

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 CO<sub>2</sub> 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.<sup>1</sup> 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*)<sup>2</sup> 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 CO<sub>2</sub> 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 CO<sub>2</sub> 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)<sup>3</sup> 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

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<sup>1</sup> [https://ec.europa.eu/info/food-farming-fisheries/plants-and-plant-products/plant-products/spirits\\_en](https://ec.europa.eu/info/food-farming-fisheries/plants-and-plant-products/plant-products/spirits_en)

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

<sup>3</sup> <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.

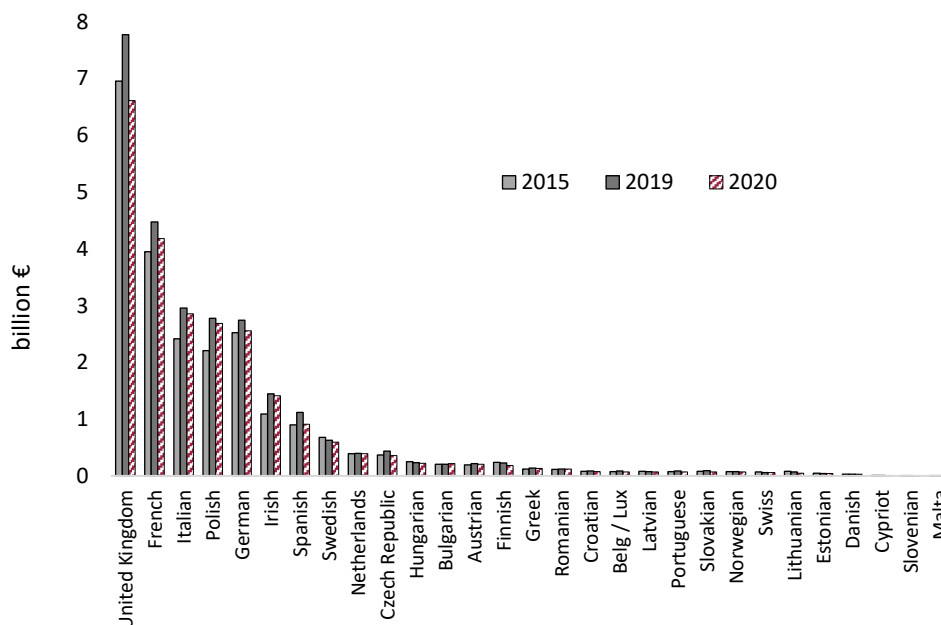
This study update is structured as follows: Section 2 provides the descriptive picture about spirits production and consumption in the EU+ in 2020. The respective legal and statistical definitions of spirits can be looked up in the base study. Section 3 will present and explain the quantitative results; 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.<sup>4</sup>

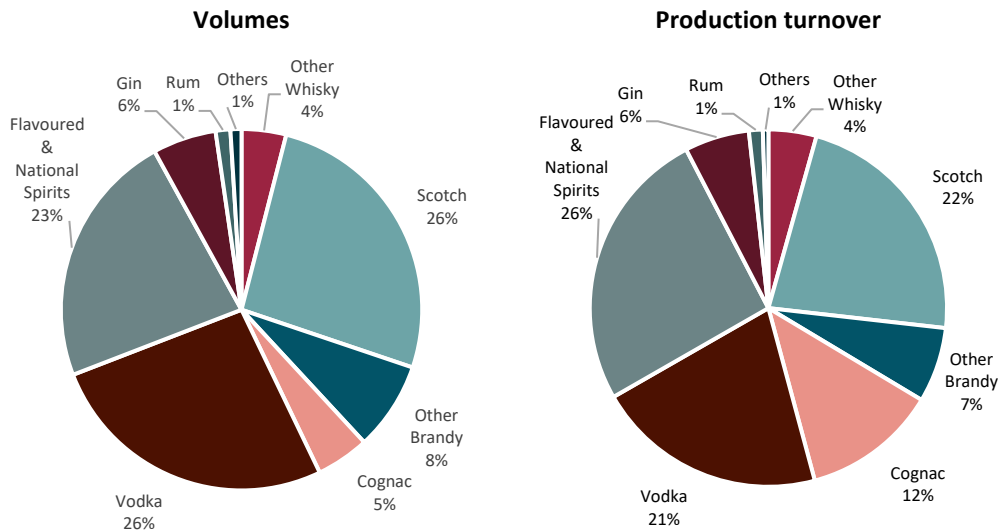
**Table 1: Production turnovers and absolute volumes 2020**

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 %)
<b>TOTAL</b>	<b>24.23</b>	<b>( -8.9 %)</b>	<b>30.21</b>	<b>( -7.5 %)</b>

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).

<sup>4</sup> 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.

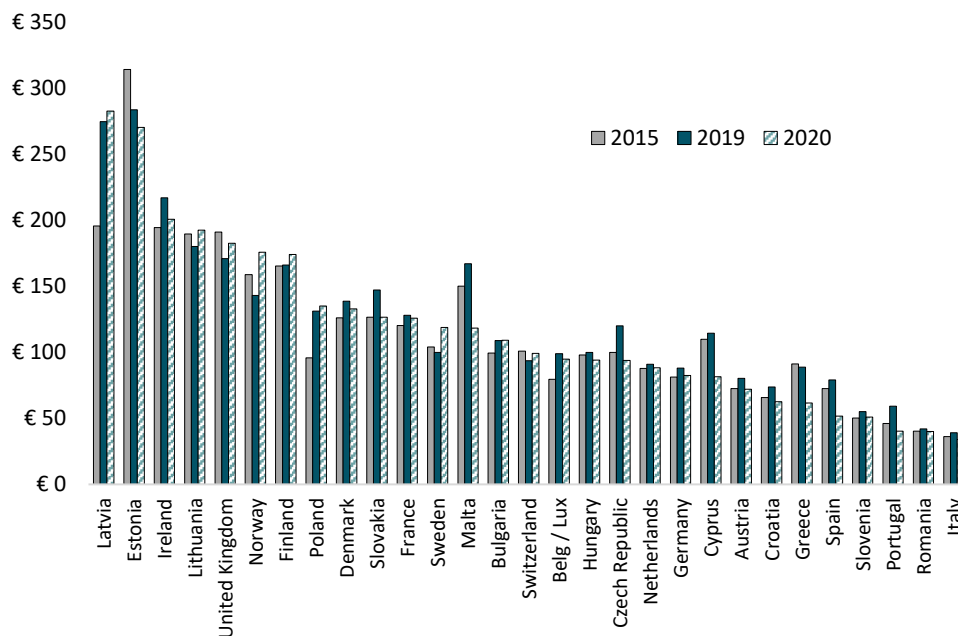


## 2.2 Spirits consumption in Europe

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.

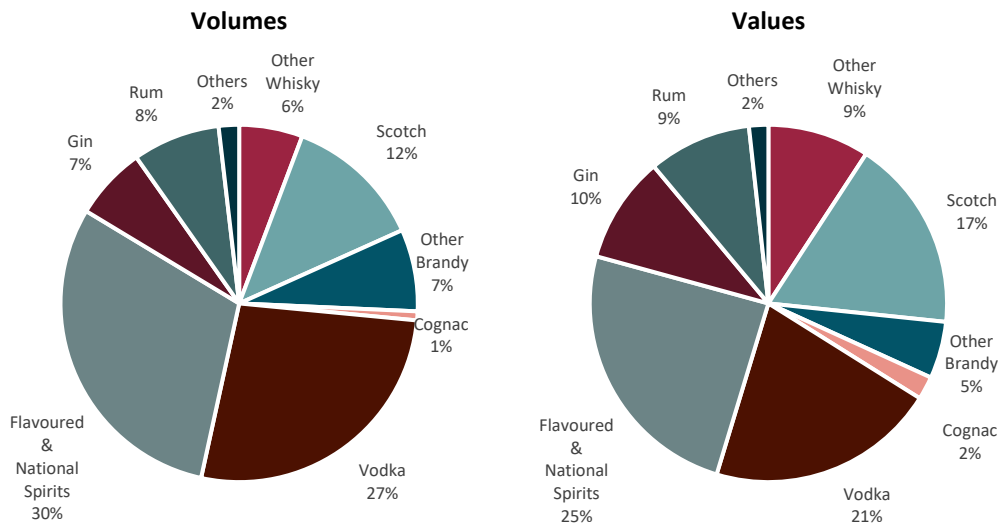
**Table 2: Sales (in Euros and absolute volumes) 2020**

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 %)
<b>TOTAL</b>	<b>42.91</b>	<b>( -3.9 %)</b>	<b>23.23</b>	<b>( -6.9 %)</b>

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 Appenix A.

**Figure 4: Spirits consumption by categories (in 2020)**



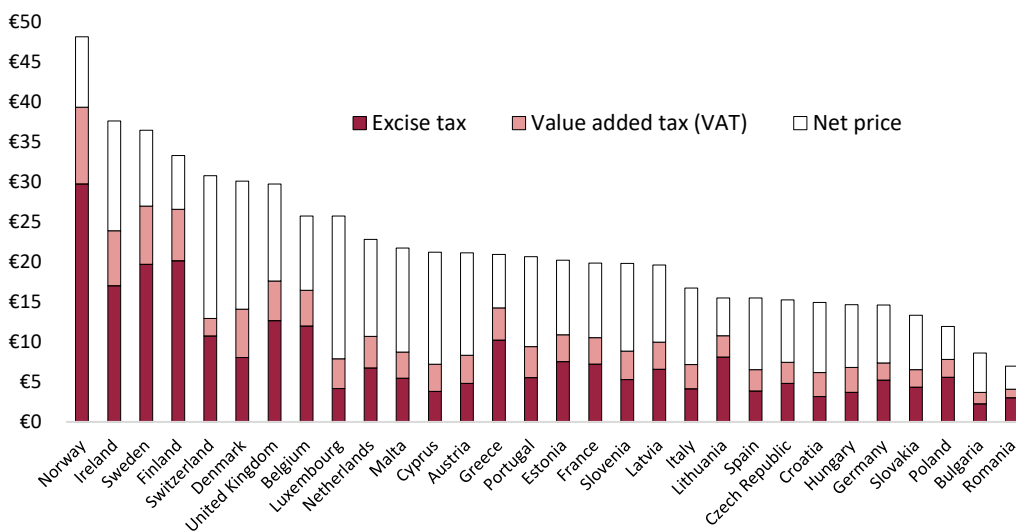
Source: Own calculations on the basis of IWSR (2022), including taxes.

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.<sup>5</sup> 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

<sup>5</sup> 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](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.<sup>6</sup>

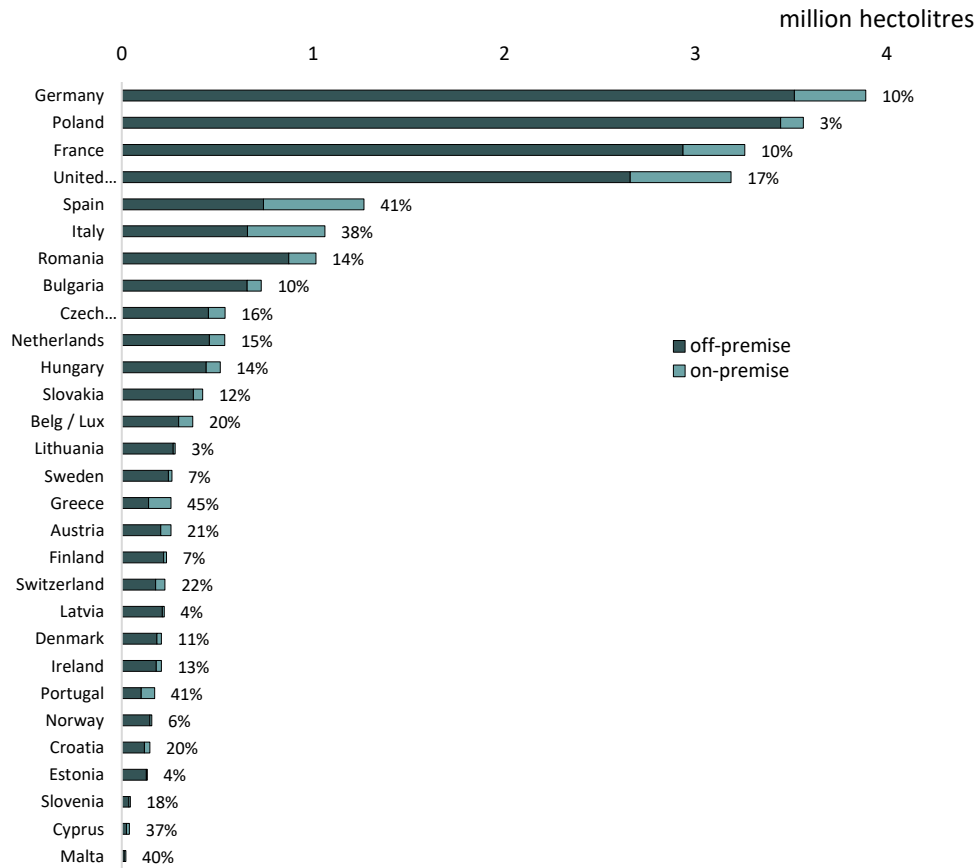
We have already noted that per-capita spirits sales developed very differently during the COVID-19 crisis. They did not decrease dramatically for the overall EU+ but dropped considerably in southern Europe and even increased in Scandinavia.<sup>7</sup> The on- vs. off-premise analysis can contribute 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.

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

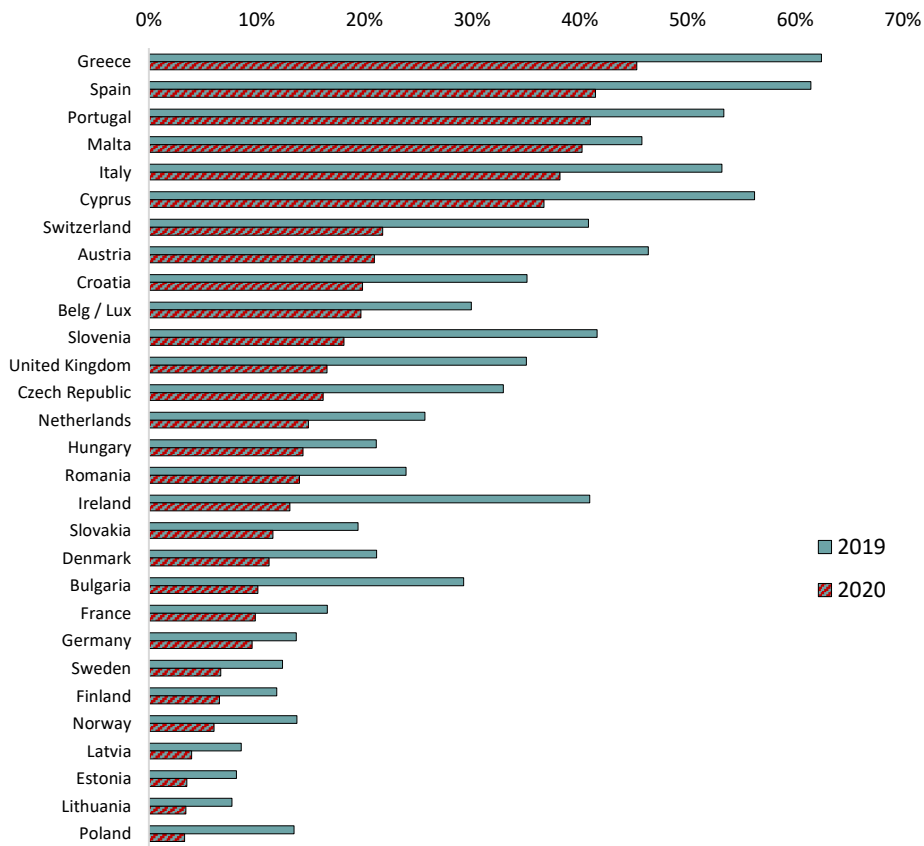
<sup>7</sup> Again, cross-border shopping must be mentioned for the latter, since this source of consumption was not open for many months.

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



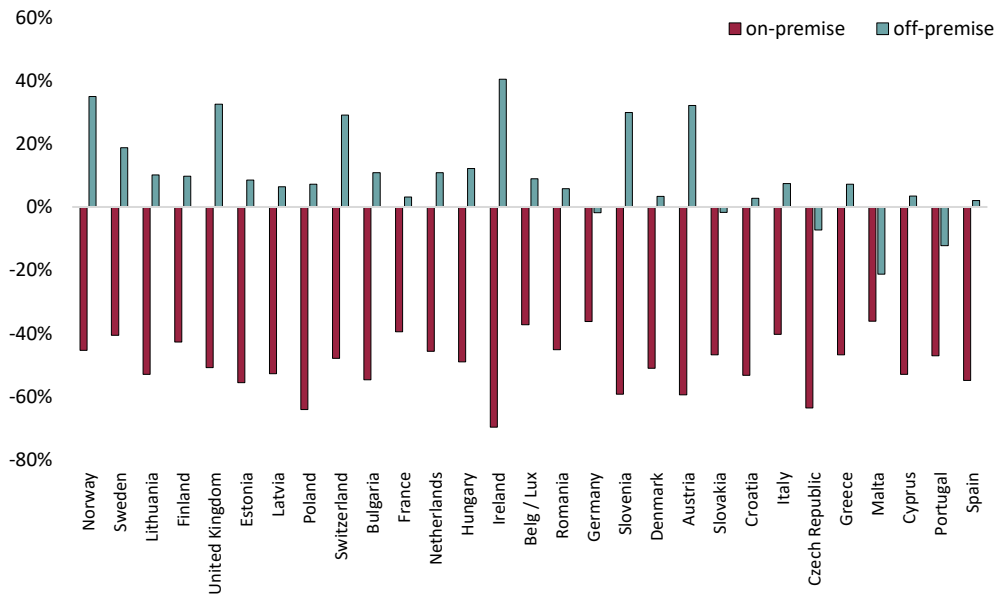
Source: IWSR (2022).

**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.<sup>8</sup>

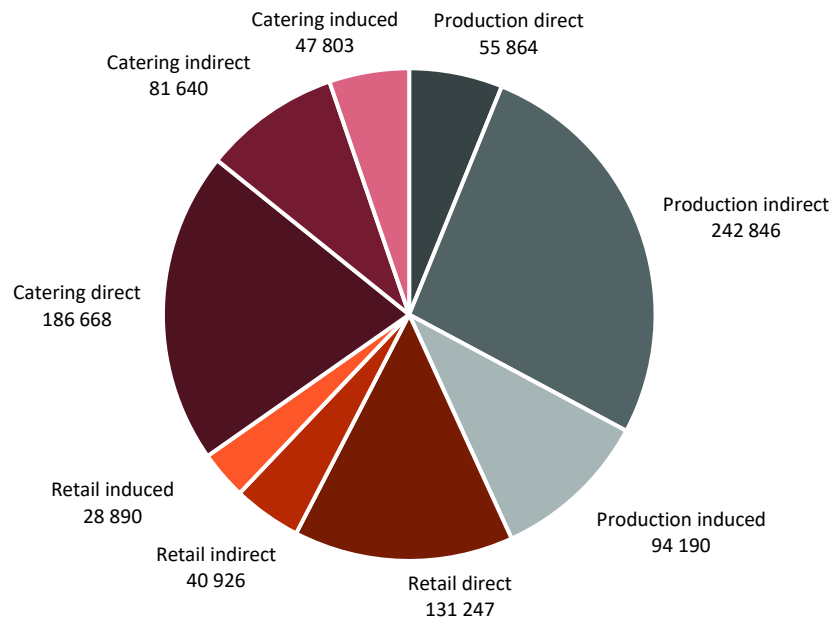
Figure 9 shows where these jobs are: We find that employment in the spirits production activities have changed only mildly. About 56,000 jobs (-9 %) still fall upon the actual production of spirits; those are called *direct* effects of production (see the dark grey slice in Figure 9). Another 243,000 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.

