirits consumption in the EU+. The Czech Republic no longer stands out the way it did in 2019. Overall rum consumption in the EU+ amounted to 4.0 billion Euros in 2020 (including taxes, compared to 4.2 billion Euros in 2019).

Figure 31: Annual rum consumption per capita (only adults)

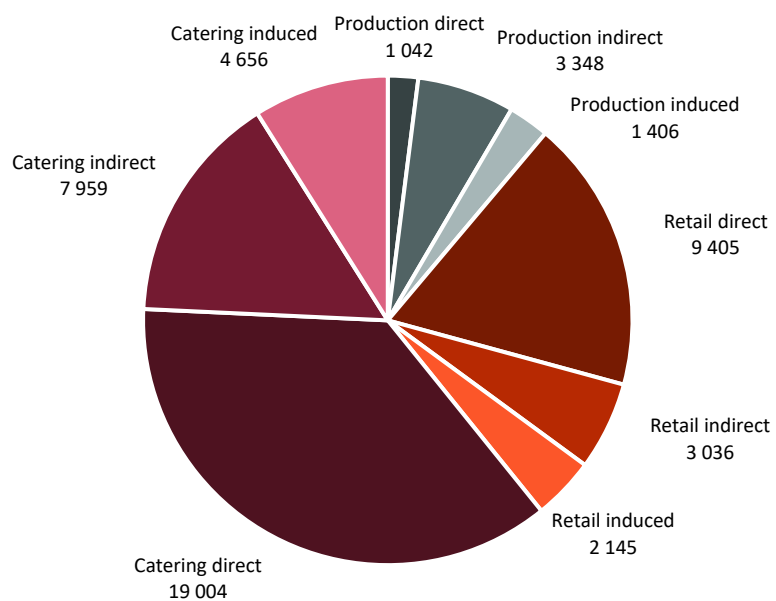
Source: IWSR (2022), including taxes.

6.5.2 Results

The production and consumption of rum in the EU+ has generated a gross value added (GVA) effect of about 2.2 billion Euros in 2020 (-40 % compared to 2019). About 52,000 jobs have been supported by rum (-42 % compared to 2019). The fiscal effects from income and profit taxes etc. on economic activities related to rum production and consumption are estimated to about 0.8 billion Euros (-35 % compared to 2019); value added tax (VAT) and excise duties for the consumption of rum amount to another 2.1 billion Euros (-12 % compared to 2019).

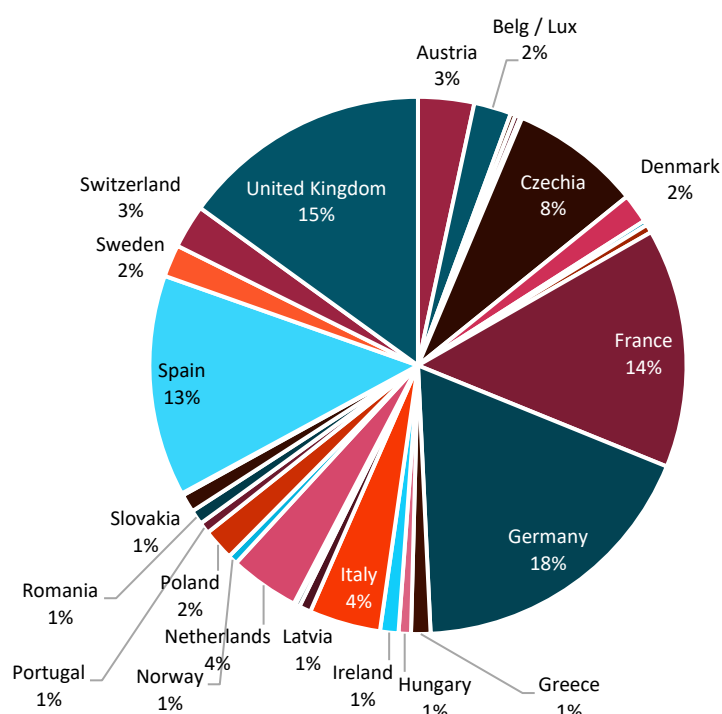
Figure 32 illustrates the different kinds of activities that the rum employment effects come from. Rum still generates most of its economic effects via consumption (especially on-premise). Figure 33 shows the GVA decomposition by country. The overall economic results for rum are summarised in Table 12.

Figure 32: Employment results by type of effect (for rum)



Source: IHS (2022).

Figure 33: GVA effects by country (for rum)



Source: IHS (2022).

Table 13: Overall economic effects of rum in the EU+ (including production, retail trade and catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
Germany	402	146	160	305	96	8 664	4 635	2 574	7 209	1 455	156	51	63	114	43
United Kingdom	334	150	104	254	80	6 250	3 893	1 399	5 293	957	116	40	41	81	35
France	320	145	111	256	63	5 790	3 494	1 490	4 984	805	167	64	64	127	40
Spain	295	144	90	234	61	6 424	3 569	1 747	5 316	1 107	106	45	34	79	27
Czech Republic	174	86	62	147	27	6 527	3 782	1 918	5 700	827	56	24	20	44	12
Italy	95	37	37	74	22	1 893	930	606	1 536	357	39	13	16	29	10
Netherlands	93	41	35	75	18	2 077	1 359	476	1 835	242	27	10	11	20	6
Austria	75	36	27	62	13	1 088	567	362	929	160	29	12	11	23	6
Switzerland	58	22	20	42	17	815	486	180	666	149	13	4	5	9	4
Belg/Lux	50	19	20	39	11	752	401	233	634	118	22	8	10	17	5
Sweden	43	19	14	33	10	653	402	147	549	104	19	6	7	13	5
Poland	42	13	18	31	11	1 994	814	767	1 581	413	13	3	6	9	4
Denmark	39	18	14	32	8	850	587	174	762	88	18	6	7	14	4
Greece	26	13	9	22	4	872	494	263	757	116	8	3	3	6	2
Ireland	25	10	9	19	6	468	346	71	417	52	7	3	2	5	2
Slovak Republic	24	10	8	19	5	1 237	826	260	1 086	151	7	3	2	5	2
Romania	20	7	7	14	5	1 218	487	453	941	277	4	1	1	3	1
Hungary	17	6	7	12	4	881	424	291	715	166	6	2	2	4	2
Latvia	16	8	5	12	3	830	537	164	701	129	5	2	2	4	1
Portugal	15	6	5	11	4	497	215	159	374	123	5	2	2	3	2
Norway	13	2	6	8	5	111	48	33	81	30	5	1	2	3	2
Finland	11	4	4	8	3	195	96	60	156	39	4	1	2	3	1
Croatia	7	3	2	5	2	320	168	84	252	68	2	1	0	1	1
Bulgaria	7	3	2	5	2	774	408	230	637	137	2	1	0	1	1
Estonia	6	3	2	5	1	312	208	65	273	39	2	1	1	1	1
Lithuania	6	3	2	4	1	263	150	63	213	50	1	1	0	1	0
Slovenia	3	1	1	2	1	93	35	34	69	24	1	0	0	1	0
Cyprus	3	1	1	2	1	87	55	19	74	13	1	0	0	1	0
Malta	2	1	1	2	0	62	36	19	55	8	1	0	0	0	0
EU+	2 219	954	783	1 738	481	51 999	29 451	14 342	43 793	8 206	842	307	315	622	220

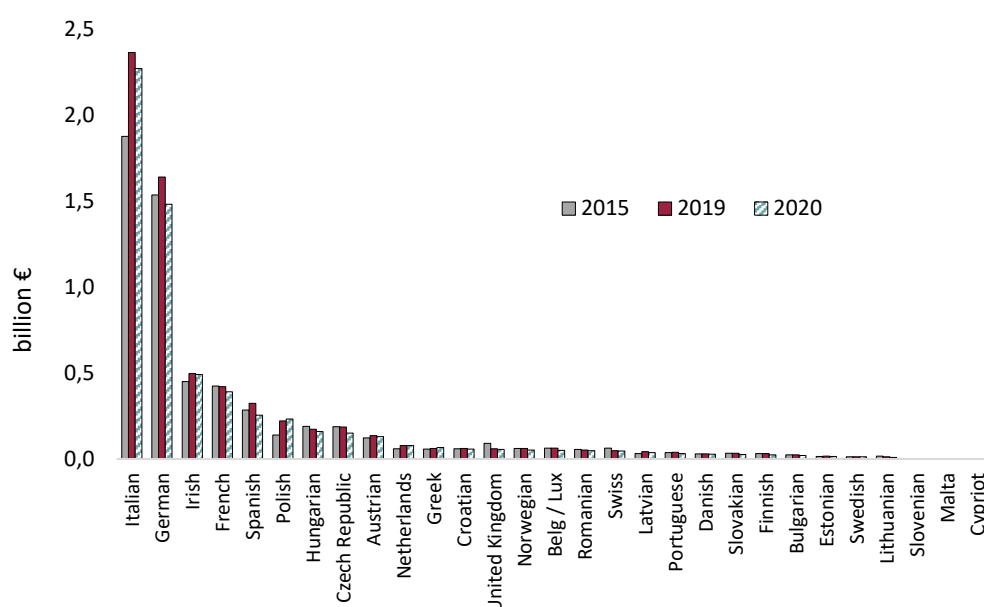
Source: IHS (2022).

6.6 Flavoured & National Spirits (including liqueurs)

6.6.1 Descriptives about production and consumption

The category *flavoured & national spirits* is derived from IWSR classifications¹⁰ and covers a large variety of spirits products not covered under the already described categories. The estimated turnovers generated by the production of flavoured and national spirits in the EU+ are displayed in Figure 34. The overall production turnover in the EU+ in 2020 was 6.2 billion Euros (compared to 6.7 billion Euros in 2019).

Figure 34: Production turnovers of flavoured & national spirits (2015/2019/2020, estimated)



Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

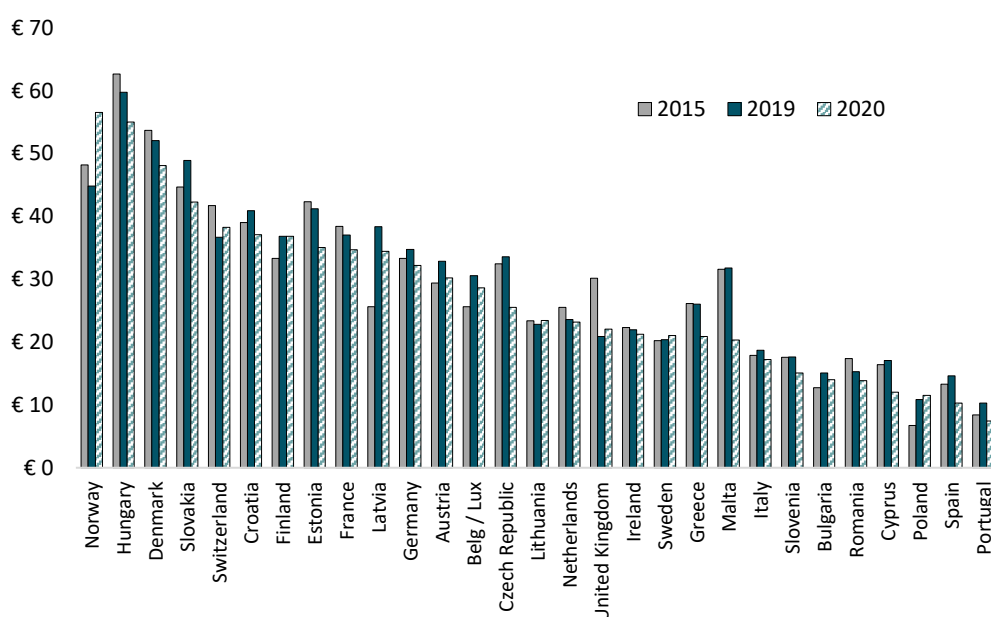
Considerable production of this kind is taking place in Italy, Germany and Ireland. Italy produces all kinds of aperitifs and beverages like Amari, Sambuca or Limoncello. Germany is particularly strong in the production of korn and bitters; Ireland is specialized in the production of cream liqueurs (besides Irish whiskey, of course).

The consumption pattern for flavoured & national spirits is shown in Figure 35. The characteristic feature of this category is that considerable amounts of it are consumed in every EU+ country. While other spirits categories showed much steeper patterns (e. g. much vodka in the Baltics but almost none in the Mediterranean area), the category of

¹⁰ https://data.theiwsr.com/_assets/pdfs/IWSR%20Global%20Database%20Methodology%20&%20Definitions%202020.pdf

flavoured & national spirits is a catch-all label for all kinds of local specialties that almost every region in Europe has. The overall consumption of flavoured & national spirits in the EU+ in 2020 amounted to 10.5 billion Euros (including taxes, compared to 11.3 billion Euros in 2019).

Figure 35: Annual per-capita consumption of flavoured & national spirits



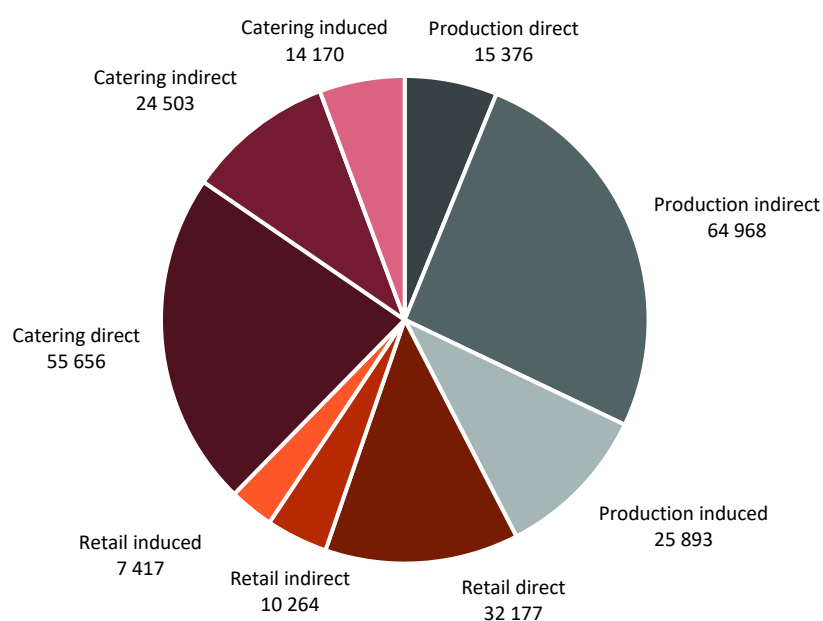
Source: IWSR (2022), including taxes.

6.6.2 Results

Flavoured & national spirits in the EU+ have generated a gross value added (GVA) effect of about 12.2 billion Euros in 2020 (-21 % compared to 2019) and supported 250,000 jobs per year (-22 % compared to 2019). The fiscal effects from income and profit taxes etc. on economic activities related to the production and consumption of flavoured & national spirits are estimated to about 4.5 billion Euros (-19 % compared to 2019); value added tax (VAT) and excise duties for consumption amount to another 5.0 billion Euros (-18 % compared to 2019).

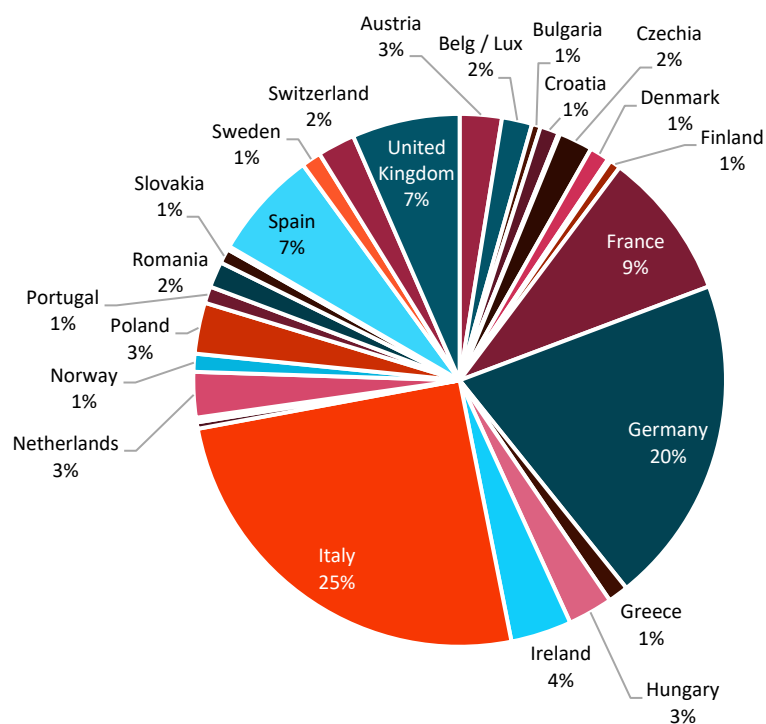
Figure 36 shows the different kinds of activities that the employment related to flavoured & national spirits comes from. Still, the production effects are considerable as many of those drinks are produced in the EU+. Figure 37 shows the GVA decomposition by country. The overall economic results for flavoured & national spirits are summarised in Table 12.

Figure 36: Employment results by type of effect (for flavoured & national spirits)



Source: IHS (2022).

Figure 37: GVA effects by country (for flavoured & national spirits)



Source: IHS (2022).

