

REPUBLIC OF IRELAND

GUIDE TO THE IRISH MARKET 2024

Market Profile



Drinks Ireland Wine who operates within the IBEC business association, represent the interests of the Irish wine importing companies. Every year they publish their Wine Market Report which gives an overview of the wine market in Ireland for the previous year. The **Drinks Ireland Wine 2024 Wine Report** highlights the trade data for 2023.

The Republic of Ireland has a relatively low per capita consumption for wine, during 2023 wine consumption per capita did increase after several years of declining consumption in the category. However, overall alcohol consumption levels in Ireland remain on a downward trajectory.

Wine consumption per capita

Year	2022	2023
Consumption / adult (litres of pure alcohol)	2.7 litres per adult	2.8 litres per adult

Based on Adult Population (aged 15 and over) 2023: 4.27 million 2022: 4.17 million
Source: Revenue Commissioners



The recently released 2023 Drinks Ireland Wine Report (DIW) show that 2023 was a positive year for the Irish wine market with volume sales increasing by +6.9%, to 9.4 million cases, up from 8.8 million in 2022. Wine is still the nation's second most popular alcoholic beverage and while wine's market share expanded, sales for other alcohol categories showed a small decrease during 2023. As in previous years, October to December was the most popular months for wine sales.



According to the data, Chile retains its crown as the most popular country of origin in terms of volume sales, with a 25.3% market share. Chile's nearest rival is Spain, in 2nd position with a 13.5% market share. Next comes Australia, in 3rd place with 13.1% of the Irish market. French wines are in fourth place with 12.7% of the market and Italy with just over 10% remains in 5th place. Sales of New Zealand wines continued to grow strongly during 2023, with New Zealand placed 6th place overall, and showing the most significant growth, with a market share of 7.7% of total volume sales.

According to the 2023 DIW report, the wine sector contributed €395 million in excise duty alone to the exchequer. Cormac Healy, Director of Drinks Ireland noted that in the past decade, wine alone, generated €4.1 billion for the exchequer from excise. In the report, he states that Ireland now has the second highest excise rate on wine in the EU. Irish consumers pay €3.19 in excise per standard bottle of wine (13% ABV). For sparkling wine drinkers, the excise hit is doubled with a rate of €6.37 on a standard bottle. While Budget 2025 did not change excise levels, Cormac Healy, and his colleague Jennifer Wallace, Director of Drinks Ireland Wine continues to call on the Government to move Irish alcohol excise levels closer to the EU norm.

Country of for the Irish Market for 2000 - 2023

Percentage share

	Share % 2000	Share % 2016	Share % 2017	Share % 2018	Share % 2019	Share % 2020	Share % 2021	Share % 2022	Share % 2023
Chile	14.9%	25.6%	27.0%	27.2%	27.5%	25.8%	24.3%	25.0%	25.3%
Spain	5.7%	12.3%	12.6%	13.0%	14.0%	15.4%	15.3%	14.0%	13.5%
Australia	16.7%	17.7%	16.7%	15.6%	12.8%	13.8%	13.3%	13.6%	13.1%
France	23.0%	12.9%	12.7%	11.9%	12.6%	12.0%	12.7%	11.6%	12.7%
Italy	8.9%	9.7%	9.4%	9.4%	9.8%	10.0%	10.0%	10.4%	10.1%
New Zealand	0.9%	5.6%	6.0%	6.4%	7.1%	7.0%	6.4%	6.7%	7.7%
United States	14.1%	7.0%	6.6%	7.0%	6.8%	6.4%	6.0%	6.4%	5.8%
Argentina	2.2%	2.8%	3.0%	3.2%	3.6%	4.3%	4.7%	5.0%	4.9%
South Africa	7.4%	3.8%	3.6%	3.4%	2.7%	2.2%	2.0%	2.2%	1.8%
All others	5.5%	2.4%	2.4%	2.9%	3.1%	3.1%	5.3%	5.1%	5.1%

Total Table Wine	100%	100%	100%	100%	100%	100%	100%	100%	100%
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Europe	43.4%	36.2%	37.1%	37.8%	39.5%	40.5%	43.3%	41.6%	41.4%
Rest of World	56.6%	63.8%	62.9%	62.7%	60.5%	59.5%	56.7%	58.4%	58.6%

