

“Zero-Alcs” are Changing the Beer Market

The 0.0% Revolution is On





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The 0.0% beer phenomenon

We are privy to a true revolution in terms of change to non-alcoholic beer-related mindset and behaviours in the Polish consumer community. Alcohol-containing beer is losing popularity, consumers turning to no-alcohol beer *en masse*, with a double-digit annual sales growth.

In Poland, it was the brewing industry that had become the harbinger for NoLo (no alcohol low alcohol), a market trend with many years of global presence, currently most popular with Generation Z – consumers born post-1994, many of whom have adopted NoLo as part of their lifestyle, frequently coupled with changes to daily diet and health-promoting attitudes. When building the 0.0% beer category, the brewing industry was the only one to respond to the change in trends, encouraging Poles to reach for non-alcoholic products offering top beer flavours. With 0.0% beers, **socially desirable change in the structure and culture of beer consumption has become most pronounced** – the lower the alcohol content in any beverage, the lower the risk of harmful drinking. Large breweries were 0.0% beer revolution pioneers; smaller domestic producers would soon follow suit. Market players large and small have contributed to new product awareness owing to powerful brands, their alcohol-containing beverages well-known to consumers. The brewing industry has become the driving force behind consumers giving up alcohol – in Generation Z as well as the older consumer community, the latter offered non-alcoholic equivalents of their preferred beer brands.

While thirty-year-olds are by far the largest group of “zero-alc” purchasers, the frequency and volume of non-alcoholic beer purchases is on the rise across all adult consumer age groups, in the 18-29 group in particular.¹ **Non-alcoholic beers have become a commonly available and consumed beverage in Poland – tried and regularly chosen by 97 and 62 percent of Poles, respectively.²**

Poland is the third largest alcohol-free beer producer in Europe today; Poland, Germany and Spain jointly account for 68 percent of European “zero-alc” production.³ One in every ten 0.0% beers in Europe is made in Poland.⁴ “Zero-alc” beer sales have grown by 250 percent since 2018 – the first major surge in the non-alcoholic beer segment on the Polish market – reaching just under 2 million hectolitres in 2024. Last year, the daily purchase of alcohol-free beer on the Polish market totalled 1.06 beers and/or cans, alcohol-containing beer unit sales concurrently dropping by 441,000.⁵

In 2024, the non-alcoholic IPA beer produced by the Amber Brewery was a first-time winner of the prestigious “Beer of the Year” title in the national Beer Fraternity competition; as emphasised by industry experts, the award proves beyond doubt that flavour and quality rather than alcohol content are what actually counts in beer

“Zero-alc”s respond to modern consumer needs as a source of refreshment and flavour with no alcohol content. Polish market beer sales data suggest that apart from having become a key development trend for the brewing sector, non-alcoholic beers have contributed to a drop in alcohol consumption in Polish society. It is further notable that interest in strong beer is on a steady decline, the 0.0% beer segment persistently growing. The two coinciding trends – the slump of more potent beer sales combined with dynamic “zero-alc” growth – are a blatant indication of consumer preferences, boosted by powerful advertising and non-alcoholic beer promotion.

1

Non-alcoholic beer: facts and myths

Multiple myths have developed around alcohol-free beers
– all the more reason to confront them with facts.

MYTH:

the “non-alcoholic beer” name is in itself misleading, since all beer contains alcohol.

0.0% beer can cause intoxication.

it is impossible to differentiate between non-alcoholic and alcohol-containing beer in retail shops.

0.0% beer causes dehydration.

non-alcoholic beer is bland.

FACT:



pursuant to Polish law,⁶ non-alcoholic beer may contain up to 0.50% alcohol. Be that as it may, 0.0% (fully non-alcoholic) beers have been accounting for 98 percent of alcohol-free beers on the market for a few years now, in line with consumer expectations. **The 0.0% label notifies true zero alcohol content in beer.**



no, it cannot, since 0.0% beer contains no alcohol, making it the perfect drink for persons who choose not to or should not consume alcohol-containing beverages. It is noteworthy that multiple food products purchased on a daily basis may contain residue alcohol from fermentation processes: consider pickled goods (alcohol content: up to 0.5%), kefir (alcohol content: up to 0.5%), vinegar-containing processed goods (alcohol content in vinegar may reach 1.5%), leavened rye bread (alcohol content: up to 0.3%), or even fruit juices (alcohol content in grape juice may reach 0.4%). Has anyone ever heard of kefir-induced intoxication?



consumers have no problem with discerning between alcohol-free and alcohol-containing beer. “Zero-alc” marketed in Poland **are distinct in their labelling code: the colour blue, coupled with a clear “0.0%” logo**. Eighty-five percent of surveyed consumers⁷ claim that both components are easily discernible non-alcoholic beer markings.



the exact opposite is true. Alcohol-free beer is a source of water, microelements and electrolytes, with no diuretic effect (given the lack of alcohol content), making it a wonderful hydration choice – after a long and exhausting run, for example.⁸



non-alcoholic beers are alcohol-containing beers’ equals in terms of flavour and style diversity. Brewers have improved non-alcoholic beer brewing methods, preserving the unique taste of beer in all 0.0% product versions sold. They have been marketing dozens of new 0.0% flavoured beer options each year, in line with market expectations – an encouragement for new adult consumers to reach for “zero-alc” beers.

MYTH:

non-alcoholic beers are a beer producers' trick to attract underage consumers and get them used to the taste of beer.

0.0% beers are sold under the same brands as alcohol-containing beers with intent to encourage consumers to choose alcohol-containing products more often.

non-alcoholic beer is as calorie-rich as the traditional beverage.

non-alcoholic beer should not be consumed by persons engaging in sports activities.

FACT:



market data and research have proven the exact opposite. Presented by the National Centre for the Prevention of Addictions, most recent ESPAD⁹ survey (Poland, 2024) results have shown that beer consumption in the underage community has dropped by 8 percentage points in comparison with 2019 (previous ESPAD survey edition), vodka consumption remaining unchanged. Two years ago, on the other hand, the SW Research agency¹⁰ surveyed young people aged 13-17 with a focus on their alcohol-free beverages of choice, 0.0% beer included. Neither the younger nor older respondents pointed to alcohol-free beer as their beverage of frequent choice. Most producers are clear in labelling their non-alcoholic and 0.0% beer packaging with a "18+" logo – a distinct guideline that these products are intended for adult consumers only. Non-alcoholic beer commercials, "zero-alc" commercials included, are subject to self-regulating restrictions identical to those applying to alcohol-containing beers in terms of protecting underage consumers. The absence of any statutory ban on selling "zero-alc" beers to underage consumers notwithstanding, the largest beer producers have expanded their retail trade guidelines to include a recommendation of selling non-alcoholic and 0.0% beers to adults only. Large retail chains and many smaller shops have acquiesced.



the exact opposite is true, as proven by sales performance and consumer survey results. Alcohol-containing beer consumption is on the decline, "zero-alc" sales having grown by over 17 percent last year. Over the past two decades, the brewing industry has been successful in developing non-alcoholic beer recipes to match the flavours of their alcohol-containing equivalents. It is noteworthy that dynamic 0.0% beer category development was made possible exactly thanks to the effort of building "zero-alcs" up on brands known to Polish consumers and associated with high quality; otherwise, growth would have been nowhere near as significant.



in principle, non-alcoholic beers are the **lowest calorie-count beverages in comparison with other beers**. They do not contain alcohol, each gram of which carries 7 kcal. One hundred millilitres of classic 0.0% lager contains around 20 kcal, roughly one-half of the calorie count of its alcoholic equivalent. Flavoured non-alcoholic beers have a somewhat higher calorie content than lagers due to flavour additives: approximately 26 kcal per 100 ml.¹¹



the exact opposite is true – given its low calorie count coupled with minerals and vitamins content, 0.0% beer's isotonic and hydration properties make it a great post-exercise drink.¹²

2 Non-alcoholic beer description

2.1 Legal regulations – the definition of non-alcoholic beer.

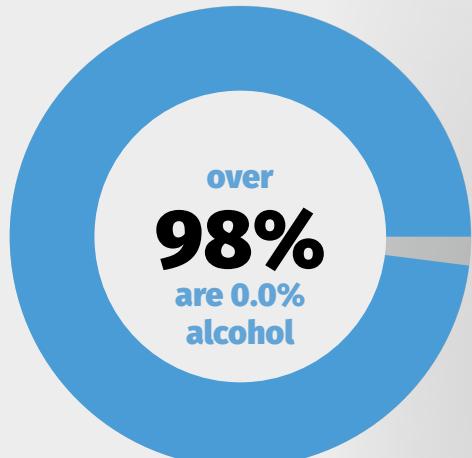
This is how Article 46
of the Sober Upbringing
and Alcoholism Prevention Law
defines alcoholic beverages:

An alcoholic beverage [...] is a consumption-intended product containing ethyl alcohol of agricultural origin, ethyl alcohol concentration in excess of 0.5% by volume.



In legal terms, beer with alcohol content up to 0.50% by overall volume shall thus be considered non-alcoholic.

Over 98 percent of non-alcoholic beers sold in Poland today are zero (0.0%) alcohol content beverages.



2.2 0.0% alcohol, 100% refreshment and flavour – category transformation over the years.