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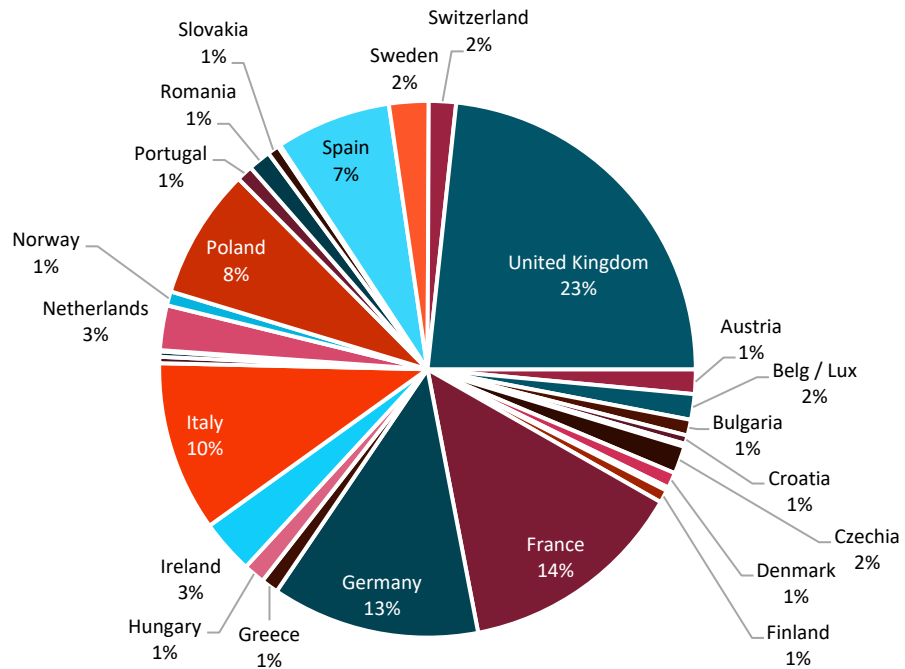
<sup>8</sup> See Eurostat (2022b) for overall employment numbers.

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



Source: IHS (2022).

**Figure 10: GVA effects by EU+ country**



Source: IHS (2022).

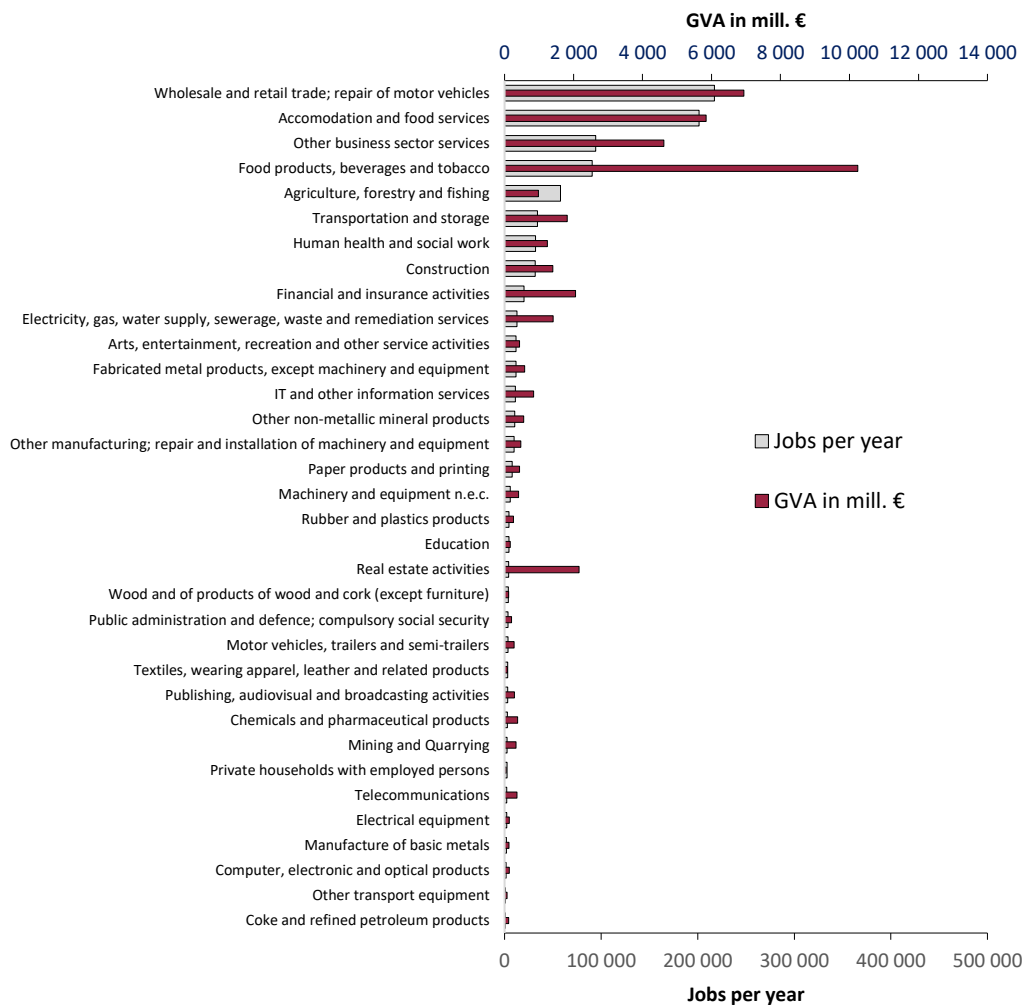


The fiscal effects in 2020 amounted to 16.6 billion Euros (-23 % compared to 2019). This number includes for example income and profit taxes paid in all industries influenced by spirits production and consumption. What the standard input-output model can not capture, however, is the amount of value added 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	<b>10 599</b>	5 106	3 387	<b>8 492</b>	2 107	<b>126 283</b>	56 336	44 342	<b>100 678</b>	25 605	<b>3 587</b>	1 550	1 128	<b>2 678</b>	909
France	<b>6 248</b>	2 127	2 911	<b>5 037</b>	1 211	<b>85 578</b>	31 020	39 141	<b>70 161</b>	15 417	<b>3 180</b>	975	1 448	<b>2 422</b>	758
Germany	<b>5 702</b>	1 589	2 634	<b>4 222</b>	1 479	<b>106 758</b>	42 506	42 037	<b>84 543</b>	22 215	<b>2 159</b>	551	967	<b>1 518</b>	641
Italy	<b>4 673</b>	1 593	2 186	<b>3 779</b>	895	<b>75 152</b>	24 475	35 764	<b>60 239</b>	14 912	<b>1 825</b>	553	865	<b>1 419</b>	406
Poland	<b>3 584</b>	974	2 000	<b>2 973</b>	611	<b>143 854</b>	43 148	77 701	<b>120 849</b>	23 005	<b>1 093</b>	258	568	<b>826</b>	268
Spain	<b>3 164</b>	1 256	1 172	<b>2 428</b>	736	<b>62 669</b>	26 907	22 447	<b>49 354</b>	13 315	<b>1 116</b>	390	407	<b>797</b>	319
Ireland	<b>1 483</b>	862	435	<b>1 297</b>	185	<b>11 869</b>	6 603	3 423	<b>10 026</b>	1 843	<b>328</b>	169	97	<b>266</b>	62
Netherlands	<b>1 226</b>	365	583	<b>948</b>	278	<b>21 028</b>	9 609	7 649	<b>17 258</b>	3 770	<b>335</b>	86	153	<b>240</b>	96
Sweden	<b>1 085</b>	453	405	<b>858</b>	227	<b>12 361</b>	5 629	4 271	<b>9 900</b>	2 461	<b>448</b>	148	176	<b>324</b>	124
Czechia	<b>756</b>	295	306	<b>601</b>	155	<b>26 261</b>	11 904	9 551	<b>21 455</b>	4 806	<b>237</b>	83	93	<b>175</b>	62
Switzerland	<b>746</b>	219	290	<b>510</b>	237	<b>9 143</b>	4 545	2 512	<b>7 057</b>	2 086	<b>171</b>	41	68	<b>109</b>	62
Belg/Lux	<b>700</b>	163	362	<b>525</b>	174	<b>9 381</b>	3 409	4 045	<b>7 454</b>	1 927	<b>298</b>	66	151	<b>217</b>	81
Austria	<b>675</b>	264	266	<b>530</b>	145	<b>9 933</b>	4 545	3 551	<b>8 097</b>	1 836	<b>260</b>	89	106	<b>195</b>	65
Romania	<b>619</b>	226	241	<b>467</b>	152	<b>37 617</b>	15 572	13 704	<b>29 275</b>	8 341	<b>130</b>	44	42	<b>86</b>	44
Hungary	<b>589</b>	231	238	<b>469</b>	120	<b>31 571</b>	16 588	9 982	<b>26 570</b>	5 001	<b>208</b>	67	79	<b>145</b>	63
Greece	<b>475</b>	199	197	<b>396</b>	79	<b>14 977</b>	7 056	5 571	<b>12 627</b>	2 351	<b>142</b>	53	58	<b>111</b>	31
Portugal	<b>445</b>	189	148	<b>337</b>	108	<b>14 150</b>	6 268	4 730	<b>10 998</b>	3 152	<b>148</b>	54	49	<b>102</b>	45
Bulgaria	<b>437</b>	162	186	<b>347</b>	89	<b>46 851</b>	23 811	15 919	<b>39 730</b>	7 122	<b>106</b>	35	34	<b>69</b>	38
Denmark	<b>427</b>	151	177	<b>328</b>	99	<b>8 053</b>	4 664	2 233	<b>6 897</b>	1 155	<b>183</b>	53	80	<b>133</b>	51
Norway	<b>388</b>	67	206	<b>273</b>	115	<b>3 175</b>	1 175	1 188	<b>2 364</b>	812	<b>148</b>	24	73	<b>97</b>	50
Finland	<b>349</b>	105	162	<b>267</b>	82	<b>5 246</b>	1 948	2 203	<b>4 150</b>	1 095	<b>130</b>	36	56	<b>92</b>	37
Slovakia	<b>316</b>	117	124	<b>241</b>	75	<b>14 065</b>	8 245	3 711	<b>11 956</b>	2 109	<b>91</b>	32	33	<b>64</b>	27
Croatia	<b>232</b>	110	68	<b>178</b>	54	<b>10 489</b>	5 394	2 865	<b>8 258</b>	2 230	<b>68</b>	26	17	<b>43</b>	25
Latvia	<b>174</b>	72	62	<b>134</b>	40	<b>8 043</b>	4 224	2 307	<b>6 531</b>	1 512	<b>47</b>	16	16	<b>32</b>	15
Lithuania	<b>146</b>	63	52	<b>115</b>	31	<b>5 821</b>	2 935	1 787	<b>4 721</b>	1 100	<b>33</b>	12	11	<b>23</b>	10
Estonia	<b>96</b>	37	38	<b>76</b>	21	<b>3 993</b>	2 240	1 106	<b>3 346</b>	647	<b>28</b>	10	10	<b>19</b>	9
Cyprus	<b>82</b>	41	25	<b>66</b>	16	<b>2 716</b>	1 710	598	<b>2 308</b>	407	<b>23</b>	8	8	<b>16</b>	7
Slovenia	<b>67</b>	20	28	<b>48</b>	20	<b>2 181</b>	833	814	<b>1 646</b>	535	<b>24</b>	6	10	<b>16</b>	8
Malta	<b>34</b>	17	11	<b>29</b>	5	<b>858</b>	482	261	<b>743</b>	115	<b>9</b>	4	3	<b>7</b>	2
<b>EU+</b>	<b>45 517</b>	<b>17 074</b>	<b>18 899</b>	<b>35 972</b>	<b>9 545</b>	<b>910 074</b>	<b>373 780</b>	<b>365 412</b>	<b>739 192</b>	<b>170 883</b>	<b>16 556</b>	<b>5 438</b>	<b>6 805</b>	<b>12 243</b>	<b>4 313</b>

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

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

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

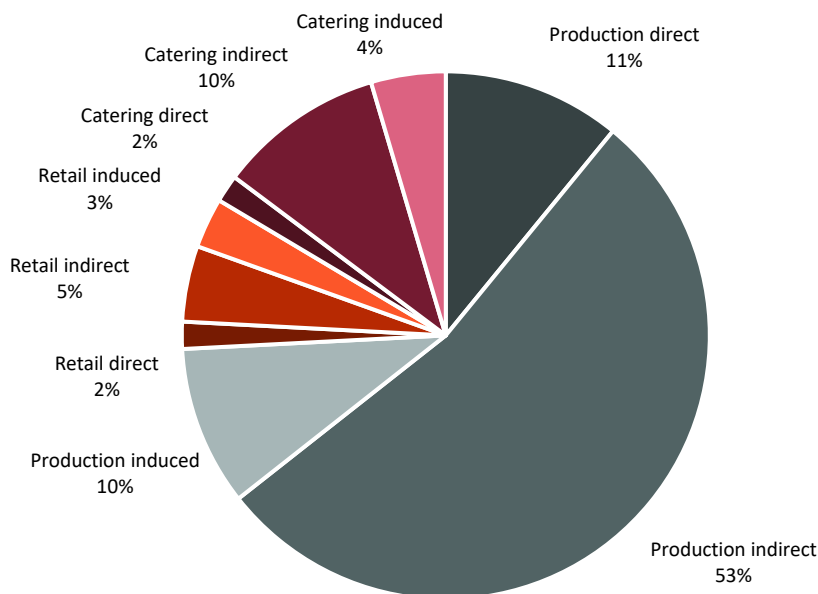
Source: IHS (2022).

### 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 CO<sub>2</sub> 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 CO<sub>2</sub> 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: CO<sub>2</sub> equivalent emissions by type of activity**

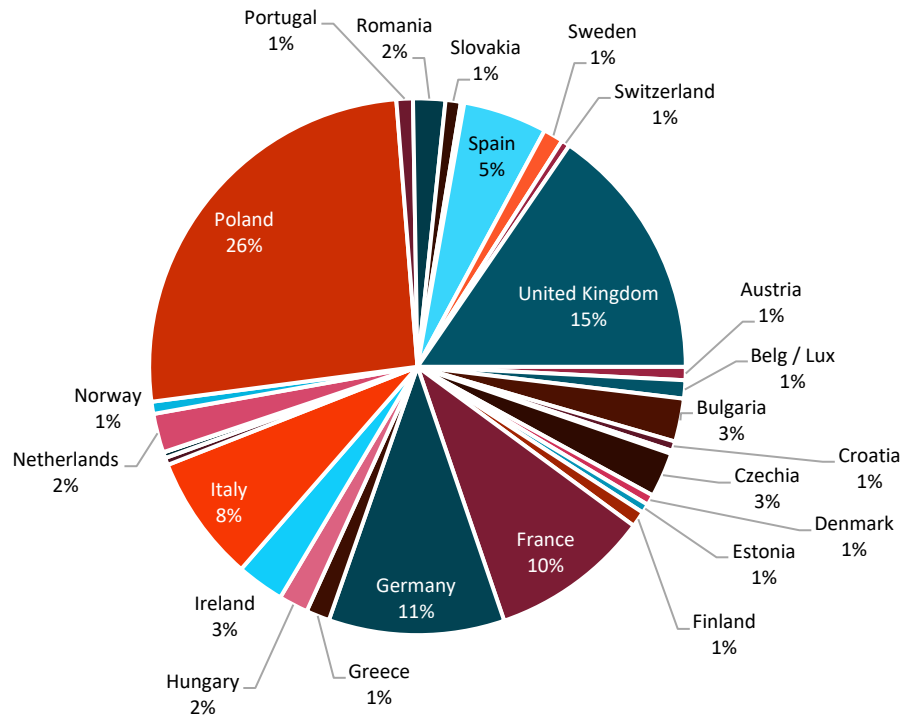


Source: IHS (2022).

Figure 13 presents the distribution of CO<sub>2</sub> 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 CO<sub>2</sub> emissions were distributed across countries. Only production activities matter.

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

Source: IHS (2022).

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

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

<sup>9</sup> 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 CO<sub>2</sub> 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 CO<sub>2</sub> 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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The IWSR – Drinks market analysis (2022): International Wines and Spirits Record

(<https://www.theiwsr.com/>).

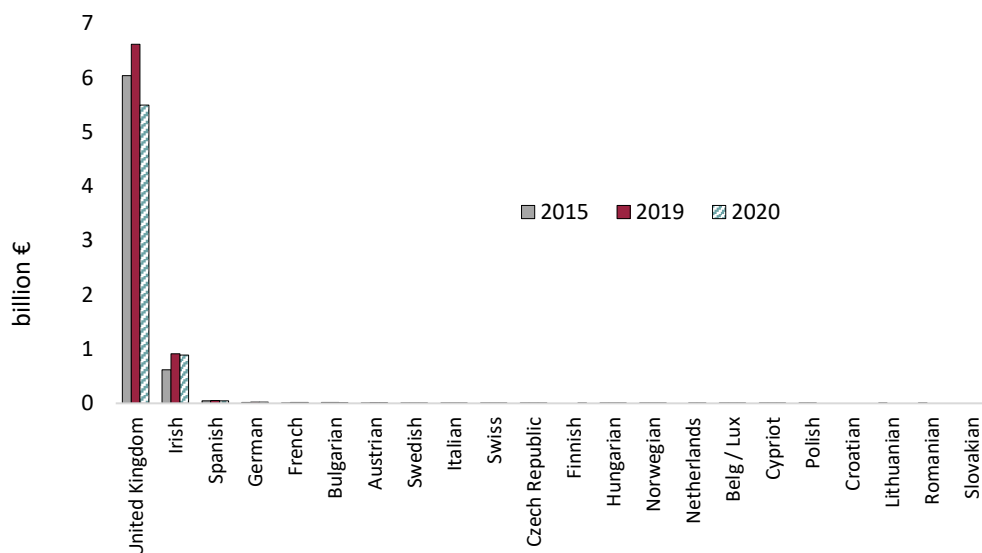
## 6 Appendix A: Analyses for individual categories or geographical indications

### 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)**



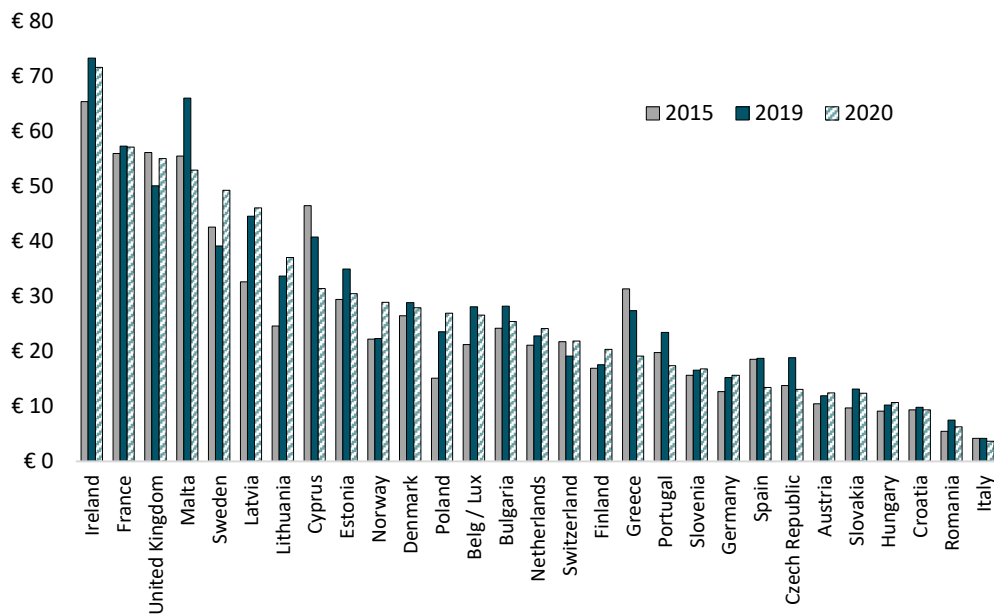
Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

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)**



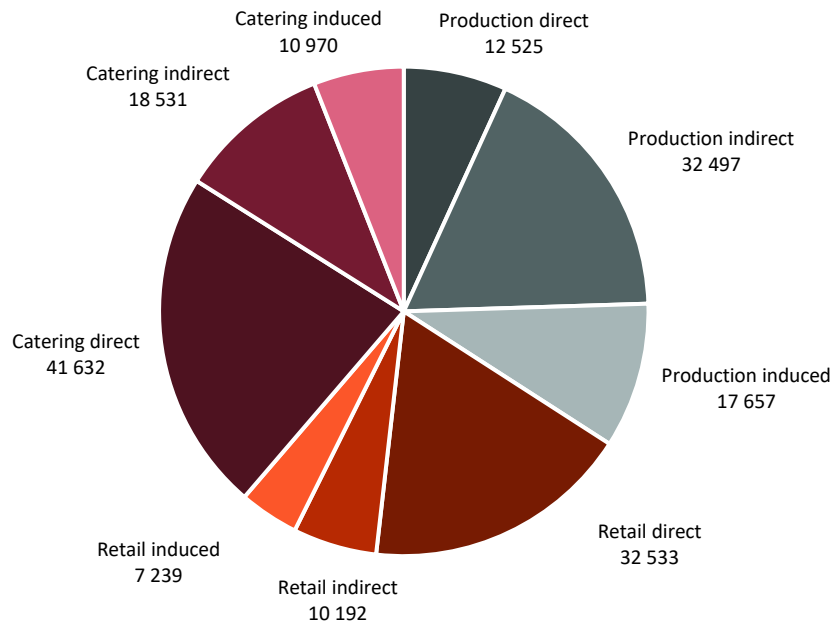
Source: IWSR (2022), including taxes.