Source: Estimated member data, trade statistics and Revenue Commissioners

Country of origin for still wine

	Cases 2000	Cases 2016	Cases 2017	Cases 2018	Cases 2019	Cases 2020	Cases 2021	Cases 2022	Cases 2023
Chile	669,000	2308600	2,446,295	2,415,128	2,476,438	2,602,151	2,128,085	2,172,090	2,368,113
Spain	257,000	1109210	1,141,605	1,154,289	1,260,732	1,553,222	1,339,905	1,217,421	1,263,618
Australia	750,000	1,596,180	1,513,079	1,385,147	1,152,669	1,391,848	1,164,754	1,173,629	1,226,177
France	1,043,000	1,163,318	1,150,665	1,056,619	1,134,659	1,210,303	1,112,209	1,077,287	1,188,737
Italy	386,000	874,743	851,673	834,640	882,513	1,008,586	875,755	902,118	945,373
New Zealand	41,000	505,006	543,621	568,265	639,371	706,010	560,483	586,815	720,730
United States	632,000	631,258	597,983	621,540	612,356	645,495	525,453	560,539	542,888
Argentina	96,000	252,403	271,811	284,132	324,188	433,692	411,605	437,921	458,646
South Africa	332,000	342,683	326,173	301,891	243,141	221,889	175,151	183,927	168,482
All others	278,000	234,569	217,449	257,496	279,161	312,662	464,151	446,680	477,367

Total Table Wine	4,484,000	9,017,970	9,060,354	8,879,147	9,005,230	10,085,858	8,757,551	8,758,427	9,360,131
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Europe	1,946,000	3,256,107	3,361,392	3,303,044	3,557,067	4,084,773	3,792,020	3,643,506	3,875,095
Rest of World	2,538,000	5,761,863	5,698,962	5,576,103	5,448,163	6,001,085	4,965,531	5,114,921	5,485,036

Source: Estimated member data, trade statistics and Revenue Commissioners

New World v Old World

Sales of New World wines are still dominant on the Irish market, though this is slightly changing. In 2020 New World Wine sales accounted for 60.50% of the market against 39.50% for sales of European wines. Sales from outside Europe, continue to dominate the Irish market, though they are showing a slight decrease since 2020.



Wine Consumption Breakdown

Accounting for 48% of the market, white wine continues to be the nation's favourite, ahead of red by four percentage points. Sparkling wine which includes, for example, champagne, cava, and prosecco, saw some market share increase in 2023, however, still wine dominates the category. 2023 also saw growth in non-alcohol wine as well as trends to lower ABV wines and organic wines.

Wine consumption breakdown

Year	Red	White	Rose
2019	45%	48%	6%
2020	45%	47%	7%
2021	45%	47%	7%
2022	45%	48%	6%
2023	44%	48%	7%

Source: Industry estimates

Irish Excise on Wine

Irish consumers pay €3.19 in excise per standard bottle of wine (13% ABV). Put bluntly, spend €12 on a bottle of wine and the Government is taking 45% of this in tax. It is even worse at cheaper price point, if you pay €8.00 (which is the entry level price point) 59% of this cost goes straight into the Irish exchequer.

The average spend on a bottle of wine on the Irish market is €10.00 - €12.00. Mid-price spend is €18.00 and more premium is €24.00

Ireland was the second most expensive country for alcohol in the Eurozone and the fourth most expensive of the total of 36 countries surveyed, with prices in Ireland running at just over double the EU27 average in 2023. Within the EU Ireland was the second most expensive for alcohol after Finland.

Irish Duty is €2.97 per bottle plus VAT at 23% which is 0.68 cent €3.65 which equates to €21.91 per case of 6 bottles. Vat @23% IS ADDED TO THE FINAL CASE PRICE

Irish Duty on Sparkling Wine is €3.94 per bottle + VAT @ 23% which is 0.90 cents which equates to €4.84 per case of 6 bottles. Vat @23% IS ADDED TO THE FINAL CASE PRICE

Note: VAT on Duty also applies in Ireland

Customs Duty Still wines not exceeding 13%: € 0.131 per litre

Still wines exceeding 13% not exceeding 15%: € 0.154 per litre

Sparkling wine: € 0.32 per litre

Excise Duty:

Still wine not exceeding 15%: € 4.2484 per litre

Sparkling wine: € 8.4968 per litre



IRELAND – WINE MARGINS IRELAND INDEPENDENT TRADE, SMALL QUANTITIES, RETAIL

EX-CELLARS COST	€5.00
SHIPPING, WAREHOUSING, DELIVERY	€0.75
EXCISE DUTY + VAT	€3.59
SUBTOTAL	€9.34
IMPORTER MARGIN 20%	€2.25
RETAILER MARGIN 30%	€4.80
	€16.53
VAT @ 23%	€3.80
RETAIL PRICE	€20.33

IRELAND MULTIPLES IMPORTING DIRECT

EX-CELLARS COST	€2.00
SHIPPING WAREHOUSING ETC	€0.25
EXCISE DUTY	€3.59
SUB-TOTAL	€5.89
MARGIN 50%	€5.89
	€11.78
VAT @ 23%	€2.70
RETAIL PRICE	€14.48

The Irish Importing Trade Structure

The domestic big guns are made up of the following key companies: **Ampersand, Barry & Fitzwilliam, Bibendum Ireland, Cassidy Wines, Classic Drinks, Comans Beverages, Dalcassian Wines & Spirits, Edward Dillon & Co, Findlater & Co, Febvre & Co, Irish Distillers/Pernod Ricard, Liberty Wines (Ireland), Richmond Marketing, Tindal Wine Merchants and 10 International.**

Many of the global brands have their own key account managers and offices in Ireland and sell directly to the trade here in association with an Irish distributor. They include **Castella Family Brands, Concha y Toro, E & J Gallo, FXC Brands, Delegat Wine Estates, Kenderman, Laurent Miguel, Santa Rita Estates and Treasury Wine Estates.** In the smaller independent sector, there are approximately 45-50 medium sized and small importing companies who specialise in importing premium and niche wines and selling them into the on trade and specialist off licences.

Wine Brands



The Top 20 Wine Brands is based on the Nielsen Scantrack sales figures. Every year we compare the overall volume sales of each wine brand in the off-trade on a MAT basis against the previous year's sales figures. The summary comes from Nielsen Scantrack which compares March 2023 with March 2024.

Top 20 Wine Brands in Ireland 2024

Once again, this year, there is no change this year in the top five, **Santa Rita**, **Casillero del Diabolo** and **McGuigan** remain in the top three position as they have since 2018. **Dadá** moved into the top five in 2022 and the **Barefoot** brand got there in 2023.

There was one new re-entrant this year, the Australian brand **Hardy's** returns to the top 20 after an absence of a few years, with a significant increase in volume sales of + 69.9%. The **Graham Norton** range also grew strongly last year with sales of the GN wine range increasing by +45.8%. Other brands showing strong growth included **Viña Carmen** from Chile +28.5%. New Zealand also performed well with volume sales of both **Brancott Estate** +25.1% and **Villa Maria** +24.4% showing significant growth. The Top 5 Wine Brands on the Irish Market for 2023-2024 are:

<u>Position</u>	<u>Wine Brand</u>	<u>Country</u>	<u>Importer</u>
No 1	Santa Rita	Chile	Bibendum Ireland
No 2	Concha y Toro	Chile	Concha y Toro
No 3	McGuigan	Australia	Barry & Fitzwilliam
No 4	Barefoot (E&J Gallo)	California	Comans Beverages
No 5	Fincas Las Moras (Dadá)	Argentina	Comans Beverages
No 6	I Heart Wine	Global	Frexinet/Copestick
No 7	Wolf Blass	Australia	Findlater & Co
No 8	Yellow Tail	Australia	Bibendum Ireland
No 9	Oyster Bay	New Zealand	Delegats Wine Estates Irish Distillers/Pernod Ricard
No 10	Campo Viejo	Spain	Ricard
No 11	Cono Sur (Concha y Toro)	Chile	Findlater & Co
No 12	Villa Maria	New Zealand	Barry & Fitzwilliam
No 13	19 Crimes	Australia	Findlater & Co
No 14	E&J Gallo (other brands)	California	Comans Wholesale
No 15	Torres	Spain	Findlater & Co
No 16	Brancott Estate	New Zealand	IDL/Pernod Ricard
No 17	Graham Norton	Global	Barry & Fitzwilliam
No 18	Faustino	Spain	Richmond Marketing
No 19	Hardy's	Australia	Bibendum Ireland
No 20	Vina Carmen (Santa Rita Group)	Chile	United Wines

Source: Nielsen Scantrack March 2024

Supermarkets in Ireland

Ireland is not a big grocery market, but it remains an innovative one, which should help drive additional growth. While there are signs that the recent inflationary wave is receding, cost pressures remain across the supply chain. Despite inflation rising again and sitting at 2.8% over the last 12 weeks compared to the same period last year, it is still the lowest inflation level since March 2022 and is down 8.5 percentage points from September 2023.