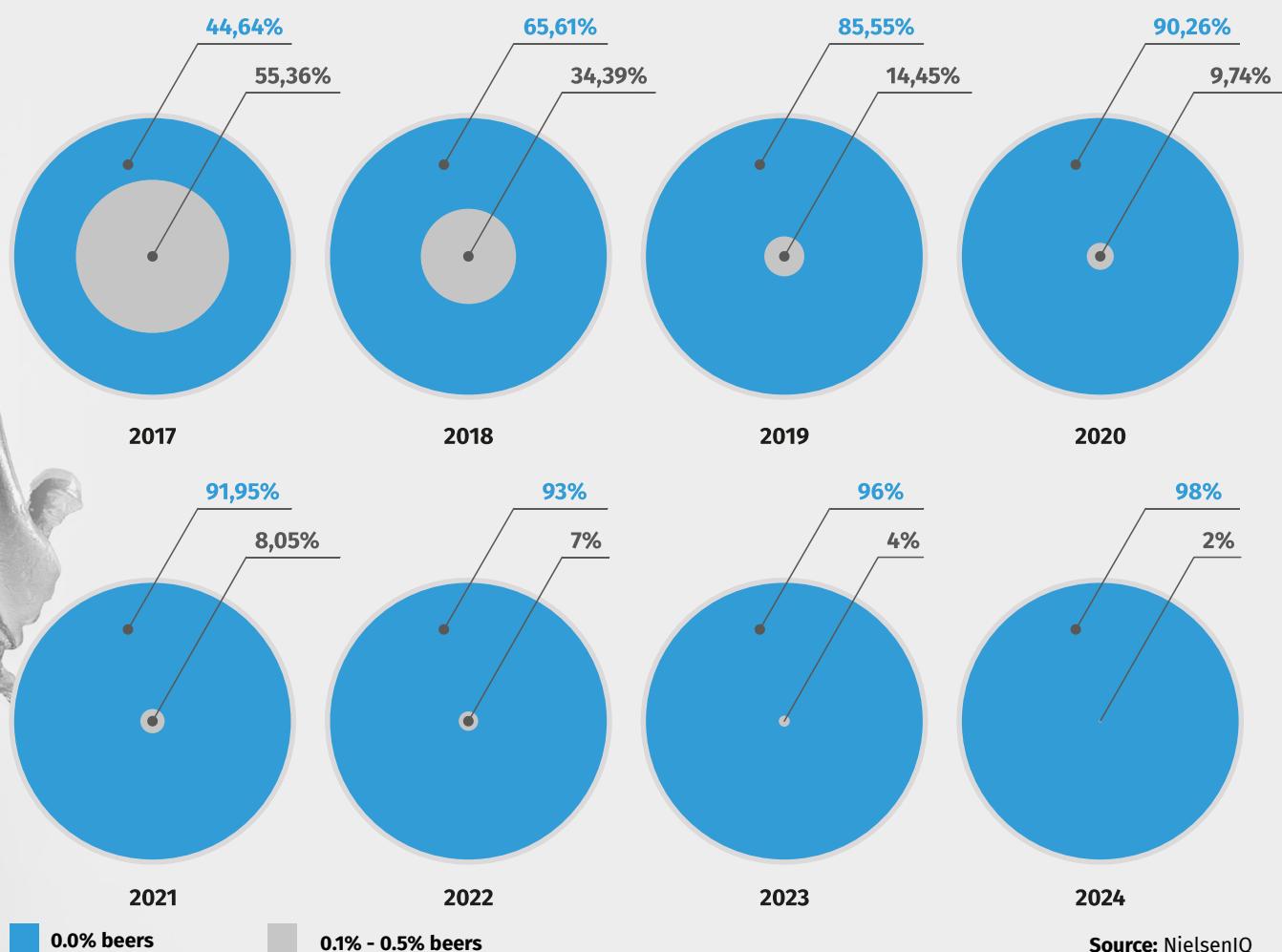
First non-alcoholic beers were brewed in Poland in the 1990s already, category pioneers including *Karmi*, the first full wort production cycle completed at the Okocim Brewery in 1993, contemporaneous 0.50% alcohol content products isolated and far apart. Over the past thirty years, breweries have improved their non-alcoholic beer recipes and brewing technologies, the segment expanded to include craft products. In 2017, the category's sales value and volumes reached PLN 287,000,000 and 426,000 hectolitres, respectively.¹³ That said, beers with alcohol content up to 0.50% (55 percent) prevailed on the market, the remaining 45 percent occupied by 0.0% beers.¹⁴

True 0.0% revolution began one year later (in 2018), the non-alcoholic beer category nearly doubling in value, sales volumes growing by 85 percent.¹⁵ Breweries began offering an extraordinarily vast array of 30 style-diverse non-alcoholic beers. The year 2019 brought non-alcoholic IPAs (India Pale Ales), APAs (American Pale Ales), Sour Ales, Witbiers, and others. Fully alcohol-free beers took over the entire segment, accounting for 65 percent of sales volumes.

“Zero-alcs” have been driving the category since 2018, making Poland one of the three largest non-alcoholic beer producers in Europe. Alcohol-free beers account for over 98 percent of the segment in Poland, reaching PLN 1.72 billion and just under 2 million hectolitres (1.92 million hl) in 2024 in sales value and volumes, respectively.¹⁶

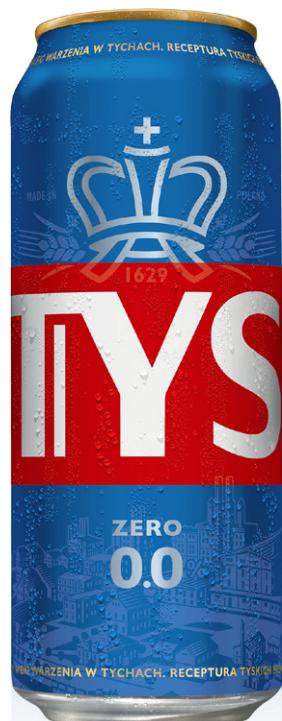
Polish consumers purchased over 1 million bottles and/or cans of 0.0% beer per day in 2024, the phenomenon pointing to a conscious choice of zero alcohol-content beer over alcohol-containing equivalents. The constant annual increase of 0.0% beer popularity is ample proof that a conscious response to long-term consumer preferences rather than short-lived fads is in play. “Zero-alcs” have also become a regular item on shop shelves and HoReCa menus.

Figure 1. Changes to the non-alcoholic beer segment structure



Over 98 percent of non-alcoholic beers sold in Poland today are zero (0.0%) alcohol content beverages; to be precise – their ethanol content is detectable in laboratory testing only. The single-digit milligram ethanol count per 100 ml of product places alcohol-free beers below everyday food products, such as standard rye bread or sauerkraut.

“Zero-alcs” are a perfect fit for the NoLo trend. Tasty and refreshing – just like traditional beer – they contain no alcohol, all aforementioned properties valued by consumers, NoLo preferences having trickled over into older beer drinker communities. The category is distinct in its own labelling code. The colour blue is coupled with clear markings: “zero”, “free”, “no alcohol”, or a simple “0.0%” logo, all of which – as admitted by consumers themselves – making the conscious choice of non-alcoholic beverages much easier, and mitigating the risk of mistakes.



clear marking:
0.0



colour
labelling code
- blue

 **Grupa Żywiec**



clear marking:
0.0



colour
labelling code
- blue





Carlsberg



clear marking:
0.0



colour
labelling code
- blue

We owe the birth of the NoLo segment to the brewing industry, which is why the most recognisable 0.0% beverages include eminent beer brands. While wine and spirits producers have followed suit, the NoLo segment development in their case is considerably slower and lesser in scale in comparison with “zero-alc” beers.

A January 2025 IQS survey has proven that 97 percent of consumers aged 18-64 have tried non-alcoholic beer; one-half (48 percent), one-third (33 percent) and 12 percent in the same age group have tried non-alcoholic sparkling wine or prosecco, non-alcoholic wine or non-alcoholic aperitifs, respectively.¹⁷



2.3 How is non-alcoholic beer made? Modern “zero-alc” brewing methods.

Non-alcoholic beer is made with the exact same ingredients that are used in producing alcohol-containing beer (malt, hops, yeast and water), the brewing process nearly identical to that of brewing alcohol-containing beer. Individual non-alcoholic beer producing methods regardless, the ultimate purpose involves preventing alcohol presence in beer, or removing alcohol from beer. There are three most popular non-alcoholic beer production methods, two of which biological and one physical, the latter applicable in two different ways.

Brief descriptions of most popular non-alcoholic beer production methods follow:

1. Interrupted fermentation

– while the brewing process is identical to that applied in producing traditional beer, fermentation is interrupted in order to let yeast break down into the minimum alcohol volume required for the given beer type. Interrupting the yeast process involves yeast cooling or removal from new beer.

2. Limited fermentation

– involves the use of specific brewing yeast strains, their properties allowing limited sugar processing into alcohol.

3. Dealcoholisation

– alcohol is removed from beer in one of two ways: low-temperature evaporation (vacuum distillation), or filtration with the use of a special membrane (reverse osmosis).

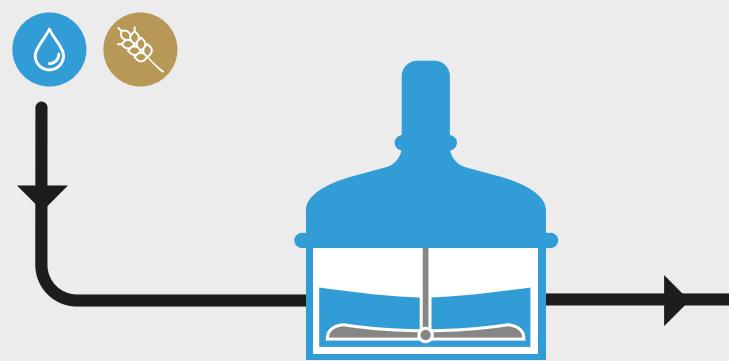


The illustration shows the beer making process, individual methods of non-alcoholic beer brewing duly referenced.

1

Malting

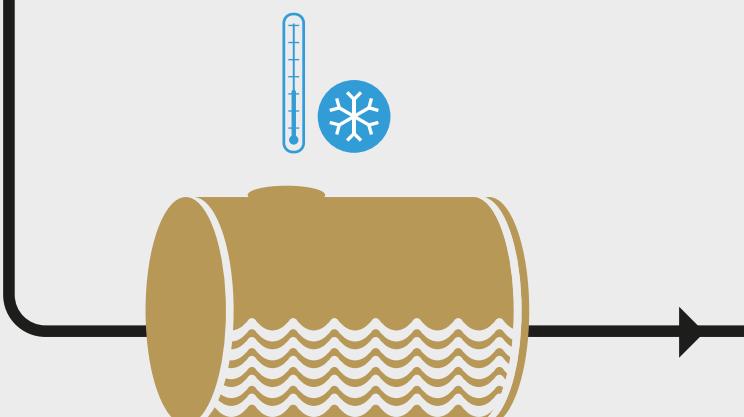
Grain used to make beer - usually barley or wheat - must first be malted. Grain germination is halted by drying, and the resulting malt is sieved and milled. Milled malt goes into the mash. Subjected to high temperatures, it produces sugars essential for fermentation, or the so-called extract.



5

Ageing

The finished beer needs to be put aside for a while: it is ageing in a special tank at near-zero temperature for about a week to develop flavour.

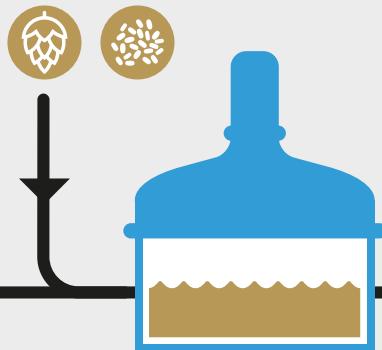
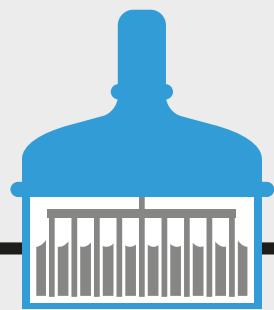


2**Filtration**

Later, the finished malt mash is filtered, and the process results in what is known as wort.

3**Brewing**

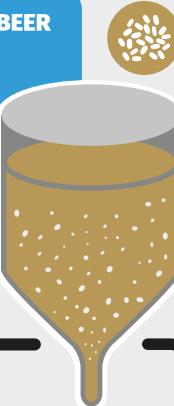
Wort now goes into boilers where it is boiled for at least several dozen minutes with an addition of hops. At this stage, hops lend the future brew its distinctive bitter taste. After brewing, beer is cooled down and yeasts are added.