### 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.

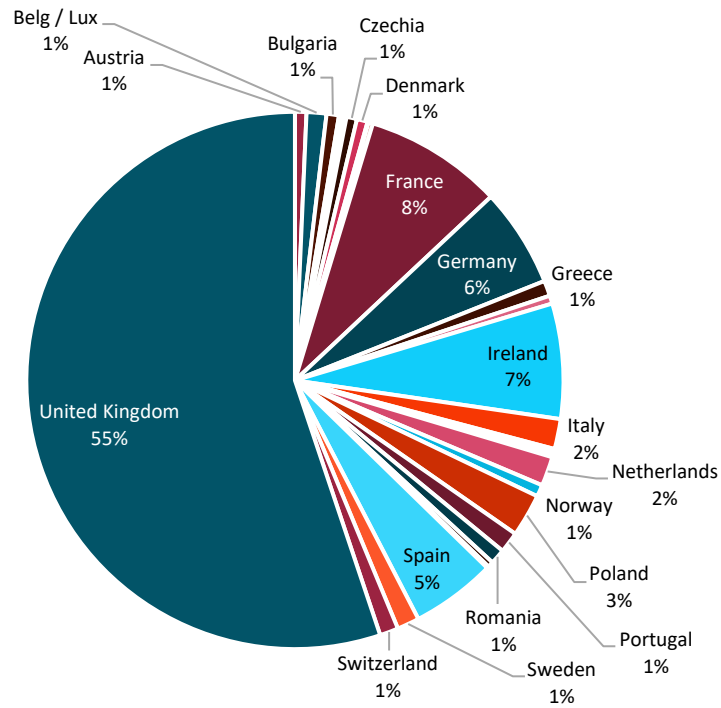
Figure 16 illustrates the different kinds of activities that the whisky employment effects come from. Figure 17 shows the GVA decomposition by country. The overall economic results for whisky are summarised in Table 9.

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

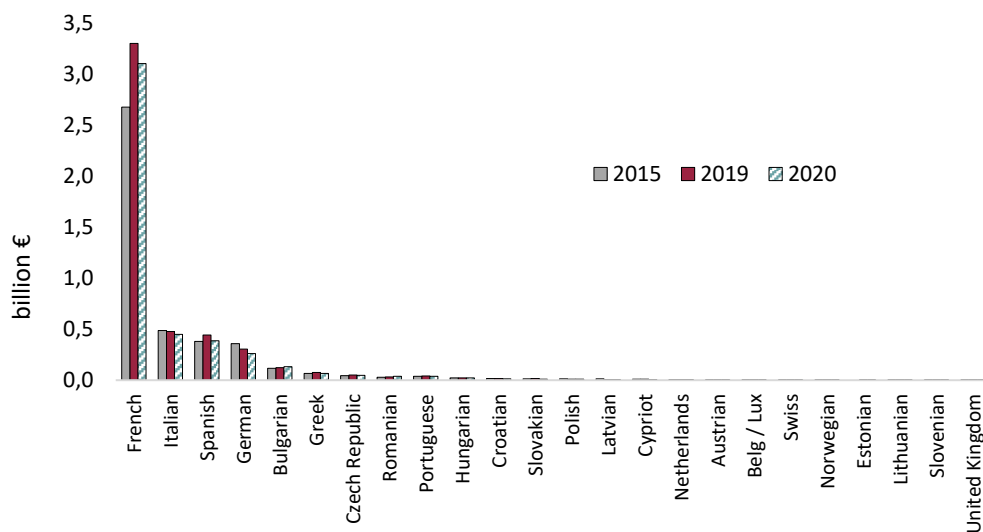
Source: IHS (2022).

## 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)**

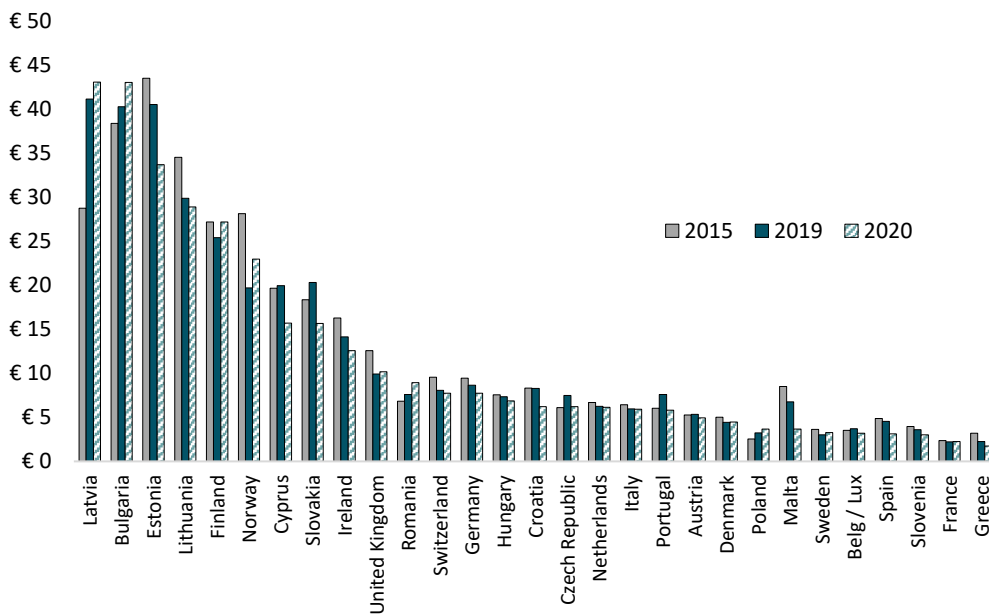


Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

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)**



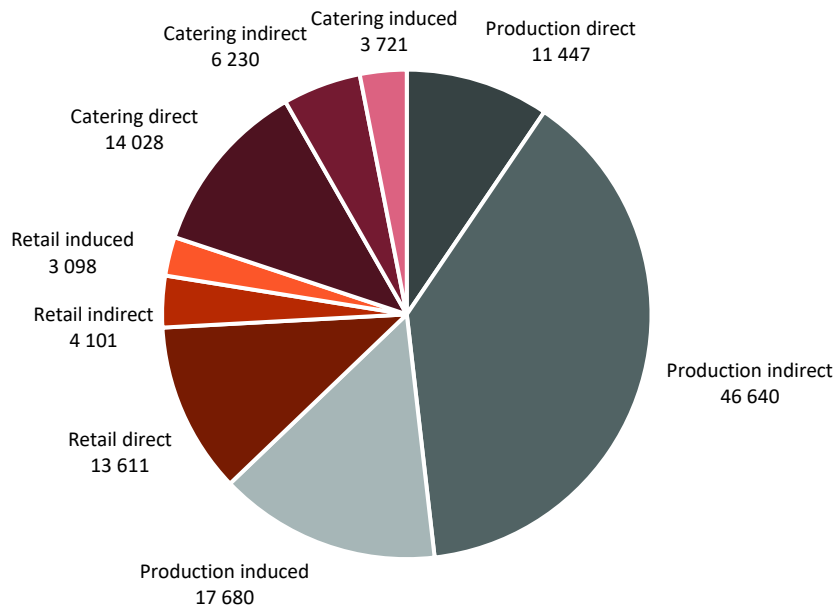
Source: IWSR (2022), including taxes.

### 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.

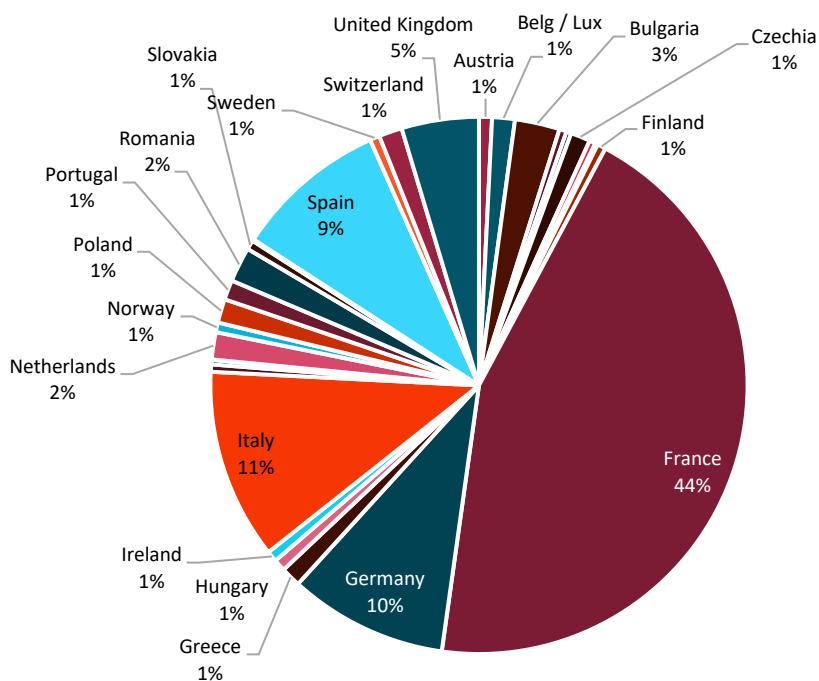
Figure 20 shows the different kinds of activities that the brandy employment effects result from. We find that production activities dominate while those related to on- and off-premise consumption are rather small (as in the base study). Figure 21 shows the GVA decomposition by country. Not surprisingly, 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	<b>2 835</b>	900	1 461	2 361	474	<b>32 035</b>	6 365	19 643	26 008	6 027	<b>1 426</b>	427	693	1 120	306
Italy	<b>732</b>	239	352	592	141	<b>11 601</b>	3 500	5 756	9 257	2 345	<b>285</b>	83	139	221	64
Germany	<b>610</b>	133	307	440	170	<b>10 540</b>	3 159	4 836	7 995	2 545	<b>228</b>	46	109	155	73
Spain	<b>588</b>	179	267	446	142	<b>10 171</b>	2 588	5 008	7 597	2 574	<b>202</b>	55	87	142	61
United Kingdom	<b>297</b>	85	122	207	89	<b>4 981</b>	2 289	1 603	3 891	1 089	<b>102</b>	23	42	65	37
Bulgaria	<b>172</b>	55	84	139	33	<b>17 355</b>	7 811	6 944	14 755	2 600	<b>42</b>	12	16	27	14
Romania	<b>134</b>	48	54	102	32	<b>7 997</b>	3 244	2 981	6 225	1 772	<b>28</b>	9	10	19	9
Netherlands	<b>104</b>	20	56	76	28	<b>1 738</b>	624	731	1 355	383	<b>28</b>	5	14	19	9
Poland	<b>91</b>	24	44	68	24	<b>4 024</b>	1 382	1 750	3 132	891	<b>28</b>	6	13	19	9
Switzerland	<b>89</b>	19	40	59	30	<b>1 029</b>	423	340	764	265	<b>21</b>	4	9	13	8
Belg/Lux	<b>87</b>	7	56	63	24	<b>1 047</b>	142	634	776	271	<b>36</b>	3	22	24	11
Greece	<b>77</b>	23	39	62	15	<b>2 054</b>	509	1 114	1 623	430	<b>23</b>	7	11	18	6
Portugal	<b>76</b>	25	31	57	19	<b>2 301</b>	753	995	1 748	554	<b>24</b>	7	9	16	8
Czech Republic	<b>75</b>	27	32	59	16	<b>2 351</b>	836	1 002	1 838	514	<b>23</b>	7	9	17	6
Austria	<b>50</b>	12	24	35	14	<b>720</b>	227	311	538	182	<b>19</b>	4	9	13	6
Hungary	<b>46</b>	15	20	35	11	<b>2 197</b>	913	835	1 748	448	<b>15</b>	4	6	10	5
Ireland	<b>41</b>	8	22	30	12	<b>530</b>	259	167	426	104	<b>10</b>	2	5	7	3
Sweden	<b>38</b>	5	19	25	13	<b>445</b>	110	201	311	134	<b>16</b>	2	8	10	6
Norway	<b>37</b>	6	20	26	11	<b>327</b>	136	113	249	79	<b>14</b>	2	7	9	5
Slovak Republic	<b>36</b>	13	15	27	9	<b>1 504</b>	829	430	1 259	245	<b>10</b>	3	4	7	3
Finland	<b>33</b>	11	14	25	8	<b>574</b>	290	180	470	104	<b>13</b>	4	5	9	4
Latvia	<b>28</b>	13	9	22	6	<b>1 357</b>	788	337	1 125	232	<b>8</b>	3	3	6	2
Croatia	<b>28</b>	13	9	21	7	<b>1 210</b>	577	365	942	268	<b>8</b>	3	2	5	3
Denmark	<b>23</b>	4	12	16	7	<b>366</b>	130	152	282	84	<b>9</b>	1	5	6	3
Cyprus	<b>19</b>	9	6	15	4	<b>614</b>	369	152	520	94	<b>5</b>	2	2	4	2
Lithuania	<b>17</b>	9	5	14	4	<b>758</b>	455	173	628	130	<b>4</b>	2	1	3	1
Estonia	<b>10</b>	4	4	8	2	<b>491</b>	311	113	424	67	<b>3</b>	1	1	2	1
Slovenia	<b>7</b>	1	3	4	2	<b>200</b>	50	90	139	61	<b>2</b>	0	1	1	1
Malta	<b>2</b>	1	1	1	0	<b>40</b>	17	15	32	8	<b>0</b>	0	0	0	0
<b>EU+</b>	<b>6 383</b>	1 907	3 129	5 036	1 346	<b>120 556</b>	39 086	56 970	96 057	24 500	<b>2 636</b>	727	1 242	1 969	666

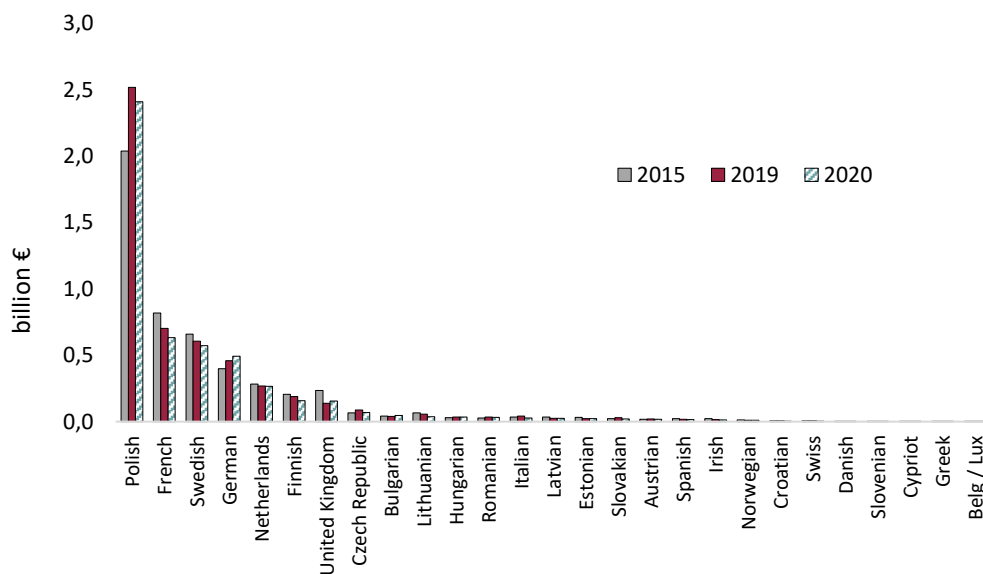
Source: IHS (2022).