Grocery Market Data - September 2024

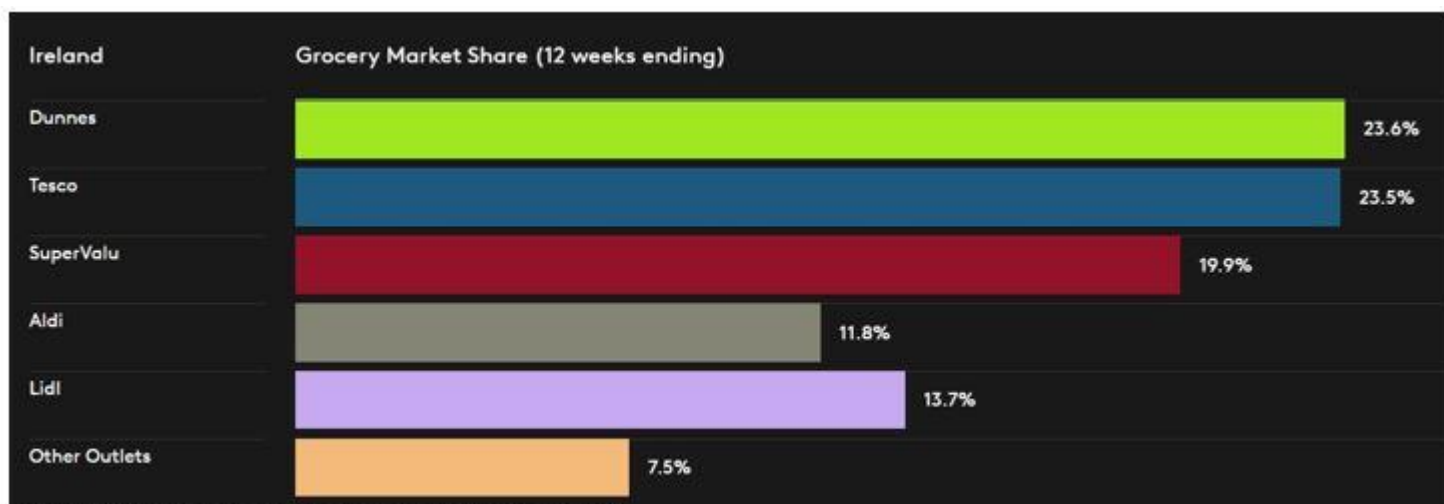
Dunnes hold 23.6% market share with growth of 9.4% year-on-year. It had the strongest growth in trips amongst all retailers, up 12% year-on-year and contributing an additional €83.6 million to their overall performance.



Tesco holds 23.5% of the market, up 10.4% year-on-year. Tesco's growth stems mainly from more frequent trips, which contributed an additional €32.9 million to their overall performance.

SuperValu holds 19.9% of the market with growth of 2.5%. SuperValu shoppers make the most trips in-store when compared to all retailers, 21.8 trips on average, up 2.5% year-on-year, which contributes an additional €15.5 million to their overall performance year-on-year.

Lidl holds 13.7% share with growth of 6.9% year on year. More frequent trips in-store, alongside new shopper recruits, contributed an additional combined €27 million to their overall performance. Aldi holds 11.8% market share with growth of 1% year on year. More frequent trips contributed an additional €9.4 million to their overall performance.



Kantar data over the 12 weeks to 1 September 2024.

Independent Retailers

The bigger off licence groups include **Carry Out, Fine Wines Limerick, O'Brien's Wines Beers Spirits, O'Donovan's, Molloy's Next Door,** and **The Wine Buff**, all are Irish owned.

The National Off Licence Association (NoffLA) represents the interests of the independent off licence sector. Most are franchise owners of the symbol group shops. Independent Off Licences as a stand-alone retail entity (outside of the off-licence chains) amount to no more than approximately 50 shops nationally. There are no national chains, but there are several key regional chains listed below.