**4****Fermentation**

Over the next several days, yeasts trigger fermentation and "saturate" beer with alcohol. This is when the distinctive flavour and beer aroma are created.

NON-ALCOHOLIC BEER

interrupted
fermentation
or
arrested
fermentation

**6****Filtration**

We are nearly done - in order for the beer to be clear, it still needs to be well filtered and cleaned of yeast.

7**Packaging**

Filtered beer may be poured into bottles, cans, kegs and released to the world at large where throngs of loyal admirers await it.

8

Brewing high-quality non-alcoholic beer requires considerable knowledge and brewer experience, not to mention proper technical appliances. Regardless of the chosen method of *"removing alcohol from beer"*, excellency in the art of brewing is essential to preserving the distinctive beer taste and aroma when making a 0.0% beverage, while keeping the worty flavour to a bare minimum.

NON-ALCOHOLIC BEER
dealcoholisation

used yeast

The beer brewing syllabus for brewers, non-alcoholic beer-making included, is delivered as part of the graduate studies curriculum under Aleksander Poreda, Ph.D. Hab., M.Sc., professor at the University of Agriculture in Cracow, and during brewery curriculum courses offered by the Cracow School of Brewing.

Methods focused on ethanol removal or reducing ethanol production in beer apart, the choice of correct raw materials – quantity and quality of malt included – and of brewhouse process parameters is of paramount significance. As soon as brewing begins, the brewer concentrates on producing wort with low fermentable sugar volumes by limiting the malt charge weight, for example, or through adequate mashing to maximise dextrin production, keeping maltose production to a minimum.

Other curious trends include the production of non-alcoholic beers – as functional beverages, containing assorted additives to mask the worty nature of non-alcoholic beer, or introducing additional sensory stimuli to boost non-alcoholic beer drinkability. Microbiological and sensory stability of non-alcoholic beers remains an unquestionable challenge of this particular product category – a factor brewers have to pay special attention to. In view of these challenges, an ever-increasing section of our scientific research involves efforts to optimise brewing and fermentation processes required in non-alcoholic beer production, opening the gateway for breweries not equipped with dealcoholisation equipment.

Fast-track laboratory analytic services offered by the Research Centre of the Cracow School of Brewing are another crucial facet of our activities – breweries without access to in-house testing facilities can deliver beer samples to our laboratory to confirm that alcohol content tolerance limits (0.5% or 0.05%) have not been exceeded; within a few hours, they receive validation of whether the production process was correct, the outcome determining beer release to the market.



Aleksander Poreda

Ph.D. Hab., M.Sc.,
professor at the University of Agriculture in Cracow

Non-alcoholic beer production is a technology with considerably long-standing traditions. Such methods as dealcoholisation, cold contact fermentation, and the use of special-purpose yeast strains have been known for years. Consumer expectations have been on the rise in recent years, due to the growing popularity of alcohol-free beers. In order to meet these expectations while preserving the delicious taste of traditional beers in their zero-alcohol equivalents, we had to improve existing methods through intense research and collaboration with suppliers. Our long-term efforts have yielded a vast array of non-alcoholic products now available in retail shops.



Patryk Cieślik

Managing Director,
Warka Brewery

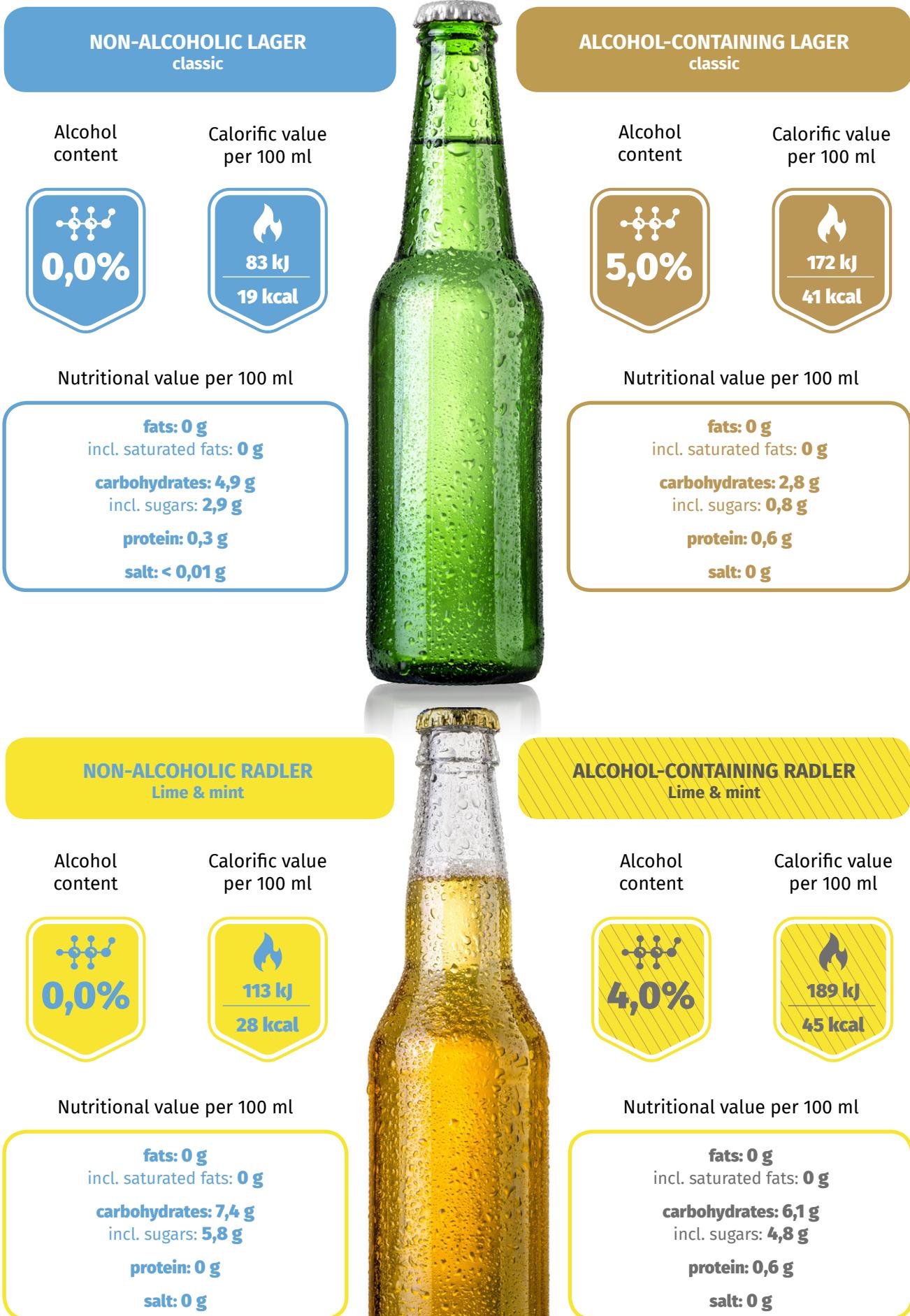
2.3 Non-alcoholic beer: ingredients and nutritional facts.



Assorted malt and hops varieties are used to make non-alcoholic beers, allowing richly flavoured beverages to be produced, aromas ranging from caramel and biscuit to citrus and floral notes. Most popular additives found in non-alcoholic flavoured Radler beers, for example, include fruit juices and pulps, tealeaves, and many others.

Owing to the absence of alcohol, “zero-alcs” usually have a **lower calorie count than alcohol-containing beers**. Individual beer labels and producer websites list all ingredients in detail, specifying the nutritional and calorific value for each beverage.

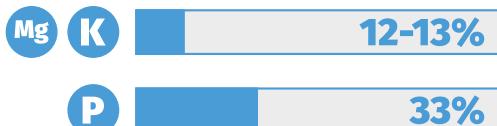
Figure. 2 Sample nutritional values for 0.0% beer in comparison with alcohol-containing beer:



Facts about non-alcoholic beer and health



Non-alcoholic beer is a source of B vitamins and macro-elements such as magnesium, potassium and phosphorus, all of which regulate neuromuscular conduction and are essential to generating energy, contributing to homeostasis.¹⁸ Just half a litre of non-alcoholic beer can deliver up to 12-13% of the recommended daily magnesium and potassium intake, and 33% of recommended phosphorus intake.



Polyphenols beer is rich in are powerful antioxidants, removing free radicals and preventing cell damage. Polyphenols protect the cardiovascular system, reducing the risk of cardiovascular disease.



Alpha-acids and flavonoids, both found in non-alcoholic beer, make regular “zero-alc” consumption beneficial: they improve sleep quality and duration, reduce stress levels, and enhance mental wellbeing¹⁹.



Given its low calorie count and high mineral and vitamin content, non-alcoholic beer is a beverage with useful isotonic properties, an excellent source of hydration and valuable fit for physically active individuals, fond of sports and/or careful with their calorie intake.

Improving 0.0% beer production technology remains one of the most significant research and development areas in brewing today. Key research assumptions include improving the sensory qualities of 0.0% beers and adding to their bioactive ingredients – such as phenolic compounds, amino acids, minerals and vitamins – turning 0.0% beers into functional beverages. The use of new beer ingredients and functional additives, such as herbs, spices, fruit, medicinal mushrooms (e.g. Ganoderma lucidum), algae (e.g. spirulina), bee pollen, probiotics or prebiotics, does more than improve taste – it enhances 0.0% beers by adding unique health-promoting properties to the beverage. Functional properties of 0.0% beer can make the product more distinct on the market while responding to needs of health-conscious consumers willing to combine the pleasure of drinking 0.0% beer with health benefits. While some functional beer additives are in production already, others are still researched. Growing interest in functional beers encourages innovation.

Developing methods to increase antioxidant properties of 0.0% beers is an important field of research. Solutions allowing improved product protection against oxidative stress have entered the testing stage – options of extending 0.0% beer shelf life are investigated.

Diverse research, such as the application of new yeast species, probiotic yeast included, will be crucial to developing the non-alcoholic beer segment; studies of modified fermentation parameters, improved filtration technologies and low-temperature distillation processes are required as well, allowing for precise alcohol content control while preserving the beverage's rich sensory profile, resembling traditional alcohol-containing beer.

Researching ecological and sustainable methods of producing 0.0% beers, including i.a. the use of certified crop-sourced raw materials, minimising water and energy consumption, and reducing production process-related waste, is of major significance as well. Attention to sustainable development can be a significant market asset – a response to growing environmental awareness in consumer communities.