Table 14: Overall economic effects of flavoured & national spirits in the EU+ (incl. production, retail trade & catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
Italy	3 087	1 095	1 455	2 550	537	47 861	15 081	23 798	38 879	8 982	1 198	379	572	951	247
Germany	2 446	725	1 153	1 878	568	44 561	17 485	18 492	35 977	8 584	921	250	420	670	251
France	1 103	382	482	864	240	16 893	7 337	6 504	13 841	3 052	566	171	249	420	147
Spain	810	312	307	619	190	15 714	6 376	5 891	12 267	3 447	285	97	106	202	82
United Kingdom	802	280	299	579	223	13 553	6 932	3 915	10 846	2 706	276	76	107	183	93
Ireland	452	277	123	400	52	3 022	1 544	957	2 502	521	98	53	28	81	18
Poland	380	85	214	299	81	15 181	3 677	8 445	12 122	3 059	115	22	60	82	33
Netherlands	337	99	161	260	77	5 974	2 809	2 120	4 929	1 045	93	23	43	66	26
Hungary	333	140	131	271	61	17 723	9 617	5 523	15 140	2 583	117	40	44	84	34
Austria	313	131	121	252	60	4 560	2 155	1 636	3 791	769	120	44	48	92	27
Switzerland	279	88	107	195	84	3 366	1 677	942	2 618	748	64	16	25	42	22
Czech Republic	252	100	102	202	50	8 305	3 541	3 200	6 741	1 564	78	28	30	58	20
Belg/Lux	225	58	114	173	52	3 032	1 196	1 263	2 458	573	96	24	48	72	25
Romania	193	68	76	145	48	11 590	4 693	4 266	8 959	2 631	41	14	13	27	14
Greece	151	60	66	126	25	4 554	1 919	1 895	3 814	740	45	16	19	35	10
Denmark	146	58	57	115	31	2 738	1 659	717	2 375	363	62	20	26	46	16
Sweden	145	48	59	107	38	1 966	934	621	1 555	411	63	15	27	43	20
Croatia	139	67	41	108	32	6 180	3 145	1 738	4 883	1 297	40	15	10	26	15
Norway	134	36	64	100	34	1 241	560	424	983	258	52	13	23	36	16
Portugal	124	52	43	95	30	3 859	1 626	1 365	2 991	868	41	15	14	29	13
Slovak Republic	108	40	43	83	25	4 738	2 754	1 272	4 026	712	31	11	11	22	9
Finland	81	26	36	62	19	1 325	584	484	1 067	257	31	9	13	23	9
Bulgaria	66	24	27	51	15	7 250	3 652	2 390	6 042	1 209	16	5	5	10	6
Latvia	47	18	19	36	11	1 934	813	709	1 522	412	12	4	4	8	4
Lithuania	27	9	11	21	6	1 013	401	391	791	222	6	2	2	4	2
Slovenia	26	7	11	18	8	829	275	340	615	213	9	2	4	6	3
Estonia	23	8	10	18	5	865	429	276	705	160	7	2	2	5	2
Cyprus	12	6	4	10	3	396	236	95	331	65	3	1	1	2	1
Malta	8	4	3	7	1	198	105	65	170	28	2	1	1	2	0
EU+	12 249	4 302	5 340	9 642	2 607	250 423	103 209	99 735	202 944	47 479	4 489	1 369	1 955	3 324	1 165

Source: IHS (2022).

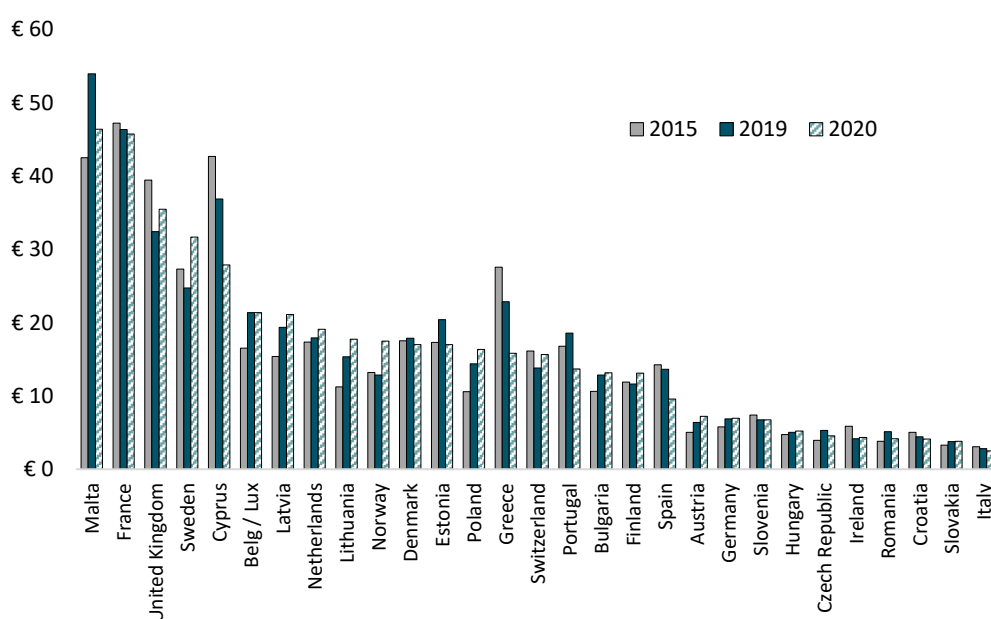
6.7 Scotch whisky (GI)

6.7.1 Descriptives about Scotch whisky production and consumption

Scotch whisky is without a doubt one of the most iconic spirits products made in Europe. For this reason, it has been registered as a protected geographical indication (GI) in 1989 (file number: PGI-GB-01854). The Scotch whisky producer's turnover is not published. We conduct an estimation based on IWSR and Eurostat data (as in the *base study*). The estimation yields a production turnover in 2020 of about 5.4 billion Euros. Hence, the decline from 6.5 billion Euros in the pre-COVID year of 2019 is quite considerable. Still, only very little whisky made in the United Kingdom is not Scotch (given the overall UK whisky turnover of 5.5 billion Euros from section 6.1). *Blended Scotch* is by far the most dominant sort.¹¹

The consumption pattern of Scotch whisky is depicted in Figure 38. Consumers in Malta and France still buy more Scotch per capita than those in the United Kingdom. Irish consumers, on the other hand, seem to prefer their own product and spent only very little on Scotch whisky.

Figure 38: Annual Scotch whisky consumption per capita (only adults)



Source: IWSR (2022), including taxes.

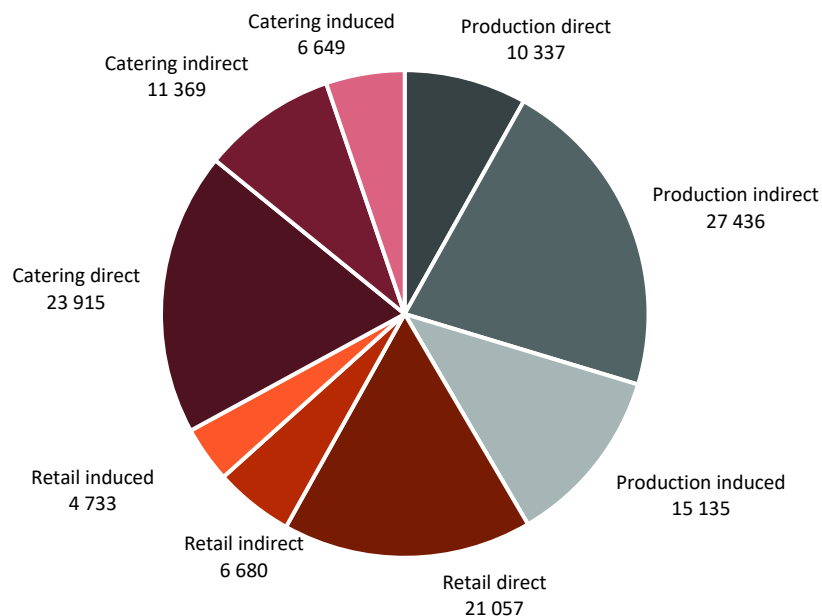
¹¹ As the United Kingdom is by definition the only producing country, a detailed figure as shown for the entire category of whisky would not be informative and is therefore not provided here.

6.7.2 Results

Scotch whisky production and consumption in the EU+ in 2020 can be associated with a gross value added (GVA) effect of about 9.0 billion Euros which is about 24 % less than in the pre-COVID year 2019. The number of jobs supported by Scotch whisky amounts to 127,000 per year (-26 % compared to 2019). We estimate the fiscal effects from economic activities related to Scotch production and consumption to 3.1 billion Euros (-23 % compared to 2019). Another 3.6 billion Euros (-6 % compared to 2019) must be added in value added tax (VAT) and excise duties on the actual consumption of Scotch whisky in the EU+.

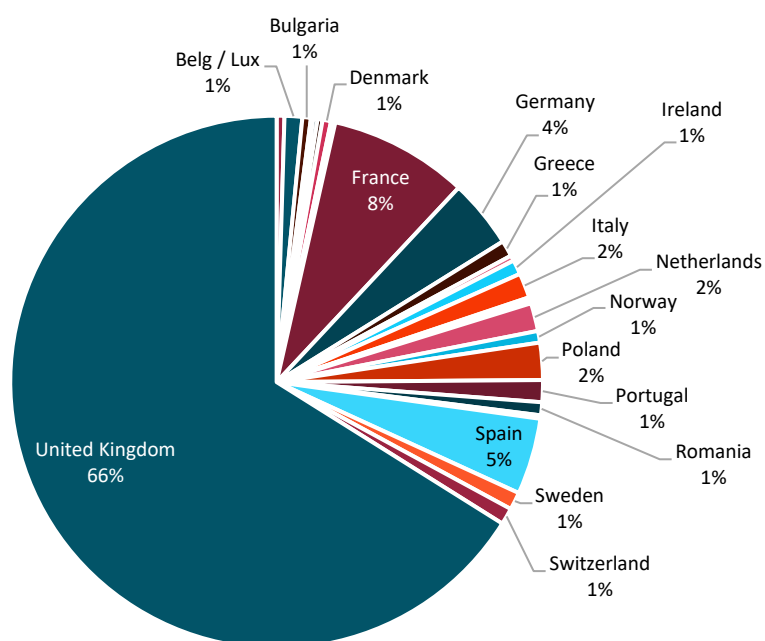
Figure 39 presents how the Scotch whisky employment effects are composed by activities. Figure 40 shows the GVA decomposition by country. The United Kingdom still accounts for only 66 % of overall GVA related to Scotch whisky; the reason is that all direct production is, of course, taking place in Scotland, but (1) intermediate goods can be delivered from outside the UK and (2) all kinds of consumption-related activities (trading and catering) are taking place in other countries as well. The latter effect pushes France again to the second place. The overall economic results for Scotch whisky are summarised in Table 15.

Figure 39: Employment results by type of effect (for Scotch whisky)



Source: IHS (2022).

Figure 40: GVA effects by country (for Scotch whisky)



Source: IHS (2022).

Table 15: Overall economic effects of Scotch whisky in the EU+ (including production, retail trade and catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
United Kingdom	5 919	3 102	1 811	4 913	1 006	52 125	16 354	23 502	39 856	12 269	1 978	982	560	1 541	436
France	755	318	276	594	162	13 622	7 889	3 671	11 560	2 062	392	139	153	292	100
Spain	415	183	133	316	99	8 958	4 563	2 598	7 161	1 797	149	57	49	106	43
Germany	374	84	153	237	137	7 347	2 951	2 394	5 345	2 002	143	30	57	87	56
Poland	202	94	70	164	37	9 687	5 534	2 741	8 275	1 412	64	25	23	48	16
Netherlands	153	48	66	114	39	3 031	1 638	872	2 510	521	42	11	18	29	13
Italy	135	29	62	90	44	2 460	704	1 022	1 726	734	54	10	25	35	19
Portugal	119	59	33	93	27	3 876	2 053	1 052	3 106	770	40	17	12	29	12
Belg/Lux	96	24	45	70	26	1 321	530	500	1 031	290	41	10	19	29	12
Sweden	96	39	33	72	24	1 328	734	340	1 073	254	40	13	15	27	13
Switzerland	90	27	33	60	30	1 111	572	276	848	263	21	5	8	13	8
Greece	88	42	32	74	14	3 051	1 773	869	2 642	409	26	11	10	21	5
Ireland	79	2	54	56	23	732	70	454	524	209	16	1	10	10	6
Romania	70	28	25	53	17	4 506	2 019	1 544	3 563	943	15	5	4	10	5
Norway	63	4	38	41	22	345	83	129	212	133	24	1	13	15	9
Bulgaria	46	23	13	36	10	5 532	3 525	1 225	4 750	782	11	5	2	7	4
Denmark	46	14	20	34	12	841	447	254	701	140	19	5	8	13	6
Austria	42	15	16	30	12	662	311	203	514	148	16	5	6	11	5
Hungary	30	10	12	22	8	1 703	887	497	1 384	319	11	3	4	7	4
Czech Republic	27	7	11	18	9	1 048	407	352	759	290	9	2	3	5	3
Cyprus	23	13	6	19	4	790	535	148	682	108	6	3	2	5	2
Finland	19	4	9	13	6	290	96	115	210	80	7	1	3	4	2
Slovak Republic	14	4	5	9	5	579	296	152	448	131	4	1	1	2	1
Croatia	13	7	3	10	3	643	371	139	510	133	4	2	1	2	1
Lithuania	12	6	4	10	3	532	311	121	432	100	3	1	1	2	1
Malta	11	6	3	9	2	278	167	77	245	34	3	1	1	2	1
Latvia	10	4	3	8	3	523	295	127	422	101	3	1	1	2	1
Slovenia	5	2	2	3	2	161	63	54	117	44	2	0	1	1	1
Estonia	5	2	2	4	1	228	133	56	189	39	1	0	0	1	0
EU+	8 956	4 197	2 973	7 171	1 786	127 310	55 309	45 485	100 793	26 517	3 143	1 347	1 011	2 358	785

Source: IHS (2022).

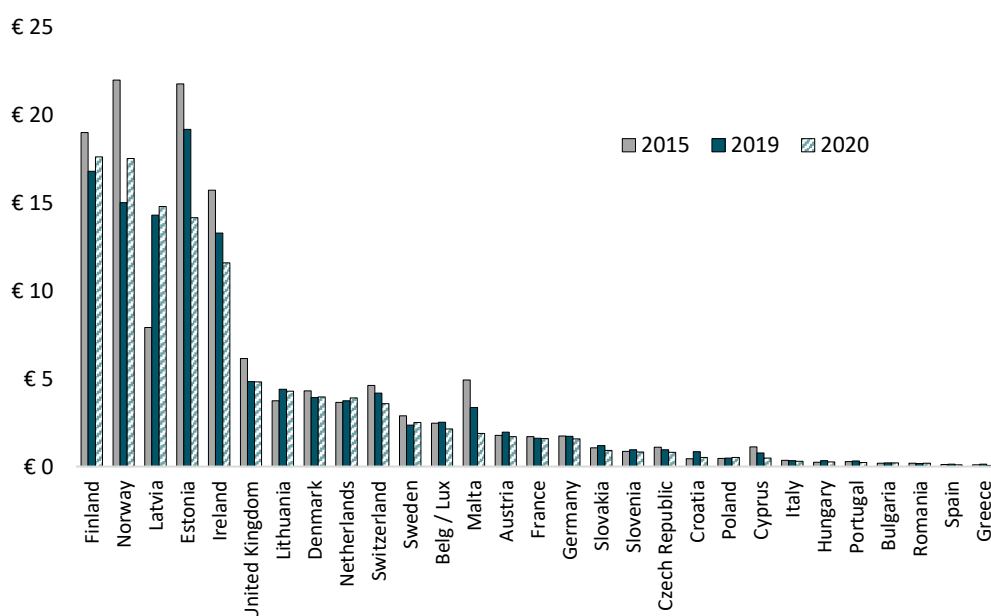
6.8 Cognac (GI)

6.8.1 Descriptives about Cognac production and consumption

Cognac is one of the most distinguished products in the spirits sector and, therefore, was among the very first spirits to be registered as geographical indications (GIs) in 1989 (file number: PGI-FR-02043). The estimated production turnover of Cognac in 2020 was 3.0 billion Euros (compared to 3.2 billion Euros in 2019). Given the estimated turnovers for the entire category of brandy as shown in subsection 6.2, only very little brandy production turnover in France does not stem from Cognac.¹²

The Cognac consumption pattern is shown in Figure 41. It is still very popular in Scandinavia and Ireland while only little is sold in France. It also seems that almost none is sold in countries that have their own brandy specialties, like in Bulgaria or Spain. The overall Cognac consumption in the EU+ in 2020 amounted to 0.90 billion Euros (including taxes, compared to 0.92 billion Euros in 2019).

Figure 41: Annual Cognac consumption per capita (only adults)



Source: IWSR (2022), including taxes.

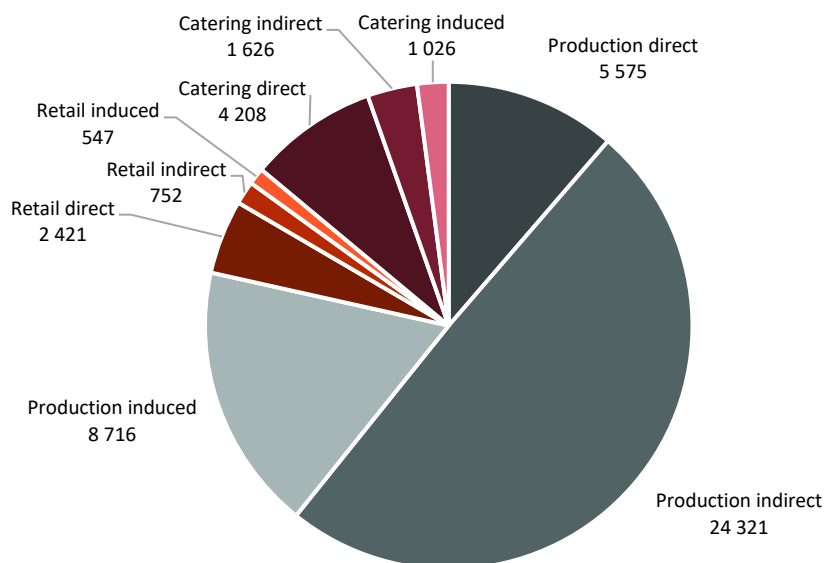
¹² As France is by definition the only producing country, a detailed figure as shown for the entire category of brandy would not be informative and is therefore not provided here.