Carry Out – 105 Shops (franchised) www.carryout.ie

Carry Out, One of Ireland's leading specialists off licence franchises, first opened its door in 2003 and since then has grown to over 100 stores located mostly in the Munster region. It is owned by Barry Group. As well as buying from the importing companies, the buying team at the Barry Group, also import a range of wines directly.



Fine Wines Off Licence Group www.finewines.ie

Ralph Parke's a successful property developer with a keen interest in wine started his chain of 17 stores, in Limerick City over 25 years ago. In 2017 a management buyout saw former MD John Blake take over the company. The Fine Wine chain shops can now be found in several key population centres around Ireland. They have nine shops in Limerick, one in Ennis, Co. Clare, two in Cork, one in Tralee, Co. Kerry, two in Co. Dublin, one in Galway and one in Clonmel, Co Tipperary. Fine Wines import wines directly but they also buy from many of the key importing and wholesale companies.

Molloys www.molloys.ie

This Dublin based group of off licences tends to have shops in areas not associated with wine. Consequently, they sell huge amounts of beer and heavily concentrate on value for money. The Molloy Group was founded in 1933, as a pub group. In the 1980's they ventured into off sales when several off licences were opened. Each store offers a large range of wines, beers, and spirits. They import some wines directly themselves but mainly buy from the key importing companies. Maureen O'Hara is the group's wine consultant and Shane O'Regan is the Molloy Group purchasing manager.



Next Door www.nextdoor.ie

This is a chain of over 60 stores, outside Dublin, originally set up by the Vintners Federation, the body that represents the interests of publicans outside the Dublin area, now operating on a stand-alone basis. The shops are all attached to larger pubs and are run by their owners. Wines stocked are sourced mainly from the major wholesale and importing companies, all the favourite brands are there and New World features strongly. The group is managed by a council made up of the owners, many of who are publicans. There are no Next-Door outlets in the Greater Dublin area.

O'Brien's Wine Off Licence Group www.obrienswine.ie

The O'Brien's group, a family run company, started out as a family run grocery shop in Bray, Co. Wicklow. The drinks retail chain grew up out of that grocery business with the first off-licence opening in Greystones in 1970, in 2019 they opened their 35th shop. This is one of the most dynamic wine retailers in Ireland. Their stores are not so much "off-licences" but a one stop shop for everything vinous! The company has built a very strong wine brand. It deals with 86 vineyard owners and stocks 1,200 wines. Their wine buyer, Lynne Coyle MW, worked with Oddbins in the UK and has a very keen eye. They import many of their own wines, but also buy from many of the key wine importing companies. The staff are all very well trained and this family-owned group is a bench mark in wine retailing and is one of Ireland's largest independent drinks retailers.

O'Donovan's Off Licence Group www.odonovansofflicence.com

9 stores (including a wine warehouse) A family firm run by the energetic Gary O'Donovan. All the stores are in and around Cork City in the Province of Munster. An increasingly exciting fine wine range, to supplement the big-name brands and solid New World selection, gives them a dynamic edge over other off-licenses in the city. They buy mainly from the Irish importing companies but also import a small amount directly themselves.