Edyta Kordialik-Bogacka

Ph.D. Hab., M.Sc.,
professor at the Institute of Fermentation
Technology and Microbiology,
Faculty of Biotechnology and Food Sciences,
Łódź University of Technology

3 Non-alcoholic beer market in Poland and Europe

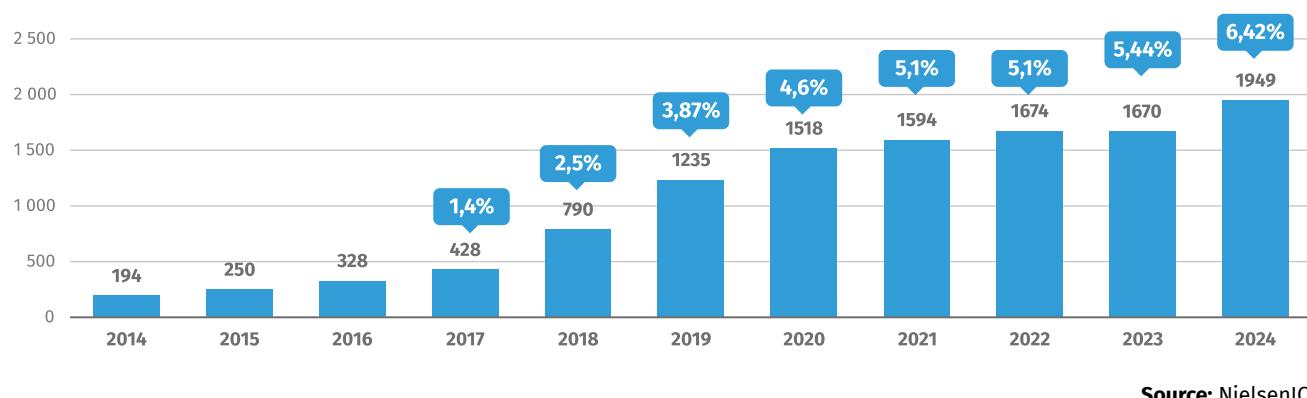
3.1 Description and size of the Polish “zero-alc” market.

Over the past decade, the 0.0% beer market has grown tenfold in volume, reaching a share of nearly 6.5 percent of the overall beer market.²⁰ Given the steady decline in alcohol-containing beer sales observed over several years, we may well assume that **1.94 million hectolitres of “zero-alcs” purchased by Polish consumers in 2024 translate into 1.94 million fewer hectolitres consumed in alcohol-containing beer.**

This in turn translates into a drop in pure alcohol consumption volumes – 9.7 million litres not consumed by Polish consumers choosing alcohol-free beers.

This market trend has been visible for several years. Classic alcohol-containing lager and strong beer consumption is on the decline, with “zero-alcs” on the rise. Average alcohol content in beer has been gradually dropping year to year as a result.

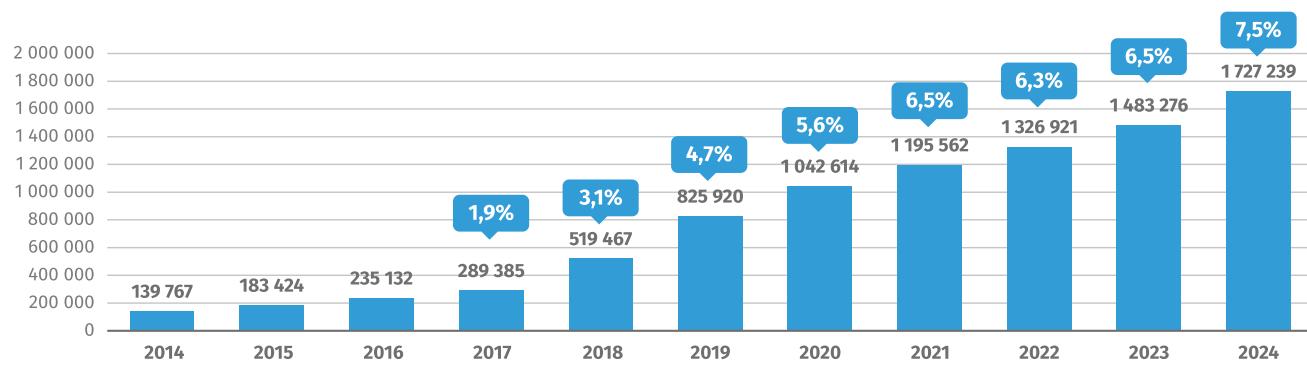
Figure. 3 Increase in 2014-2024 non-alcoholic beer sales [1,000 hl] and the share of non-alcoholic beers in the overall beer market (by volume)



Source: NielsenIQ

The non-alcoholic beer segment reached PLN 1.72 billion in value in 2024, having grown more than twelvefold over the span of a decade and reaching a share of 7.5 percent of the entire brewing market.²¹ Today, alcohol-free beers are worth more than many other popular FMCG categories.

Figure. 4 Increase in 2014-2024 non-alcoholic beer sales [PLN 1,000] and the share of non-alcoholic beers in the overall beer market (by value)



Source: NielsenIQ

Observed by NielsenIQ over the past few years, the dynamic growth of 0.0% beer sales is part of a much larger macro-trend of consumers seeking healthier, alternative daily shopping choices. We believe that decisions to reduce or give up alcohol consumption altogether are one of the main reasons behind consumers replacing alcohol-containing beers with 0.0% beverages.

We at NielsenIQ have also seen segments of rapidly growing products communicating functional or health-promoting values in other categories, as well as in survey responses regarding individual preferences. In 2024, for example, we recorded growth exceeding 40 percent in the sales of products communicating high protein. Furthermore, 54 percent of surveyed consumers have declared a desire to start taking or increase their intake of dietary supplements or vitamins.



Marcin Cyganiak
Commercial Director,
NielsenIQ



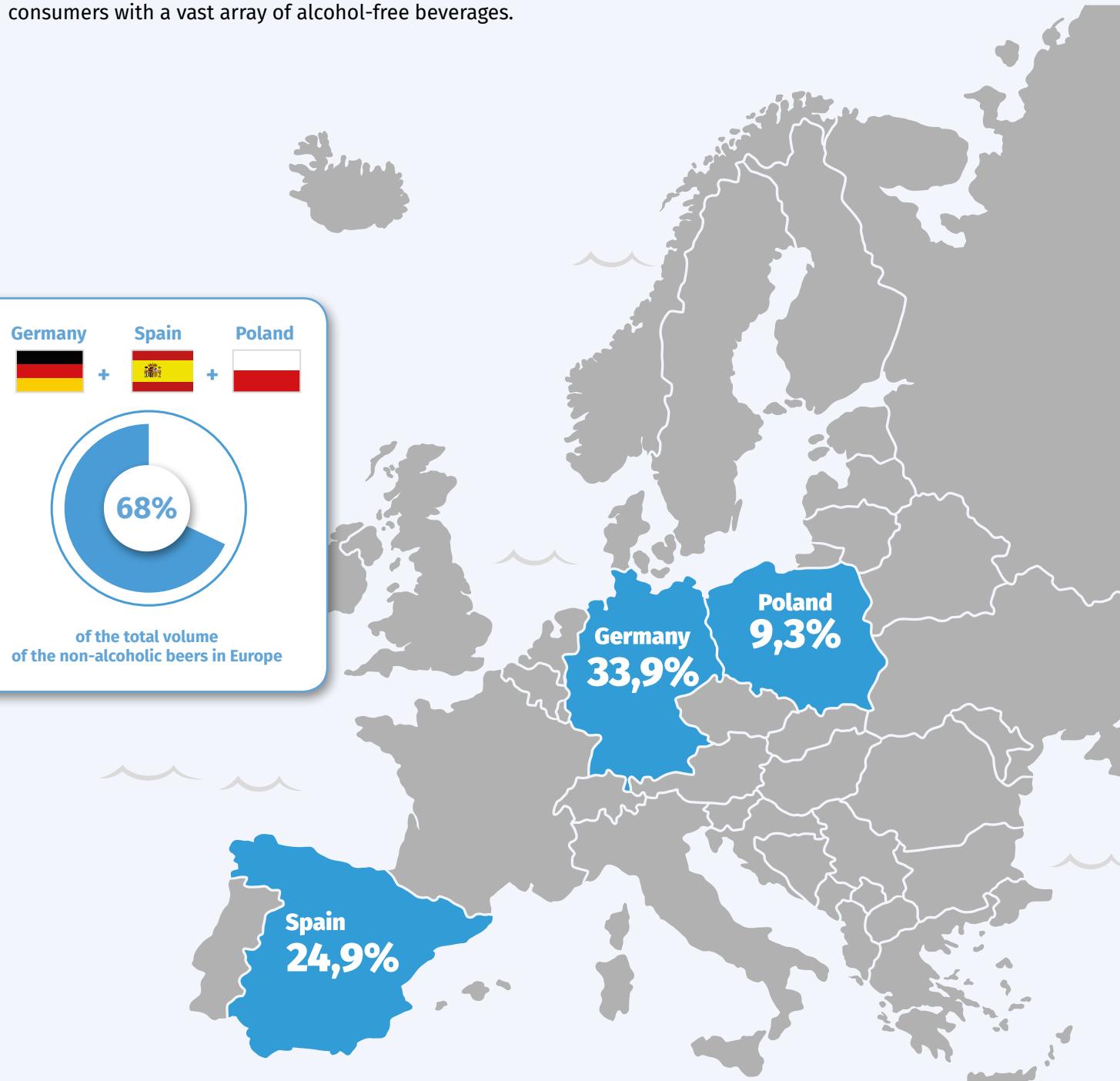
The non-alcoholic beer market in Poland spans three segments:

1. lager
2. flavoured beers
3. beer specialties

Greatest category growth stimulants, **flavoured beers** are by far the most popular “zero-alc” beer category, accounting for **61 percent of sales.²²**

3.2 Poland ranked the third largest alcohol-free beer producer in Europe

The global non-alcoholic beer market owes its dynamic development to consumers, their propensity for reducing alcohol consumption and seeking non-alcoholic alternatives giving rise to the 0.0% beer segment. The category's potential has become the driving force behind innovations allowing breweries to provide consumers with a vast array of alcohol-free beverages.



According to Euromonitor 2023, Europe produced 22 million hectolitres of non-alcoholic beer that year – 6 percent of Europe's annual production of the hops-based beverage.²³ **Germany (33.9 percent), Spain (24.9 percent) and Poland (9.3 percent) are the three largest actors on the European non-alcoholic beer market**, jointly accounting for over 68% of the overall alcohol-free beer volume in Europe.

Poland is much more than the third largest producer of “zero-alc beer” across the continent – it is also the only major market where the non-alcoholic beer segment volume has doubled since 2018, 0.0% beers the driving force behind the category’s development.