6.8.2 Results

The production and consumption of Cognac in the EU+ is related to a gross value added (GVA) effect of about 3.6 billion Euros in 2020 which is about 14 % less than in 2019. The number of jobs per year supported by Cognac is about 49,000 (-16 % compared to 2019). The fiscal effects resulting from economic activities around the production and consumption of Cognac are estimated to 1.7 billion Euros (-12 % compared to 2019). Another 400 million Euros (-12 % compared to 2019) are added in value added tax (VAT) and excise duties on the consumption of Cognac in the EU+.

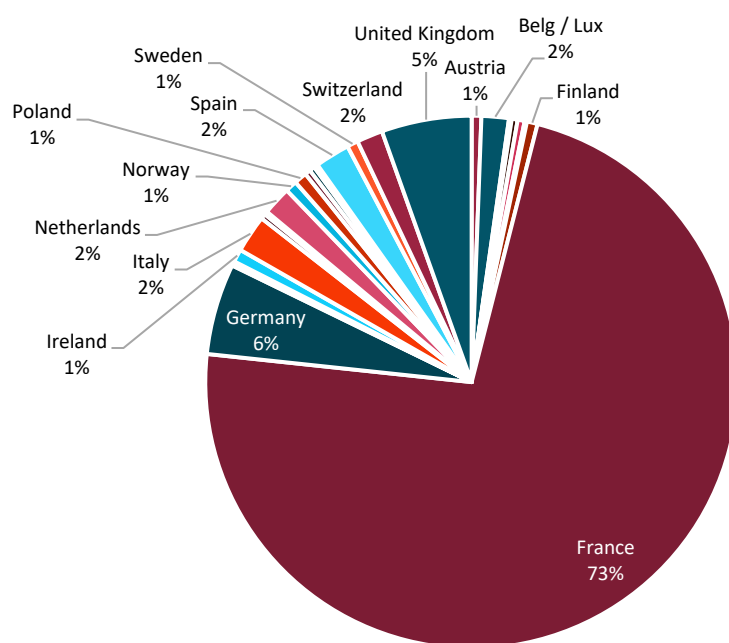
Figure 42 presents how Cognac employment effects are composed by economic activities. Figure 43 shows the GVA decomposition by country. France accounts for the lion's share (73 %) as all direct and most indirect Cognac production take place there. Other countries can benefit from consumption-related effects and to some extent from delivering machinery or services. The overall economic results for Cognac are summarised in Table 16.

Figure 42: Employment results by type of effect (for Cognac)



Source: IHS (2022).

Figure 43: GVA effects by country (for Cognac)



Source: IHS (2022).

Table 16: Overall economic effects of Cognac in the EU+ (including production, retail trade and catering) sorted by overall GVA

	Gross value added (GVA, mill. €)					Employment (jobs per year)					Fiscal effects (mill. €, excl. VAT and excise on spirits)				
	overall	direct	indirect	dir.+ind.	induced	overall	direct	indirect	dir. + ind.	induced	overall	direct	indirect	dir. + ind.	induced
France	2 642	852	1 361	2 214	428	29 665	5 931	18 290	24 221	5 444	1 329	405	645	1 050	279
Germany	201	28	106	134	67	3 683	1 039	1 651	2 690	993	76	10	38	48	28
United Kingdom	199	60	82	142	57	3 420	1 630	1 095	2 724	696	68	16	29	45	24
Italy	83	8	49	57	25	1 445	211	812	1 023	422	33	3	19	22	11
Spain	77	4	46	50	27	1 467	82	893	974	493	26	1	14	15	11
Netherlands	63	13	34	47	16	1 115	457	442	899	216	17	3	9	12	5
Belg/Lux	60	4	40	44	16	733	94	461	554	179	25	2	16	17	7
Switzerland	57	13	26	39	18	689	299	228	527	162	13	2	6	8	5
Ireland	28	7	14	21	7	414	244	107	351	63	7	2	3	5	2
Poland	28	4	16	19	9	1 172	228	613	841	331	9	1	4	5	3
Norway	26	5	14	19	7	242	107	83	190	52	10	2	5	7	3
Sweden	24	4	13	17	8	294	83	131	214	80	10	1	5	7	4
Finland	24	9	10	19	5	428	231	128	359	69	9	3	4	7	2
Austria	21	6	10	16	6	312	118	124	242	70	8	2	4	6	2
Denmark	15	4	8	11	4	259	116	95	211	49	6	1	3	4	2
Czech Republic	13	2	6	9	4	484	144	209	353	131	4	1	2	3	2
Portugal	12	1	7	8	4	393	40	223	263	131	4	0	2	2	2
Romania	12	2	6	8	4	692	117	357	474	218	2	0	1	1	1
Latvia	11	5	3	9	3	590	372	123	495	95	4	1	1	3	1
Slovak Republic	7	1	3	5	2	271	119	91	210	61	2	0	1	1	1
Lithuania	6	3	2	5	1	281	157	72	229	52	2	1	0	1	0
Hungary	6	1	4	4	2	288	60	140	200	88	2	0	1	1	1
Estonia	5	2	2	4	1	241	153	55	208	32	1	0	1	1	0
Greece	3	0	2	2	1	101	12	58	70	31	1	0	1	1	0
Bulgaria	3	0	1	2	1	296	75	145	220	76	1	0	0	0	0
Croatia	2	1	1	2	1	107	48	32	80	26	1	0	0	0	0
Slovenia	2	0	1	1	1	63	16	28	44	19	1	0	0	0	0
Cyprus	1	0	0	1	0	29	14	9	23	6	0	0	0	0	0
Malta	1	0	0	1	0	19	9	7	15	3	0	0	0	0	0
EU+	3 634	1 042	1 867	2 909	725	49 193	12 204	26 700	38 904	10 289	1 673	459	816	1 275	397

Source: IHS (2022).

Table 17: Summary – Economic effects by category (including production, retail trade and catering) for the year 2020

	Overall GVA		Overall employment		Overall fiscal effects	
	billion € p.a.	Δ 2019/2020	jobs p.a.	Δ 2019/2020	billion € p.a.	Δ 2019/2020
Category						
Whisky	11.7	-25 %	183,776	-30 %	9.6	-15 %
...of which Scotch whisky	9.0	-24 %	127,310	-26 %	6.8	-15 %
Brandy	6.4	-16 %	120,556	-17 %	4.0	-16 %
...of which Cognac	3.6	-14 %	49,193	-16 %	2.1	-12 %
Vodka	8.4	-18 %	218,007	-18 %	7.5	-23 %
Gin	4.0	-37 %	72,561	-41 %	3.8	-20 %
Rum	2.2	-40 %	51,999	-42 %	3.0	-20 %
FlavNat	12.2	-21 %	250,423	-22 %	9.5	-18 %
Others	0.5	-37 %	12,752	-40 %	0.6	-28 %
Total	45.5	-24 %	910,074	-26 %	38.1	-19 %

Source: IHS (2022).

7 Appendix B: Data sheets by country

The tables on the following pages display detailed results for the 30 countries in the EU+ (i. e. EU27 + United Kingdom + Norway + Switzerland. Belgium and Luxembourg are considered as one country (like in IWSR)). Each table consists of four parts. In the following, we will explain the tables step by step using Austria as an example:

A – Production: The upper array displays some basic information about the particular country¹³ and about spirits production in that country. We show the volume of spirits from that country being sold worldwide in 2020 (first line, in hectolitres, see IWSR); this volume can roughly be interpreted as that country's production volume. We also show how this figure has developed between 2019 and 2020 (second line). The third line displays that country's spirits production turnover as reported by Eurostat for 2018 and predicted for 2020 using IWSR data. The remaining lines show the country's top-selling spirits products and its largest export destination (see IWSR).

The table below shows the economic effects of spirits production. In the case of Austria: The overall GVA effect in 2020 was 306.5 million Euros; most of this was indirect at producers of intermediate goods. This number can be decomposed into production activities *in* Austria due to domestic spirits products (164.7 mill. €) and indirect/induced production activities taking place *in* Austria that are actually due to *other* countries' spirits companies (141.8 mill. €; e. g. when Austria delivers intermediate products to the spirits sector in France). This is why countries without a spirits sector of their own may nonetheless report production effects. The table also shows the opposite effect; i. e. the effects triggered by Austrian spirits producers in other EU+ countries (60.3 mill. €). We also report the employment effects (in jobs per year) and relate them to that country's overall employment. The final line shows the fiscal effects.

B – Consumption: The table shows some basic information about spirits consumption in the shaded array (all of this stems from the IWSR database). We show the volume of spirits sold in that country and how this number has developed between 2019 and 2020. It also shows the on-premise share; i. e. how much of it has been consumed in bars, restaurants etc. The next lines show the per-adult sales (in Euros) and the growth rate between 2019 and 2020. The final two lines name that country's most favoured products and the largest import country. An *(I)* indicates that most spirits consumed in that country are made by international brands that produce in many countries so that the actual country of origin cannot be determined. The country behind the *(I)* would then name the second largest country of origin.

¹³ We show population figures and the annual final consumption expenditure per capita (in 2020, see Eurostat 2022a/c). This gives an idea of the particular country's size and development stage.

The table below shows the economic effects of consumption (i. e. on- and off-premise sales). Again, the first line shows the effect that stems from spirits being consumed in Austria; the second line shows the effect that Austria experiences when spirits are sold in other countries. The third line displays the opposite effect (effects to other countries when spirits are sold in Austria). Again, we show employment effects and fiscal effects. Note that the fiscal effects consist of income taxes, profit taxes etc. generated by all kinds of economic activities related to spirits, and VAT/excise duties paid for the actual spirits products.

C – Environmental aspects: The shaded array gives some basic information about ecological aspects. We report the share of spirits production-related CO₂ equivalents (in 1,000 tonnes) that this country is accountable for (only 0.7 % for Austria as only little production is taking place here). We also show the amount of land used for spirits related agricultural activities (in hectares).

The table below shows the ecological effects in terms of CO₂ eq. emissions. Again, the table consists of production and consumption activities (the latter is further decomposed into on- and off-premise, i. e. catering und retail). We also present the usual decomposition into a) in Austria due to Austrian spirits production/ consumption, b) in Austria due to other countries' spirits production/consumption and c) in other countries due to Austrian spirits production/consumption.

TOTAL: We present the key numbers at the bottom of the table. We show the overall GVA effect (in million Euros) alongside with the EU+ share and that country's rank among EU+ countries. The tables also show the employment, fiscal effects and CO₂ eq. emissions in the same manner (see Eurostat 2022b-e for EU+ comparison).

7.1 Austria

A. Production					
Population: 8.9 mill.					
Annual final consumption expenditure per capita: € 30,395					
Spirits from Austria sold worldwide (in 1,000 hectolitres): 90.8					
Δ 2019-2020 (in %): -6.1					
Austrian spirits production turnover (in mill. €): 204.4					
Top-selling Austrian spirits products: Liqueurs, Rum, Bitters/Spirit Aperitifs					
Largest export country: Germany					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Austria	306.5	74.7	157.6	232.3	74.2
due to Austrian activities in Austria	164.7	74.7	67.6	142.3	22.4
due to other EU+ countries in Austria	141.8	0.0	90.0	90.0	51.9
due to Austria in other EU+ countries	60.3	0.0	37.3	37.3	23.0
Employment effect (jobs per year)	3,855	822	2,095	2,917	938
(in % of total Austrian employment)	0.09%	0.02%	0.05%	0.07%	0.02%
Fiscal returns (in mill. €)	115.1	25.2	57.3	82.5	32.6
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Austria (in 1,000 hectolitres): 256.8					
Δ 2019-2020 (in %): -10.3					
On-premise share (of volume): 21 %					
Spirits sold in Austria (in € per adult): € 72.07					
Δ 2019-2020 (in %): -10.3					
Most favoured products: Bitters/Spirit Aperitifs, Vodka, Liqueurs					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Austria	368.4	189.0	108.5	297.4	70.9
due to Austrian activities in Austria	290.8	189.0	69.1	258.1	32.7
due to other EU+ countries in Austria	77.6	0.0	39.3	39.3	38.2
due to Austria in other EU+ countries	46.6	0.0	23.5	23.5	23.1
Employment effect (jobs per year)	6,077	3,724	1,456	5,179	898
(in % of total employment)	0.15%	0.09%	0.03%	0.12%	0.02%
Fiscal returns (in mill. €)	380.1	64.0	48.7	112.7	32.3

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.7 %			
indirect land use:		3,699 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	92.2	13.7	61.7	75.4	16.8
due to Austrian activities in Austria	43.4	13.7	26.1	39.8	3.6
due to other EU+ countries in Austria	48.7	0.0	35.6	35.6	13.1
due to Austria in other EU+ countries	73.1	13.7	47.7	61.4	11.7
Retail (off-premise)	14.2	1.9	6.9	8.8	5.5
due to Austrian activities in Austria	6.7	1.9	3.1	5.0	1.7
due to other EU+ countries in Austria	7.6	0.0	3.8	3.8	3.8
due to Austria in other EU+ countries	12.2	1.9	6.0	7.8	4.4
Catering (on-premise)	33.3	3.1	20.4	23.6	9.7
due to Austrian activities in Austria	18.5	3.1	11.8	15.0	3.5
due to other EU+ countries in Austria	14.8	0.0	8.6	8.6	6.2
due to Austria in other EU+ countries	32.4	3.1	20.0	23.1	9.3
TOTAL					
		Value (%)	in % of EU+ effects	= Rank (EU+)	
Gross value added (GVA) in mill. €: (in % of Austrian GVA)		674.9 (0.2 %)	1.5 %	13.	
Employment (in jobs per year): (in % of Austrian employment)		9,933 (0.2 %)	1.1 %	18.	
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Austrian government revenue)		495.1 (0.3 %)	1.3 %	15.	
CO ₂ eq. emissions in 1,000 tonnes: (in % of Austrian total CO ₂ eq. emissions)		139.7 (0.3 %)	0.8 %	19.	

Source: Own calculations on the basis of IWSR and Eurostat.

7.2 Belgium and Luxembourg (Belg/Lux)

A. Production					
Population: 12.1 mill.					
Annual final consumption expenditure per capita: € 30,584					
Spirits from Belg/Lux sold worldwide (in 1,000 hectolitres): 44.8					
Δ 2019-2020 (in %): - 12.1					
Belg/Lux spirits production turnover (in mill. €): 71.9					
Top-selling Belg/Lux spirits products: Liqueurs, Gin, No-Alcohol Spirits					
Largest export country: Sweden					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Belg/Lux	310.8	10.5	210.4	220.9	89.9
due to Belg/Lux activities in Belg/Lux	43.4	10.5	26.7	37.2	6.2
due to other EU+ countries in Belg/Lux	267.5	0.0	183.7	183.7	83.8
due to Belg/Lux in other EU+ countries	28.7	0.0	19.6	19.6	9.2
Employment effect (jobs per year)	3,464	160	2,316	2,476	988
(in % of total Belg/Lux employment)	0.07%	0.00%	0.05%	0.05%	0.02%
Fiscal returns (in mill. €)	123.2	4.3	78.4	82.7	40.6
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Belg/Lux (in 1,000 hectolitres): 371.3					
Δ 2019-2020 (in %): -4.8					
On-premise share (of volume): 20 %					
Spirits sold in Belg/Lux (in € per adult): € 94.81					
Δ 2019-2020 (in %): -4.3					
Most favoured products: Scotch Whisky, Liqueurs, Gin					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Belg/Lux	388.9	152.5	151.9	304.4	84.5
due to Belg/Lux activities in Belg/Lux	272.5	152.5	85.4	237.9	34.5
due to other EU+ countries in Belg/Lux	116.4	0.0	66.5	66.5	50.0
due to Belg/Lux in other EU+ countries	90.2	0.0	55.3	55.3	34.9
Employment effect (jobs per year)	5,918	3,249	1,729	4,978	939
(in % of total employment)	0.12%	0.06%	0.03%	0.10%	0.02%
Fiscal returns (in mill. €)	773.6	61.6	72.7	134.3	40.8

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.8%			
indirect land use:		2,457 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	113.6	3.2	88.0	91.1	22.4
due to Belg/Lux activities in Belg/Lux	20.0	3.2	15.6	18.7	1.3
due to other EU+ countries in Belg/Lux	93.6	0.0	72.4	72.4	21.2
due to Belg/Lux in other EU+ countries	32.4	3.2	25.3	28.5	3.9
Retail (off-premise)	19.2	2.0	10.0	12.0	7.3
due to Belg/Lux activities in Belg/Lux	8.5	2.0	4.4	6.4	2.1
due to other EU+ countries in Belg/Lux	10.7	0.0	5.5	5.5	5.2
due to Belg/Lux in other EU+ countries	15.9	2.0	8.9	10.9	5.1
Catering (on-premise)	58.1	10.6	34.5	45.1	12.9
due to Belg/Lux activities in Belg/Lux	36.4	10.6	20.8	31.5	4.9
due to other EU+ countries in Belg/Lux	21.7	0.0	13.6	13.6	8.0
due to Belg/Lux in other EU+ countries	62.1	10.6	39.1	49.7	12.4
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Belg/Lux GVA)	699.7 (0.2 %)	1.5%	12.		
Employment (in jobs per year): (in % of Belg/Lux employment)	9,381 (0.2 %)	1.0%	19.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Belg/Lux government revenue)	896.9 (0.3 %)	2.4%	8.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Belg/Lux total CO ₂ eq. emissions)	190.9 (0.2 %)	1.1%	15.		

Source: Own calculations on the basis of IWSR and Eurostat.

Note: IWSR considers Belgium and Luxembourg as one entity; we have followed this approach throughout this study. According to the official spirits production data released by Eurostat (2021), spirits producers' turnovers in Luxembourg in 2018 have amounted to 0.6 million Euros; Belgium reports 100.1 million Euros. Hence, it seems safe to say that the lion's share (probably around 99 %) of the results reported in the table above will apply to Belgium.