## 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)**



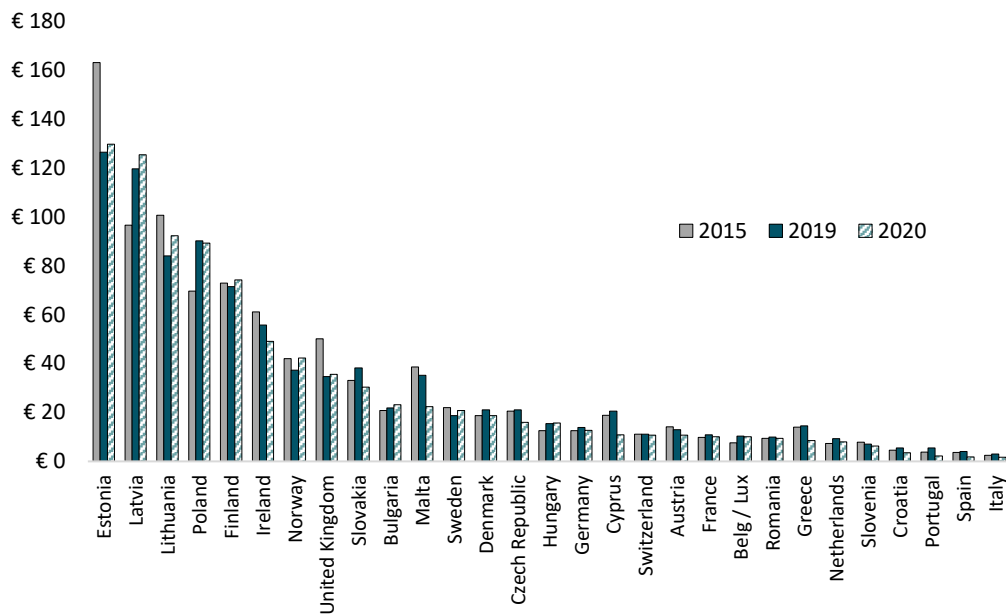
Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

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)**



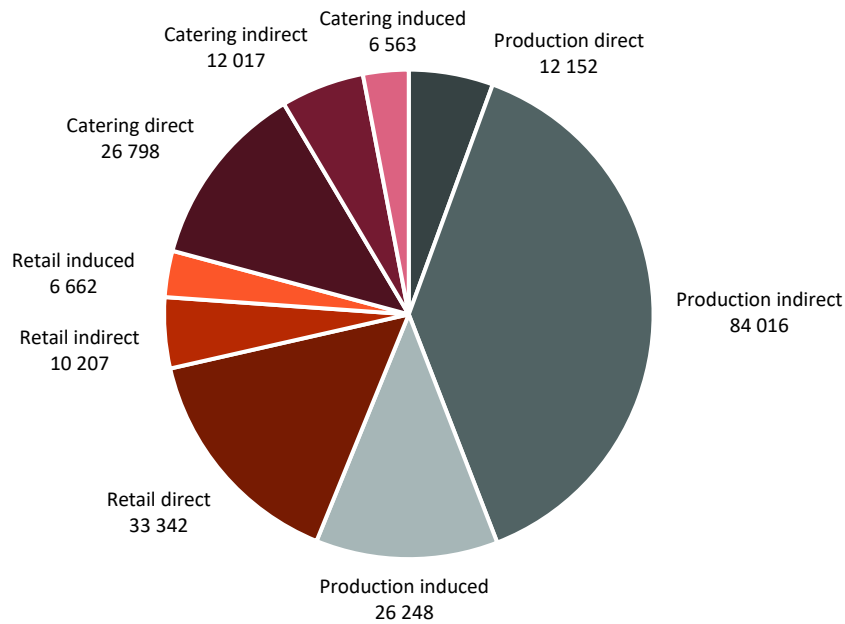
Source: IWSR (2022), including taxes.

### 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 %).

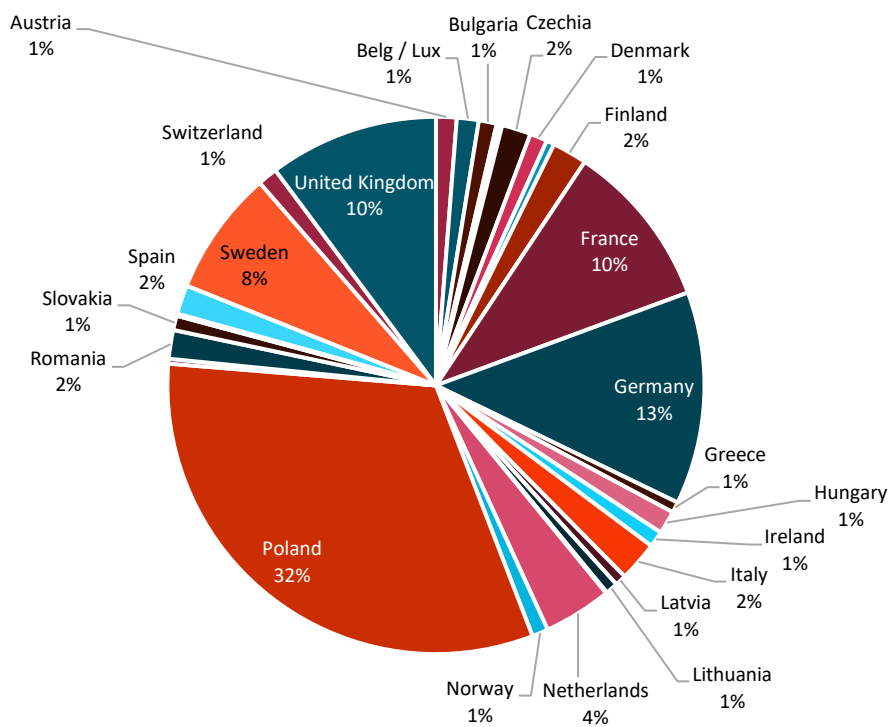
Figure 24 illustrates the different kinds of activities that the vodka employment effects come from. Figure 25 shows the GVA decomposition by country. The overall economic results for whisky are summarised in Table 11.

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

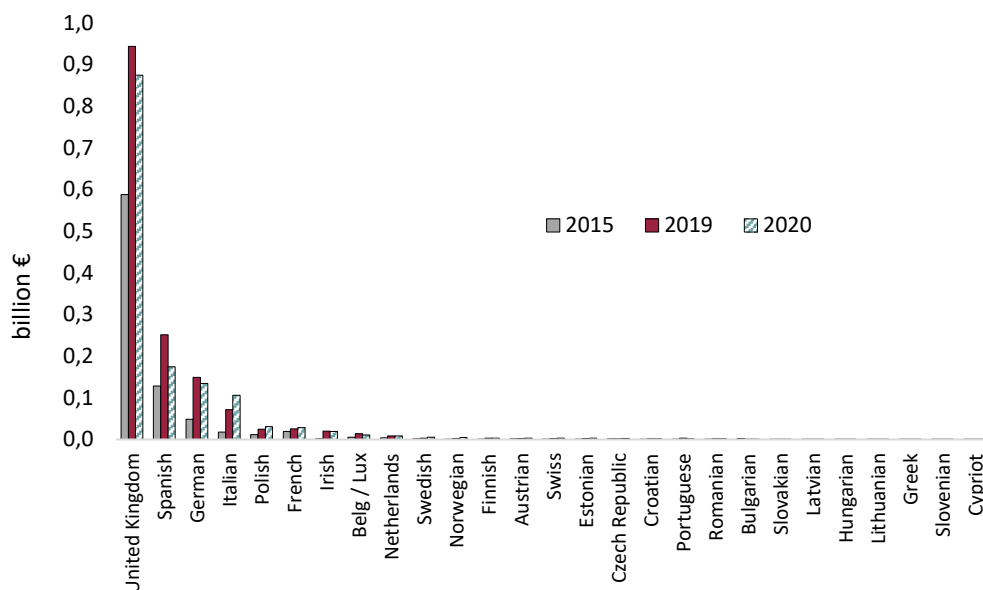
Source: IHS (2022).

## 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)**

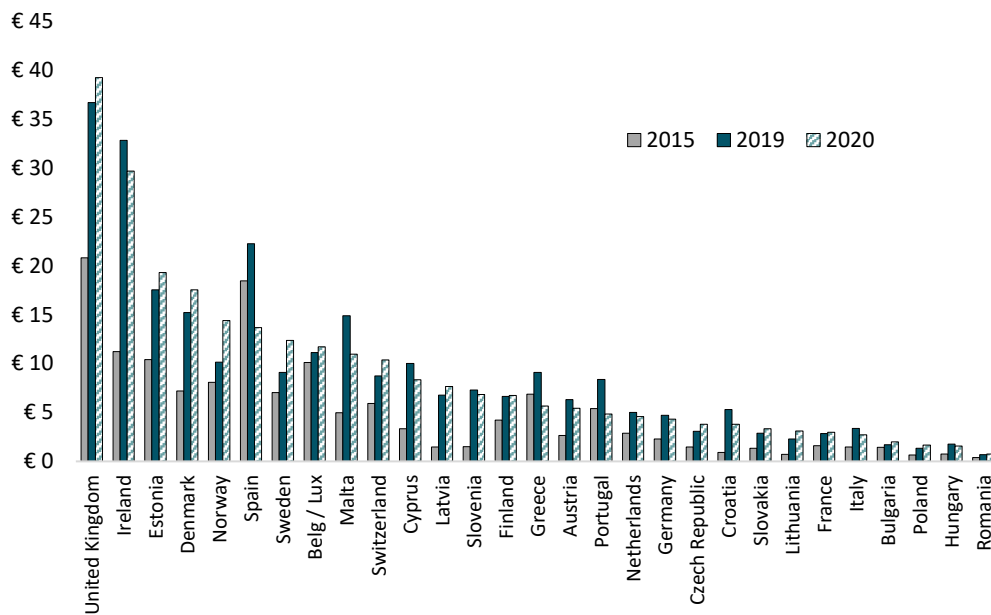


Source: Own calculations on the basis of IWSR (2021) and Eurostat (2021); excluding taxes.

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)**



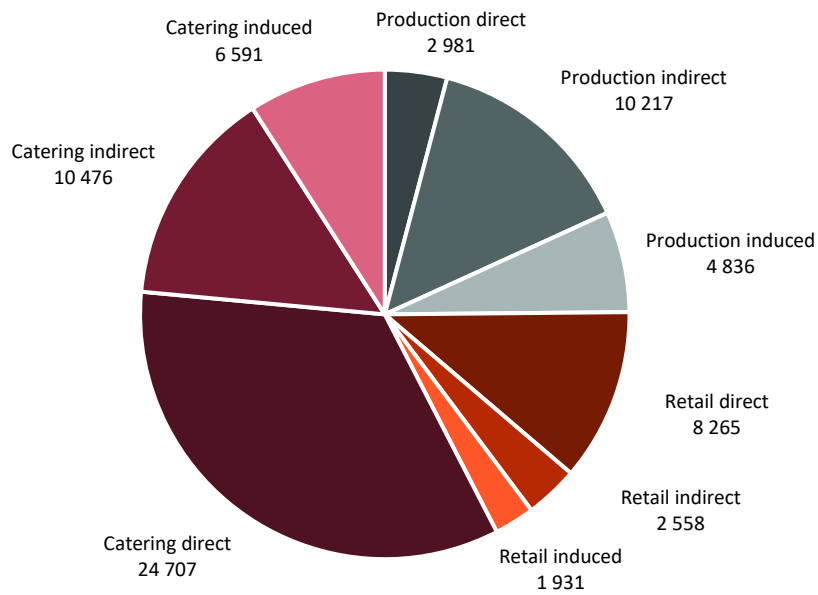
Source: IWSR (2021), including taxes.

## 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 %).

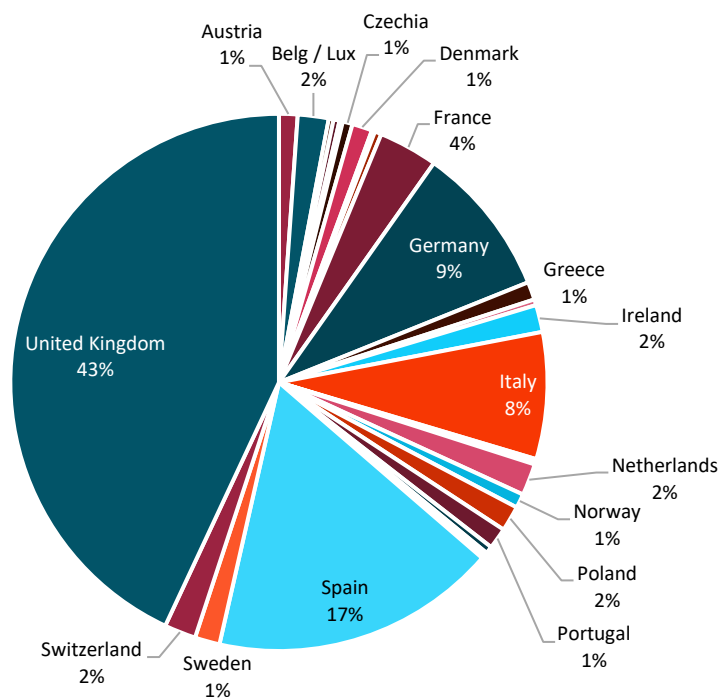
Figure 28 illustrates the different kinds of activities that the gin employment effects come from. Figure 29 shows the GVA decomposition by country; the United Kingdom and Spain as the major gin producers in the EU+ stand out. The overall economic results for gin are summarised in Table 12.

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

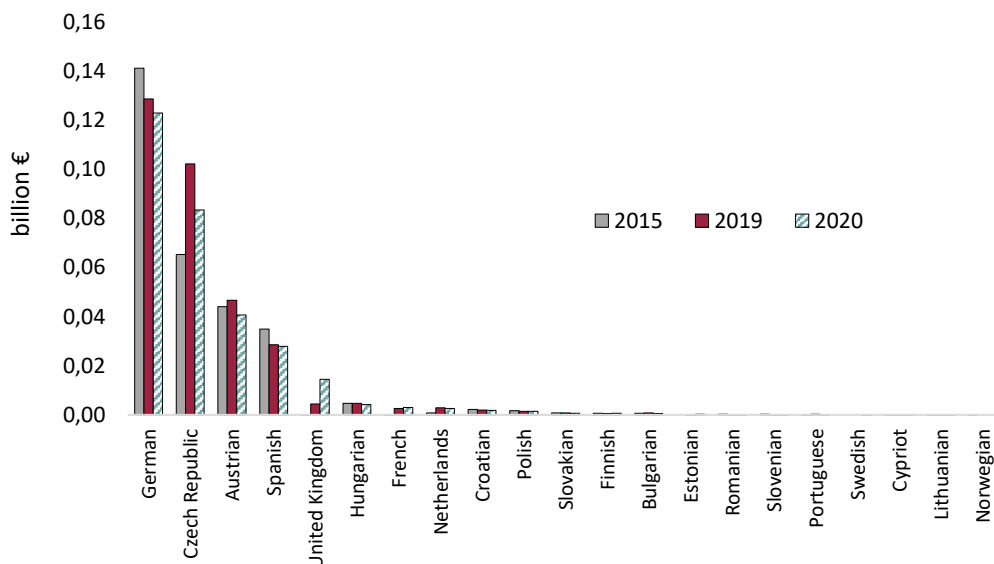
Source: IHS (2022).

## 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)**



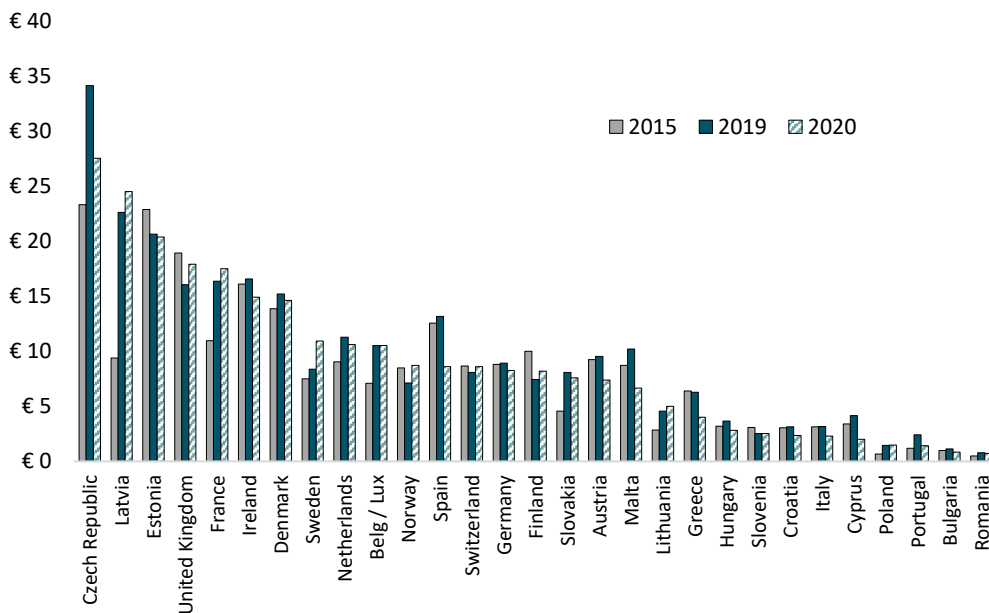
Source: Own calculations on the basis of IWSR (2022) and Eurostat (2021); excluding taxes.

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)**



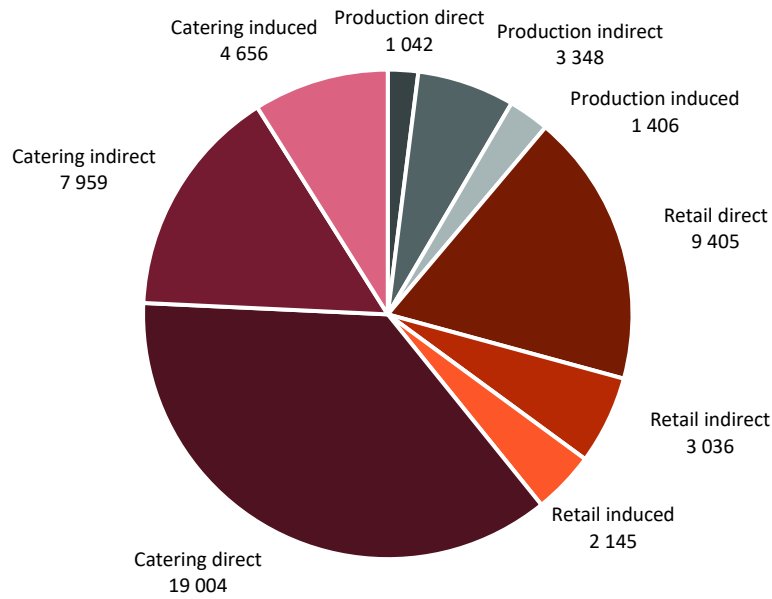
Source: IWSR (2022), including taxes.

### 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).

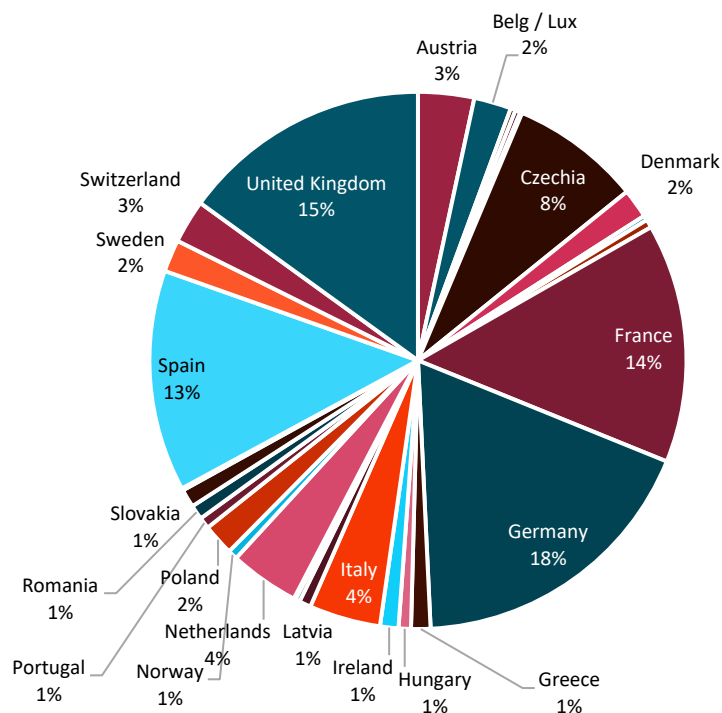
Figure 32 illustrates the different kinds of activities that the rum employment effects come from. Rum still generates most of its economic effects via consumption (especially on-premise). Figure 33 shows the GVA decomposition by country. The overall economic results for rum are summarised in Table 12.