The share of alcohol-free beers on individual domestic markets is diverse, not necessarily tying in with the given beer market's size. Consider the United Kingdom: while one of the largest beer producers in Europe, Great Britain's alcohol-free beer production is three times lower than Poland's, the “zero-alc” beer segment accounting for a mere 1.76 percent of the British beer market.²⁴



One in every three non-alcoholic beers is produced in Germany

– Europe's largest beer market, traditional and alcohol-free alike. While the first non-alcoholic beers hit the German market over 50 years ago, sales grew slowly. Only in 2008 was an upsurge in consumer interest in 0.0% beers recorded, the trend continuing today. While annual non-alcoholic beer production in Germany in the years 2019-2023 has reached the rather stable volume of 6.6 million hectolitres, the entire beer market has shrunk considerably over the period, the share of non-alcoholic beers growing as a result. Alcohol-free beer production broke the prevalent market trend in 2024, reaching 6.9 million hectolitres and a share of 8.3 percent of the German beer market. According to recent estimates, one in every ten beers produced in Germany will be non-alcoholic in the not-too-distant future.²⁵ German consumers can choose from approximately 800 different non-alcoholic beer brands (10 percent of brands on the market). A survey carried out by the German Brewers' Federation (*Deutscher Brauer-Bund*) proved that Germans appreciate the satisfying taste, low calorie count and natural ingredients of non-alcoholic beer. Pleased with its isotonic properties, natural ingredients and low calorie count, physically active individuals, professional athletes included, are particularly interested in 0.0% beer. Classic alcohol-free beer styles (Pilsner, wheat beer, shandy) apart, Germany is brewing growing volumes of non-alcoholic regional specialities, such as Kölsch, Alt and popular craft varieties.



One in every four non-alcoholic beers is brewed in Spain, the country a record-breaking region in terms of “zero-alc” share in the beer market: around 13-15 percent of annual beer consumption. Non-alcoholic beer production in Spain reached 5.48 million hectolitres in 2023, having grown by 21 percent since 2018. Practically all of Spain's breweries have begun marketing alcohol-free beers, doubling their offer over the last decade.²⁶ As proven by surveys held by *Cerveceros de España* – the Spanish beer producers' organisation – non-alcoholic beer variations are less of a gateway to alcoholic beverage consumption than a substitute consciously chosen by consumers over their regular alcohol-containing beers whenever they cannot or do not want to drink alcohol.

Nearly 30 percent of beer-drinking Spaniards are choosing non-alcoholic options (exclusively or occasionally), the Spanish market displaying strong cultural acceptance for “zero-alc” options. One-half of alcohol-free consumption cases ties in with driving. Given the persistent growth, the non-alcoholic beer segment in Spain is more than ready for further expansion, flavour profiles and premium offer innovations the driving force behind future demand, promising to make Spain's position more powerful as a role model for 0.0% beer markets.



One in every ten non-alcoholic beers is produced in Poland.

The outlook for the Polish alcohol-free beer market is extremely promising. The “zero-alc” segment has grown by nearly 250 percent since 2018, with a coinciding decline in alcohol-containing beers. Non-alcoholic beers have become an icon of changing consumer habits, the groundswell of healthy lifestyle awareness and expanding array of alcohol-free beer flavours conducive to consumers choosing them over alcoholic beverages.

Many consumers, the young adult generation in particular, are interested in reducing their alcohol intake without giving up on social life – alcohol-free beers are a perfect fit. For the physically active, on the other hand, non-alcoholic beers can be a great energy drink option, given their electrolyte content and low calorie count.

In a challenging market for European brewers where high inflation, supply chain bottlenecks, increased raw material prices and fluctuating energy costs, coupled with reduced consumer spending power and changing consumer trends, are all factors provoking a dip in beer sales, production and exports, the growth in non-alcohol beer is a shining light. We can now claim that every fifteenth beer consumed in the European Union is a non-alcoholic beer, the kind of numbers that would have been scarcely believable, even just five or ten years ago.

As innovation has progressed, so too has the popularity of these beers, spurring further investment not just in their production, where there is now a wide range of non-alcohol beer styles, but also in their availability and marketing.

No longer is it unusual to see non-alcohol beer on tap at the bar. No longer is it unfashionable to take a non-alcohol beer from the shelf or when on a night out with friends. It remains the ideal beverage for drivers but is also a perfectly acceptable option for any consumer, on any occasion, just building on the choice and diversity of beers available to today's modern consumer.

Cheers to non-alcohol beer, cheers to choice!



Julia Leferman
Secretary General,
The Brewers of Europe



4

Who are non-alcoholic beers for? Who is choosing them – and why?

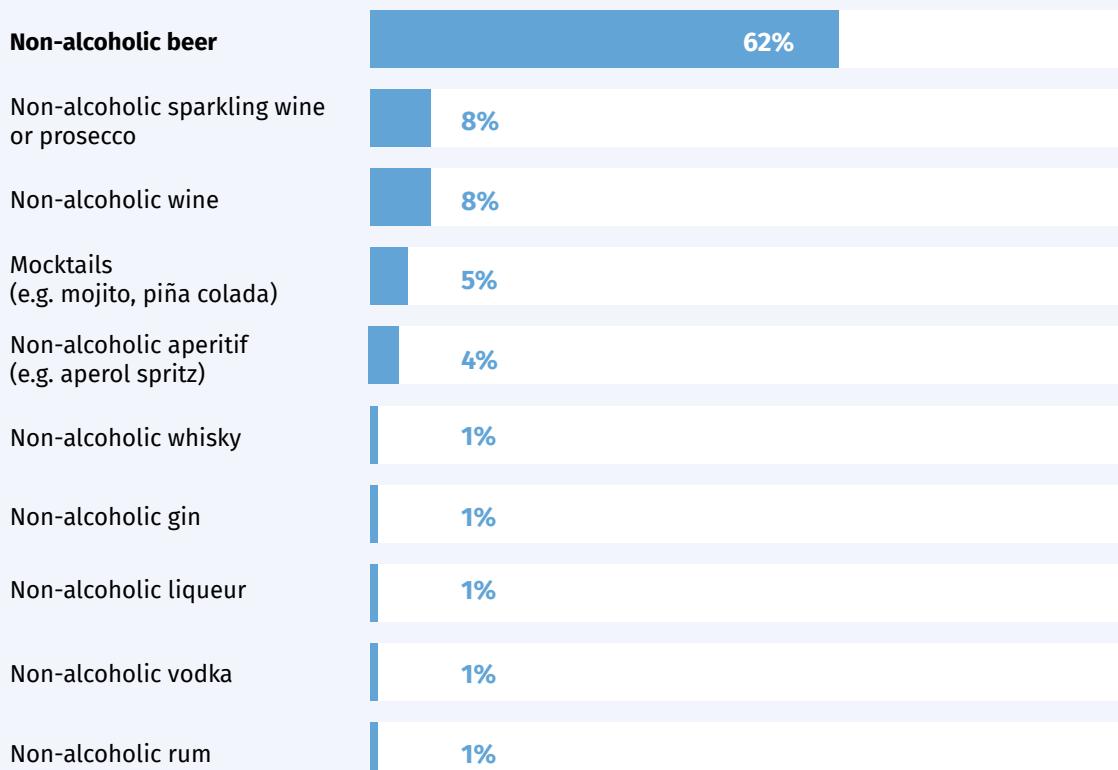
4.1 An alcohol-free world: the solution.

Approaching the NoLo trend in contexts extending beyond reduced alcohol consumption is certainly noteworthy. The phenomenon involves changes observable over the past few years in how consumers handle food product choices, seeking “no” or “low” sugar, calorie, gluten and/or alcohol content options. **This is why “zero-alcs” are not beers for newbies, or aperitifs preceding alcohol-containing beer consumption, or an introduction to the world of beers.** Alcohol-free beers are chosen by individuals who – while fond of flavour and refreshment – do not want to or cannot consume alcohol, for one reason or another.

“Zero-alcs” are not a substitute for juices or carbonated soft drinks – they are usually drunk instead of alcohol-containing beer or other alcoholic beverages. **Sixty-three percent of consumers aged 18-34 consider alcohol-free beers a decent alcoholic drink replacement. Fifty-four percent of older consumers (aged 35-44) think so too.²⁷**

Of all the alcohol-free beverage options available on the market, “zero-alcs” are the most popular by far – they have been tried by as many as 97 percent of adult Poles. Six out of ten consumers choose alcohol-free beers on a regular basis, making them the most frequently picked substitute for alcohol-containing beverages.²⁸

Figure 5. Which alcohol-free equivalents of alcoholic beverages do you consume more or less regularly, even if occasionally?



Source: IQS Omnisurv, January 2025, N=864, respondent age group: 18-64.

As it turns out, the non-alcoholic beverage market offer, of beers in particular – given the relatively highest interest therein – is a solid option for anyone who chooses not to or cannot consume alcohol.

Today, such options are common and continually expanding, known to consumers throughout Poland. Surveys have proven that most consumers have tried such beverages, quite a few choosing them on a regular basis.

Distinct labelling of alcohol-free beverages, distinguishing them from low-alcohol content drinks, and clear “zero alcohol” information seem to be of particular significance. The above may also prove educational, pointing to alcohol-related risks by contrasting alcohol-free and alcohol-containing products.



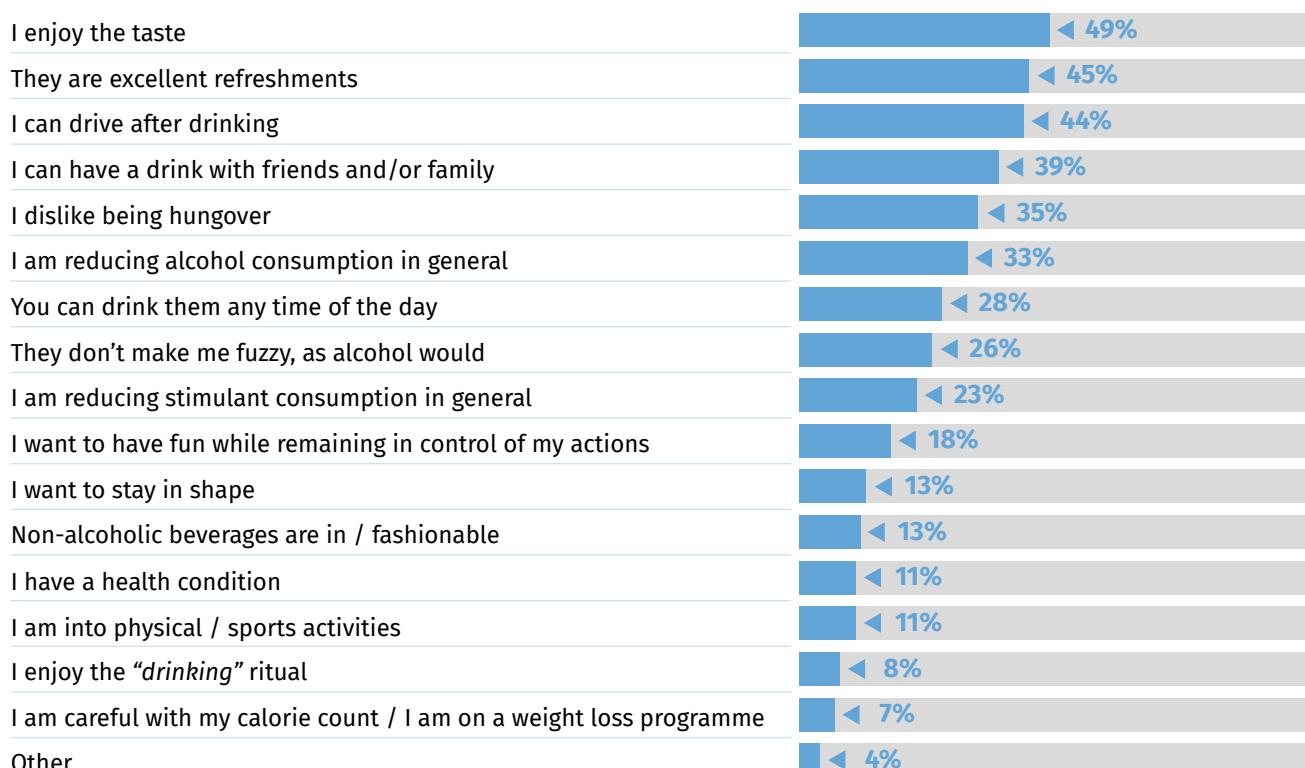
Małgorzata Dragan

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4.2 Giving up alcohol consumption consciously in contrast to circumstantial necessity.