7.3 Bulgaria

A. Production					
Population: 7.0 mill.					
Annual final consumption expenditure per capita: € 6,899					
Spirits from Bulgaria sold worldwide (in 1,000 hectolitres): 606.7					
Δ 2019-2020 (in %): - 2.2					
Bulgarian spirits production turnover (in mill. €): 213.7					
Top-selling Bulgarian spirits products: Brandy, Vodka, Whisky					
Largest export country: Poland					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Bulgaria	163.5	21.6	107.7	129.3	34.2
due to Bulgarian activities in Bulgaria	145.6	21.6	96.7	118.3	27.3
due to other EU+ countries in Bulgaria	17.9	0.0	11.0	11.0	6.9
due to Bulgarian in other EU+ countries	79.2	0.0	47.2	47.2	32.0
Employment effect (jobs per year)	14,065	2,161	9,155	11,317	2,748
(in % of total Bulgarian employment)	0.47%	0.07%	0.31%	0.38%	0.09%
Fiscal returns (in mill. €)	38.2	4.6	19.8	24.4	13.8
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Bulgaria (in 1,000 hectolitres): 729.7					
Δ 2019-2020 (in %): -3.3					
On-premise share (of volume): 10 %					
Spirits sold in Bulgaria (in € per adult): € 109.06					
Δ 2019-2020 (in %): +0.1					
Most favoured products: Brandy, Vodka, Scotch Whisky					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Bulgaria	273.0	140.0	78.1	218.1	54.9
due to Bulgarian activities in Bulgaria	260.9	140.0	71.9	211.9	49.0
due to other EU+ countries in Bulgaria	12.1	0.0	6.2	6.2	5.9
due to Bulgaria in other EU+ countries	66.6	0.0	28.0	28.0	38.6
Employment effect (jobs per year)	32,786	21,649	6,764	28,413	4,373
(in % of total employment)	1.10%	0.73%	0.23%	0.95%	0.15%
Fiscal returns (in mill. €)	274.8	29.9	14.4	44.2	23.8

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		2.1 %			
indirect land use:		15,991 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	274.8	11.7	223.7	235.4	39.4
due to Bulgarian activities in Bulgaria	245.4	11.7	203.1	214.8	30.7
due to other EU+ countries in Bulgaria	29.4	0.0	20.6	20.6	8.8
due to Bulgaria in other EU+ countries	288.4	11.7	232.9	244.5	43.9
Retail (off-premise)	71.8	5.4	43.0	48.3	23.4
due to Bulgarian activities in Bulgaria	66.4	5.4	40.3	45.7	20.7
due to other EU+ countries in Bulgaria	5.4	0.0	2.6	2.6	2.7
due to Bulgaria in other EU+ countries	78.6	5.4	46.1	51.5	27.1
Catering (on-premise)	105.1	6.0	58.7	64.6	40.5
due to Bulgarian activities in Bulgaria	91.3	6.0	50.3	56.3	35.0
due to other EU+ countries in Bulgaria	13.8	0.0	8.3	8.3	5.5
due to Bulgaria in other EU+ countries	110.9	6.0	59.5	65.5	45.4
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Bulgarian GVA)	436.5 (0.8 %)	1.0%	18.		
Employment (in jobs per year): (in % of Bulgarian employment)	46,851 (1.6 %)	5.1%	7.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Bulgarian government revenue)	312.9 (1.3 %)	0.8%	22.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Bulg. total CO ₂ eq. emissions)	451.7 (0.9 %)	2.6%	9.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.4 Croatia

A. Production					
Population: 4.1 mill.					
Annual final consumption expenditure per capita: € 10,246					
Spirits from Croatia sold worldwide (in 1,000 hectolitres): 132.3					
Δ 2019-2020 (in %): - 11.9					
Croatian spirits production turnover (in mill. €): 77.9					
Top-selling Croatian spirits products: Bitters/Spirit Aperitifs, Brandy, Liqueurs					
Largest export country: North Macedonia					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Croatia	81.6	31.0	31.7	62.7	18.9
due to Croatian activities in Croatia	71.7	31.0	26.0	56.9	14.8
due to other EU+ countries in Croatia	9.9	0.0	5.8	5.8	4.1
due to Croatia in other EU+ countries	21.7	0.0	11.3	11.3	10.4
Employment effect (jobs per year)	2,768	659	1,326	1,984	784
(in % of total Croatian employment)	0.17%	0.04%	0.08%	0.12%	0.05%
Fiscal returns (in mill. €)	23.0	6.8	7.8	14.7	8.3
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Croatia (in 1,000 hectolitres): 147.3					
Δ 2019-2020 (in %): - 17.0					
On-premise share (of volume): 20 %					
Spirits sold in Croatia (in € per adult): € 62.68					
Δ 2019-2020 (in %): - 14.9					
Most favoured products: Fruit Eaux de Vie, Bitters/Spirit Aperitifs, Brandy					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Croatia	150.6	79.4	35.8	115.2	35.4
due to Croatian activities in Croatia	144.9	79.4	32.9	112.3	32.5
due to other EU+ countries in Croatia	5.7	0.0	2.9	2.9	2.8
due to Croatia in other EU+ countries	29.7	0.0	11.4	11.4	18.4
Employment effect (jobs per year)	7,720	4,735	1,539	6,274	1,446
(in % of total employment)	0.47%	0.29%	0.09%	0.38%	0.09%
Fiscal returns (in mill. €)	122.6	18.9	9.1	28.0	16.5

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.3 %			
indirect land use:		2,009 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	47.8	6.3	30.1	36.4	11.4
due to Croatian activities in Croatia	38.8	6.3	23.8	30.1	8.7
due to other EU+ countries in Croatia	9.0	0.0	6.3	6.3	2.7
due to Croatia in other EU+ countries	50.7	6.3	31.4	37.7	13.0
Retail (off-premise)	15.2	2.3	6.5	8.9	6.3
due to Croatian activities in Croatia	13.9	2.3	6.0	8.3	5.6
due to other EU+ countries in Croatia	1.2	0.0	0.5	0.5	0.7
due to Croatia other EU+ countries	17.9	2.3	7.6	9.9	8.0
Catering (on-premise)	37.8	1.2	22.2	23.4	14.4
due to Croatian activities in Croatia	34.6	1.2	20.3	21.5	13.1
due to other EU+ countries in Croatia	3.2	0.0	1.9	1.9	1.3
due to Croatian other EU+ countries	45.4	1.2	25.5	26.7	18.7
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Croatian GVA)	232.2 (0.6 %)	0.5%	23		
Employment (in jobs per year): (in % of Croatian employment)	10,489 (0.6 %)	1.2%	17.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Croatian government revenue)	145.6 (0.6 %)	0.4%	26.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Croatian total CO ₂ eq. emissions)	100.7 (0.6 %)	0.6%	22.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.5 Cyprus

A. Production					
Population: 0.9 mill.					
Annual final consumption expenditure per capita: € 20,303					
Spirits from Cyprus sold worldwide (in 1,000 hectolitres): 9.8					
Δ 2019-2020 (in %): - 22.5					
Cypriot spirits production turnover (in mill. €): 8.3					
Top-selling Cypriot spirits products: Brandy, Aniseed, Vodka					
Largest export country: St. Kitts					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Cyprus	11.3	1.7	6.6	8.2	3.1
due to Cypriot activities in Cyprus	5.3	1.7	2.5	4.2	1.1
due to other EU+ countries in Cyprus	6.1	0.0	4.0	4.0	2.0
due to Cyprus in other EU+ countries	3.2	0.0	2.0	2.0	1.1
Employment effect (jobs per year)	285	52	154	207	78
(in % of total Cypriot employment)	0.07%	0.01%	0.04%	0.05%	0.02%
Fiscal returns (in mill. €)	3.4	0.4	1.8	2.2	1.2
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Cyprus (in 1.000 hectolitres): 40.1					
Δ 2019-2020 (in %): - 28.2					
On-premise share (of volume): 37 %					
Spirits sold in Cyprus (in € per adult): € 81.57					
Δ 2019-2020 (in %): - 28.8					
Most favoured products: Scotch Whisky, Vodka, Brandy					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Cyprus	70.5	39.3	18.6	57.9	12.6
due to Cypriot activities in Cyprus	66.8	39.3	16.4	55.7	11.1
due to other EU+ countries in Cyprus	3.7	0.0	2.2	2.2	1.5
due to Cyprus in other EU+ countries	15.3	0.0	7.5	7.5	7.8
Employment effect (jobs per year)	2,431	1,658	444	2,102	329
(in % of total employment)	0.60%	0.41%	0.11%	0.52%	0.08%
Fiscal returns (in mill. €)	59.4	7.9	6.1	14.0	5.6

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.1 %			
indirect land use:		310 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	10.3	0.7	8.0	8.7	1.7
due to Cypriot activities in Cyprus	7.7	0.7	6.3	7.0	0.7
due to other EU+ countries in Cyprus	2.7	0.0	1.6	1.6	1.0
due to Cyprus in other EU+ countries	9.3	0.7	7.5	8.2	1.1
Retail (off-premise)	3.9	0.5	1.9	2.5	1.4
due to Cypriot activities in Cyprus	3.3	0.5	1.7	2.2	1.1
due to other EU+ countries in Cyprus	0.5	0.0	0.2	0.2	0.3
due to Cyprus in other EU+ countries	4.2	0.5	2.0	2.6	1.6
Catering (on-premise)	18.6	2.0	10.5	12.5	6.1
due to Cypriot activities in Cyprus	17.6	2.0	10.0	12.0	5.6
due to other EU+ countries in Cyprus	1.0	0.0	0.5	0.5	0.4
due to Cyprus in other EU+ countries	23.1	2.0	12.8	14.8	8.3
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Cypriot GVA)	81.8 (0.4 %)	0.2%	27.		
Employment (in jobs per year): (in % of Cypriot employment)	2,716 (0.7 %)	0.3%	27.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Cypriot government revenue)	62.9 (0.7 %)	0.2%	28.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Cypriot total CO ₂ eq. emissions)	32.9 (0.5 %)	0.2%	28.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.6 Czech Republic

A. Production					
Population: 10.7 mill.					
Annual final consumption expenditure per capita: € 13,535					
Spirits from Czechia sold worldwide (in 1,000 hectolitres): 510.0					
Δ 2019-2020 (in %): - 22.0					
Czech spirits production turnover (in mill. €): 358.1					
Top-selling Czech spirits products: Bitters/Spirit Aperitifs, Rum,, Vodka					
Largest export country: Slovakia					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Czechia	395.1	130.1	180.8	310.9	84.2
due to Czech activities in Czechia	284.2	130.1	112.2	242.3	41.9
due to other EU+ countries in Czechia	110.9	0.0	68.6	68.6	42.3
due to Czechia in other EU+ countries	116.0	0.0	68.9	68.9	47.0
Employment effect (jobs per year)	10,272	2,006	5,652	7,658	2,614
(in % of total Czech employment)	0.20%	0.04%	0.11%	0.15%	0.05%
Fiscal returns (in mill. €)	116.7	34.7	49.2	83.9	32.8
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Czechia (in 1,000 hectolitres): 540.2					
Δ 2019-2020 (in %): - 25.9					
On-premise share (of volume): 16 %					
Spirits sold in Czechia (in € per adult): € 93.92					
Δ 2019-2020 (in %): - 21.8					
Most favoured products: Rum, Bitters/Spirit Aperitifs, Vodka					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Czechia	360.7	165.2	124.8	290.0	70.7
due to Czech activities in Czechia	304.7	165.2	97.4	262.7	42.0
due to other EU+ countries in Czechia	56.0	0.0	27.3	27.3	28.7
due to Czechia in other EU+ countries	82.4	0.0	43.7	43.7	38.7
Employment effect (jobs per year)	15,989	9,899	3,898	13,797	2,192
(in % of total employment)	0.31%	0.19%	0.08%	0.27%	0.04%
Fiscal returns (in mill. €)	532.6	48.0	43.4	91.4	28.9

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		2.3 %			
indirect land use:		12,521 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	316.6	38.8	219.2	258.0	58.6
due to Czech activities in Czechia	192.6	38.8	127.3	166.1	26.5
due to other EU+ countries in Czechia	124.0	0.0	91.9	91.9	32.1
due to Czechia in other EU+ countries	256.5	38.7	172.6	211.3	45.2
Retail (off-premise)	47.1	3.1	24.7	27.8	19.3
due to Czech activities in Czechia	28.3	3.1	15.2	18.3	10.0
due to other EU+ countries in Czechia	18.7	0.0	9.5	9.5	9.3
due to Czechia in other EU+ countries	39.1	3.1	20.5	23.6	15.4
Catering (on-premise)	106.0	1.3	74.0	75.4	30.6
due to Czech activities in Czechia	78.0	1.3	58.3	59.6	18.4
due to other EU+ countries in Czechia	28.0	0.0	15.7	15.7	12.2
due to Czechia in other EU+ countries	105.0	1.3	74.8	76.1	28.8
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Czech GVA)	755.8 (0.4 %)	1.7%	10.		
Employment (in jobs per year): (in % of Czech employment)	26,261 (0.50 %)	2.9%	10.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Czech government revenue)	649.3 (0.7 %)	1.7%	13.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Czech total CO ₂ eq. emissions)	469.6 (0.5 %)	2.7%	8.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.7 Denmark

A. Production					
Population: 5.8 mill.					
Annual final consumption expenditure per capita: € 37,905					
Spirits from Denmark sold worldwide (in 1,000 hectolitres): 75.7					
Δ 2019-2020 (in %): - 14.0					
Danish spirits production turnover (in mill. €): 29.4					
Top-selling Danish spirits products: Aquavit, Bitters/Spirit Aperitifs, Liqueurs					
Largest export country: Sweden					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Denmark	121.9	11.7	71.4	83.2	38.8
due to Danish activities in Denmark	24.0	11.7	8.3	20.0	4.0
due to other EU+ countries in Denmark	97.9	0.0	63.1	63.1	34.8
due to Denmark in other EU+ countries	8.3	0.0	5.2	5.2	3.1
Employment effect (jobs per year)	1,464	135	876	1,011	453
(in % of total Danish employment)	0.05%	0.00%	0.03%	0.04%	0.02%
Fiscal returns (in mill. €)	46.2	4.0	24.3	28.3	17.8
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Denmark (in 1,000 hectolitres): 207.4					
Δ 2019-2020 (in %): - 8.1					
On-premise share (of volume): 11 %					
Spirits sold in Denmark (in € per adult): € 132.87					
Δ 2019-2020 (in %): - 4.2					
Most favoured products: Vodka, Gin, Scotch Whisky					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Denmark	305.1	139.6	105.5	245.1	60.0
due to Danish activities in Denmark	257.4	139.6	78.6	218.2	39.2
due to other EU+ countries in Denmark	47.7	0.0	26.9	26.9	20.8
due to Denmark in other EU+ countries	49.4	0.0	27.4	27.4	22.0
Employment effect (jobs per year)	6589	4529	1357	5887	702
(in % of total employment)	0.24%	0.16%	0.05%	0.21%	0.03%
Fiscal returns (in mill. €)	324.8	48.9	55.5	104.4	32.9

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.5 %			
indirect land use:		3,425 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	61.8	3.6	47.4	50.9	10.9
due to Danish activities in Denmark	8.8	3.6	4.5	8.1	0.7
due to other EU+ countries in Denmark	53.1	0.0	42.9	42.9	10.2
due to Denmark in other EU+ countries	12.9	3.6	7.6	11.2	1.7
Retail (off-premise)	18.0	2.5	9.2	11.7	6.3
due to Danish activities in Denmark	10.5	2.5	4.6	7.1	3.4
due to other EU+ countries in Denmark	7.5	0.0	4.6	4.6	2.9
due to Denmark in other EU+ countries	17.4	2.5	8.2	10.7	6.7
Catering (on-premise)	28.9	2.4	18.9	21.3	7.6
due to Danish activities in Denmark	16.1	2.4	10.0	12.4	3.7
due to other EU+ countries in Denmark	12.8	0.0	8.9	8.9	3.9
due to Denmark in other EU+ countries	29.3	2.4	18.9	21.3	8.0
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Danish GVA)	427.0 (0.2 %)	0.9%	19.		
Employment (in jobs per year): (in % of Danish employment)	8,053 (0.3 %)	0.9%	21.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Danish government revenue)	371.0 (0.2 %)	1.0%	19.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Danish total CO ₂ eq. emissions)	108.7 (0.1 %)	0.6%	21.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.8 Estonia

A. Production					
Population: 1.3 mill.					
Annual final consumption expenditure per capita: € 14,346					
Spirits from Estonia sold worldwide (in 1,000 hectolitres): 83.6					
Δ 2019-2020 (in %): -6.8					
Estonian spirits production turnover (in mill. €): 40.5					
Top-selling Estonian spirits products: Vodka, Bitters/Spirit Aperitifs, Liqueurs					
Largest export country: Latvia					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Estonia	40.7	11.1	19.6	30.7	10.0
due to Estonian activities in Estonia	29.7	11.1	12.7	23.8	5.9
due to other EU+ countries in Estonia	11.0	0.0	6.9	6.9	4.1
due to Estonia in other EU+ countries	16.3	0.0	9.5	9.5	6.9
Employment effect (jobs per year)	1208	338	557	895	312
(in % of total Estonian employment)	0.20%	0.05%	0.09%	0.14%	0.05%
Fiscal returns (in mill. €)	11.6	3.4	4.0	7.5	4.1
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Estonia (in 1,000 hectolitres): 132.8					
Δ 2019-2020 (in %): + 3.3					
On-premise share (of volume): 4 %					
Spirits sold in Estonia (in € per adult): € 270.18					
Δ 2019-2020 (in %): - 4.7					
Most favoured products: Vodka, Brandy, Rum					
Largest import country: (I) French					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Estonia	55.8	26.2	18.8	45.0	10.7
due to Estonian activities in Estonia	49.5	26.2	15.6	41.8	7.7
due to other EU+ countries in Estonia	6.3	0.0	3.2	3.2	3.0
due to Estonia in other EU+ countries	13.9	0.0	6.7	6.7	7.2
Employment effect (jobs per year)	2,785	1,902	549	2,451	334
(in % of total employment)	0.45%	0.31%	0.09%	0.40%	0.05%
Fiscal returns (in mill. €)	155.2	6.1	5.7	11.9	4.6