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

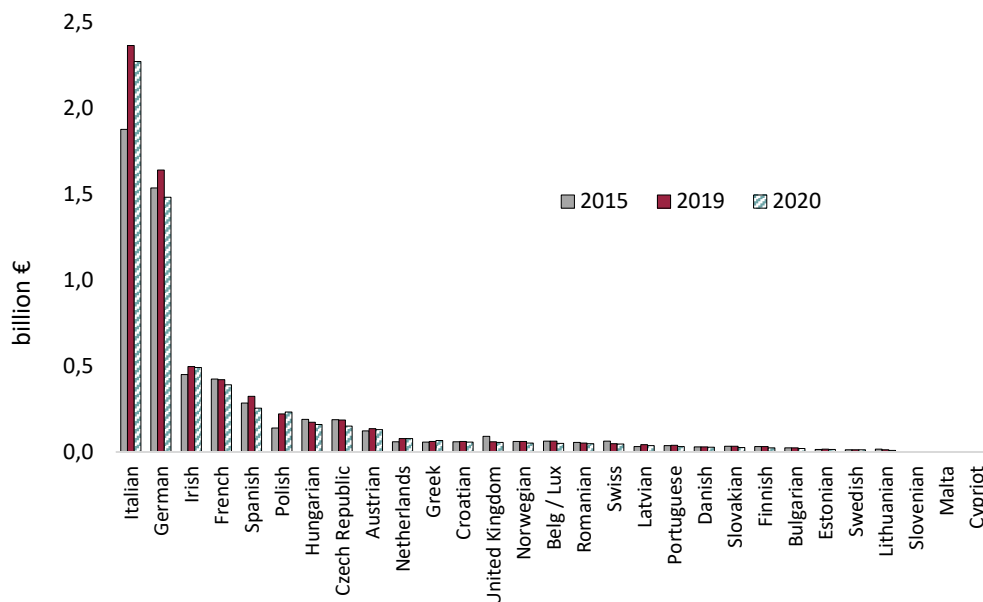
Source: IHS (2022).

## 6.6 Flavoured & National Spirits (including liqueurs)

### 6.6.1 Descriptives about production and consumption

The category *flavoured & national spirits* is derived from IWSR classifications<sup>10</sup> 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.

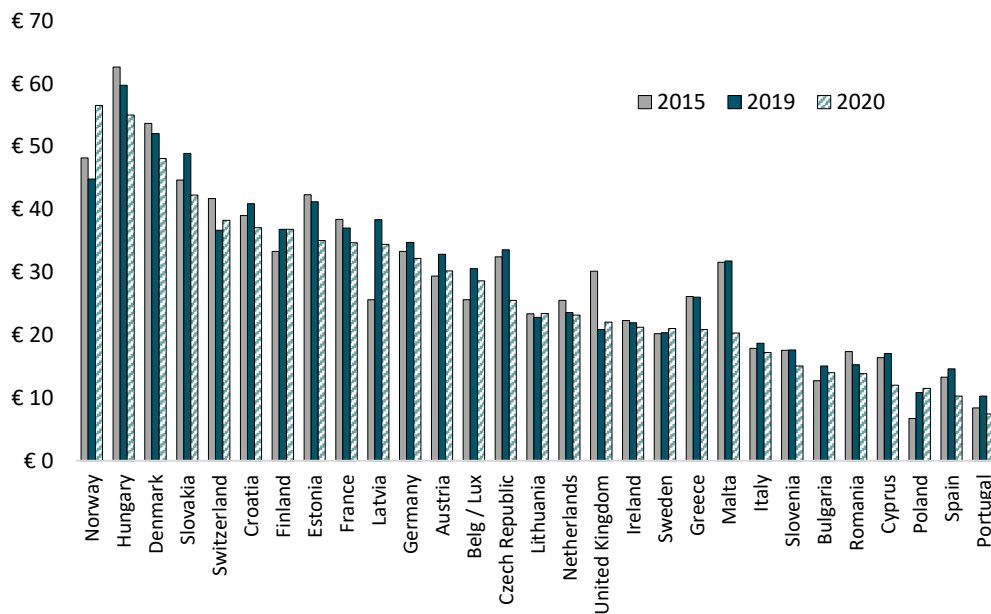
Considerable production of this kind is taking place in Italy, Germany and Ireland. Italy produces all kinds of aperitifs and beverages like Amari, Sambuca or Limoncello. Germany is particularly strong in the production of korn and bitters; Ireland is specialized in the production of cream liqueurs (besides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

<sup>10</sup> [https://data.theiwsr.com/\\_assets/pdfs/IWSR%20Global%20Database%20Methodology%20&%20Definitions%202020.pdf](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**



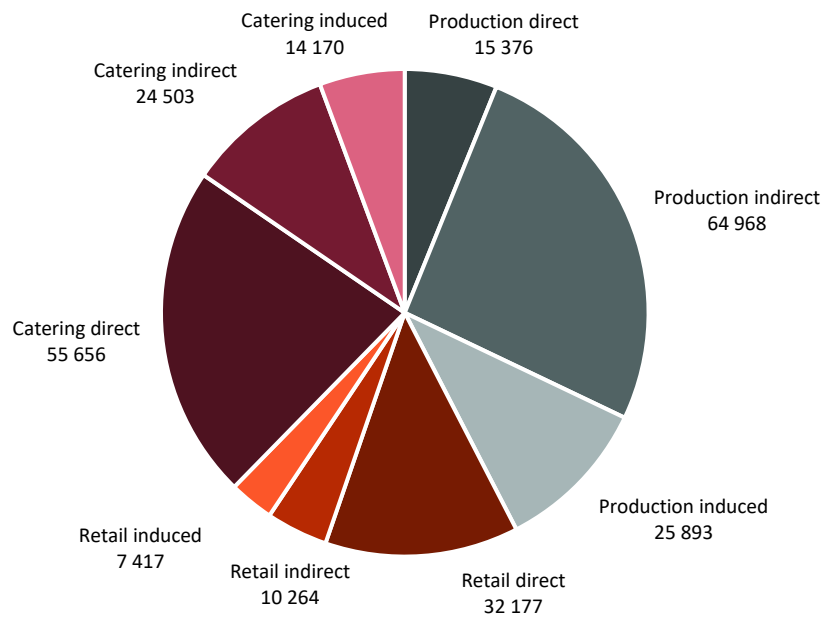
Source: IWSR (2022), including taxes.

## 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).

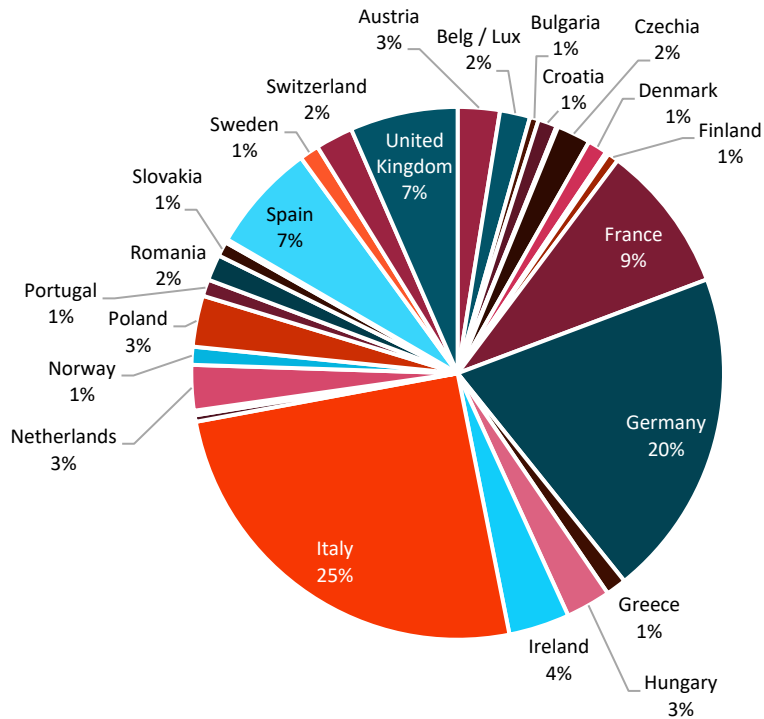
Figure 36 shows the different kinds of activities that the employment related to flavoured & national spirits comes from. Still, the production effects are considerable as many of those drinks are produced in the EU+. Figure 37 shows the GVA decomposition by country. The overall economic results for 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	<b>3 087</b>	1 095	1 455	2 550	537	<b>47 861</b>	15 081	23 798	38 879	8 982	<b>1 198</b>	379	572	951	247
Germany	<b>2 446</b>	725	1 153	1 878	568	<b>44 561</b>	17 485	18 492	35 977	8 584	<b>921</b>	250	420	670	251
France	<b>1 103</b>	382	482	864	240	<b>16 893</b>	7 337	6 504	13 841	3 052	<b>566</b>	171	249	420	147
Spain	<b>810</b>	312	307	619	190	<b>15 714</b>	6 376	5 891	12 267	3 447	<b>285</b>	97	106	202	82
United Kingdom	<b>802</b>	280	299	579	223	<b>13 553</b>	6 932	3 915	10 846	2 706	<b>276</b>	76	107	183	93
Ireland	<b>452</b>	277	123	400	52	<b>3 022</b>	1 544	957	2 502	521	<b>98</b>	53	28	81	18
Poland	<b>380</b>	85	214	299	81	<b>15 181</b>	3 677	8 445	12 122	3 059	<b>115</b>	22	60	82	33
Netherlands	<b>337</b>	99	161	260	77	<b>5 974</b>	2 809	2 120	4 929	1 045	<b>93</b>	23	43	66	26
Hungary	<b>333</b>	140	131	271	61	<b>17 723</b>	9 617	5 523	15 140	2 583	<b>117</b>	40	44	84	34
Austria	<b>313</b>	131	121	252	60	<b>4 560</b>	2 155	1 636	3 791	769	<b>120</b>	44	48	92	27
Switzerland	<b>279</b>	88	107	195	84	<b>3 366</b>	1 677	942	2 618	748	<b>64</b>	16	25	42	22
Czech Republic	<b>252</b>	100	102	202	50	<b>8 305</b>	3 541	3 200	6 741	1 564	<b>78</b>	28	30	58	20
Belg/Lux	<b>225</b>	58	114	173	52	<b>3 032</b>	1 196	1 263	2 458	573	<b>96</b>	24	48	72	25
Romania	<b>193</b>	68	76	145	48	<b>11 590</b>	4 693	4 266	8 959	2 631	<b>41</b>	14	13	27	14
Greece	<b>151</b>	60	66	126	25	<b>4 554</b>	1 919	1 895	3 814	740	<b>45</b>	16	19	35	10
Denmark	<b>146</b>	58	57	115	31	<b>2 738</b>	1 659	717	2 375	363	<b>62</b>	20	26	46	16
Sweden	<b>145</b>	48	59	107	38	<b>1 966</b>	934	621	1 555	411	<b>63</b>	15	27	43	20
Croatia	<b>139</b>	67	41	108	32	<b>6 180</b>	3 145	1 738	4 883	1 297	<b>40</b>	15	10	26	15
Norway	<b>134</b>	36	64	100	34	<b>1 241</b>	560	424	983	258	<b>52</b>	13	23	36	16
Portugal	<b>124</b>	52	43	95	30	<b>3 859</b>	1 626	1 365	2 991	868	<b>41</b>	15	14	29	13
Slovak Republic	<b>108</b>	40	43	83	25	<b>4 738</b>	2 754	1 272	4 026	712	<b>31</b>	11	11	22	9
Finland	<b>81</b>	26	36	62	19	<b>1 325</b>	584	484	1 067	257	<b>31</b>	9	13	23	9
Bulgaria	<b>66</b>	24	27	51	15	<b>7 250</b>	3 652	2 390	6 042	1 209	<b>16</b>	5	5	10	6
Latvia	<b>47</b>	18	19	36	11	<b>1 934</b>	813	709	1 522	412	<b>12</b>	4	4	8	4
Lithuania	<b>27</b>	9	11	21	6	<b>1 013</b>	401	391	791	222	<b>6</b>	2	2	4	2
Slovenia	<b>26</b>	7	11	18	8	<b>829</b>	275	340	615	213	<b>9</b>	2	4	6	3
Estonia	<b>23</b>	8	10	18	5	<b>865</b>	429	276	705	160	<b>7</b>	2	2	5	2
Cyprus	<b>12</b>	6	4	10	3	<b>396</b>	236	95	331	65	<b>3</b>	1	1	2	1
Malta	<b>8</b>	4	3	7	1	<b>198</b>	105	65	170	28	<b>2</b>	1	1	2	0
<b>EU+</b>	<b>12 249</b>	4 302	5 340	9 642	2 607	<b>250 423</b>	103 209	99 735	202 944	47 479	<b>4 489</b>	1 369	1 955	3 324	1 165

Source: IHS (2022).

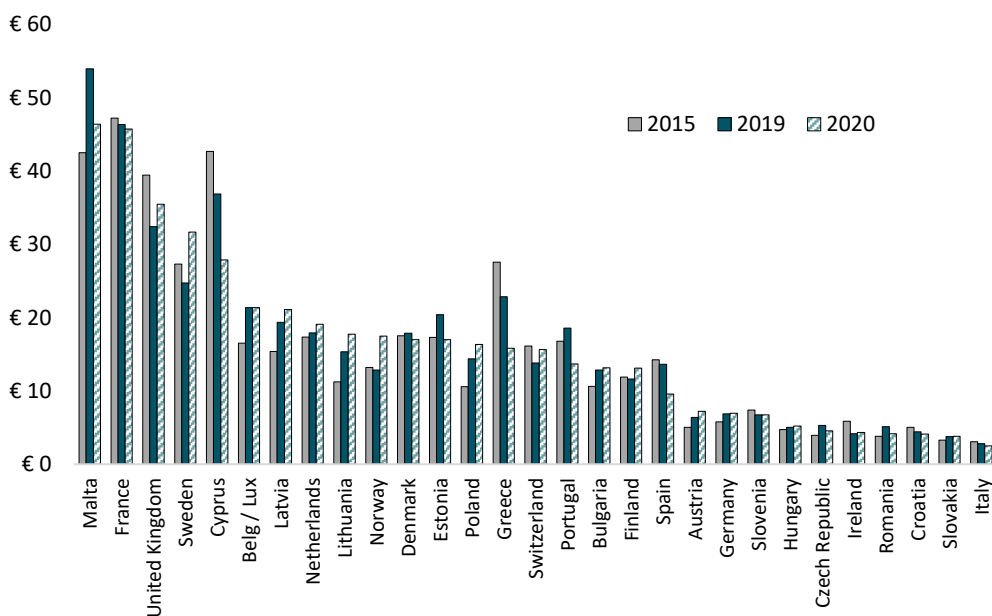
## 6.7 Scotch whisky (GI)

### 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.<sup>11</sup>

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.

<sup>11</sup> 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.

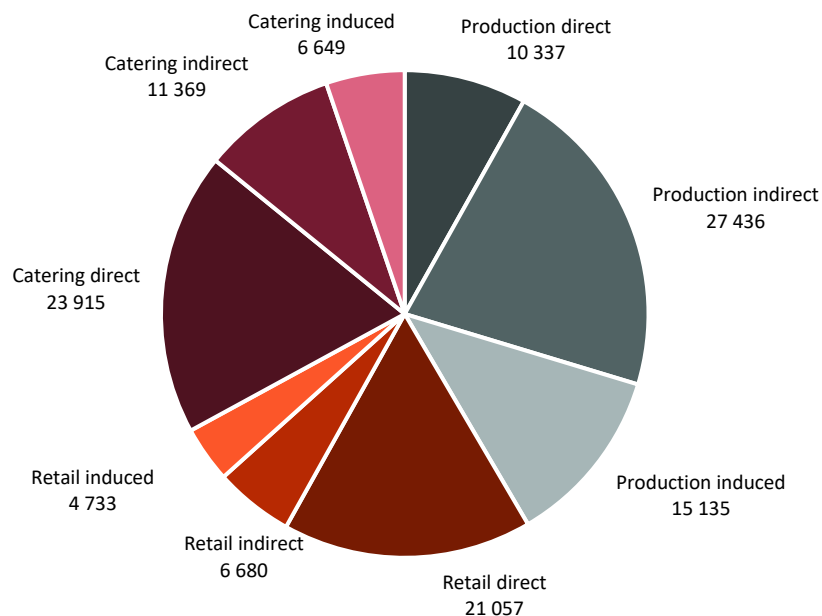


### 6.7.2 Results

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+.

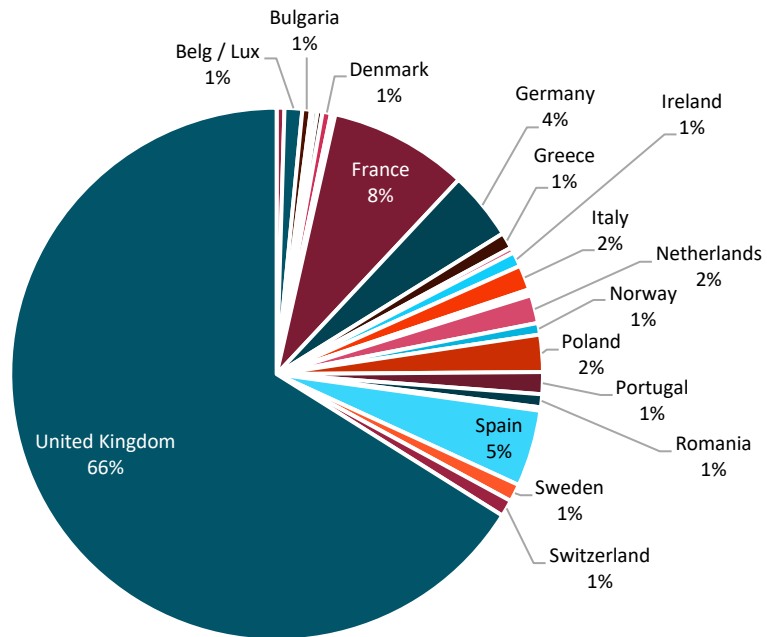
Figure 39 presents how the Scotch whisky employment effects are composed by activities. Figure 40 shows the GVA decomposition by country. The United Kingdom still accounts for only 66 % of overall GVA related to Scotch whisky; the reason is that all direct production is, of course, taking place in Scotland,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

Source: IHS (2022).

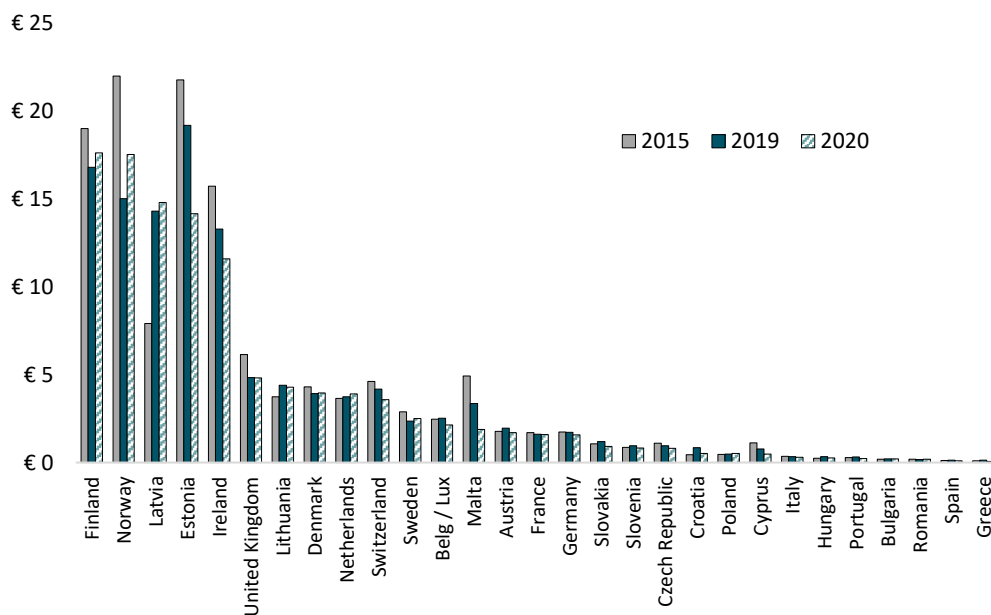
## 6.8 Cognac (GI)

### 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.<sup>12</sup>

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.