Reasons for consumers choosing 0.0% beers are rational today, suggesting a growing sense of responsibility for personal health and activities. Multiple surveys carried out in Poland and worldwide include one simple answer to the question: “Why do we choose alcohol-free beer?”: because – while enjoying the flavour and refreshment associated with beer, we do not wish to be intoxicated. Reasons mentioned by Polish consumers opting for “zero-alcs” instead of alcoholic drinks point to intentional and conscious decisions not to consume alcohol rather than to circumstantial needs, such as driving motor vehicles.

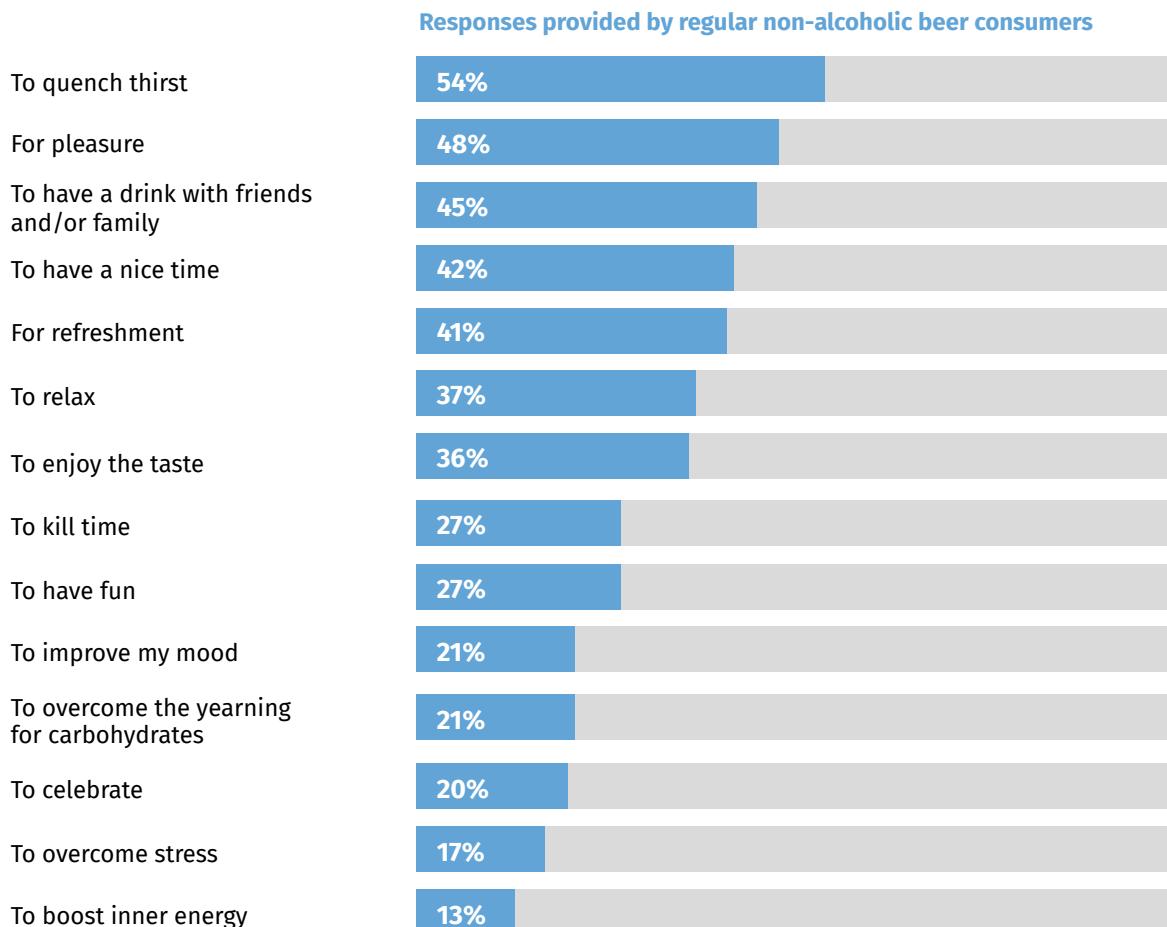
Figure 6. Specify key reasons for choosing alcohol-free beverages



Source: IQS Omnisurv, January 2025, N=864, respondent age group: 18-64.

Consumers regularly choosing 0.0% beers associate the beverage with specific social occasions, identical to those listed by alcohol-containing beer drinkers. This proves that opting for “zero-alcs” is most frequently the outcome of personal and conscious decisions grounded in positive emotions – consumers can have fun with friends and have a great time while not consuming alcohol. Such attitudes are particularly pronounced in the Generation Z and amongst Millennials. **They drink “zero-alc” beers by choice rather than under pressure.**

Figure 7. Why do you believe people drink non-alcoholic beer?



Source: “Health risks in the Polish society”, IQS 2024

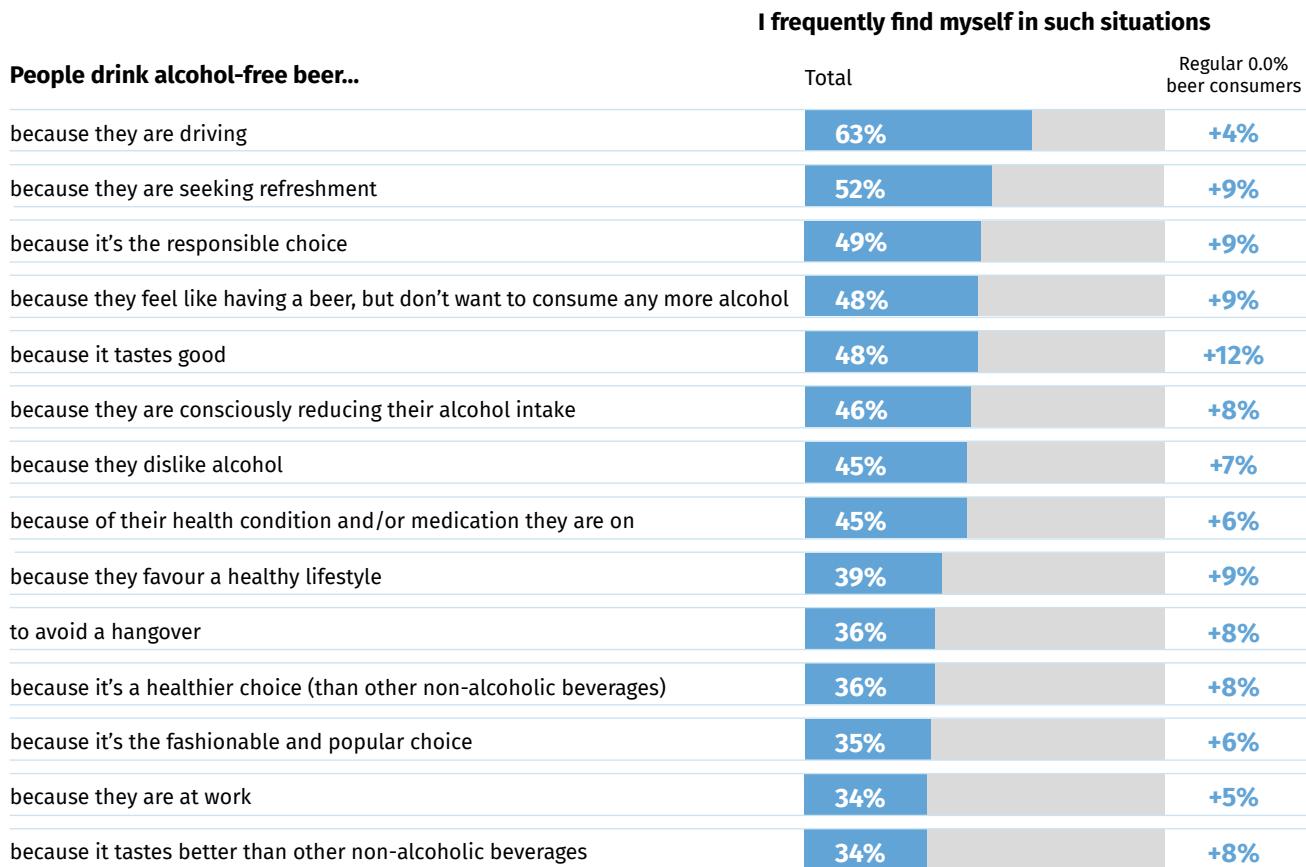
4.3 Alcohol-free beverage consumption models.

Consumers consider it natural that drinking 0.0% beer may be chiefly associated with the drinker intending to drive, and thus unconditionally refraining from consuming alcohol. Over one-half of respondents aged 18-24 and over 40 percent of older respondents (25-44 lata) agree that non-alcoholic beer can be consumed before driving.²⁹

Forty-five percent of Polish consumers believe that persons under 18 should not drink “zero-alc” beers. The female mindset is more rigorous – according to 52 percent of women (and 37 percent of men), “zero-alc” beers should not be provided to underage consumers at all.³⁰ Notably, producers agree that pursuant to “the world of beer is a place for adults” doctrine, 0.0% beers are not marketed with underage persons in mind. The respective “18+” logo is placed on all labelling, retailers requested not to sell 0.0% beers to individuals younger than 18 years of age.

While driving and seeking refreshment are the most popular reasons for choosing 0.0% beer, taste and motivations associated with the beverage’s alcohol-free nature itself are of equal significance. Alcohol-free beers are a responsible choice, a response to the “I’d love a beer, but not alcohol” whim. In case of regular alcohol-free beer drinkers, aforesaid aspects become even more significant: choosing the NON-alcoholic beer option consciously and responsibly.

Figure 8. When do people choose alcohol-free beer?