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.4 %			
indirect land use:		4,398 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	60.6	7.0	42.6	49.6	11.0
due to Estonian activities in Estonia	45.4	7.0	31.9	38.9	6.4
due to other EU+ countries in Estonia	15.3	0.0	10.7	10.7	4.6
due to Estonia in other EU+ countries	53.9	7.0	37.8	44.8	9.1
Retail (off-premise)	20.5	1.5	11.0	12.5	8.0
due to Estonian activities in Estonia	16.9	1.5	9.3	10.7	6.1
due to other EU+ countries in Estonia	3.6	0.0	1.7	1.7	1.9
due to Estonia in other EU+ countries	20.1	1.5	10.6	12.1	8.1
Catering (on-premise)	14.4	1.0	9.3	10.2	4.2
due to Estonian activities in Estonia	10.0	1.0	6.6	7.6	2.5
due to other EU+ countries in Estonia	4.4	0.0	2.7	2.7	1.8
due to Estonia in other EU+ countries	12.6	1.0	8.2	9.2	3.4
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Estonian GVA)	96.4 (0.4 %)	0.2%	26.		
Employment (in jobs per year): (in % of Estonian employment)	3,993 (0.6 %)	0.4%	25.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Estonian government revenue)	166.8 (1.5 %)	0.4%	25.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Estonian total CO ₂ eq. emissions)	95.6 (0.9 %)	0.5%	23.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.9 Finland

A. Production					
Population: 5.5 mill.					
Annual final consumption expenditure per capita: € 32,305					
Spirits from Finland sold worldwide (in 1,000 hectolitres): 392.0					
Δ 2019-2020 (in %): -13.7					
Finnish spirits production turnover (in mill. €): 184.6					
Top-selling Finish spirits products: Vodka, Liqueurs, White Spirits					
Largest export country: Poland					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Finland	216.3	50.3	115.0	165.3	51.1
due to Finnish activities in Finland	152.5	50.3	74.6	124.8	27.7
due to other EU+ countries in Finland	63.8	0.0	40.5	40.5	23.4
due to Finland in other EU+ countries	48.3	0.0	29.8	29.8	18.5
Employment effect (jobs per year)	2,757	511	1,562	2,073	684
(in % of total Finish employment)	0.11%	0.02%	0.06%	0.09%	0.03%
Fiscal returns (in mill. €)	76.0	17.0	36.1	53.1	23.0
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Finland (in 1.000 hectolitres): 234.2					
Δ 2019-2020 (in %): + 3.5					
On-premise share (of volume): 7 %					
Spirits sold in Finland (in € per adult): € 174.14					
Δ 2019-2020 (in %): + 4.8					
Most favoured products: Vodka, Cognac/Armagnac, Liqueurs					
Largest import country: French					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Finland	132.7	54.9	46.8	101.7	31.0
due to Finnish activities in Finland	107.9	54.9	35.0	89.9	18.0
due to other EU+ countries in Finland	24.8	0.0	11.8	11.8	13.0
due to Finland in other EU+ countries	19.9	0.0	10.7	10.7	9.2
Employment effect (jobs per year)	2,489	1,437	641	2,078	411
(in % of total employment)	0.10%	0.06%	0.03%	0.09%	0.02%
Fiscal returns (in mill. €)	618.1	19.1	20.3	39.4	14.2

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		1.0 %			
indirect land use:		12,683 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	126.0	4.1	102.5	106.7	19.3
due to Finnish activities in Finland	80.7	4.1	67.4	71.5	9.2
due to other EU+ countries in Finland	45.2	0.0	35.1	35.1	10.1
due to Finland in other EU+ countries	101.8	4.1	82.7	86.8	15.1
Retail (off-premise)	16.4	0.9	9.4	10.3	6.1
due to Finnish activities in Finland	10.7	0.9	6.4	7.3	3.4
due to other EU+ countries in Finland	5.7	0.0	3.0	3.0	2.7
due to Finland in other EU+ countries	13.9	0.9	8.0	8.9	5.0
Catering (on-premise)	23.5	1.3	16.0	17.3	6.2
due to Finnish activities in Finland	14.8	1.3	10.8	12.1	2.7
due to other EU+ countries in Finland	8.7	0.0	5.2	5.2	3.5
due to Finland in other EU+ countries	18.7	1.3	13.3	14.6	4.1
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Finnish GVA)	349.0 (0.2 %)	0.8%	21.		
Employment (in jobs per year): (in % of Finnish employment)	5,246 (0.2 %)	0.6%	24.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Finnish government revenue)	694.2 (0.6 %)	1.8%	12.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Finnish total CO ₂ eq. emissions)	165.8 (0.4 %)	1.0%	17.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.10 France

A. Production					
Population: 67.3 mill.					
Annual final consumption expenditure per capita: € 26,753					
Spirits from France sold worldwide (in 1,000 hectolitres): 3,879.0					
Δ 2019-2020 (in %): - 5.6					
French spirits production turnover (in mill. €): 4,179.1					
Top-selling French spirits products: Cognac/Armagnac, Vodka, Other Brandy					
Largest export country: United States					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in France	4,115.6	1,182.7	2,166.0	3,348.7	766.9
due to French activities in France	3,678.4	1182.7	1902.5	3,085.2	593.2
due to other EU+ countries in France	437.3	0.0	263.5	263.5	173.7
due to France in other EU+ countries	817.6	0.0	529.1	529.1	288.5
Employment effect (jobs per year)	46,811	7,867	29,186	37,053	9,758
(in % of total French employment)	0.17%	0.03%	0.11%	0.14%	0.04%
Fiscal returns (in mill. €)	2,069.3	562.6	1,024.7	1,587.3	482.0
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in France (in 1,000 hectolitres): 3,257.7					
Δ 2019-2020 (in %): - 3.6					
On-premise share (of volume): 10 %					
Spirits sold in France (in € per adult): 125.93					
Δ 2019-2020 (in %): - 1.7					
Most favoured products: Scotch Whisky, Aniseed, Rum					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in France	2,132.5	944.0	744.6	1,688.6	443.9
due to French activities in France	1,870.4	944.0	606.1	1,550.1	320.3
due to other EU+ countries in France	262.1	0.0	138.5	138.5	123.6
due to France in other EU+ countries	215.2	0.0	111.7	111.7	103.5
Employment effect (jobs per year)	38,768	23,153	9,955	33,108	5,659
(in % of total employment)	0.14%	0.09%	0.04%	0.12%	0.02%
Fiscal returns (in mill. €)	4,492.1	412.0	423.0	835.0	276.0

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		10.8 %			
indirect land use:		89,928 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	1,344.6	289.9	916.9	1,206.8	137.8
due to French activities in France	1,201.5	289.9	812.5	1,102.3	99.2
due to other EU+ countries in France	143.1	0.0	104.5	104.5	38.6
due to France in other EU+ countries	1,569.9	289.6	1,091.9	1,381.5	188.4
Retail (off-premise)	119.3	32.3	49.0	81.3	38.0
due to French activities in France	102.1	32.3	41.3	73.6	28.5
due to other EU+ countries in France	17.2	0.0	7.7	7.7	9.4
due to France in other EU+ countries	135.8	32.3	57.4	89.7	46.2
Catering (on-premise)	217.7	28.4	144.2	172.5	45.2
due to French activities in France	153.1	28.4	99.7	128.1	25.1
due to other EU+ countries in France	64.6	0.0	44.4	44.4	20.1
due to France in other EU+ countries	194.2	28.3	124.9	153.3	40.9
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of French GVA)	6,248.2 (0.3 %)	13.7%	2.		
Employment (in jobs per year): (in % of French employment)	85,578 (0.3 %)	9.4%	4.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of French government revenue)	6,561.4 (0.5 %)	17.2%	2.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of French total CO ₂ eq. emissions)	1,681.6 (0.6 %)	9.7%	4.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.11 Germany

A. Production					
Population: 83.2 mill.					
Annual final consumption expenditure per capita: € 29,610					
Spirits from Germany sold worldwide (in 1,000 hectolitres): 2,296.5					
Δ 2019-2020 (in %): - 8.6					
German spirits production turnover (in mill. €): 2,552.7					
Top-selling German spirits products: Liqueurs, Brandy, Bitters/Spirit Aperitifs					
Largest export country: United States					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Germany	3,214.2	546.4	1,830.9	2,377.3	836.9
due to German activities in Germany	2,224.5	546.4	1,254.9	1,801.2	423.2
due to other EU+ countries in Germany	989.7	0.0	576.1	576.1	413.7
due to Germany in other EU+ countries	565.6	0.0	367.2	367.2	198.4
Employment effect (jobs per year)	46,410	4,645	29,203	33,848	12,562
(in % of total German employment)	0.12%	0.01%	0.07%	0.09%	0.03%
Fiscal returns (in mill. €)	1,169.9	182.4	628.4	810.8	359.1
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Germany (in 1.000 hectolitres): 3,890.8					
Δ 2019-2020 (in %): - 6.6					
On-premise share (of volume): 10 %					
Spirits sold in Germany (in € per adult): 82.43					
Δ 2019-2020 (in %): - 6.4					
Most favoured products: Liqueurs, Bitters/Spirit Aperitifs, Vodka					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
Gross value added (GVA) in Germany	2,487.6	1042.4	802.6	1,845.0	642.6
due to German activities in Germany	1,991.4	1,042.4	573.4	1,615.9	375.6
due to other EU+ countries in Germany	496.2	0.0	229.2	229.2	267.0
due to Germany in other EU+ countries	245.9	0.0	126.0	126.0	119.9
Employment effect (jobs per year)	60,348	37,861	12,834	50,695	9,653
(in % of total employment)	0.15%	0.10%	0.03%	0.13%	0.02%
Fiscal returns (in mill. €)	3,500.8	368.7	338.2	707.0	282.1

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		10.2 %			
indirect land use:		30.964 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	1,358.1	122.8	1,020.7	1,143.5	214.6
due to German activities in Germany	999.8	122.8	773.7	896.5	103.3
due to other EU+ countries in Germany	358.2	0.0	246.9	246.9	111.3
due to Germany in other EU+ countries	1,287.5	122.7	992.6	1,115.3	172.2
Retail (off-premise)	191.0	33.2	85.1	118.3	72.7
due to German activities in Germany	139.4	33.2	61.3	94.6	44.9
due to other EU+ countries in Germany	51.6	0.0	23.7	23.7	27.8
due to Germany in other EU+ countries	176.8	33.2	78.3	111.5	65.3
Catering (on-premise)	292.9	41.3	157.4	198.7	94.3
due to German activities in Germany	194.9	41.3	105.4	146.6	48.3
due to other EU+ countries in Germany	98.1	0.0	52.0	52.0	46.0
due to Germany in other EU+ countries	262.6	41.2	148.9	190.2	72.4
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of German GVA)	5,701.8 (0.2 %)	12.5%	3.		
Employment (in jobs per year): (in % of German employment)	106,758 (0.3 %)	11.7%	3.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of German government revenue)	4,670.7 (0.3 %)	12.3%	3.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of German total CO ₂ eq. emissions)	1,842.0 (0.3 %)	10.6%	3.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.12 Greece

A. Production					
Population: 10.7 mill.					
Annual final consumption expenditure per capita: € 14,286					
Spirits from Greece sold worldwide (in 1,000 hectolitres): 274.6					
Δ 2019-2020 (in %): - 8.2					
Greek spirits production turnover (in mill. €): 132.3					
Top-selling Greek spirits products: Brand, Aniseed, Liqueurs					
Largest export country: Germany					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Greece	147.7	38.3	79.8	118.1	29.7
due to Greek activities in Greece	116.0	38.3	58.8	97.1	18.9
due to other EU+ countries in Greece	31.8	0.0	21.0	21.0	10.8
due to Greece in other EU+ countries	26.2	0.0	16.2	16.2	9.9
Employment effect (jobs per year)	3,879	686	2,320	3,006	873
(in % of total Greek employment)	0.11%	0.02%	0.06%	0.08%	0.02%
Fiscal returns (in mill. €)	45.0	11.1	22.1	33.2	11.8
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Greece (in 1,000 hectolitres): 257.2					
Δ 2019-2020 (in %): - 26.6					
On-premise share (of volume): 45 %					
Spirits sold in Greece (in € per adult): 61.61					
Δ 2019-2020 (in %): - 30.6					
Most favoured products: Scotch Whisky, Aniseed, Vodka					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Greece	327.4	160.8	117.4	278.1	49.3
due to Greek activities in Greece	307.8	160.8	107.0	267.8	40.0
due to other EU+ countries in Greece	19.6	0.0	10.4	10.4	9.2
due to Greece in other EU+ countries	34.1	0.0	17.7	17.7	16.4
Employment effect (jobs per year)	11,098	6,370	3,251	9,621	1,478
(in % of total employment)	0.31%	0.18%	0.09%	0.27%	0.04%
Fiscal returns (in mill. €)	487.4	42.2	35.6	77.8	19.7

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.9 %			
indirect land use:		4,526 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	115.9	4.4	93.9	98.3	17.6
due to Greek activities in Greece	91.0	4.4	76.5	80.9	10.1
due to other EU+ countries in Greece	24.9	0.0	17.5	17.5	7.5
due to Greece in other EU+ countries	104.8	4.4	86.6	91.0	13.8
Retail (off-premise)	16.6	0.0	10.7	10.7	5.8
due to Greek activities in Greece	12.3	0.0	8.7	8.7	3.6
due to other EU+ countries in Greece	4.3	0.0	2.0	2.0	2.2
due to Greece in other EU+ countries	14.1	0.0	9.6	9.6	4.5
Catering (on-premise)	114.2	6.3	85.4	91.7	22.5
due to Greek activities in Greece	104.2	6.3	79.9	86.1	18.0
due to other EU+ countries in Greece	10.1	0.0	5.6	5.6	4.5
due to Greece in other EU+ countries	118.6	6.3	89.0	95.3	23.3
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Greek GVA)	475.1 (0.3 %)	1.0%	16.		
Employment (in jobs per year): (in % of Greek employment)	14,977 (0.4 %)	1.6%	12.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Greek government revenue)	532.3 (0.6 %)	1.4%	14.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Greek total CO ₂ eq. emissions)	246.8 (0.3 %)	1.4%	13.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.13 Hungary

A. Production					
Population: 9.8 mill.					
Annual final consumption expenditure per capita: € 9,902					
Spirits from Hungary sold worldwide (in 1,000 hectolitres): 421.6					
Δ 2019-2020 (in %): -3.5					
Hungarian spirits production turnover (in mill. €): 223.0					
Top-selling Hungarian spirits products: Vodka, Bitters/Spirit Aperitifs, Brandy					
Largest export country: Poland					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Hungary	211.3	59.4	105.4	164.8	46.5
due to Hungarian activities in Hungary	153.7	59.4	70.1	129.5	24.3
due to other EU+ countries in Hungary	57.5	0.0	35.3	35.3	22.2
due to Hungary in other EU+ countries	97.5	0.0	57.7	57.7	39.7
Employment effect (jobs per year)	7,818	1,513	4,369	5,882	1,936
(in % of total Hungarian employment)	0.17%	0.03%	0.10%	0.13%	0.04%
Fiscal returns (in mill. €)	63.7	13.9	27.8	41.7	22.0
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Hungary (in 1,000 hectolitres): 515.0					
Δ 2019-2020 (in %): - 4.3					
On-premise share (of volume): 14 %					
Spirits sold in Hungary (in € per adult): € 94.02					
Δ 2019-2020 (in %): - 5.9					
Most favoured products: Fruit Eaux de Vie, Vodka, Bitters/Spirit Aperitifs					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Hungary	377.4	171.7	132.2	303.8	73.6
due to Hungarian activities in Hungary	344.6	171.7	116.0	287.6	57.0
due to other EU+ countries in Hungary	32.7	0.0	16.2	16.2	16.5
due to Hungary in other EU+ countries	137.2	0.0	69.7	69.7	67.5
Employment effect (jobs per year)	23,753	15,075	5,613	20,688	3,065
(in % of total employment)	0.53%	0.33%	0.12%	0.46%	0.07%
Fiscal returns (in mill. €)	384.1	52.9	50.8	103.7	40.8

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		1.1 %			
indirect land use:		11,483 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	151.8	23.1	104.5	127.6	24.2
due to Hungarian activities in Hungary	112.5	23.1	76.9	100.0	12.5
due to other EU+ countries in Hungary	39.3	0.0	27.6	27.6	11.7
due to Hungary in other EU+ countries	160.5	23.1	110.0	133.1	27.5
Retail (off-premise)	48.8	14.9	19.3	34.2	14.6
due to Hungarian activities in Hungary	42.3	14.9	16.4	31.3	11.0
due to other EU+ countries in Hungary	6.5	0.0	2.9	2.9	3.5
due to Hungary in other EU+ countries	59.6	14.9	24.4	39.3	20.3
Catering (on-premise)	107.1	9.1	72.4	81.5	25.6
due to Hungarian activities in Hungary	93.0	9.1	64.1	73.1	19.9
due to other EU+ countries in Hungary	14.1	0.0	8.4	8.4	5.7
due to Hungary in other EU+ countries	133.2	9.1	87.1	96.1	37.0
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Hungarian GVA)	588.6 (0.5 %)	1.3%	15.		
Employment (in jobs per year): (in % of Hungarian employment)	31,571 (0.7 %)	3.5%	9.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Hungarian government revenue)	447.8 (0.8 %)	1.2%	16.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Hung. total CO ₂ eq. emissions)	307.7 (0.6 %)	1.8%	12.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.14 Ireland