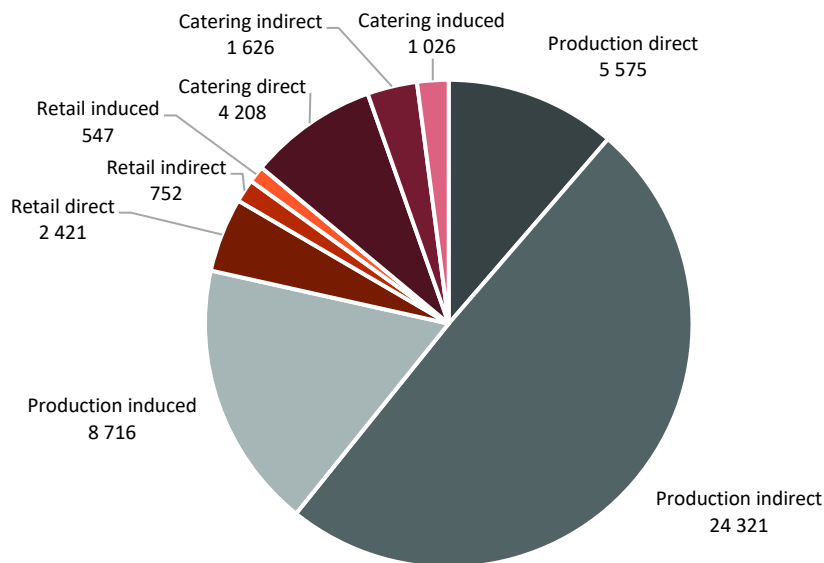
<sup>12</sup> As France is by definition the only producing country, a detailed figure as shown for the entire category of brandy would not be informative and is therefore not provided here.

### 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+.

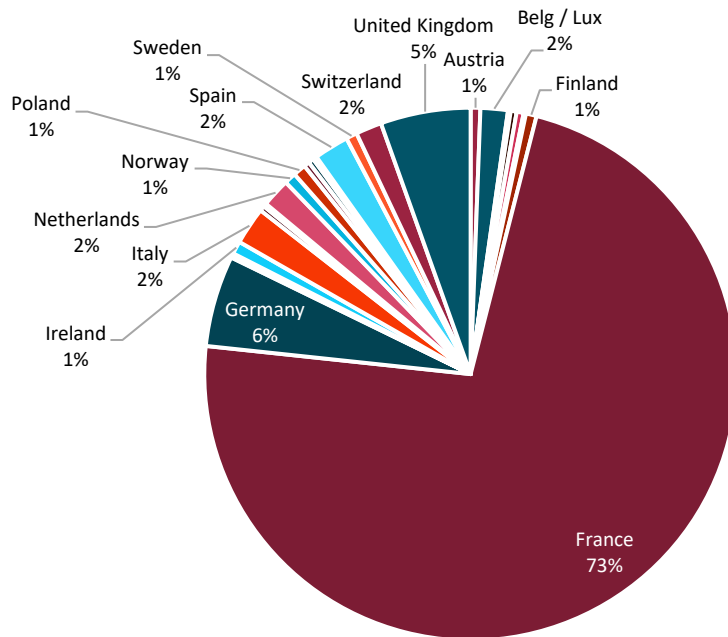
Figure 42 presents how Cognac employment effects are composed by economic activities. Figure 43 shows the GVA decomposition by country. France accounts for the lion’s share (73 %) as all direct and most indirect Cognac production take place there. Other countries can benefit from consumption-related 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	<b>2 642</b>	852	1 361	2 214	428	<b>29 665</b>	5 931	18 290	24 221	5 444	<b>1 329</b>	405	645	1 050	279
Germany	<b>201</b>	28	106	134	67	<b>3 683</b>	1 039	1 651	2 690	993	<b>76</b>	10	38	48	28
United Kingdom	<b>199</b>	60	82	142	57	<b>3 420</b>	1 630	1 095	2 724	696	<b>68</b>	16	29	45	24
Italy	<b>83</b>	8	49	57	25	<b>1 445</b>	211	812	1 023	422	<b>33</b>	3	19	22	11
Spain	<b>77</b>	4	46	50	27	<b>1 467</b>	82	893	974	493	<b>26</b>	1	14	15	11
Netherlands	<b>63</b>	13	34	47	16	<b>1 115</b>	457	442	899	216	<b>17</b>	3	9	12	5
Belg/Lux	<b>60</b>	4	40	44	16	<b>733</b>	94	461	554	179	<b>25</b>	2	16	17	7
Switzerland	<b>57</b>	13	26	39	18	<b>689</b>	299	228	527	162	<b>13</b>	2	6	8	5
Ireland	<b>28</b>	7	14	21	7	<b>414</b>	244	107	351	63	<b>7</b>	2	3	5	2
Poland	<b>28</b>	4	16	19	9	<b>1 172</b>	228	613	841	331	<b>9</b>	1	4	5	3
Norway	<b>26</b>	5	14	19	7	<b>242</b>	107	83	190	52	<b>10</b>	2	5	7	3
Sweden	<b>24</b>	4	13	17	8	<b>294</b>	83	131	214	80	<b>10</b>	1	5	7	4
Finland	<b>24</b>	9	10	19	5	<b>428</b>	231	128	359	69	<b>9</b>	3	4	7	2
Austria	<b>21</b>	6	10	16	6	<b>312</b>	118	124	242	70	<b>8</b>	2	4	6	2
Denmark	<b>15</b>	4	8	11	4	<b>259</b>	116	95	211	49	<b>6</b>	1	3	4	2
Czech Republic	<b>13</b>	2	6	9	4	<b>484</b>	144	209	353	131	<b>4</b>	1	2	3	2
Portugal	<b>12</b>	1	7	8	4	<b>393</b>	40	223	263	131	<b>4</b>	0	2	2	2
Romania	<b>12</b>	2	6	8	4	<b>692</b>	117	357	474	218	<b>2</b>	0	1	1	1
Latvia	<b>11</b>	5	3	9	3	<b>590</b>	372	123	495	95	<b>4</b>	1	1	3	1
Slovak Republic	<b>7</b>	1	3	5	2	<b>271</b>	119	91	210	61	<b>2</b>	0	1	1	1
Lithuania	<b>6</b>	3	2	5	1	<b>281</b>	157	72	229	52	<b>2</b>	1	0	1	0
Hungary	<b>6</b>	1	4	4	2	<b>288</b>	60	140	200	88	<b>2</b>	0	1	1	1
Estonia	<b>5</b>	2	2	4	1	<b>241</b>	153	55	208	32	<b>1</b>	0	1	1	0
Greece	<b>3</b>	0	2	2	1	<b>101</b>	12	58	70	31	<b>1</b>	0	1	1	0
Bulgaria	<b>3</b>	0	1	2	1	<b>296</b>	75	145	220	76	<b>1</b>	0	0	0	0
Croatia	<b>2</b>	1	1	2	1	<b>107</b>	48	32	80	26	<b>1</b>	0	0	0	0
Slovenia	<b>2</b>	0	1	1	1	<b>63</b>	16	28	44	19	<b>1</b>	0	0	0	0
Cyprus	<b>1</b>	0	0	1	0	<b>29</b>	14	9	23	6	<b>0</b>	0	0	0	0
Malta	<b>1</b>	0	0	1	0	<b>19</b>	9	7	15	3	<b>0</b>	0	0	0	0
<b>EU+</b>	<b>3 634</b>	1 042	1 867	2 909	725	<b>49 193</b>	12 204	26 700	38 904	10 289	<b>1 673</b>	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
<b>Category</b>						
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 %
<b>Total</b>	<b>45.5</b>	<b>-24 %</b>	<b>910,074</b>	<b>-26 %</b>	<b>38.1</b>	<b>-19 %</b>

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 country<sup>13</sup> 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.

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<sup>13</sup> 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 CO<sub>2</sub> 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 CO<sub>2</sub> 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 CO<sub>2</sub> eq. emissions in the same manner (see Eurostat 2022b-e for EU+ comparison).

## 7.1 Austria

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Austria</b>	<b>306.5</b>	<b>74.7</b>	<b>157.6</b>	<b>232.3</b>	<b>74.2</b>
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
<b>Employment effect (jobs per year)</b>	<b>3,855</b>	<b>822</b>	<b>2,095</b>	<b>2,917</b>	<b>938</b>
(in % of total Austrian employment)	0.09%	0.02%	0.05%	0.07%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>115.1</b>	<b>25.2</b>	<b>57.3</b>	<b>82.5</b>	<b>32,6</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Austria</b>	<b>368.4</b>	<b>189.0</b>	<b>108.5</b>	<b>297.4</b>	<b>70.9</b>
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
<b>Employment effect (jobs per year)</b>	<b>6,077</b>	<b>3,724</b>	<b>1,456</b>	<b>5,179</b>	<b>898</b>
(in % of total employment)	0.15%	0.09%	0.03%	0.12%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>380.1</b>	<b>64.0</b>	<b>48.7</b>	<b>112.7</b>	<b>32.3</b>

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

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

## 7.2 Belgium and Luxembourg (Belg/Lux)

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Belg/Lux</b>	<b>310.8</b>	<b>10.5</b>	<b>210.4</b>	<b>220.9</b>	<b>89.9</b>
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
<b>Employment effect (jobs per year)</b>	<b>3,464</b>	<b>160</b>	<b>2,316</b>	<b>2,476</b>	<b>988</b>
(in % of total Belg/Lux employment)	0.07%	0.00%	0.05%	0.05%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>123.2</b>	<b>4.3</b>	<b>78.4</b>	<b>82.7</b>	<b>40.6</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Belg/Lux</b>	<b>388.9</b>	<b>152.5</b>	<b>151.9</b>	<b>304.4</b>	<b>84.5</b>
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
<b>Employment effect (jobs per year)</b>	<b>5,918</b>	<b>3,249</b>	<b>1,729</b>	<b>4,978</b>	<b>939</b>
(in % of total employment)	0.12%	0.06%	0.03%	0.10%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>773.6</b>	<b>61.6</b>	<b>72.7</b>	<b>134.3</b>	<b>40.8</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO <sub>2</sub> eq. emissions:	0.8%				
indirect land use:	2,457 ha				
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>					
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>...of which</b>	<b>induced</b>
				<b>dir.+indir.</b>	
<b>Production</b>	<b>113.6</b>	<b>3.2</b>	<b>88.0</b>	<b>91.1</b>	<b>22.4</b>
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
<b>Retail (off-premise)</b>	<b>19.2</b>	<b>2.0</b>	<b>10.0</b>	<b>12.0</b>	<b>7.3</b>
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
<b>Catering (on-premise)</b>	<b>58.1</b>	<b>10.6</b>	<b>34.5</b>	<b>45.1</b>	<b>12.9</b>
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
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
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 <sub>2</sub> eq. emissions in 1,000 tonnes: (in % of Belg/Lux total CO <sub>2</sub> 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

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Bulgaria</b>	<b>163.5</b>	<b>21.6</b>	<b>107.7</b>	<b>129.3</b>	<b>34.2</b>
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
<b>Employment effect (jobs per year)</b>	<b>14,065</b>	<b>2,161</b>	<b>9,155</b>	<b>11,317</b>	<b>2,748</b>
(in % of total Bulgarian employment)	0.47%	0.07%	0.31%	0.38%	0.09%
<b>Fiscal returns (in mill. €)</b>	<b>38.2</b>	<b>4.6</b>	<b>19.8</b>	<b>24.4</b>	<b>13.8</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Bulgaria</b>	<b>273.0</b>	<b>140.0</b>	<b>78.1</b>	<b>218.1</b>	<b>54.9</b>
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
<b>Employment effect (jobs per year)</b>	<b>32,786</b>	<b>21,649</b>	<b>6,764</b>	<b>28,413</b>	<b>4,373</b>
(in % of total employment)	1.10%	0.73%	0.23%	0.95%	0.15%
<b>Fiscal returns (in mill. €)</b>	<b>274.8</b>	<b>29.9</b>	<b>14.4</b>	<b>44.2</b>	<b>23.8</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO2 eq. emissions:	2.1 %				
indirect land use:	15,991 ha				
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>					
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>...of which</b>	<b>induced</b>
				<b>dir.+indir.</b>	
<b>Production</b>	<b>274.8</b>	<b>11.7</b>	<b>223.7</b>	<b>235.4</b>	<b>39.4</b>
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
<b>Retail (off-premise)</b>	<b>71.8</b>	<b>5.4</b>	<b>43.0</b>	<b>48.3</b>	<b>23.4</b>
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
<b>Catering (on-premise)</b>	<b>105.1</b>	<b>6.0</b>	<b>58.7</b>	<b>64.6</b>	<b>40.5</b>
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
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
<i>Gross value added (GVA) in mill. €:</i> (in % of Bulgarian GVA)	436.5 (0.8 %)	1.0%	18.		
<i>Employment (in jobs per year):</i> (in % of Bulgarian employment)	46,851 (1.6 %)	5.1%	7.		
<i>Fiscal effects (incl. VAT+Excise) in mill. €:</i> (in % of Bulgarian government revenue)	312.9 (1.3 %)	0.8%	22.		
<i>CO<sub>2</sub> eq. emissions in 1,000 tonnes:</i> (in % of Bulg. total CO <sub>2</sub> eq. emissions)	451.7 (0.9 %)	2.6%	9.		

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



## 7.4 Croatia

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Croatia</b>	<b>81.6</b>	<b>31.0</b>	<b>31.7</b>	<b>62.7</b>	<b>18.9</b>
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
<b>Employment effect (jobs per year)</b>	<b>2,768</b>	<b>659</b>	<b>1,326</b>	<b>1,984</b>	<b>784</b>
(in % of total Croatian employment)	0.17%	0.04%	0.08%	0.12%	0.05%
<b>Fiscal returns (in mill. €)</b>	<b>23.0</b>	<b>6.8</b>	<b>7.8</b>	<b>14.7</b>	<b>8.3</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Croatia</b>	<b>150.6</b>	<b>79.4</b>	<b>35.8</b>	<b>115.2</b>	<b>35.4</b>
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
<b>Employment effect (jobs per year)</b>	<b>7,720</b>	<b>4,735</b>	<b>1,539</b>	<b>6,274</b>	<b>1,446</b>
(in % of total employment)	0.47%	0.29%	0.09%	0.38%	0.09%
<b>Fiscal returns (in mill. €)</b>	<b>122.6</b>	<b>18.9</b>	<b>9.1</b>	<b>28.0</b>	<b>16.5</b>

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

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

## 7.5 Cyprus

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Cyprus</b>	<b>11.3</b>	<b>1.7</b>	<b>6.6</b>	<b>8.2</b>	<b>3.1</b>
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
<b>Employment effect (jobs per year)</b>	<b>285</b>	<b>52</b>	<b>154</b>	<b>207</b>	<b>78</b>
(in % of total Cypriot employment)	0.07%	0.01%	0.04%	0.05%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>3.4</b>	<b>0.4</b>	<b>1.8</b>	<b>2.2</b>	<b>1.2</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Cyprus</b>	<b>70.5</b>	<b>39.3</b>	<b>18.6</b>	<b>57.9</b>	<b>12.6</b>
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
<b>Employment effect (jobs per year)</b>	<b>2,431</b>	<b>1,658</b>	<b>444</b>	<b>2,102</b>	<b>329</b>
(in % of total employment)	0.60%	0.41%	0.11%	0.52%	0.08%
<b>Fiscal returns (in mill. €)</b>	<b>59.4</b>	<b>7.9</b>	<b>6.1</b>	<b>14.0</b>	<b>5.6</b>

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

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

## 7.6 Czech Republic

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Czechia</b>	<b>395.1</b>	<b>130.1</b>	<b>180.8</b>	<b>310.9</b>	<b>84.2</b>
<i>due to Czech activities in Czechia</i>	284.2	130.1	112.2	242.3	41.9
<i>due to other EU+ countries in Czechia</i>	110.9	0.0	68.6	68.6	42.3
<i>due to Czechia in other EU+ countries</i>	116.0	0.0	68.9	68.9	47.0
<b>Employment effect (jobs per year)</b>	<b>10,272</b>	<b>2,006</b>	<b>5,652</b>	<b>7,658</b>	<b>2,614</b>
(in % of total Czech employment)	0.20%	0.04%	0.11%	0.15%	0.05%
<b>Fiscal returns (in mill. €)</b>	<b>116.7</b>	<b>34.7</b>	<b>49.2</b>	<b>83.9</b>	<b>32.8</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Czechia</b>	<b>360.7</b>	<b>165.2</b>	<b>124.8</b>	<b>290.0</b>	<b>70.7</b>
<i>due to Czech activities in Czechia</i>	304.7	165.2	97.4	262.7	42.0
<i>due to other EU+ countries in Czechia</i>	56.0	0.0	27.3	27.3	28.7
<i>due to Czechia in other EU+ countries</i>	82.4	0.0	43.7	43.7	38.7
<b>Employment effect (jobs per year)</b>	<b>15,989</b>	<b>9,899</b>	<b>3,898</b>	<b>13,797</b>	<b>2,192</b>
(in % of total employment)	0.31%	0.19%	0.08%	0.27%	0.04%
<b>Fiscal returns (in mill. €)</b>	<b>532.6</b>	<b>48.0</b>	<b>43.4</b>	<b>91.4</b>	<b>28.9</b>

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

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

## 7.7 Denmark

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Denmark</b>	<b>121.9</b>	<b>11.7</b>	<b>71.4</b>	<b>83.2</b>	<b>38.8</b>
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
<b>Employment effect (jobs per year)</b>	<b>1,464</b>	<b>135</b>	<b>876</b>	<b>1,011</b>	<b>453</b>
(in % of total Danish employment)	0.05%	0.00%	0.03%	0.04%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>46.2</b>	<b>4.0</b>	<b>24.3</b>	<b>28.3</b>	<b>17.8</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Denmark</b>	<b>305.1</b>	<b>139.6</b>	<b>105.5</b>	<b>245.1</b>	<b>60.0</b>
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
<b>Employment effect (jobs per year)</b>	<b>6589</b>	<b>4529</b>	<b>1357</b>	<b>5887</b>	<b>702</b>
(in % of total employment)	0.24%	0.16%	0.05%	0.21%	0.03%
<b>Fiscal returns (in mill. €)</b>	<b>324.8</b>	<b>48.9</b>	<b>55.5</b>	<b>104.4</b>	<b>32.9</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO <sub>2</sub> eq. emissions:	0.5 %				
indirect land use:	3,425 ha				
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>					
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>...of which</b>	<b>induced</b>
				<b>dir.+indir.</b>	
<b>Production</b>	<b>61.8</b>	<b>3.6</b>	<b>47.4</b>	<b>50.9</b>	<b>10.9</b>
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
<b>Retail (off-premise)</b>	<b>18.0</b>	<b>2.5</b>	<b>9.2</b>	<b>11.7</b>	<b>6.3</b>
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
<b>Catering (on-premise)</b>	<b>28.9</b>	<b>2.4</b>	<b>18.9</b>	<b>21.3</b>	<b>7.6</b>
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
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
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 <sub>2</sub> eq. emissions in 1,000 tonnes: (in % of Danish total CO <sub>2</sub> eq. emissions)	108.7 (0.1 %)	0.6%	21.		