Source: U&A 2024 survey, Minds & Roses, N=1700, November/December 2024

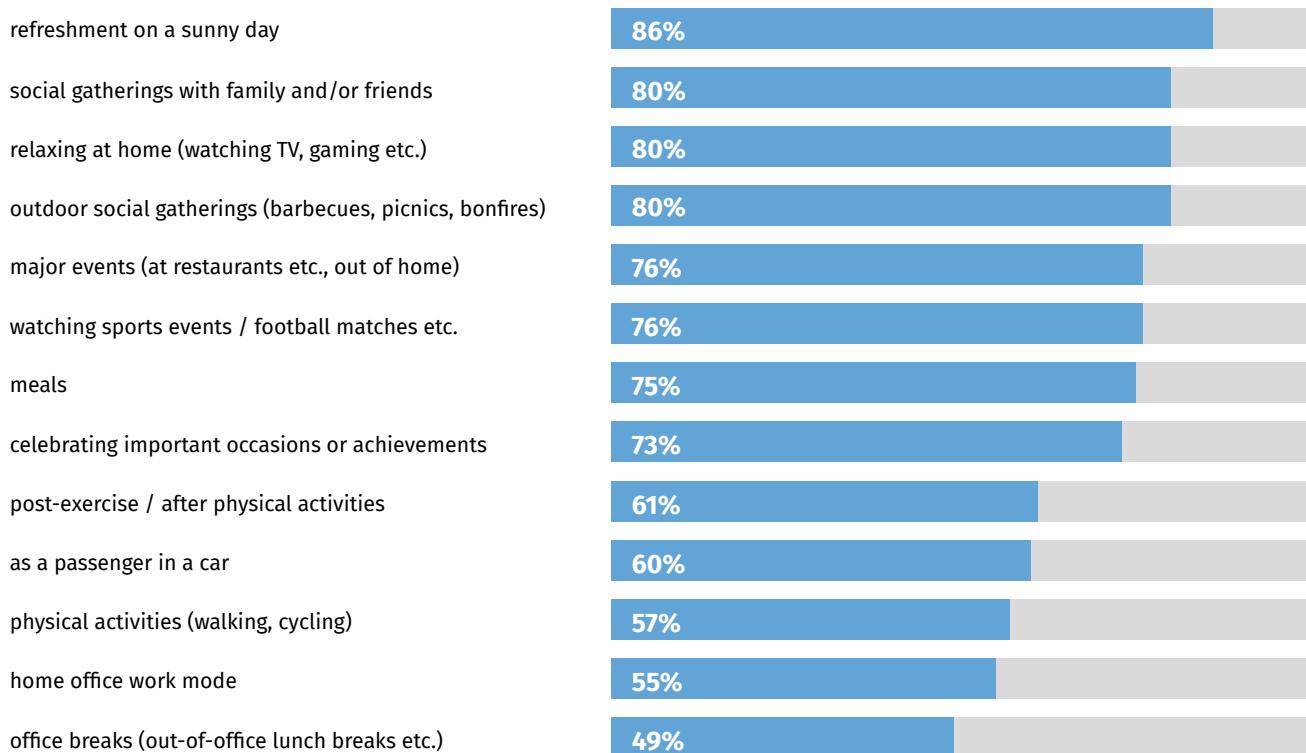
Consumers choosing “zero-alcs” on a regular basis associate 0.0% beer with being in a good mood, fun, and having a great time. Considered valuable, the nil-alcohol content is seen by regular alcohol-free beer drinkers as an attractive benefit.³¹

Alcohol-free beers are usually consumed as a refreshment on sunny days, or occasions associated with leisure time – with family and friends, at home and outdoors (barbecues, picnics) – and on “special” occasions (parties, watching sports / football matches, festivities). 0.0% beer is also consumed with meals. All these are typical “beer” occasions when “zero-alc” consumers leave alcohol behind while still enjoying the taste of beer.



Figure 9. Alcohol-free beer consumption occasions

How well does alcohol-free beer match these situations?



Source: U&A 2024 survey, Minds & Roses, N=1700, November/December 2024

Surveys of societal attitudes to non-alcoholic beers suggest a rather favourable perception. The new beverage category on the market has become a solid alcohol replacement in situations usually associated with drinking – such as social gatherings or attending sports events. Potential for change to social drinking-related behaviours is clearly observable, lessening the sense of exclusion frequently communicated by non-drinkers. Furthermore, societal contexts include a particularly notable incentive when choosing 0.0% beverages: the ability to drive after having a drink. This points to the growing awareness of threats arising from harmful drinking situations – risks to oneself and one's nearest and dearest as well as to other road users. This is obviously a major issue, given the rather alarming data regarding DUI case volumes in Poland, and car accidents caused by drunk drivers. Access to alcohol-free alcoholic beverage substitutes might even be seen as a preventive measure in this case, drivers choosing non-alcoholic drinks – as harbingers of new social conventions.

Lower beer consumption by underage individuals is a notable fact, both positive and potentially permanent, given healthy lifestyle promoting, growing awareness, and something akin to fashion in the field. Moreover, the significance of regulations distinctly embedding alcohol-free beers in the segment of beverages targeting adult consumers seems to be of paramount importance in view of the need to extend particular protection to young consumers.



dr hab. n. hum. Małgorzata Dragan

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4.4 How do Poles perceive “zero-alcs” and their consumers?

0.0% beers enjoy excellent reputation with regular and sporadic users alike, the category considered most fashionable and “in” today. Considered more refreshing than traditional beer or carbonated soft drinks even, alcohol-free beers are also seen as a lower calorie count option. Consumers believe that “zero-alcs” are the best replacement for alcohol-containing beverages. Women have a considerably higher opinion of alcohol-free beers than men, in all probability because they are in the lead in terms of 0.0% beer consumption, in the flavoured segment in particular. Factors impacting the “zero” beer category include consumer age. 0.0% beers enjoy markedly higher appreciation in the consumer group aged 25-49 than amongst older consumers who choose it rarely, and (due to their consumption habits) are incapable of identifying benefits arising from the “alcohol-free” nature of this category.³² The deeper the consumer’s knowledge of the “zero-alc” segment, the higher his or her appreciation for its flavours and nil alcohol content, both associated with being in a good mood and having a great time.

How do Poles perceive 0.0% beer?

Descriptions matching alcohol-free beer

Source: U&A 2024 survey,
Minds & Roses, N=1700,
November/December 2024



52%

Solid alcoholic beverage replacement

40%

Wonderful refreshment

36%

Makes leisure time even more pleasant

35%

Fashionable and “in”

35%

I can have a great time drinking it

33%

I enjoy the taste

31%

A perfect fit for a healthy lifestyle if drunk with moderation

28%

Puts me in a good mood

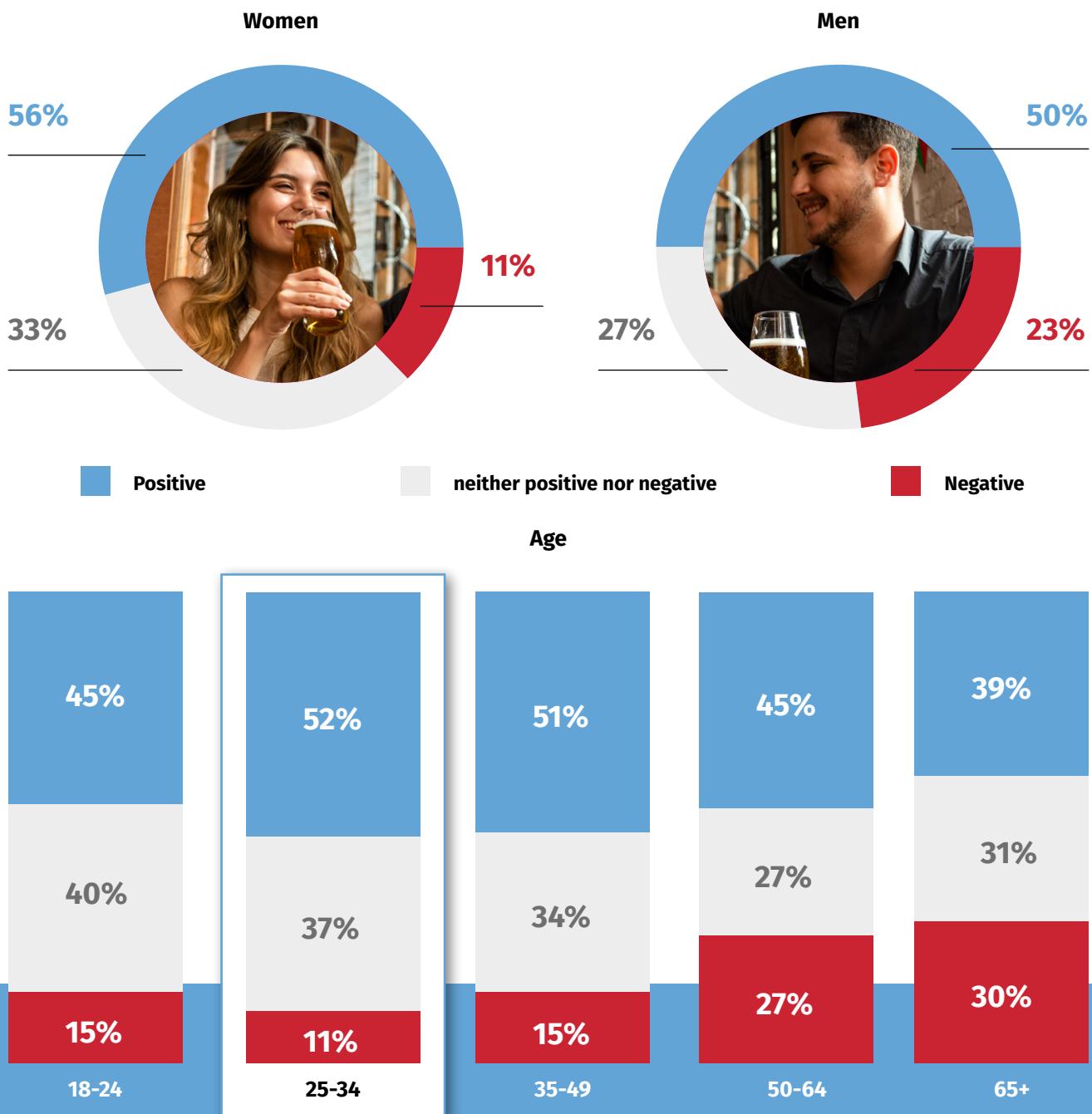
27%

Made of natural ingredients

23%

Has a lower calorie count than other beverages

Figure 10. Alcohol-free beer perception in the demographic context



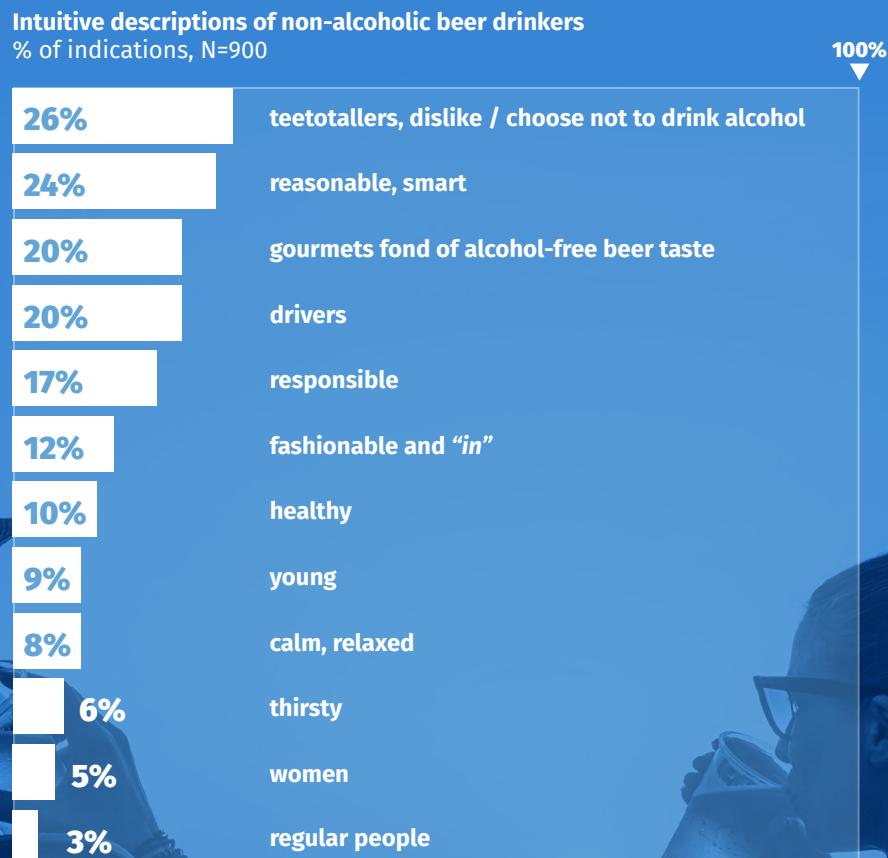
Source: U&A 2024 survey, Minds & Roses, N=1700, November/December 2024