A. Production					
Population: 5.0 mill.					
Annual final consumption expenditure per capita: € 28,316					
Spirits from Ireland sold worldwide (in 1,000 hectolitres): 1,848.8					
Δ 2019-2020 (in %): - 3.8					
Irish spirits production turnover (in mill. €): 1,412.3					
Top-selling Irish spirits products: Irish Whiskey, Liqueurs, Gin					
Largest export country: United States					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Ireland	1,233.8	746.4	355.8	1,102.2	131.6
due to Irish activities in Ireland	1,062.1	746.4	237.9	984.3	77.9
due to other EU+ countries in Ireland	171.6	0.0	117.9	117.9	53.7
due to Ireland in other EU+ countries	377.7	0.0	241.6	241.6	136.1
Employment effect (jobs per year)	6,802	2,684	2,767	5,451	1,351
(in % of total Irish employment)	0.31%	0.12%	0.13%	0.25%	0.06%
Fiscal returns (in mill. €)	258.8	138.5	75.8	214.3	44.5
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Ireland (in 1,000 hectolitres): 207.3					
Δ 2019-2020 (in %): - 4.8					
On-premise share (of volume): 13 %					
Spirits sold in Ireland (in € per adult): € 200.81					
Δ 2019-2020 (in %): - 7.4					
Most favoured products: Irish Whiskey, Vodka, Gin					
Largest import country: (I) French					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Ireland	249.0	116.0	79.1	195.1	53.9
due to Irish activities in Ireland	161.7	116.0	27.7	143.7	18.0
due to other EU+ countries in Ireland	87.3	0.0	51.4	51.4	35.9
due to Ireland in other EU+ countries	45.6	0.0	25.8	25.8	19.8
Employment effect (jobs per year)	5,067	3,919	656	4,575	492
(in % of total employment)	0.23%	0.18%	0.03%	0.21%	0.02%
Fiscal returns (in mill. €)	569.1	30.2	21.7	51.9	17.1

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		3.7 %			
indirect land use:		11,658 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	452.0	104.2	315.2	419.4	32.5
due to Irish activities in Ireland	378.9	104.2	256.9	361.2	17.7
due to other EU+ countries in Ireland	73.1	0.0	58.3	58.3	14.8
due to Ireland in other EU+ countries	493.0	104.1	340.2	444.3	48.7
Retail (off-premise)	12.1	2.5	4.8	7.3	4.8
due to Irish activities in Ireland	5.2	2.5	1.5	4.0	1.3
due to other EU+ countries in Ireland	6.8	0.0	3.3	3.3	3.5
due to Ireland in other EU+ countries	8.7	2.5	3.4	5.9	2.9
Catering (on-premise)	34.5	5.4	19.6	25.0	9.5
due to Irish activities in Ireland	15.0	5.4	6.5	11.9	3.1
due to other EU+ countries in Ireland	19.4	0.0	13.1	13.1	6.4
due to Ireland in other EU+ countries	21.3	5.4	9.8	15.2	6.1
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Irish GVA)	1,482.7 (0.4 %)	3.3%	7.		
Employment (in jobs per year): (in % of Irish employment)	11,869 (0.5 %)	1.3%	16.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Irish government revenue)	827.9 (1.0 %)	2.2%	9.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Irish total CO ₂ eq. emissions)	498.5 (1.0 %)	2.9%	7.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.15 Italy

A. Production					
Population: 59.6 mill.					
Annual final consumption expenditure per capita: € 21,827					
Spirits from Italy sold worldwide (in 1,000 hectolitres): 1,377.2					
Δ 2019-2020 (in %): - 9.9					
Italian spirits production turnover (in mill. €): 2,855.0					
Top-selling Italian spirits products: Bitters/Spirit Aperitifs, Brandy, Aniseed					
Largest export country: Germany					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Italy	3,037.0	836.3	1,606.1	2,442.4	594.7
due to Italian activities in Italy	2,683.0	836.3	1,388.4	2,224.6	458.4
due to other EU+ countries in Italy	354.0	0.0	217.7	217.7	136.3
due to Italy in other EU+ countries	448.2	0.0	265.6	265.6	182.6
Employment effect (jobs per year)	41,153	4,848	26,370	31,218	9,935
(in % of total Italian employment)	0.19%	0.02%	0.12%	0.14%	0.05%
Fiscal returns (in mill. €)	1,155.2	283.7	603.6	887.3	267.9
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Italy (in 1,000 hectolitres): 1,062.4					
Δ 2019-2020 (in %): - 17.7					
On-premise share (of volume): 38 %					
Spirits sold in Italy (in € per adult): € 34.09					
Δ 2019-2020 (in %): - 12.6					
Most favoured products: Bitters/Spirit Aperitifs, Brandy, Liqueurs					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Italy	1,636.3	756.5	579.8	1,336.3	300.0
due to Italian activities in Italy	1,450.4	756.5	489.2	1,245.7	204.7
due to other EU+ countries in Italy	185.9	0.0	90.6	90.6	95.3
due to Italy in other EU+ countries	145.6	0.0	78.4	78.4	67.2
Employment effect (jobs per year)	33,998	19,627	9,394	29,021	4,977
(in % of total employment)	0.16%	0.09%	0.04%	0.13%	0.02%
Fiscal returns (in mill. €)	1,597.9	269.8	261.6	531.4	138.2

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		8.3 %			
indirect land use:		30,432 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	1,047.2	190.7	735.3	925.9	121.3
due to Italian activities in Italy	920.4	190.7	641.4	832.1	88.3
due to other EU+ countries in Italy	126.8	0.0	93.9	93.9	32.9
due to Italy in other EU+ countries	1,116.7	190.5	777.9	968.4	148.4
Retail (off-premise)	47.9	9.6	23.5	33.2	14.8
due to Italian activities in Italy	31.0	9.6	15.8	25.5	5.6
due to other EU+ countries in Italy	16.9	0.0	7.7	7.7	9.2
due to Italy in other EU+ countries	37.6	9.6	19.2	28.9	8.7
Catering (on-premise)	232.2	31.5	150.7	182.3	49.9
due to Italian activities in Italy	195.1	31.5	129.2	160.7	34.4
due to other EU+ countries in Italy	37.1	0.0	21.5	21.5	15.6
due to Italy in other EU+ countries	246.5	31.5	161.2	192.6	53.9
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Italian GVA)	4,673.3 (0.3 %)	10.3%	4.		
Employment (in jobs per year): (in % of Italian employment)	75,152 (0.3 %)	8.3%	5.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Italian government revenue)	2,753.1 (0.4 %)	7.2%	4.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Italian total CO ₂ eq. emissions)	1,327.4 (0.5 %)	7.6%	5.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.16 Latvia

A. Production					
Population: 1.9 mill.					
Annual final consumption expenditure per capita: € 11,830					
Spirits from Latvia sold worldwide (in 1,000 hectolitres): 90.8					
Δ 2019-2020 (in %): - 1.5					
Latvian spirits production turnover (in mill. €): 70.8					
Top-selling Latvian spirits products: Bitters/Spirit Aperitifs, Vodka, Brandy					
Largest export country: Lithuania					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Latvia	69.7	20.7	31.6	52.3	17.4
due to Latvian activities in Latvia	57.8	20.7	24.5	45.3	12.6
due to other EU+ countries in Latvia	11.9	0.0	7.0	7.0	4.8
due to Latvia in other EU+ countries	25.7	0.0	14.7	14.7	11.1
Employment effect (jobs per year)	2,517	630	1,231	1,860	656
(in % of total Latvian employment)	0.30%	0.07%	0.14%	0.22%	0.08%
Fiscal returns (in mill. €)	16.5	4.5	5.9	10.4	6.1
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Latvia (in 1,000 hectolitres): 221.7					
Δ 2019-2020 (in %): + 1.4					
On-premise share (of volume): 4 %					
Spirits sold in Latvia (in € per adult): € 282.53					
Δ 2019-2020 (in %): + 2.9					
Most favoured products: Vodka, Brandy, Rum					
Largest import country: (I) French					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Latvia	104.5	51.0	30.6	81.7	22.8
due to Latvian activities in Latvia	98.7	51.0	28.0	79.0	19.7
due to other EU+ countries in Latvia	5.8	0.0	2.7	2.7	3.1
due to Latvia in other EU+ countries	23.2	0.0	9.9	9.9	13.3
Employment effect (jobs per year)	5,526	3,595	1,076	4,670	856
(in % of total employment)	0.65%	0.42%	0.13%	0.55%	0.10%
Fiscal returns (in mill. €)	250.5	11.6	10.4	22.0	8.7

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.3 %			
indirect land use:		5,374 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	43.8	6.4	28.7	35.1	8.7
due to Latvian activities in Latvia	33.2	6.4	21.1	27.5	5.7
due to other EU+ countries in Latvia	10.6	0.0	7.6	7.6	3.0
due to Latvia in other EU+ countries	51.0	6.4	33.4	39.8	11.2
Retail (off-premise)	19.3	3.5	8.8	12.3	6.9
due to Latvian activities in Latvia	17.5	3.5	8.1	11.6	5.9
due to other EU+ countries in Latvia	1.7	0.0	0.7	0.7	1.0
due to Latvia in other EU+ countries	24.7	3.5	10.9	14.4	10.3
Catering (on-premise)	12.6	0.7	7.5	8.2	4.4
due to Latvian activities in Latvia	9.7	0.7	5.7	6.4	3.3
due to other EU+ countries in Latvia	2.9	0.0	1.8	1.8	1.1
due to Latvia in other EU+ countries	16.2	0.7	9.5	10.2	6.0
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Latvian GVA)	174.2 (0.7 %)	0.4%	24.		
Employment (in jobs per year): (in % of Latvian employment)	8,043 (0.9 %)	0.9%	22.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Latvian government revenue)	267.0 (2.3 %)	0.7%	24.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Latvian total CO ₂ eq. emissions)	75.7 (0.8 %)	0.4%	25.		

Source: Own calculations on the basis of IWSR and Eurostat.

Note: The Latvian Alcohol Industry Association has deposed that those figures based on IWSR and Eurostat seem to deviate from national data sources, especially with regard to production figures. Latvia is an interesting case as we had to estimate missing production turnovers based on available Eurostat employment figures. This underlines the need to further improve and coordinate industry statistics in Europe. We must leave the mismatch to future investigations.

7.17 Lithuania

A. Production					
Population: 2.8 mill.					
Annual final consumption expenditure per capita: € 13,687					
Spirits from Lithuania sold worldwide (in 1,000 hectolitres): 162.6					
Δ 2019-2020 (in %): -4.7					
Lithuanian spirits production turnover (in mill. €): 70.8					
Top-selling Lithuanian spirits products: Vodka, Bitters/Spirit Aperitifs, Liqueurs					
Largest export country: Poland					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Lithuania	62.7	15.6	32.6	48.2	14.5
due to Lithuanian activities in Lithuania	38.3	15.6	16.3	31.9	6.4
due to other EU+ countries in Lithuania	24.3	0.0	16.3	16.3	8.0
due to Lithuania in other EU+ countries	15.2	0.0	8.9	8.9	6.3
Employment effect (jobs per year)	2,081	442	1,126	1,569	513
(in % of total Lithuanian employment)	0.16%	0.03%	0.09%	0.12%	0.04%
Fiscal returns (in mill. €)	13.6	3.0	6.1	9.0	4.6
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Lithuania (in 1,000 hectolitres): 278.6					
Δ 2019-2020 (in %): + 5.3					
On-premise share (of volume): 3 %					
Spirits sold in Lithuania (in € per adult): € 192.49					
Δ 2019-2020 (in %): + 6.9					
Most favoured products: Vodka, Brandy, Scotch Whisky					
Largest import country: French					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Lithuania	83.1	46.9	19.7	66.6	16.4
due to Lithuanian activities in Lithuania	70.6	46.9	13.0	60.0	10.7
due to other EU+ countries in Lithuania	12.4	0.0	6.7	6.7	5.7
due to Lithuania in other EU+ countries	12.2	0.0	4.8	4.8	7.3
Employment effect (jobs per year)	3,740	2,492	660	3,153	587
(in % of total employment)	0.29%	0.19%	0.05%	0.24%	0.05%
Fiscal returns (in mill. €)	298.6	9.0	4.8	13.8	5.7

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.3 %			
indirect land use:		5,182 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	39.6	3.9	28.6	32.5	7.1
due to Lithuanian activities in Lithuania	19.1	3.9	12.6	16.5	2.6
due to other EU+ countries in Lithuania	20.5	0.0	16.0	16.0	4.5
due to Lithuania in other EU+ countries	28.8	3.9	19.3	23.2	5.6
Retail (off-premise)	10.6	1.8	4.3	6.1	4.5
due to Lithuanian activities in Lithuania	7.0	1.8	2.3	4.2	2.8
due to other EU+ countries in Lithuania	3.6	0.0	1.9	1.9	1.7
due to Lithuania in other EU+ countries	10.6	1.8	3.7	5.5	5.1
Catering (on-premise)	9.8	0.3	5.9	6.2	3.6
due to Lithuanian activities in Lithuania	4.4	0.3	2.3	2.6	1.8
due to other EU+ countries in Lithuania	5.4	0.0	3.6	3.6	1.8
due to Lithuania in other EU+ countries	7.5	0.3	3.9	4.2	3.3
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Lithuanian GVA)	145.7 (0.3 %)	0.3%	25.		
Employment (in jobs per year): (in % of Lithuanian employment)	5,821 (0.4 %)	0.6%	23.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Lithuanian government revenue)	312.2 (1.8 %)	0.8%	23.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Lithuanian total CO ₂ eq. emissions)	60.0 (0.3 %)	0.3%	26.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.18 Malta

A. Production					
Population: 0.5 mill.					
Annual final consumption expenditure per capita: € 16,500					
Spirits from Malta sold worldwide (in 1,000 hectolitres): 0.4					
Δ 2019-2020 (in %): - 38.2					
Maltese spirits production turnover (in mill. €): 0.5					
Top-selling Maltese spirits products: Liqueurs					
Largest export country: -					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Malta	3.9	0.2	2.3	2.6	1.3
due to Maltese activities in Malta	0.4	0.2	0.1	0.3	0.0
due to other EU+ countries in Malta	3.5	0.0	2.2	2.2	1.3
due to Malta in other EU+ countries	0.2	0.0	0.1	0.1	0.1
Employment effect (jobs per year)	83	5	49	54	29
(in % of total Maltese employment)	0.03%	0.00%	0.02%	0.02%	0.01%
Fiscal returns (in mill. €)	0.9	0.1	0.5	0.5	0.4
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Malta (in 1,000 hectolitres): 20.9					
Δ 2019-2020 (in %): - 28.0					
On-premise share (of volume): 40 %					
Spirits sold in Malta (in € per adult): € 118.43					
Δ 2019-2020 (in %): - 29.1					
Most favoured products: Scotch Whisky, Vodka, Liqueurs					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Malta	30.0	17.0	9.1	26.2	3.9
due to Maltese activities in Malta	28.3	17.0	8.2	25.2	3.0
due to other EU+ countries in Malta	1.8	0.0	0.9	0.9	0.9
due to Malta in other EU+ countries	12.7	0.0	7.8	7.8	4.8
Employment effect (jobs per year)	775	477	211	688	87
(in % of total employment)	0.30%	0.19%	0.08%	0.27%	0.03%
Fiscal returns (in mill. €)	31.0	3.9	2.1	6.0	1.7

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.0 %			
indirect land use:		10 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	0.5	0.0	0.3	0.3	0.2
due to Maltese activities in Malta	0.1	0.0	0.0	0.1	0.0
due to other EU+ countries in Malta	0.4	0.0	0.3	0.3	0.2
due to Malta in other EU+ countries	0.1	0.0	0.1	0.1	0.0
Retail (off-premise)	0.4	0.2	0.1	0.3	0.1
due to Maltese activities in Malta	0.3	0.2	0.1	0.3	0.1
due to other EU+ countries in Malta	0.1	0.0	0.0	0.0	0.0
due to Malta in other EU+ countries	0.6	0.2	0.2	0.4	0.2
Catering (on-premise)	2.6	0.2	1.9	2.1	0.4
due to Maltese activities in Malta	2.4	0.2	1.8	2.0	0.4
due to other EU+ countries in Malta	0.2	0.0	0.1	0.1	0.1
due to Malta in other EU+ countries	5.5	0.2	3.8	4.0	1.4
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Maltese GVA)	33.9 (0.3 %)	0.1%	29.		
Employment (in jobs per year): (in % of Maltese employment)	858 (0.3 %)	0.1%	29.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Maltese government revenue)	32.0 (0.7 %)	0.1%	29.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Maltese total CO ₂ eq. emissions)	3.4 (0.2 %)	0.0%	29.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.19 Netherlands

A. Production					
Population: 17.4 mill.					
Annual final consumption expenditure per capita: € 31,185					
Spirits from the Netherlands sold worldwide (in 1,000 hl): 534.0					
Δ 2019-2020 (in %): - 5.8					
Dutch spirits production turnover (in mill. €): 391.6					
Top-selling Dutch spirits products: Vodka, Liqueurs, Genever					
Largest export country: United States					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in the Netherlands	620.1	102.5	365.6	468.1	152.0
due to Dutch activities in the Netherlands	299.9	102.5	151.4	253.9	46.0
due to other EU+ countries in the Netherlands	320.2	0.0	214.2	214.2	106.0
due to the Netherlands in other EU+ countries	101.9	0.0	65.5	65.5	36.4
Employment effect (jobs per year)	7,333	643	4,631	5,274	2,059
(in % of total Dutch employment)	0.08%	0.01%	0.05%	0.06%	0.02%
Fiscal returns (in mill. €)	162.3	23.6	87.6	111.2	51.1
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in the Netherlands (in 1,000 hectolitres): 538.0					
Δ 2019-2020 (in %): - 3.9					
On-premise share (of volume): 15 %					
Spirits sold in the Netherlands (in € per adult): € 88.32					
Δ 2019-2020 (in %): - 3.0					
Most favoured products: Scotch Whisky, Liqueurs, Rum					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in the Netherlands	606.3	262.8	217.6	480.4	125.9
due to Dutch activities in the Netherlands	453.9	262.8	131.5	394.3	59.6
due to other EU+ countries in the Netherlands	152.4	0.0	86.1	86.1	66.3
due to the Netherlands in other EU+ countries	78.9	0.0	44.8	44.8	34.1
Employment effect (jobs per year)	13,694	8,967	3,017	11,984	1,710
(in % of total employment)	0.16%	0.10%	0.03%	0.14%	0.02%
Fiscal returns (in mill. €)	752.3	62.7	65.6	128.4	44.6