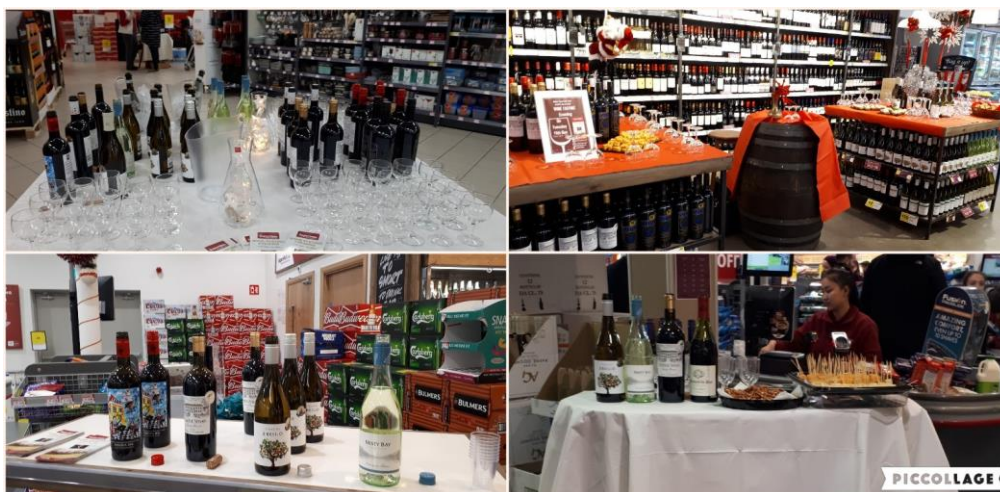
The Wine Buff www.thewinebuff.com

11 stores – Nationwide. Paddy O'Flynn and Daragh Moore set this up in 2000 and the first Wine Buff franchise opened its doors in Limerick. They import a portfolio of wines from France, Italy, and Spain that they import directly themselves. Recently they have opened their portfolio to include New World wines. They specialise in wines of real character and authenticity from small family-owned vineyards. Daragh Moore and Mick McDonnell now run the day-to-day operations from their base in Limerick City.



Donnybrook Fair <https://www.donnybrookfair.ie/>

Acquired in 2018 by the Musgrave group Donnybrook Fair is a small upmarket retailer specialising in ready made and premium food products and an off licence with a lot of mid-priced and premium wines. In December 2021 they launched at new flagship store at Dundrum Town Centre, The Dundrum store will join Donnybrook Fair's five premium food stores – Donnybrook, Stillorgan, Malahide, Greystones, and Baggot Street situated in Dublin and Wicklow as well as a gourmet food production facility.



Wine Shops & Off Licences

I have listed a small selection below of some of the top independent off-licences and wine shops in various part of Ireland, who sell niche wines, fine wines, and specialize in regional wines and quality producers:

Ardkeen Superstores, Dunmore Road, Co. Waterford.
Barnhill Stores, 11-12 Barnhill Rd, Dalkey, Co. Dublin
Bradley's Supermarket, 81-82 North Main St, Cork
Brown's Coliseum Lane, Portlaoise, Co Laoise
Clontarf Wines, Clontarf Road, Dublin 3.
Dacey Reilly's Market Street, Ballyshannon, Co. Clare
Drink Store, 87 Manor Street, Dublin 7.
Fahy's Off-License, Teeling Street, Ballina, Co Mayo
H2G Wines, Glasnevin, Dublin 11.
Higgins Off Licence, 34 Gledswood Drive, Clonskeagh, Dublin 14.
Gibneys Off Licence, New Street, Malahide, Co. Dublin.
Grape & Bean, Naas, Co Kildare.
Green Man Wines, 3 Terenure Road North, Dublin 6W
Greenacres Selskar Street, North Main Street, Wexford, Co Wexford
Jus de Vine, Unit 10, Portmarnock Town Centre, Co Dublin
Lilac Wines, 117 Philipsburgh Avenue, Marino, Dublin 3.
Loneragan Off-License, 35 O'Connell Street, Clonmel, Co Tipperary
Martin's Off Licence, Marino Mart, Fairview, Dublin 3.
McHugh's, 57 Kilbarrack Street, Kilbarrack, Dublin 13
Mitchell & Sons, Glasthule, IFSC, Avoca Kilmacanogue & Avoca Dunboyne
Morton & Sons, 15 Dunville Avenue, Ranelagh, Dublin 6
Neighbourhood Wines, Baggot Street, Leeson St, & Churchtown
Nectar Wines, 3 Sandyford Village, Dublin 18.
On the Grapevine, 21 St Patricks Road, Dalkey, Co Dublin
Redmond's of Ranelagh, 25 Ranelagh, Dublin 6
Searson's, The Crescent, Monkstown, Co Dublin
Terroirs, 103 Morehampton Road, Dublin 4
The Vintry, 102 Rathgar Road, Rathgar, Dublin 6
The Wicklow Wine Company, Main Street, Wicklow Town, Co Wicklow
The Wine Centre, 15 John Street, Kilkenny
The Wine House, Main Street, Howth, Co Dublin
Whelehan Wines, Silver Tassie, Loughlinstown, Co Dublin.
World Wide Wines, Dunmore Road, Waterford
64 Wine, Glasthule Road, Sandycove, Co. Dublin.