Persons aged 25-34 are most open to 0.0% beer. “Zero-alcs” have a poorer reputation in the youngest consumer group (18-24) due to the fact that a massive 46 percent of consumers in that age group have encountered negative societal reactions (such as criticism and mockery) to drinking non-alcoholic beer.

Alcohol-free beer drinkers experienced kindly responses (acceptance, appreciation, support) in 55 percent of all cases; that said, respondents' friends reacted badly in 28 percent of cases, criticism mainly designed to encourage persons giving up on alcohol to have an alcoholic drink.

Notwithstanding the above, consumers choosing non-alcoholic beers over alcohol-containing beverages are commonly perceived as reasonable, smart and responsible.

Figure 11. Perception of persons drinking alcohol-free beers



Source: U&A 2024 survey, Minds & Roses, N=1700, November/December 2024

A consumer survey organised by Polish scientists as part of
 "Poznań University of Economics and Business for Economy 5.0: Regional Initiative – Global Effects (RIGE)"
 identified key factors behind the decision to purchase alcohol-free beer:³³

86%

Taste

73%

Availability

61%

Price

59%

Brand

The above proves the extraordinary importance of 0.0% beer marketing to building the NoLo market. To the consumer community, a recognisable beer brand offering alcohol-containing products and their 0.0% equivalents alike is a guarantee of the quality and taste they know and appreciate.

5

0.0% beers

in the context of the Polish brewery market's future

5.1 There is no No-Lo without 0.0% beer

NoLo market development is a story of 0.0% beer revolution and using that space to build a sizable and diverse segment of nil-alcohol content beers over several years, "zero-alcs" regularly chosen by 6 out of 10 Polish consumers today. Each 0.0% beer bottle sold translates into lower alcohol volumes consumed by Poles. In 2018, "zero-alc" beers gave rise to a transformation of the alcoholic beverage market and changes to the structure of alcohol consumption in Poland. Said changes are clearly visible in data collected and processed by the Central Statistical Office and National Centre for the Prevention of Addictions. Since the COVID-19 pandemic, pure alcohol consumption in Poland dropped by 0.8 litres: from 9.73 litres to 8.93 litres *per capita* in 2023.³⁴ From the moment the "zero" beer market began flourishing, alcohol-containing beer consumption declined by 13 litres *per capita* (in beer-related pure alcohol content terms: 5.34 to 4.81 litres).³⁵ Moreover, as proven by ESPAD 2024 surveys, the share of underage beer consumers dropped by as much as 8 percentage points in comparison with the previous 2019 survey edition; vodka-related indicators remained unchanged, dropping in the wine segment by 2 percentage points.

The 0.0% beer market expansion, alcohol-free annual beer sales reaching just under 2 million hectolitres, impacts more than the beer market itself (strong beer sales and average alcohol content in beer on a steady annual decline) – it gives rise to changes in other alcohol-containing product categories as well.



Alcohol-free beers have been proving their significance to the Polish brewery market for years. While their early success stories were approached with something akin to scepticism and considered a curio, successive years of non-alcoholic beers shattering one “glass ceiling” of production volumes and sales value after another have firmly established alcohol-free beers as a fully-fledged market segment rather than a passing fad. Today, they seem to be a hair's breadth away from average European consumption of around 10%. Mature and domestic consumption-based, can the Polish market afford to reach the cap market share of non-alcoholic beers permanently – or even take a few steps further, as major producers are wont to claim? Time will show...

Be that as it may, it seems that any further domestic expansion of low- and no-alcohol content beers – and the development of the Polish brewing industry in consequence – will require benefits of low- and no-alcohol content beers to be accounted for, extra expansion space to be sought, conceptual order to prevail, and system of defence against product forgeries to be set up.



Andrzej Olkowski

Chairman,
Association of Regional Polish Breweries

Craft beer breweries are quick to respond to any new trends and consumer needs, as proven over recent years in the non-alcoholic beer (alcohol content up to 0,5%) segment. From the craft breweries' perspective, the trend is a combination of technological challenges and market opportunities. Nonetheless, the smallest brewery segment succeeded in building a vast array of interesting craft non-alcoholic beers in just a couple of years, product styles diverse. As ever, artisanal breweries proceeded with innate creativity, passion for top quality, and attention to diversity.

Owing to the growth in “zero-alc” beer popularity, craft breweries have been marketing alcohol-free beers with distinct flavour profiles, sour, fruity and higher-potency hop beer segments an unquestionable particular market opportunity, intense flavour and taste a guarantee of sensory complexity. This has allowed non-alcoholic craft beers to convey the rich fullness of beer taste with no need for compromise, also when one chooses not to or cannot enjoy alcohol-containing beer.

Non-alcoholic beers apart, phenomena forming part of the NoLo market development have over recent years evolved into an expansion of the low-alcohol content craft beer segment; in combination with alcohol-free beers, they have blazed an observable retreat from strong beers in favour of session beers, lighter and more refreshing.



Marek Kamiński

CEO,
Polish Association
of Craft Breweries



5.2 0.0% beers: a window onto an alcohol-free world

“Zero-alc” beers have shown that alcohol-free beer carries identical societal and social functions to those formerly conveyed upon traditional beer, taste and refreshment qualities a solid match as well. Developing new recipes and flavours and improving “zero-alc” beer brewing technologies remain the most important opportunities for brewers, regardless of whether they work for small artisanal breweries or multinationals. By purchasing 1 million of “zero-alcs” per day Poles have proven that one can give up on alcohol while remaining a loyal beer consumer.

0.0% beer segment development is certainly a move in the desirable direction in terms of public health-associated challenges, reduced alcohol intake, excess consumption in particular, the main focus therein – excess alcohol consumption causes greatest damage to health. Market data, research, trends and statistics have all proven the paramount importance of alcohol-free beer consumption to reduced alcohol intake, defined as an ultimate transition from drinking traditional beer to choosing 0.0% beers.

Motives for choosing non-alcoholic beverages frequently include attention to health, pursuing healthy lifestyles, and awareness of negative consequences of drinking alcohol, such as feeling unwell when hungover, loss of behavioural control, or risks associated with driving under the influence. Aforesaid reasons have been firmly embedded in a growing conscious consumption-related trend of taking responsibility for personal choices when it comes to health-impacting behaviour. This is further proven by the fact that non-alcoholic beverages are known to and chosen more frequently by persons concurrently declaring an interest in a healthy lifestyle (healthy nutrition, sports activities), younger consumers, and women. It is also notable that assorted alcohol-free beverage qualities (their low calorie count, for example), may encourage consumers to choose non-alcoholic drinks over alcohol, even if their knowledge of potential negative consequences of drinking is limited.

The option of replacing alcoholic beverages with their nil-alcohol content equivalents raises hopes for reducing overall alcohol consumption, and thus limiting the prevalence of alcohol-related issues. Alcohol-free beverage availability may in a sense offer protection from drinking. Particular attention ought to be paid to data pointing to reduced beer consumption in the underage consumer community, despite the peer pressure to experiment with and indulge in alcoholic drinks, frequent in and typical for that age group. Greater interest in 0.0% beers ties in with a general decline in beer consumption in the Polish society. While no similar decline has been observed in alcoholic beverage segments other than beer, the research-confirmed trend is a ray of hope in terms of successively reducing overall alcohol consumption



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Summary

0.0% beers are a substitute for traditional alcohol-containing beers: alcohol drinkers have been replacing alcoholic beverages with non-alcoholic or trace alcohol content products through personal choice. The resulting substitution effect boosts state health policy goals. Once the substitution effect reaches general population levels, overall ethanol consumption is brought down, in line with what is the public health strategy objective. This is happening already – in Poland and other European Union member states alike, the scale of the “zero-alc” beer substitution effect on the rise – 97 percent of Poles have tried 0.0% beer, 6 out of 10 Polish consumers choosing alcohol-free beers on a regular basis.³⁶ Pure alcohol consumption in Poland has dropped by 0.8 litres per capita since 2021³⁷; since the early days of the 0.0% revolution, alcohol-containing beer consumption has dropped by 13 litres per capita³⁸, to levels last recorded 20 years ago.

Notably, 0.0% beers were the first non-alcoholic equivalents of alcoholic beverages as well as NoLo trend contributors. Over a mere few years, the segment grew several times, grabbing a 6.4% share of the market by 2024, sales value approaching PLN 2 billion per annum – topping the 2023 performance by nearly PLN 250 million. The 0.0% beer segment has in all actuality evolved into a separate product category, recording top growth rates in excess of twelve percent across the entire beer industry.

The trend is observable globally. In global terms, non-alcoholic beer accounts for approximately 3 percent of the beer market, the World Brewing Alliance expecting the segment to reach 5 percent of the market by 2030. In Poland, the “zero-alc” share has exceeded that threshold already, our aspirations reaching double-digit levels. Given the overall growth dynamics, this seems to be a viable perspective by the end of the decade.

Market research has confirmed that alcohol-free beers are most frequently chosen by former alcohol-containing beer drinkers currently seeking non-alcoholic beer equivalents, having decided to reduce or eliminate their alcohol intake. Consumers have been explicit in declaring that “zero-alc” beers are an exit gateway from the world of alcohol, and thus a significant implement in reducing its excess consumption in Poland, which ought to be duly mirrored in legislation.



Bartłomiej Morzycki

Director General,
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“Zero-Alcs” are Changing the Beer Market

The 0.0% Revolution is On

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