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		2.2 %			
indirect land use:		4,597 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	285.2	31.9	209.1	240.9	44.2
due to Dutch activities in the Netherlands	135.0	31.9	93.1	124.9	10.0
due to other EU+ countries in the Netherlands	150.2	0.0	116.0	116.0	34.2
due to the Netherlands in other EU+ countries	178.6	31.8	126.3	158.2	20.4
Retail (off-premise)	31.9	4.7	13.4	18.1	13.8
due to Dutch activities in the Netherlands	14.7	4.7	5.0	9.8	5.0
due to other EU+ countries in the Netherlands	17.2	0.0	8.4	8.4	8.8
due to the Netherlands in other EU+ countries	21.3	4.7	8.1	12.8	8.5
Catering (on-premise)	90.6	13.1	54.6	67.8	22.8
due to Dutch activities in the Netherlands	45.7	13.1	24.5	37.6	8.1
due to other EU+ countries in the Netherlands	44.9	0.0	30.1	30.1	14.8
due to the Netherlands in other EU+ countries	63.9	13.1	36.3	49.4	14.4
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Dutch GVA)	1,226.3 (0.2 %)	2.7%	8.		
Employment (in jobs per year): (in % of Dutch employment)	21,028 (0.2 %)	2.3%	11.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Dutch government revenue)	914.6 (0.3 %)	2.4%	7.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Dutch total CO ₂ eq. emissions)	407.7 (0.3 %)	2.3%	10.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.20 Norway

A. Production					
Population: 5.4 mill.					
Annual final consumption expenditure per capita: € 41,792					
Spirits from Norway sold worldwide (in 1,000 hectolitres): 49,0					
Δ 2019-2020 (in %): - 0.4					
Norwegian spirits production turnover (in mill. €): 67.5					
Top-selling Norwegian spirits products: Aquavit, Vodka, Liqueurs					
Largest export country: Germany					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Norway	233.3	20.4	145.3	165.7	67.6
due to Norwegian activities in Norway	59.4	20.4	28.3	48.7	10.7
due to other EU+ countries in Norway	173.9	0.0	117.0	117.0	56.9
due to Norway in other EU+ countries	15.4	0.0	9.7	9.7	5.7
Employment effect (jobs per year)	1,438	170	789	959	480
(in % of total Norwegian employment)	0.06%	0.01%	0.03%	0.04%	0.02%
Fiscal returns (in mill. €)	85.7	7.2	49.3	56.5	29.1
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Norway (in 1,000 hectolitres): 156.7					
Δ 2019-2020 (in %): + 24.0					
On-premise share (of volume): 6 %					
Spirits sold in Norway (in € per adult): € 175.66					
Δ 2019-2020 (in %): + 22.7					
Most favoured products: Liqueurs, Vodka, Bitters/Spirit Aperitifs					
Largest import country: (I) French					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Norway	154.4	47.0	60.3	107.3	47.1
due to Norwegian activities in Norway	91.3	47.0	27.8	74.8	16.6
due to other EU+ countries in Norway	63.1	0.0	32.6	32.6	30.5
due to Norway in other EU+ countries	14.1	0.0	7.6	7.6	6.5
Employment effect (jobs per year)	1,737	1,006	399	1,405	332
(in % of total employment)	0.07%	0.04%	0.02%	0.05%	0.01%
Fiscal returns (in mill. €)	628.7	17.0	23.9	40.9	21.3

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.7 %			
indirect land use:		5,051 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	90.3	2.3	70.9	73.2	17.2
due to Norwegian activities in Norway	18.1	2.3	14.0	16.3	1.8
due to other EU+ countries in Norway	72.2	0.0	56.9	56.9	15.3
due to Norway in other EU+ countries	24.5	2.3	18.7	21.0	3.6
Retail (off-premise)	13.9	1.3	7.0	8.3	5.6
due to Norwegian activities in Norway	5.8	1.3	2.7	4.0	1.8
due to other EU+ countries in Norway	8.1	0.0	4.3	4.3	3.9
due to Norway in other EU+ countries	8.3	1.3	4.1	5.3	3.0
Catering (on-premise)	22.9	0.5	15.7	16.2	6.7
due to Norwegian activities in Norway	6.3	0.5	4.7	5.2	1.2
due to other EU+ countries in Norway	16.6	0.0	11.0	11.0	5.6
due to Norway in other EU+ countries	8.4	0.5	6.0	6.5	2.0
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Norwegian GVA)	387.6 (0.1 %)	0.9%	20.		
Employment (in jobs per year): (in % of Norwegian employment)	3,175 (0.1 %)	0.3%	26.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Norwegian government revenue)	714.4 (0.4 %)	1.9%	11.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Norwegian total CO ₂ eq. emissions)	127.2 -	0.7%	20.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.21 Poland

A. Production					
Population: 38.0 mill.					
Annual final consumption expenditure per capita: € 10,479					
Spirits from Poland sold worldwide (in 1,000 hectolitres): 3,221.2					
Δ 2019-2020 (in %): - 0.7					
Polish spirits production turnover (in mill. €): 2,682.6					
Top-selling Polish spirits products: Vodka, Liqueurs, Gin					
Largest export country: United States					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Poland	2,333.0	304.8	1,611.5	1,916.3	416.7
due to Polish activities in Poland	2,157.6	304.8	1,501.3	1,806.1	351.5
due to other EU+ countries in Poland	175.4	0.0	110.2	110.2	65.3
due to Poland in other EU+ countries	748.9	0.0	467.8	467.8	281.1
Employment effect (jobs per year)	8,3785	5,008	63,139	68,148	15,637
(in % of total Polish employment)	0.53%	0.03%	0.40%	0.43%	0.10%
Fiscal returns (in mill. €)	699.3	81.5	436.4	517.9	181.4
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Poland (in 1,000 hectolitres): 3,563.6					
Δ 2019-2020 (in %): + 0.6					
On-premise share (of volume): 3 %					
Spirits sold in Poland (in € per adult): € 135.02					
Δ 2019-2020 (in %): + 3.0					
Most favoured products: Vodka, Scotch Whisky, Liqueurs					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Poland	1,251.4	669.1	388.0	1,057.1	194.3
due to Polish activities in Poland	1,153.7	669.1	339.4	1,008.5	145.1
due to other EU+ countries in Poland	97.8	0.0	48.6	48.6	49.2
due to Poland in other EU+ countries	169.3	0.0	87.9	87.9	81.5
Employment effect (jobs per year)	6,0069	38,140	14,562	52,702	7,368
(in % of total employment)	0.38%	0.24%	0.09%	0.33%	0.05%
Fiscal returns (in mill. €)	1,723.5	176.4	131.5	307.9	86.2

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		28.9 %			
indirect land use:		86,856 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	3688.3	129.8	3104.4	3,234.2	454.2
due to Polish activities in Poland	3,460.0	129.8	2,947.4	3,077.2	382.8
due to other EU+ countries in Poland	228.3	0.0	157.0	157.0	71.4
due to Poland in other EU+ countries	3,808.8	129.7	3,204.6	3,334.3	474.6
Retail (off-premise)	501.6	100.7	264.9	365.6	136.0
due to Polish activities in Poland	464.5	100.7	248.4	349.0	115.4
due to other EU+ countries in Poland	37.1	0.0	16.6	16.6	20.5
due to Poland in other EU+ countries	506.4	100.6	270.9	371.5	134.9
Catering (on-premise)	300.5	20.6	192.9	213.5	87.0
due to Polish activities in Poland	227.6	20.6	154.1	174.6	53.0
due to other EU+ countries in Poland	72.9	0.0	38.9	38.9	34.0
due to Poland in other EU+ countries	252.6	20.5	169.9	190.4	62.2
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Polish GVA)	3,584.5 (0.8 %)	7.9%	5.		
Employment (in jobs per year): (in % of Polish employment)	143,854 (0.9 %)	15.8%	1.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Polish government revenue)	2,422.7 (1.1 %)	6.4%	5.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Polish total CO ₂ eq. emissions)	4,490.4 (1.3 %)	25.8%	1.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.22 Portugal

A. Production					
Population: 10.3 mill.					
Annual final consumption expenditure per capita: € 16,200					
Spirits from Portugal sold worldwide (in 1,000 hectolitres): 67.8					
Δ 2019-2020 (in %): - 23.5					
Portuguese spirits production turnover (in mill. €): 69.0					
Top-selling Portuguese spirits products: Brandy, Liqueurs, Gin					
Largest export country: France					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Portugal	114.3	21.3	58.2	79.5	34.8
due to Portuguese activities in Portugal	61.6	21.3	27.5	48.8	12.8
due to other EU+ countries in Portugal	52.8	0.0	30.7	30.7	22.0
due to Portugal in other EU+ countries	20.2	0.0	11.2	11.2	9.0
Employment effect (jobs per year)	3336	410	1888	2298	1038
(in % of total Portuguese employment)	0.07%	0.01%	0.04%	0.05%	0.02%
Fiscal returns (in mill. €)	35.4	6.1	15.8	21.8	13.6
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Portugal (in 1,000 hectolitres): 171.4					
Δ 2019-2020 (in %): - 30.9					
On-premise share (of volume): 41 %					
Spirits sold in Portugal (in € per adult): € 40.24					
Δ 2019-2020 (in %): - 32.1					
Most favoured products: Scotch Whisky, Liqueurs, Brandy					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Portugal	330.8	167.5	90.3	257.8	73.0
due to Portuguese activities in Portugal	302.8	167.5	76.8	244.4	58.4
due to other EU+ countries in Portugal	28.0	0.0	13.4	13.4	14.5
due to Portugal in other EU+ countries	53.7	0.0	22.4	22.4	31.3
Employment effect (jobs per year)	10,814	5,858	2,842	8,700	2,114
(in % of total employment)	0.24%	0.13%	0.06%	0.19%	0.05%
Fiscal returns (in mill. €)	318.0	47.7	32.7	80.4	31.9

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.5 %			
indirect land use:		2,603 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	75.0	5.7	54.6	60.3	14.7
due to Portuguese activities in Portugal	35.6	5.7	25.2	30.9	4.7
due to other EU+ countries in Portugal	39.4	0.0	29.4	29.4	10.0
due to Portugal in other EU+ countries	44.7	5.7	31.5	37.2	7.5
Retail (off-premise)	12.5	1.8	5.6	7.4	5.1
due to Portuguese activities in Portugal	8.6	1.8	3.9	5.6	2.9
due to other EU+ countries in Portugal	3.9	0.0	1.8	1.8	2.2
due to Portugal in other EU+ countries	10.7	1.8	4.7	6.4	4.3
Catering (on-premise)	85.3	13.4	48.3	61.7	23.5
due to Portuguese activities in Portugal	73.6	13.4	41.6	55.0	18.7
due to other EU+ countries in Portugal	11.6	0.0	6.8	6.8	4.9
due to Portugal in other EU+ countries	92.0	13.4	50.9	64.3	27.6
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Portuguese GVA)	445.1 (0.3 %)	1.0%	17.		
Employment (in jobs per year): (in % of Portuguese employment)	14,150 (0.3 %)	1.6%	13.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Portuguese government revenue)	353.5 (0.4 %)	0.9%	21.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Portuguese total CO ₂ eq. emissions)	172.7 (0.3 %)	1.0%	16.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.23 Romania

A. Production					
Population: 19.3 mill.					
Annual final consumption expenditure per capita: € 9,047					
Spirits from Romania sold worldwide (in 1,000 hectolitres): 917.4					
Δ 2019-2020 (in %): -4.6					
Romanian spirits production turnover (in mill. €): 121.1					
Top-selling Romanian spirits products: Brandy, Vodka, Fruit Eaux de Vie					
Largest export country: Greece					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Romania	176.5	44.3	83.0	127.3	49.2
due to Romanian activities in Romania	117.3	44.3	49.3	93.6	23.6
due to other EU+ countries in Romania	59.2	0.0	33.6	33.6	25.6
due to Romania in other EU+ countries	29.9	0.0	15.1	15.1	14.8
Employment effect (jobs per year)	8,801	1,521	4,594	6,115	2,686
(in % of total Romanian employment)	0.12%	0.02%	0.06%	0.08%	0.04%
Fiscal returns (in mill. €)	36.5	8.7	14.3	23.0	13.5
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Romania (in 1,000 hectolitres): 1,014.8					
Δ 2019-2020 (in %): - 6.4					
On-premise share (of volume): 14 %					
Spirits sold in Romania (in € per adult): € 40.10					
Δ 2019-2020 (in %): - 4.5					
Most favoured products: Fruit Eaux de Vie, Vodka, Brandy					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Romania	442.3	181.9	157.7	339.6	102.7
due to Romanian activities in Romania	407.2	181.9	141.4	323.3	84.0
due to other EU+ countries in Romania	35.1	0.0	16.4	16.4	18.7
due to Romania in other EU+ countries	78.5	0.0	32.6	32.6	45.8
Employment effect (jobs per year)	28,816	14,051	9,109	23,160	5,656
(in % of total employment)	0.38%	0.19%	0.12%	0.31%	0.07%
Fiscal returns (in mill. €)	318.5	35.6	27.8	63.4	30.4

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.9 %			
indirect land use:		8,961 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	130.1	6.3	89.9	96.2	33.9
due to Romanian activities in Romania	78.3	6.3	56.0	62.3	16.0
due to other EU+ countries in Romania	51.8	0.0	33.9	33.9	17.9
due to Romania in other EU+ countries	93.4	6.3	65.2	71.5	21.9
Retail (off-premise)	76.0	4.8	43.9	48.7	27.3
due to Romanian activities in Romania	66.5	4.8	39.6	44.4	22.1
due to other EU+ countries in Romania	9.5	0.0	4.3	4.3	5.2
due to Romania in other EU+ countries	79.5	4.8	45.4	50.2	29.2
Catering (on-premise)	131.3	7.0	80.5	87.4	43.9
due to Romanian activities in Romania	111.2	7.0	69.3	76.3	34.9
due to other EU+ countries in Romania	20.1	0.0	11.2	11.2	8.9
due to Romania in other EU+ countries	133.4	7.0	80.3	87.2	46.2
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Romanian GVA)	618.8 (0.3 %)	1.4%	14.		
Employment (in jobs per year): (in % of Romanian employment)	37,617 (0.5 %)	4.1%	8.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Romanian government revenue)	355.0 (0.5 %)	0.9%	20.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Romanian total CO ₂ eq. emissions)	337.4 (0.4 %)	1.9%	11.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.24 Slovakia

A. Production					
Population: 5.5 mill.					
Annual final consumption expenditure per capita: € 13,450					
Spirits from Slovakia sold worldwide (in 1,000 hectolitres): 309.2					
Δ 2019-2020 (in %): - 10.1					
Slovak spirits production turnover (in mill. €): 68.4					
Top-selling Slovak spirits products: Fruit Eaux de Vie, Vodka, Brandy					
Largest export country: United States					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Slovakia	106.0	15.3	59.7	75.1	31.0
due to Slovak activities in Slovakia	51.3	15.3	26.4	41.7	9.5
due to other EU+ countries in Slovakia	54.8	0.0	33.3	33.3	21.5
due to Slovakia in other EU+ countries	26.8	0.0	15.6	15.6	11.2
Employment effect (jobs per year)	3,283	661	1,738	2,399	883
(in % of total Slovak employment)	0.13%	0.03%	0.07%	0.09%	0.03%
Fiscal returns (in mill. €)	28.1	4.3	13.6	17.9	10.2
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Slovakia (in 1,000 hectolitres): 423.4					
Δ 2019-2020 (in %): - 10.5					
On-premise share (of volume): 12 %					
Spirits sold in Slovakia (in € per adult): € 126.49					
Δ 2019-2020 (in %): - 14.1					
Most favoured products: Vodka, Bitters/Spirit Aperitifs, Fruit Eaux de Vie					
Largest import country: Czech Republic					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Slovakia	210.1	101.6	64.5	166.0	44.1
due to Slovak activities in Slovakia	181.2	101.6	50.6	152.1	29.1
due to other EU+ countries in Slovakia	28.9	0.0	13.9	13.9	15.0
due to Slovakia in other EU+ countries	48.3	0.0	23.3	23.3	25.0
Employment effect (jobs per year)	10,783	7,584	1,973	9,557	1,226
(in % of total employment)	0.42%	0.30%	0.08%	0.37%	0.05%
Fiscal returns (in mill. €)	344.0	27.2	19.1	46.3	16.8

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.6 %			
indirect land use:		6.692 ha			
CO ₂ eq. emissions (in 1.000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	85.0	13.2	52.4	65.6	19.4
due to Slovak activities in Slovakia	37.6	13.2	20.0	33.2	4.4
due to other EU+ countries in Slovakia	47.3	0.0	32.4	32.4	14.9
due to Slovakia in other EU+ countries	54.1	13.2	31.6	44.7	9.3
Retail (off-premise)	24.6	1.5	13.4	14.9	9.7
due to Slovak activities in Slovakia	16.1	1.5	9.3	10.8	5.3
due to other EU+ countries in Slovakia	8.4	0.0	4.1	4.1	4.4
due to Slovakia in other EU+ countries	24.3	1.5	13.2	14.7	9.6
Catering (on-premise)	50.5	8.8	26.5	35.3	15.2
due to Slovak activities in Slovakia	36.2	8.8	18.9	27.7	8.5
due to other EU+ countries in Slovakia	14.3	0.0	7.6	7.6	6.7
due to Slovakia in other EU+ countries	53.5	8.8	28.9	37.7	15.8
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Slovak GVA)	316.2 (0.7 %)	0.4%	22.		
Employment (in jobs per year): (in % of Slovak employment)	14,065 (0.5 %)	1.5%	14.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Slovak government revenue)	372.2 (1.0 %)	1.0%	18.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Slovak total CO ₂ eq. emissions)	160.0 (0.5 %)	0.9%	18.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.25 Slovenia