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



## 7.8 Estonia

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Estonia</b>	<b>40.7</b>	<b>11.1</b>	<b>19.6</b>	<b>30.7</b>	<b>10.0</b>
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
<b>Employment effect (jobs per year)</b>	<b>1208</b>	<b>338</b>	<b>557</b>	<b>895</b>	<b>312</b>
(in % of total Estonian employment)	0.20%	0.05%	0.09%	0.14%	0.05%
<b>Fiscal returns (in mill. €)</b>	<b>11.6</b>	<b>3.4</b>	<b>4.0</b>	<b>7.5</b>	<b>4.1</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Estonia</b>	<b>55.8</b>	<b>26.2</b>	<b>18.8</b>	<b>45.0</b>	<b>10.7</b>
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
<b>Employment effect (jobs per year)</b>	<b>2,785</b>	<b>1,902</b>	<b>549</b>	<b>2,451</b>	<b>334</b>
(in % of total employment)	0.45%	0.31%	0.09%	0.40%	0.05%
<b>Fiscal returns (in mill. €)</b>	<b>155.2</b>	<b>6.1</b>	<b>5.7</b>	<b>11.9</b>	<b>4.6</b>

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

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

## 7.9 Finland

<b>A. Production</b>					
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: <i>Vodka, Liqueurs, White Spirits</i>					
Largest export country: <i>Poland</i>					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Finland</b>	<b>216.3</b>	<b>50.3</b>	<b>115.0</b>	<b>165.3</b>	<b>51.1</b>
<i>due to Finnish activities in Finland</i>	152.5	50.3	74.6	124.8	27.7
<i>due to other EU+ countries in Finland</i>	63.8	0.0	40.5	40.5	23.4
<i>due to Finland in other EU+ countries</i>	48.3	0.0	29.8	29.8	18.5
<b>Employment effect (jobs per year)</b>	<b>2,757</b>	<b>511</b>	<b>1,562</b>	<b>2,073</b>	<b>684</b>
(in % of total Finish employment)	0.11%	0.02%	0.06%	0.09%	0.03%
<b>Fiscal returns (in mill. €)</b>	<b>76.0</b>	<b>17.0</b>	<b>36.1</b>	<b>53.1</b>	<b>23.0</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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: <i>Vodka, Cognac/Armagnac, Liqueurs</i>					
Largest import country: <i>French</i>					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Finland</b>	<b>132.7</b>	<b>54.9</b>	<b>46.8</b>	<b>101.7</b>	<b>31.0</b>
<i>due to Finnish activities in Finland</i>	107.9	54.9	35.0	89.9	18.0
<i>due to other EU+ countries in Finland</i>	24.8	0.0	11.8	11.8	13.0
<i>due to Finland in other EU+ countries</i>	19.9	0.0	10.7	10.7	9.2
<b>Employment effect (jobs per year)</b>	<b>2,489</b>	<b>1,437</b>	<b>641</b>	<b>2,078</b>	<b>411</b>
(in % of total employment)	0.10%	0.06%	0.03%	0.09%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>618.1</b>	<b>19.1</b>	<b>20.3</b>	<b>39.4</b>	<b>14.2</b>

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

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

## 7.10 France

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

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO2 eq. emissions:	10.8 %				
indirect land use:	89,928 ha				
<hr/>					
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Production</b>	<b>1,344.6</b>	<b>289.9</b>	<b>916.9</b>	<b>1,206.8</b>	<b>137.8</b>
<i>due to French activities in France</i>	<i>1,201.5</i>	<i>289.9</i>	<i>812.5</i>	<i>1,102.3</i>	<i>99.2</i>
<i>due to other EU+ countries in France</i>	<i>143.1</i>	<i>0.0</i>	<i>104.5</i>	<i>104.5</i>	<i>38.6</i>
<i>due to France in other EU+ countries</i>	<i>1,569.9</i>	<i>289.6</i>	<i>1,091.9</i>	<i>1,381.5</i>	<i>188.4</i>
<b>Retail (off-premise)</b>	<b>119.3</b>	<b>32.3</b>	<b>49.0</b>	<b>81.3</b>	<b>38.0</b>
<i>due to French activities in France</i>	<i>102.1</i>	<i>32.3</i>	<i>41.3</i>	<i>73.6</i>	<i>28.5</i>
<i>due to other EU+ countries in France</i>	<i>17.2</i>	<i>0.0</i>	<i>7.7</i>	<i>7.7</i>	<i>9.4</i>
<i>due to France in other EU+ countries</i>	<i>135.8</i>	<i>32.3</i>	<i>57.4</i>	<i>89.7</i>	<i>46.2</i>
<b>Catering (on-premise)</b>	<b>217.7</b>	<b>28.4</b>	<b>144.2</b>	<b>172.5</b>	<b>45.2</b>
<i>due to French activities in France</i>	<i>153.1</i>	<i>28.4</i>	<i>99.7</i>	<i>128.1</i>	<i>25.1</i>
<i>due to other EU+ countries in France</i>	<i>64.6</i>	<i>0.0</i>	<i>44.4</i>	<i>44.4</i>	<i>20.1</i>
<i>due to France in other EU+ countries</i>	<i>194.2</i>	<i>28.3</i>	<i>124.9</i>	<i>153.3</i>	<i>40.9</i>
<hr/>					
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
<i>Gross value added (GVA) in mill. €:</i> <i>(in % of French GVA)</i>	<i>6,248.2</i> <i>(0.3 %)</i>	<i>13.7%</i>	<i>2.</i>		
<i>Employment (in jobs per year):</i> <i>(in % of French employment)</i>	<i>85,578</i> <i>(0.3 %)</i>	<i>9.4%</i>	<i>4.</i>		
<i>Fiscal effects (incl. VAT+Excise) in mill. €:</i> <i>(in % of French government revenue)</i>	<i>6,561.4</i> <i>(0.5 %)</i>	<i>17.2%</i>	<i>2.</i>		
<i>CO<sub>2</sub> eq. emissions in 1,000 tonnes:</i> <i>(in % of French total CO<sub>2</sub> eq. emissions)</i>	<i>1,681.6</i> <i>(0.6 %)</i>	<i>9.7%</i>	<i>4.</i>		

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

## 7.11 Germany

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Germany</b>	<b>3,214.2</b>	<b>546.4</b>	<b>1,830.9</b>	<b>2,377.3</b>	<b>836.9</b>
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
<b>Employment effect (jobs per year)</b>	<b>46,410</b>	<b>4,645</b>	<b>29,203</b>	<b>33,848</b>	<b>12,562</b>
(in % of total German employment)	0.12%	0.01%	0.07%	0.09%	0.03%
<b>Fiscal returns (in mill. €)</b>	<b>1,169.9</b>	<b>182.4</b>	<b>628.4</b>	<b>810.8</b>	<b>359.1</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
		<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Germany</b>	<b>2,487.6</b>	<b>1042.4</b>	<b>802.6</b>	<b>1,845.0</b>	<b>642.6</b>
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
<b>Employment effect (jobs per year)</b>	<b>60,348</b>	<b>37,861</b>	<b>12,834</b>	<b>50,695</b>	<b>9,653</b>
(in % of total employment)	0.15%	0.10%	0.03%	0.13%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>3,500.8</b>	<b>368.7</b>	<b>338.2</b>	<b>707.0</b>	<b>282.1</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO2 eq. emissions:	10.2 %				
indirect land use:	30.964 ha				
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>					
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>...of which</b>	<b>induced</b>
				<b>dir.+indir.</b>	
<b>Production</b>	<b>1,358.1</b>	<b>122.8</b>	<b>1,020.7</b>	<b>1,143.5</b>	<b>214.6</b>
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
<b>Retail (off-premise)</b>	<b>191.0</b>	<b>33.2</b>	<b>85.1</b>	<b>118.3</b>	<b>72.7</b>
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
<b>Catering (on-premise)</b>	<b>292.9</b>	<b>41.3</b>	<b>157.4</b>	<b>198.7</b>	<b>94.3</b>
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
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
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 <sub>2</sub> eq. emissions in 1,000 tonnes: (in % of German total CO <sub>2</sub> eq. emissions)	1,842.0 (0.3 %)	10.6%	3.		

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



## 7.12 Greece

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

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

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

## 7.13 Hungary

<b>A. Production</b>					
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: <i>Vodka, Bitters/Spirit Aperitifs, Brandy</i>					
Largest export country: <i>Poland</i>					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Hungary</b>	<b>211.3</b>	<b>59.4</b>	<b>105.4</b>	<b>164.8</b>	<b>46.5</b>
<i>due to Hungarian activities in Hungary</i>	<i>153.7</i>	<i>59.4</i>	<i>70.1</i>	<i>129.5</i>	<i>24.3</i>
<i>due to other EU+ countries in Hungary</i>	<i>57.5</i>	<i>0.0</i>	<i>35.3</i>	<i>35.3</i>	<i>22.2</i>
<i>due to Hungary in other EU+ countries</i>	<i>97.5</i>	<i>0.0</i>	<i>57.7</i>	<i>57.7</i>	<i>39.7</i>
<b>Employment effect (jobs per year)</b>	<b>7,818</b>	<b>1,513</b>	<b>4,369</b>	<b>5,882</b>	<b>1,936</b>
(in % of total Hungarian employment)	0.17%	0.03%	0.10%	0.13%	0.04%
<b>Fiscal returns (in mill. €)</b>	<b>63.7</b>	<b>13.9</b>	<b>27.8</b>	<b>41.7</b>	<b>22.0</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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: <i>Fruit Eaux de Vie, Vodka, Bitters/Spirit Aperitifs</i>					
Largest import country: <i>(I) United Kingdom</i>					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Hungary</b>	<b>377.4</b>	<b>171.7</b>	<b>132.2</b>	<b>303.8</b>	<b>73.6</b>
<i>due to Hungarian activities in Hungary</i>	<i>344.6</i>	<i>171.7</i>	<i>116.0</i>	<i>287.6</i>	<i>57.0</i>
<i>due to other EU+ countries in Hungary</i>	<i>32.7</i>	<i>0.0</i>	<i>16.2</i>	<i>16.2</i>	<i>16.5</i>
<i>due to Hungary in other EU+ countries</i>	<i>137.2</i>	<i>0.0</i>	<i>69.7</i>	<i>69.7</i>	<i>67.5</i>
<b>Employment effect (jobs per year)</b>	<b>23,753</b>	<b>15,075</b>	<b>5,613</b>	<b>20,688</b>	<b>3,065</b>
(in % of total employment)	0.53%	0.33%	0.12%	0.46%	0.07%
<b>Fiscal returns (in mill. €)</b>	<b>384.1</b>	<b>52.9</b>	<b>50.8</b>	<b>103.7</b>	<b>40.8</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO2 eq. emissions:	1.1 %				
indirect land use:	11,483 ha				
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>					
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>...of which</b>	<b>induced</b>
				<b>dir.+indir.</b>	
<b>Production</b>	<b>151.8</b>	<b>23.1</b>	<b>104.5</b>	<b>127.6</b>	<b>24.2</b>
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
<b>Retail (off-premise)</b>	<b>48.8</b>	<b>14.9</b>	<b>19.3</b>	<b>34.2</b>	<b>14.6</b>
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
<b>Catering (on-premise)</b>	<b>107.1</b>	<b>9.1</b>	<b>72.4</b>	<b>81.5</b>	<b>25.6</b>
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
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
<i>Gross value added (GVA) in mill. €:</i> (in % of Hungarian GVA)	588.6 (0.5 %)	1.3%	15.		
<i>Employment (in jobs per year):</i> (in % of Hungarian employment)	31,571 (0.7 %)	3.5%	9.		
<i>Fiscal effects (incl. VAT+Excise) in mill. €:</i> (in % of Hungarian government revenue)	447.8 (0.8 %)	1.2%	16.		
<i>CO<sub>2</sub> eq. emissions in 1,000 tonnes:</i> (in % of Hung. total CO <sub>2</sub> eq. emissions)	307.7 (0.6 %)	1.8%	12.		

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

## 7.14 Ireland

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

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

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

## 7.15 Italy

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Italy</b>	<b>3,037.0</b>	<b>836.3</b>	<b>1,606.1</b>	<b>2,442.4</b>	<b>594.7</b>
<i>due to Italian activities in Italy</i>	2,683.0	836.3	1,388.4	2,224.6	458.4
<i>due to other EU+ countries in Italy</i>	354.0	0.0	217.7	217.7	136.3
<i>due to Italy in other EU+ countries</i>	448.2	0.0	265.6	265.6	182.6
<b>Employment effect (jobs per year)</b>	<b>41,153</b>	<b>4,848</b>	<b>26,370</b>	<b>31,218</b>	<b>9,935</b>
(in % of total Italian employment)	0.19%	0.02%	0.12%	0.14%	0.05%
<b>Fiscal returns (in mill. €)</b>	<b>1,155.2</b>	<b>283.7</b>	<b>603.6</b>	<b>887.3</b>	<b>267.9</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Italy</b>	<b>1,636.3</b>	<b>756.5</b>	<b>579.8</b>	<b>1,336.3</b>	<b>300.0</b>
<i>due to Italian activities in Italy</i>	1,450.4	756.5	489.2	1,245.7	204.7
<i>due to other EU+ countries in Italy</i>	185.9	0.0	90.6	90.6	95.3
<i>due to Italy in other EU+ countries</i>	145.6	0.0	78.4	78.4	67.2
<b>Employment effect (jobs per year)</b>	<b>33,998</b>	<b>19,627</b>	<b>9,394</b>	<b>29,021</b>	<b>4,977</b>
(in % of total employment)	0.16%	0.09%	0.04%	0.13%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>1,597.9</b>	<b>269.8</b>	<b>261.6</b>	<b>531.4</b>	<b>138.2</b>

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

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



## 7.16 Latvia

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Latvia</b>	<b>69.7</b>	<b>20.7</b>	<b>31.6</b>	<b>52.3</b>	<b>17.4</b>
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
<b>Employment effect (jobs per year)</b>	<b>2,517</b>	<b>630</b>	<b>1,231</b>	<b>1,860</b>	<b>656</b>
(in % of total Latvian employment)	0.30%	0.07%	0.14%	0.22%	0.08%
<b>Fiscal returns (in mill. €)</b>	<b>16.5</b>	<b>4.5</b>	<b>5.9</b>	<b>10.4</b>	<b>6.1</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Latvia</b>	<b>104.5</b>	<b>51.0</b>	<b>30.6</b>	<b>81.7</b>	<b>22.8</b>
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
<b>Employment effect (jobs per year)</b>	<b>5,526</b>	<b>3,595</b>	<b>1,076</b>	<b>4,670</b>	<b>856</b>
(in % of total employment)	0.65%	0.42%	0.13%	0.55%	0.10%
<b>Fiscal returns (in mill. €)</b>	<b>250.5</b>	<b>11.6</b>	<b>10.4</b>	<b>22.0</b>	<b>8.7</b>

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

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

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO <sub>2</sub> eq. emissions:		0.3 %			
indirect land use:		5,182 ha			
<hr/>					
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Production</b>	<b>39.6</b>	<b>3.9</b>	<b>28.6</b>	<b>32.5</b>	<b>7.1</b>
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
<b>Retail (off-premise)</b>	<b>10.6</b>	<b>1.8</b>	<b>4.3</b>	<b>6.1</b>	<b>4.5</b>
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
<b>Catering (on-premise)</b>	<b>9.8</b>	<b>0.3</b>	<b>5.9</b>	<b>6.2</b>	<b>3.6</b>
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
<hr/>					
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
<hr/>					
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 <sub>2</sub> eq. emissions in 1,000 tonnes: (in % of Lithuanian total CO <sub>2</sub> eq. emissions)	60.0 (0.3 %)	0.3%	26.		

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

## 7.18 Malta

<b>A. Production</b>					
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: -					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Malta</b>	<b>3.9</b>	<b>0.2</b>	<b>2.3</b>	<b>2.6</b>	<b>1.3</b>
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
<b>Employment effect (jobs per year)</b>	<b>83</b>	<b>5</b>	<b>49</b>	<b>54</b>	<b>29</b>
(in % of total Maltese employment)	0.03%	0.00%	0.02%	0.02%	0.01%
<b>Fiscal returns (in mill. €)</b>	<b>0.9</b>	<b>0.1</b>	<b>0.5</b>	<b>0.5</b>	<b>0.4</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Malta</b>	<b>30.0</b>	<b>17.0</b>	<b>9.1</b>	<b>26.2</b>	<b>3.9</b>
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
<b>Employment effect (jobs per year)</b>	<b>775</b>	<b>477</b>	<b>211</b>	<b>688</b>	<b>87</b>
(in % of total employment)	0.30%	0.19%	0.08%	0.27%	0.03%
<b>Fiscal returns (in mill. €)</b>	<b>31.0</b>	<b>3.9</b>	<b>2.1</b>	<b>6.0</b>	<b>1.7</b>

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

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

## 7.19 Netherlands

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in the Netherlands</b>	<b>620.1</b>	<b>102.5</b>	<b>365.6</b>	<b>468.1</b>	<b>152.0</b>
<i>due to Dutch activities in the Netherlands</i>	299.9	102.5	151.4	253.9	46.0
<i>due to other EU+ countries in the Netherlands</i>	320.2	0.0	214.2	214.2	106.0
<i>due to the Netherlands in other EU+ countries</i>	101.9	0.0	65.5	65.5	36.4
<b>Employment effect (jobs per year)</b>	<b>7,333</b>	<b>643</b>	<b>4,631</b>	<b>5,274</b>	<b>2,059</b>
(in % of total Dutch employment)	0.08%	0.01%	0.05%	0.06%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>162.3</b>	<b>23.6</b>	<b>87.6</b>	<b>111.2</b>	<b>51.1</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in the Netherlands</b>	<b>606.3</b>	<b>262.8</b>	<b>217.6</b>	<b>480.4</b>	<b>125.9</b>
<i>due to Dutch activities in the Netherlands</i>	453.9	262.8	131.5	394.3	59.6
<i>due to other EU+ countries in the Netherlands</i>	152.4	0.0	86.1	86.1	66.3
<i>due to the Netherlands in other EU+ countries</i>	78.9	0.0	44.8	44.8	34.1
<b>Employment effect (jobs per year)</b>	<b>13,694</b>	<b>8,967</b>	<b>3,017</b>	<b>11,984</b>	<b>1,710</b>
(in % of total employment)	0.16%	0.10%	0.03%	0.14%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>752.3</b>	<b>62.7</b>	<b>65.6</b>	<b>128.4</b>	<b>44.6</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO <sub>2</sub> eq. emissions:	2.2 %				
indirect land use:	4,597 ha				
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>					
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>...of which</b>	<b>induced</b>
				<b>dir.+indir.</b>	
<b>Production</b>	<b>285.2</b>	<b>31.9</b>	<b>209.1</b>	<b>240.9</b>	<b>44.2</b>
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
<b>Retail (off-premise)</b>	<b>31.9</b>	<b>4.7</b>	<b>13.4</b>	<b>18.1</b>	<b>13.8</b>
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
<b>Catering (on-premise)</b>	<b>90.6</b>	<b>13.1</b>	<b>54.6</b>	<b>67.8</b>	<b>22.8</b>
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
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
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 <sub>2</sub> eq. emissions in 1,000 tonnes: (in % of Dutch total CO <sub>2</sub> eq. emissions)	407.7 (0.3 %)	2.3%	10.		