Pictured Whelehan Wines, Silver Tassie, Loughlinstown, Co Dublin

Top On-Line websites

On-line sales have really come into their own in recent years and they show no sign of slowing down. There are several excellent wine websites selling wine directly to the consumer on the Irish market including:

<http://wineonline.ie/> <http://www.winesdirect.ie> <https://www.theallotment.ie/>
<https://winespark.com/> <https://stationtostationwine.ie/> <https://shop.elywinebar.ie/>

USEFUL INFORMATION ABOUT THE MARKET

Wine Press

There are only approximately 10-15 key wine writers, writing in the national and trade press and featuring on radio and occasionally on television. There is one wine Podcast, The Long & the Short of It presented by Lynda Coogan and Antonia Dominguez. On social media there are a handful of knowledgeable wine influencers focussing only on wine features. Lifestyle influencers are now increasingly used to market wine by some of the major wine brands.

Wine writers in Ireland mostly work on a freelance basis, the market is too small to sustain wine writing as a full-time occupation. With such a small pool to draw from, forward planning is vital when planning any event that targets the wine press.

Sommeliers in Ireland

The Sommelier ethos found in most European restaurants is quite limited in Ireland. Today there are a certain number of Sommeliers with actual buying power working on the Irish market, most work for the top hotels and restaurants.

The President of the **Irish Guild of Sommeliers** is **Morgan Vandenkamer** (pictured) who owns the Union Kitchen & Wine Bar in Waterford City.



The **Guild of Sommeliers in Ireland** (IGOS) was founded in 1958 and has, since 1972, been affiliated to the Association de la Sommellerie Internationale (ASI) for the past fifty-one years. Today the IGOS operates as part of the ASI governing body. The main aims of the Guild are to promote a greater knowledge of and interest in wines and their service for their members, as well as arranging educational and cultural activities for the professional Sommelier's who are part of their membership.

<https://www.irishguildofsommeliers.ie/>





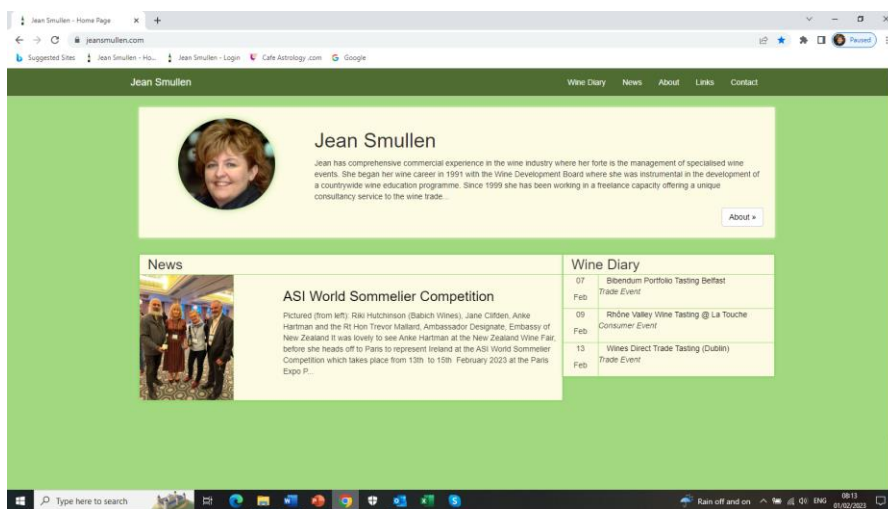
Jean Smullen’s Wine Diary: <https://jeansmullen.com/>

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The wine diary website has been running for 22 years and as a feature of Jean Smullen’s website. Offering a unique service to the trade and consumer the core of the website is the diary feature which highlights wine, beer, and spirit events for both trade and consumer.

Jean started the wine diary in 2002 to assist those organising wine related events in Ireland plan their dates. The initial objective was to alert the wine trade to upcoming events to avoid clashes. With so many trade



events taking place at certain times of the year, this was important. The diary initially began as email mail and was then published in Wine Ireland magazine from 2002 to 2006.

By 2004 the wine diary had become a website and the brief broadened to include consumer wine events which then expanded by including spirit and beer events. By 2019 the wine diary website was attracting 18,000 unique visitors per month. The website has a strong trade and press readership and in recent years readership has

grown considerably. In January 2024 viewing figure of 30,000 per month were being recorded.

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