A. Production					
Population: 2.1 mill.					
Annual final consumption expenditure per capita: € 15,844					
Spirits from Slovenia sold worldwide (in 1,000 hectolitres): 14.8					
Δ 2019-2020 (in %): -8.1					
Slovenian spirits production turnover (in mill. €): 2.1					
Top-selling Slovenian spirits products: Fruit Eaux de Vie, Liqueurs, Bitters/Spirit Aperitifs					
Largest export country: Croatia					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Slovenia	20.8	0.9	12.1	13.0	7.8
due to Slovenian activities in Slovenia	1.7	0.9	0.6	1.5	0.2
due to other EU+ countries in Slovenia	19.1	0.0	11.5	11.5	7.6
due to Slovenia in other EU+ countries	0.6	0.0	0.4	0.4	0.3
Employment effect (jobs per year)	573	17	343	360	213
(in % of total Slovenian employment)	0.06%	0.00%	0.04%	0.04%	0.02%
Fiscal returns (in mill. €)	6.8	0.2	3.6	3.9	2.9
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Slovenia (in 1,000 hectolitres): 44.6					
Δ 2019-2020 (in %): - 6.9					
On-premise share (of volume): 18 %					
Spirits sold in Slovenia (in € per adult): € 51.00					
Δ 2019-2020 (in %): - 7.5					
Most favoured products: Bitters/Spirit Aperitifs, Gin, Scotch Whisky					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Slovenia	46.5	19.1	15.7	34.8	11.7
due to Slovenian activities in Slovenia	34.6	19.1	10.0	29.1	5.5
due to other EU+ countries in Slovenia	11.9	0.0	5.7	5.7	6.2
due to Slovenia in other EU+ countries	9.9	0.0	5.1	5.1	4.8
Employment effect (jobs per year)	1,608	816	470	1,286	322
(in % of total employment)	0.17%	0.09%	0.05%	0.13%	0.03%
Fiscal returns (in mill. €)	60.2	6.0	6.4	12.3	4.9

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.1 %			
indirect land use:		416 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	14.6	0.4	9.9	10.3	4.2
due to Slovenian activities in Slovenia	1.1	0.4	0.5	0.9	0.1
due to other EU+ countries in Slovenia	13.5	0.0	9.4	9.4	4.1
due to Slovenia in other EU+ countries	1.4	0.4	0.8	1.2	0.2
Retail (off-premise)	5.9	1.0	2.7	3.7	2.2
due to Slovenian activities in Slovenia	3.5	1.0	1.5	2.5	0.9
due to other EU+ countries in Slovenia	2.4	0.0	1.2	1.2	1.2
due to Slovenia in other EU+ countries	4.6	1.0	2.1	3.1	1.5
Catering (on-premise)	15.5	2.2	8.9	11.2	4.3
due to Slovenian activities in Slovenia	9.6	2.2	5.4	7.7	1.9
due to other EU+ countries in Slovenia	5.9	0.0	3.5	3.5	2.4
due to Slovenia in other EU+ countries	12.9	2.2	7.4	9.6	3.3
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Slovenian GVA)	67.3 (0.2 %)	0.1%	28.		
Employment (in jobs per year): (in % of Slovenian employment)	2,181 (0.2 %)	0.2%	28.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Slovenian government revenue)	67.0 (0.3 %)	0.2%	27.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Slovenian total CO ₂ eq. emissions)	36.0 (0.2 %)	0.2%	27.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.26 Spain

A. Production					
Population: 47.3 mill.					
Annual final consumption expenditure per capita: € 18,450					
Spirits from Spain sold worldwide (in 1,000 hectolitres): 1,342,8					
Δ 2019-2020 (in %): - 18.5					
Spanish spirits production turnover (in mill. €): 909.5					
Top-selling Spanish spirits products: Brandy, Gin, Liqueurs					
Largest export country: Philippines					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Spain	1,221.9	287.2	610.6	897.8	324.1
due to Spanish activities in Spain	901.3	287.2	417.2	704.4	196.9
due to other EU+ countries in Spain	320.7	0.0	193.5	193.5	127.2
due to Spain in other EU+ countries	161.9	0.0	89.4	89.4	72.5
Employment effect (jobs per year)	20,141	2,786	11,457	14,243	5,897
(in % of total Spanish employment)	0.11%	0.01%	0.06%	0.08%	0.03%
Fiscal returns (in mill. €)	415.9	87.4	192.4	279.7	136.1
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Spain (in 1,000 hectolitres): 1,267.0					
Δ 2019-2020 (in %): - 33.0					
On-premise share (of volume): 41 %					
Spirits sold in Spain (in € per adult): € 51.61					
Δ 2019-2020 (in %): - 34.7					
Most favoured products: Gin, Scotch Whisky, Rum					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Spain	1,941.8	969.0	561.3	1,530.3	411.5
due to Spanish activities in Spain	1792.1	969.0	488.2	1457.2	334.9
due to other EU+ countries in Spain	149.7	0.0	73.1	73.1	76.6
due to Spain in other EU+ countries	178.0	0.0	82.4	82.4	95.5
Employment effect (jobs per year)	42,528	24,120	10,990	35,111	7,418
(in % of total employment)	0.22%	0.13%	0.06%	0.19%	0.04%
Fiscal returns (in mill. €)	1,778.5	302.4	214.8	517.3	182.5

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		4.0 %			
indirect land use:		32,513 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	535.9	46.7	399.7	446.4	89.5
due to Spanish activities in Spain	361.6	46.7	267.3	314.0	47.6
due to other EU+ countries in Spain	174.3	0.0	132.4	132.4	41.9
due to Spain in other EU+ countries	427.6	46.7	311.1	357.7	69.9
Retail (off-premise)	55.2	6.0	27.4	33.4	21.9
due to Spanish activities in Spain	38.1	6.0	19.7	25.7	12.4
due to other EU+ countries in Spain	17.2	0.0	7.6	7.6	9.5
due to Spain in other EU+ countries	46.1	6.0	23.1	29.1	17.0
Catering (on-premise)	288.9	7.6	195.1	202.8	86.1
due to Spanish activities in Spain	243.0	7.6	167.2	174.8	68.3
due to other EU+ countries in Spain	45.8	0.0	28.0	28.0	17.9
due to Spain in other EU+ countries	303.0	7.6	201.1	208.7	94.3
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Spanish GVA)	3,163.7 (0.3 %)	7.0%	6.		
Employment (in jobs per year): (in % of Spanish employment)	62,669 (0.3 %)	6.9%	6.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Spanish government revenue)	2,194.4 (0.5 %)	5.8%	6.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Spanish total CO ₂ eq. emissions)	880.0 (0.5 %)	5.1%	6.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.27 Sweden

A. Production					
Population: 10.3 mill.					
Annual final consumption expenditure per capita: € 32,513					
Spirits from Sweden sold worldwide (in 1,000 hectolitres): 1,387.0					
Δ 2019-2020 (in %): - 5.5					
Swedish spirits production turnover (in mill. €): 594.1					
Top-selling Swedish spirits products: Vodka, Aquavit, Whisky					
Largest export country: United States					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Sweden	682.1	260.7	282.7	543.4	138.7
due to Swedish activities in Sweden	541.2	260.7	194.6	455.2	85.9
due to other EU+ countries in Sweden	140.9	0.0	88.1	88.1	52.8
due to Sweden in other EU+ countries	131.3	0.0	76.9	76.9	54.4
Employment effect (jobs per year)	6,224	1,742	2,971	4,714	1,510
(in % of total Swedish employment)	0.13%	0.04%	0.06%	0.10%	0.03%
Fiscal returns (in mill. €)	274.7	86.9	112.9	199.8	74.9
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Sweden (in 1,000 hectolitres): 262.1					
Δ 2019-2020 (in %): + 11.4					
On-premise share (of volume): 7 %					
Spirits sold in Sweden (in € per adult): € 118.78					
Δ 2019-2020 (in %): + 19.0					
Most favoured products: Scotch Whisky, Vodka, Gin					
Largest import country: United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Sweden	402.8	192.2	122.5	314.7	88.1
due to Swedish activities in Sweden	337.8	192.2	90.4	282.6	55.2
due to other EU+ countries in Sweden	65.0	0.0	32.1	32.1	32.9
due to Sweden in other EU+ countries	51.4	0.0	24.8	24.8	26.6
Employment effect (jobs per year)	6,137	3,886	1,300	5,186	951
(in % of total employment)	0.13%	0.08%	0.03%	0.11%	0.02%
Fiscal returns (in mill. €)	447.4	61.3	63.1	124.4	48.7

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		1.3 %			
indirect land use:		11,827 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	164.8	39.2	104.0	143.2	21.6
due to Swedish activities in Sweden	128.5	39.2	77.1	116.3	12.1
due to other EU+ countries in Sweden	36.3	0.0	26.9	26.9	9.5
due to Sweden in other EU+ countries	191.8	39.2	123.0	162.2	29.6
Retail (off-premise)	22.2	4.3	10.6	14.8	7.4
due to Swedish activities in Sweden	16.7	4.3	7.6	11.9	4.8
due to other EU+ countries in Sweden	5.5	0.0	3.0	3.0	2.6
due to Sweden in other EU+ countries	26.2	4.3	12.0	16.2	10.0
Catering (on-premise)	21.5	0.6	14.1	14.7	6.7
due to Swedish activities in Sweden	12.8	0.6	9.1	9.8	3.1
due to other EU+ countries in Sweden	8.7	0.0	5.0	5.0	3.7
due to Sweden in other EU+ countries	22.7	0.6	15.3	15.9	6.8
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Swedish GVA)	1,084.9 (0.3 %)	2.4%	9.		
Employment (in jobs per year): (in % of Swedish employment)	12,361 (0.3 %)	1.4%	15.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Swedish government revenue)	722.1 (0.3 %)	1.9%	10.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Swedish total CO ₂ eq. emissions)	208.5 (0.5 %)	1.2%	14.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.28 Switzerland

A. Production					
Population: 8.6 mill.					
Annual final consumption expenditure per capita: € 48,179					
Spirits from Switzerland sold worldwide (in 1,000 hectolitres): 49.2					
Δ 2019-2020 (in %): -13.5					
Swiss spirits production turnover (in mill. €): 56.3					
Top-selling Swiss spirits products: Liqueurs, Fruit Eaux de Vie, Vodka					
Largest export country: Germany					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Switzerland	243.0	21.3	124.7	146.0	97.0
due to Swiss activities in Switzerland	54.6	21.3	20.6	41.8	12.8
due to other EU+ countries in Switzerland	188.4	0.0	104.1	104.1	84.2
due to Switzerland in other EU+ countries	15.8	0.0	8.3	8.3	7.5
Employment effect (jobs per year)	2,042	182	1,029	1,212	830
(in % of total Swiss employment)	0.05%	0.00%	0.02%	0.03%	0.02%
Fiscal returns (in mill. €)	55.9	4.0	27.4	31.5	24.5
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in Switzerland (in 1,000 hectolitres): 226.3					
Δ 2019-2020 (in %): - 2.2					
On-premise share (of volume): 22 %					
Spirits sold in Switzerland (in € per adult): € 99.14					
Δ 2019-2020 (in %): + 5.8					
Most favoured products: Scotch Whisky, Bitters/Spirit Aperitifs, Liqueurs					
Largest import country: (I) United Kingdom					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in Switzerland	503.5	198.0	165.5	363.6	139.9
due to Swiss activities in Switzerland	416.4	198.0	127.9	325.9	90.5
due to other EU+ countries in Switzerland	87.0	0.0	37.7	37.7	49.4
due to Switzerland in other EU+ countries	86.4	0.0	38.6	38.6	47.8
Employment effect (jobs per year)	7,101	4,363	1,482	5,845	1,256
(in % of total employment)	0.16%	0.10%	0.03%	0.13%	0.03%
Fiscal returns (in mill. €)	391.1	37.0	40.7	77.6	37.1

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		0.2 %			
indirect land use:		820 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	33.7	1.7	22.0	23.7	10.0
due to Swiss activities in Switzerland	9.3	1.7	6.3	8.0	1.3
due to other EU+ countries in Switzerland	24.4	0.0	15.7	15.7	8.7
due to Switzerland in other EU+ countries	15.6	1.7	10.5	12.2	3.4
Retail (off-premise)	13.2	1.3	7.6	8.8	4.4
due to Swiss activities in Switzerland	9.2	1.3	5.6	6.9	2.3
due to other EU+ countries in Switzerland	4.0	0.0	2.0	2.0	2.1
due to Switzerland in other EU+ countries	15.5	1.3	8.6	9.8	5.7
Catering (on-premise)	42.7	9.2	23.7	32.8	9.8
due to Swiss activities in Switzerland	36.4	9.2	20.6	29.7	6.7
due to other EU+ countries in Switzerland	6.2	0.0	3.1	3.1	3.1
due to Switzerland in other EU+ countries	58.8	9.2	33.0	42.2	16.6
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of Swiss GVA)	746.5 (0.1 %)	1.6%	11.		
Employment (in jobs per year): (in % of Swiss employment)	9,143.0 (0.2 %)	1.0%	20.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of Swiss government revenue)	447.1 (0.2 %)	1.2%	17.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of Swiss total CO ₂ eq. emissions)	89.6 -	0.5%	24.		

Source: Own calculations on the basis of IWSR and Eurostat.

7.29 United Kingdom (UK)

A. Production					
Population: 67.0 mill.					
Annual final consumption expenditure per capita: € 31,061.7					
Spirits from the UK sold worldwide (in 1,000 hectolitres): 10,022.1					
Δ 2019-2020 (in %): - 8.4					
British spirits production turnover (in mill. €): 6,609.7					
Top-selling British spirits products: Scotch Whisky, Gin, Other Whisky					
Largest export country: United States					
Economic Effects from production:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in the UK	7,102.8	3,493.1	2,324.0	5,817.1	1,285.7
due to British activities in the UK	6,592.6	3,493.1	2,018.5	5,511.5	1,081.1
due to other EU+ countries in the UK	510.2	0.0	305.5	305.5	204.7
due to the UK in other EU+ countries	815.3	0.0	480.7	480.7	334.5
Employment effect (jobs per year)	58,253	12,561	29,949	42,509	15,744
(in % of total British employment)	0.18%	0.04%	0.09%	0.13%	0.05%
Fiscal returns (in mill. €)	2,364.1	1,119.4	699.0	1,818.4	545.8
B. Consumption (i.e. sales on- and off-premise)					
Spirits sold in the UK (in 1,000 hectolitres): 3,185.9					
Δ 2019-2020 (in %): + 3.5					
On-premise share (of volume): 17 %					
Spirits sold in the UK (in € per adult): € 182.45					
Δ 2019-2020 (in %): + 6.7					
Most favoured products: Scotch Whisky, Gin, Vodka					
Largest import country: (I) United States					
Economic effects from on- and off-premise consumption:		...of which			
	overall	direct	indirect	dir.+indir.	induced
Gross value added (GVA) in the UK	3,496.4	1,612.7	1,062.6	2,675.3	821.1
due to British activities in the UK	3,275.5	1,612.7	955.9	2,568.6	706.9
due to other EU+ countries in the UK	221.0	0.0	106.7	106.7	114.2
due to the UK in other EU+ countries	339.7	0.0	163.6	163.6	176.1
Employment effect (jobs per year)	68,029	43,775	14,393	58,168	9,861
(in % of total employment)	0.21%	0.13%	0.04%	0.18%	0.03%
Fiscal returns (in mill. €)	6,932.3	430.6	429.1	859.7	363.3

C. Environmental Aspects					
Share of EU+ spirits production-related CO ₂ eq. emissions:		17.0 %			
indirect land use:		80,382 ha			
CO ₂ eq. emissions (in 1,000 tonnes):		...of which			
	overall	direct	indirect	dir.+indir.	induced
Production	2,140.2	786.6	1,114.9	1,901.5	238.7
due to British activities in the UK	1,997.3	786.6	1,014.2	1,800.7	196.6
due to other EU+ countries in the UK	142.9	0.0	100.7	100.7	42.1
due to the UK in other EU+ countries	2,357.6	785.8	1,270.7	2,056.5	301.1
Retail (off-premise)	181.0	42.9	83.3	126.2	54.7
due to British activities in the UK	164.0	42.9	75.7	118.6	45.4
due to other EU+ countries in the UK	16.9	0.0	7.6	7.6	9.3
due to the UK in other EU+ countries	197.9	42.9	90.3	133.2	64.7
Catering (on-premise)	361.9	57.1	203.4	260.4	101.4
due to British activities in the UK	3,24.9	57.1	182.4	239.5	85.4
due to other EU+ countries in the UK	37.0	0.0	21.0	21.0	16.0
due to the UK in other EU+ countries	412.5	57.0	232.6	289.6	122.9
TOTAL					
	Value	Share (EU+)	Rank (EU+)		
Gross value added (GVA) in mill. €: (in % of British GVA)	10,599.3 (0.54%)	23.3%	1.		
Employment (in jobs per year): (in % of British employment)	126,283 (0.38%)	13.9%	2.		
Fiscal effects (incl. VAT+Excise) in mill. €: (in % of British government revenue)	9,296.5 (0.95%)	24.4%	1.		
CO ₂ eq. emissions in 1,000 tonnes: (in % of British total CO ₂ eq. emissions)	2,683.0 (0.82%)	15.4%	2.		

Source: Own calculations on the basis of IWSR, Eurostat, Labour Force Survey (LFS), Worldbank and www.gov.uk.