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



## 7.20 Norway

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

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO2 eq. emissions:	0.7 %				
indirect land use:	5,051 ha				
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>					
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>...of which</b>	<b>induced</b>
				<b>dir.+indir.</b>	
<b>Production</b>	<b>90.3</b>	<b>2.3</b>	<b>70.9</b>	<b>73.2</b>	<b>17.2</b>
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
<b>Retail (off-premise)</b>	<b>13.9</b>	<b>1.3</b>	<b>7.0</b>	<b>8.3</b>	<b>5.6</b>
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
<b>Catering (on-premise)</b>	<b>22.9</b>	<b>0.5</b>	<b>15.7</b>	<b>16.2</b>	<b>6.7</b>
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
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
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 <sub>2</sub> eq. emissions in 1,000 tonnes: (in % of Norwegian total CO <sub>2</sub> eq. emissions)	127.2 -	0.7%	20.		

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

## 7.21 Poland

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

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO <sub>2</sub> eq. emissions:		28.9 %			
indirect land use:		86,856 ha			
<hr/>					
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Production</b>	<b>3688.3</b>	<b>129.8</b>	<b>3104.4</b>	<b>3,234.2</b>	<b>454.2</b>
<i>due to Polish activities in Poland</i>	3,460.0	129.8	2,947.4	3,077.2	382.8
<i>due to other EU+ countries in Poland</i>	228.3	0.0	157.0	157.0	71.4
<i>due to Poland in other EU+ countries</i>	3,808.8	129.7	3,204.6	3,334.3	474.6
<b>Retail (off-premise)</b>	<b>501.6</b>	<b>100.7</b>	<b>264.9</b>	<b>365.6</b>	<b>136.0</b>
<i>due to Polish activities in Poland</i>	464.5	100.7	248.4	349.0	115.4
<i>due to other EU+ countries in Poland</i>	37.1	0.0	16.6	16.6	20.5
<i>due to Poland in other EU+ countries</i>	506.4	100.6	270.9	371,5	134,9
<b>Catering (on-premise)</b>	<b>300.5</b>	<b>20.6</b>	<b>192.9</b>	<b>213.5</b>	<b>87.0</b>
<i>due to Polish activities in Poland</i>	227.6	20.6	154.1	174.6	53.0
<i>due to other EU+ countries in Poland</i>	72.9	0.0	38.9	38.9	34.0
<i>due to Poland in other EU+ countries</i>	252.6	20.5	169.9	190.4	62.2
<hr/>					
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
<hr/>					
<i>Gross value added (GVA) in mill. €:</i> <i>(in % of Polish GVA)</i>	3,584.5 (0.8 %)	7.9%	5.		
<i>Employment (in jobs per year):</i> <i>(in % of Polish employment)</i>	143,854 (0.9 %)	15.8%	1.		
<i>Fiscal effects (incl. VAT+Excise) in mill. €:</i> <i>(in % of Polish government revenue)</i>	2.422,7 (1.1 %)	6.4%	5.		
<i>CO<sub>2</sub> eq. emissions in 1,000 tonnes:</i> <i>(in % of Polish total CO<sub>2</sub> eq. emissions)</i>	4,490.4 (1.3 %)	25.8%	1.		

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

## 7.22 Portugal

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Portugal</b>	<b>114.3</b>	<b>21.3</b>	<b>58.2</b>	<b>79.5</b>	<b>34.8</b>
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
<b>Employment effect (jobs per year)</b>	<b>3336</b>	<b>410</b>	<b>1888</b>	<b>2298</b>	<b>1038</b>
(in % of total Portuguese employment)	0.07%	0.01%	0.04%	0.05%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>35.4</b>	<b>6.1</b>	<b>15.8</b>	<b>21.8</b>	<b>13.6</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Portugal</b>	<b>330.8</b>	<b>167.5</b>	<b>90.3</b>	<b>257.8</b>	<b>73.0</b>
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
<b>Employment effect (jobs per year)</b>	<b>10,814</b>	<b>5,858</b>	<b>2,842</b>	<b>8,700</b>	<b>2,114</b>
(in % of total employment)	0.24%	0.13%	0.06%	0.19%	0.05%
<b>Fiscal returns (in mill. €)</b>	<b>318.0</b>	<b>47.7</b>	<b>32.7</b>	<b>80.4</b>	<b>31.9</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO2 eq. emissions:	0.5 %				
indirect land use:	2,603 ha				
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>					
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>...of which</b>	<b>induced</b>
				<b>dir.+indir.</b>	
<b>Production</b>	<b>75.0</b>	<b>5.7</b>	<b>54.6</b>	<b>60.3</b>	<b>14.7</b>
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
<b>Retail (off-premise)</b>	<b>12.5</b>	<b>1.8</b>	<b>5.6</b>	<b>7.4</b>	<b>5.1</b>
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
<b>Catering (on-premise)</b>	<b>85.3</b>	<b>13.4</b>	<b>48.3</b>	<b>61.7</b>	<b>23.5</b>
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
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
<i>Gross value added (GVA) in mill. €:</i> (in % of Portuguese GVA)	445.1 (0.3 %)	1.0%	17.		
<i>Employment (in jobs per year):</i> (in % of Portuguese employment)	14,150 (0.3 %)	1.6%	13.		
<i>Fiscal effects (incl. VAT+Excise) in mill. €:</i> (in % of Portuguese government revenue)	353.5 (0.4 %)	0.9%	21.		
<i>CO<sub>2</sub> eq. emissions in 1,000 tonnes:</i> (in % of Portuguese total CO <sub>2</sub> eq. emissions)	172.7 (0.3 %)	1.0%	16.		

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

## 7.23 Romania

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

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO <sub>2</sub> eq. emissions:		0.9 %			
indirect land use:		8,961 ha			
<hr/>					
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Production</b>	<b>130.1</b>	<b>6.3</b>	<b>89.9</b>	<b>96.2</b>	<b>33.9</b>
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
<b>Retail (off-premise)</b>	<b>76.0</b>	<b>4.8</b>	<b>43.9</b>	<b>48.7</b>	<b>27.3</b>
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
<b>Catering (on-premise)</b>	<b>131.3</b>	<b>7.0</b>	<b>80.5</b>	<b>87.4</b>	<b>43.9</b>
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
<hr/>					
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
<hr/>					
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 <sub>2</sub> eq. emissions in 1,000 tonnes: (in % of Romanian total CO <sub>2</sub> eq. emissions)	337.4 (0.4 %)	1.9%	11.		

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



## 7.24 Slovakia

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

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

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

## 7.25 Slovenia

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Slovenia</b>	<b>20.8</b>	<b>0.9</b>	<b>12.1</b>	<b>13.0</b>	<b>7.8</b>
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
<b>Employment effect (jobs per year)</b>	<b>573</b>	<b>17</b>	<b>343</b>	<b>360</b>	<b>213</b>
(in % of total Slovenian employment)	0.06%	0.00%	0.04%	0.04%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>6.8</b>	<b>0.2</b>	<b>3.6</b>	<b>3.9</b>	<b>2.9</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Slovenia</b>	<b>46.5</b>	<b>19.1</b>	<b>15.7</b>	<b>34.8</b>	<b>11.7</b>
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
<b>Employment effect (jobs per year)</b>	<b>1,608</b>	<b>816</b>	<b>470</b>	<b>1,286</b>	<b>322</b>
(in % of total employment)	0.17%	0.09%	0.05%	0.13%	0.03%
<b>Fiscal returns (in mill. €)</b>	<b>60.2</b>	<b>6.0</b>	<b>6.4</b>	<b>12.3</b>	<b>4.9</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO <sub>2</sub> eq. emissions:	0.1 %				
indirect land use:	416 ha				
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>					
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>...of which</b>	<b>induced</b>
				<b>dir.+indir.</b>	
<b>Production</b>	<b>14.6</b>	<b>0.4</b>	<b>9.9</b>	<b>10.3</b>	<b>4.2</b>
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
<b>Retail (off-premise)</b>	<b>5.9</b>	<b>1.0</b>	<b>2.7</b>	<b>3.7</b>	<b>2.2</b>
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
<b>Catering (on-premise)</b>	<b>15.5</b>	<b>2.2</b>	<b>8.9</b>	<b>11.2</b>	<b>4.3</b>
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
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
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 <sub>2</sub> eq. emissions in 1,000 tonnes: (in % of Slovenian total CO <sub>2</sub> eq. emissions)	36.0 (0.2 %)	0.2%	27.		

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

## 7.26 Spain

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

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

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

## 7.27 Sweden

<b>A. Production</b>					
<i>Population:</i> 10.3 mill.					
<i>Annual final consumption expenditure per capita:</i> € 32,513					
<i>Spirits from Sweden sold worldwide (in 1,000 hectolitres):</i> 1,387,0					
<i>Δ 2019-2020 (in %):</i> - 5.5					
<i>Swedish spirits production turnover (in mill. €):</i> 594.1					
<i>Top-selling Swedish spirits products:</i> Vodka, Aquavit, Whisky					
<i>Largest export country:</i> United States					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Sweden</b>	<b>682.1</b>	<b>260.7</b>	<b>282.7</b>	<b>543.4</b>	<b>138.7</b>
<i>due to Swedish activities in Sweden</i>	541.2	260.7	194.6	455.2	85.9
<i>due to other EU+ countries in Sweden</i>	140.9	0.0	88.1	88.1	52.8
<i>due to Sweden in other EU+ countries</i>	131.3	0.0	76.9	76.9	54.4
<b>Employment effect (jobs per year)</b>	<b>6,224</b>	<b>1,742</b>	<b>2,971</b>	<b>4,714</b>	<b>1,510</b>
(in % of total Swedish employment)	0.13%	0.04%	0.06%	0.10%	0.03%
<b>Fiscal returns (in mill. €)</b>	<b>274.7</b>	<b>86.9</b>	<b>112.9</b>	<b>199.8</b>	<b>74.9</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
<i>Spirits sold in Sweden (in 1,000 hectolitres):</i> 262.1					
<i>Δ 2019-2020 (in %):</i> + 11.4					
<i>On-premise share (of volume):</i> 7 %					
<i>Spirits sold in Sweden (in € per adult):</i> € 118.78					
<i>Δ 2019-2020 (in %):</i> + 19.0					
<i>Most favoured products:</i> Scotch Whisky, Vodka, Gin					
<i>Largest import country:</i> United Kingdom					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Sweden</b>	<b>402.8</b>	<b>192.2</b>	<b>122.5</b>	<b>314.7</b>	<b>88.1</b>
<i>due to Swedish activities in Sweden</i>	337.8	192.2	90.4	282.6	55.2
<i>due to other EU+ countries in Sweden</i>	65.0	0.0	32.1	32.1	32.9
<i>due to Sweden in other EU+ countries</i>	51.4	0.0	24.8	24.8	26.6
<b>Employment effect (jobs per year)</b>	<b>6,137</b>	<b>3,886</b>	<b>1,300</b>	<b>5,186</b>	<b>951</b>
(in % of total employment)	0.13%	0.08%	0.03%	0.11%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>447.4</b>	<b>61.3</b>	<b>63.1</b>	<b>124.4</b>	<b>48.7</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO <sub>2</sub> eq. emissions:		1.3 %			
indirect land use:		11,827 ha			
<hr/>					
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Production</b>	<b>164.8</b>	<b>39.2</b>	<b>104.0</b>	<b>143.2</b>	<b>21.6</b>
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
<b>Retail (off-premise)</b>	<b>22.2</b>	<b>4.3</b>	<b>10.6</b>	<b>14.8</b>	<b>7.4</b>
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
<b>Catering (on-premise)</b>	<b>21.5</b>	<b>0.6</b>	<b>14.1</b>	<b>14.7</b>	<b>6.7</b>
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
<hr/>					
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
<hr/>					
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 <sub>2</sub> eq. emissions in 1,000 tonnes: (in % of Swedish total CO <sub>2</sub> eq. emissions)	208.5 (0.5 %)	1.2%	14.		

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



## 7.28 Switzerland

<b>A. Production</b>					
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					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Switzerland</b>	<b>243.0</b>	<b>21.3</b>	<b>124.7</b>	<b>146.0</b>	<b>97.0</b>
<i>due to Swiss activities in Switzerland</i>	54.6	21.3	20.6	41.8	12.8
<i>due to other EU+ countries in Switzerland</i>	188.4	0.0	104.1	104.1	84.2
<i>due to Switzerland in other EU+ countries</i>	15.8	0.0	8.3	8.3	7.5
<b>Employment effect (jobs per year)</b>	<b>2,042</b>	<b>182</b>	<b>1,029</b>	<b>1,212</b>	<b>830</b>
(in % of total Swiss employment)	0.05%	0.00%	0.02%	0.03%	0.02%
<b>Fiscal returns (in mill. €)</b>	<b>55.9</b>	<b>4.0</b>	<b>27.4</b>	<b>31.5</b>	<b>24.5</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
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					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in Switzerland</b>	<b>503.5</b>	<b>198.0</b>	<b>165.5</b>	<b>363.6</b>	<b>139.9</b>
<i>due to Swiss activities in Switzerland</i>	416.4	198.0	127.9	325.9	90.5
<i>due to other EU+ countries in Switzerland</i>	87.0	0.0	37.7	37.7	49.4
<i>due to Switzerland in other EU+ countries</i>	86.4	0.0	38.6	38.6	47.8
<b>Employment effect (jobs per year)</b>	<b>7,101</b>	<b>4,363</b>	<b>1,482</b>	<b>5,845</b>	<b>1,256</b>
(in % of total employment)	0.16%	0.10%	0.03%	0.13%	0.03%
<b>Fiscal returns (in mill. €)</b>	<b>391.1</b>	<b>37.0</b>	<b>40.7</b>	<b>77.6</b>	<b>37.1</b>

<b>C. Environmental Aspects</b>					
Share of EU+ spirits production-related CO2 eq. emissions:	0.2 %				
indirect land use:	820 ha				
<hr/>					
<b>CO<sub>2</sub> eq. emissions (in 1,000 tonnes):</b>		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Production</b>	<b>33.7</b>	<b>1.7</b>	<b>22.0</b>	<b>23.7</b>	<b>10.0</b>
<i>due to Swiss activities in Switzerland</i>	9.3	1.7	6.3	8.0	1.3
<i>due to other EU+ countries in Switzerland</i>	24.4	0.0	15.7	15.7	8.7
<i>due to Switzerland in other EU+ countries</i>	15.6	1.7	10.5	12.2	3.4
<b>Retail (off-premise)</b>	<b>13.2</b>	<b>1.3</b>	<b>7.6</b>	<b>8.8</b>	<b>4.4</b>
<i>due to Swiss activities in Switzerland</i>	9.2	1.3	5.6	6.9	2.3
<i>due to other EU+ countries in Switzerland</i>	4.0	0.0	2.0	2.0	2.1
<i>due to Switzerland in other EU+ countries</i>	15.5	1.3	8.6	9.8	5.7
<b>Catering (on-premise)</b>	<b>42.7</b>	<b>9.2</b>	<b>23.7</b>	<b>32.8</b>	<b>9.8</b>
<i>due to Swiss activities in Switzerland</i>	36.4	9.2	20.6	29.7	6.7
<i>due to other EU+ countries in Switzerland</i>	6.2	0.0	3.1	3.1	3.1
<i>due to Switzerland in other EU+ countries</i>	58.8	9.2	33.0	42.2	16.6
<hr/>					
<b>TOTAL</b>					
	<b>Value</b>	<b>Share (EU+)</b>	<b>Rank (EU+)</b>		
<hr/>					
<i>Gross value added (GVA) in mill. €:</i> <i>(in % of Swiss GVA)</i>	746.5 (0.1 %)	1.6%	11.		
<i>Employment (in jobs per year):</i> <i>(in % of Swiss employment)</i>	9,143.0 (0.2 %)	1.0%	20.		
<i>Fiscal effects (incl. VAT+Excise) in mill. €:</i> <i>(in % of Swiss government revenue)</i>	447.1 (0.2 %)	1.2%	17.		
<i>CO<sub>2</sub> eq. emissions in 1,000 tonnes:</i> <i>(in % of Swiss total CO<sub>2</sub> eq. emissions)</i>	89.6 -	0.5%	24.		

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

## 7.29 United Kingdom (UK)

<b>A. Production</b>					
<i>Population:</i> 67.0 mill.					
<i>Annual final consumption expenditure per capita:</i> € 31,061.7					
<i>Spirits from the UK sold worldwide (in 1,000 hectolitres):</i> 10,022.1					
<i>Δ 2019-2020 (in %):</i> - 8.4					
<i>British spirits production turnover (in mill. €):</i> 6,609.7					
<i>Top-selling British spirits products:</i> Scotch Whisky, Gin, Other Whisky					
<i>Largest export country:</i> United States					
<b>Economic Effects from production:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in the UK</b>	<b>7,102.8</b>	<b>3,493.1</b>	<b>2,324.0</b>	<b>5,817.1</b>	<b>1,285.7</b>
<i>due to British activities in the UK</i>	<i>6,592.6</i>	<i>3,493.1</i>	<i>2,018.5</i>	<i>5,511.5</i>	<i>1,081.1</i>
<i>due to other EU+ countries in the UK</i>	<i>510.2</i>	<i>0.0</i>	<i>305.5</i>	<i>305.5</i>	<i>204.7</i>
<i>due to the UK in other EU+ countries</i>	<i>815.3</i>	<i>0.0</i>	<i>480.7</i>	<i>480.7</i>	<i>334.5</i>
<b>Employment effect (jobs per year)</b>	<b>58,253</b>	<b>12,561</b>	<b>29,949</b>	<b>42,509</b>	<b>15,744</b>
<i>(in % of total British employment)</i>	<i>0.18%</i>	<i>0.04%</i>	<i>0.09%</i>	<i>0.13%</i>	<i>0.05%</i>
<b>Fiscal returns (in mill. €)</b>	<b>2,364.1</b>	<b>1,119.4</b>	<b>699.0</b>	<b>1,818.4</b>	<b>545.8</b>
<b>B. Consumption (i.e. sales on- and off-premise)</b>					
<i>Spirits sold in the UK (in 1,000 hectolitres):</i> 3,185.9					
<i>Δ 2019-2020 (in %):</i> + 3.5					
<i>On-premise share (of volume):</i> 17 %					
<i>Spirits sold in the UK (in € per adult):</i> € 182.45					
<i>Δ 2019-2020 (in %):</i> + 6.7					
<i>Most favoured products:</i> Scotch Whisky, Gin, Vodka					
<i>Largest import country:</i> (I) United States					
<b>Economic effects from on- and off-premise consumption:</b>					
		<b>...of which</b>			
	<b>overall</b>	<b>direct</b>	<b>indirect</b>	<b>dir.+indir.</b>	<b>induced</b>
<b>Gross value added (GVA) in the UK</b>	<b>3,496.4</b>	<b>1,612.7</b>	<b>1,062,6</b>	<b>2,675,3</b>	<b>821.1</b>
<i>due to British activities in the UK</i>	<i>3,275.5</i>	<i>1,612.7</i>	<i>955,9</i>	<i>2,568,6</i>	<i>706.9</i>
<i>due to other EU+ countries in the UK</i>	<i>221.0</i>	<i>0.0</i>	<i>106,7</i>	<i>106,7</i>	<i>114.2</i>
<i>due to the UK in other EU+ countries</i>	<i>339.7</i>	<i>0.0</i>	<i>163,6</i>	<i>163,6</i>	<i>176.1</i>
<b>Employment effect (jobs per year)</b>	<b>68,029</b>	<b>43,775</b>	<b>14,393</b>	<b>58,168</b>	<b>9,861</b>
<i>(in % of total employment)</i>	<i>0.21%</i>	<i>0.13%</i>	<i>0.04%</i>	<i>0.18%</i>	<i>0.03%</i>
<b>Fiscal returns (in mill. €)</b>	<b>6,932.3</b>	<b>430.6</b>	<b>429.1</b>	<b>859.7</b>	<b>363.3</b>

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

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