

Trend report

The Rise of Strong Beers in Europe

Latest revision, September 2012

Introduction

"World's strongest' beer with 32% strength launched", was read by visitors of the BBC News website in 2009 ("Strongest Beer," 2009). A year later, they would read that the same Scottish brewery had once again claimed the title of the 'world's strongest beer' with the release of a new beer having an astounding 41% alcohol content ("Bismarck," 2010). Proceeding both news reports in 2009 and 2010, British health NGOs reacted critically, calling the product an example of irresponsible brewing and marketing ("Bismarck," 2010; Strongest Beer," 2009). It would appear that there is just cause for such reactions: in 2010 British research by a charity organization for homeless people suggested that alcohol with high levels of alcohol content kills more homeless people than crack or heroin (Doward, 2010). Two years later, ratebeer.com advertised the top 50 strongest beers in the world, ranging from 18.2% to 57.7% alcohol content by listing them on their website ("50 Strongest," 2012). It seems that brewers internationally are in a race to create the strongest beverage and because of this several important questions must be addressed. First, is this about a trend in catering to consumers or is this an irresponsible marketing ploy to garner attention for the breweries with the highest percentage of alcohol in their beverage? Secondly, are these super-strong beers novelty items for high-end beer collectors or are they simply intended to provide a high amount of alcohol to consumers at an inexpensive price? And finally, is beer with high levels of alcohol content available and prevalent throughout Europe? Because there are few, if any, scientific studies to answer these questions, EUCAM took on the responsibility of producing the first explorative and non-representative overview of strong beers in Europe.



Above, the 2010 strongest beer in the world 'Sink the Bismarck!' Photo by Bernt Rostad @Flickr.

Methods

We asked individuals to voluntarily visit four stores where beer was sold in their respective hometowns. During the visits, the volunteers were expected to note particular characteristics of all the beers with high levels of alcohol content being sold. For this study we defined a beer as 'strong' when the volume of alcohol exceeded 7%. The characteristics evaluated included the following: brand, type, alcohol percentage, volume of the container, and the price at which the product was sold. The volunteers were then asked to visit two supermarkets and two liquor stores. However, this was not always possible .

Results

We identified 734 strong beer products through our analysis of 16 European countries, although from this point on we will discuss the results of 14 countries because in Germany and Ireland we did not find any strong beers. In supermarkets in Hamm and Berlin only beers containing up to 5% alcohol were found. In Ireland we identified beers with alcohol content up to 6.2%. In the other 14 countries the highest alcohol volumes were found to range from

8.5% in Slovenia to 14% in Austria and Switzerland. Table one lists the 14 countries analyzed in this study. Table two illustrates an overview of the top three strongest beers found in our research.

Table 1. The top 3 beers with the highest amount of alcohol found in this research. On the right a picture of Schloss Eggenberg Samichlaus Clasic.

	Brand and Product Name	Alcohol Percentage	Found in which type of outlet	Country
1.	Schloss Eggenberg Samichlaus Clasic	14%	Supermarket	Austria & Switzerland
2.	Belzebuth Extra Forte	13%	Liquor store	Netherlands
2.	Bush DeNuit	13%	Liquor Store	Belgium
2.	Bush Prestige	13%	Liquor Store	Belgium
3.	Bush ambrée	12%	Supermarket	France
3.	Gordon, Platinum XXX	12%	Supermarket	France

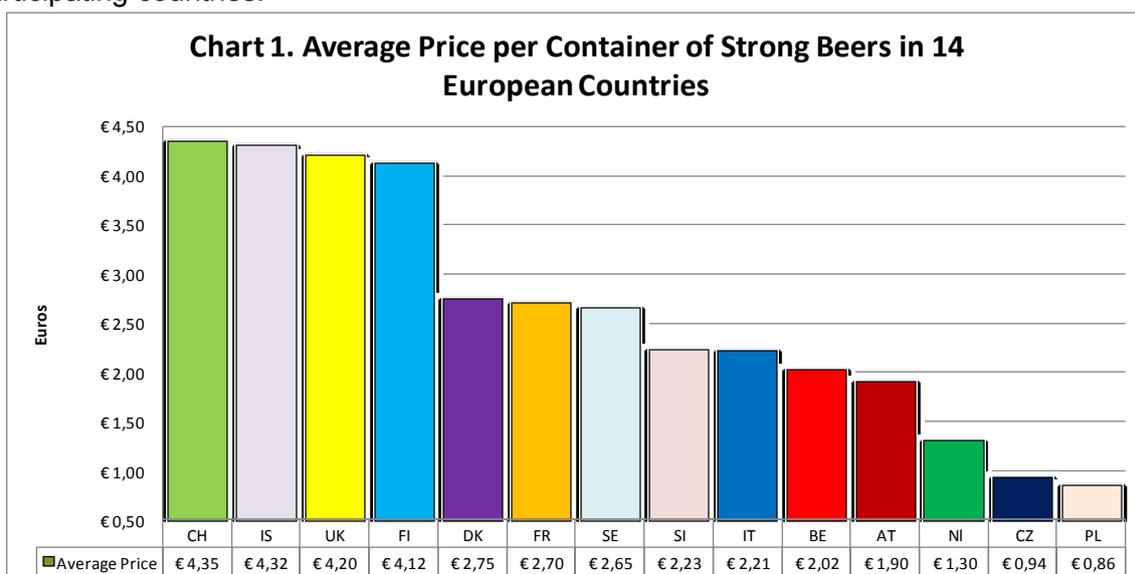


The highest number of beer with high levels of alcohol content was found in the Netherlands with 158 beer products being sold in two supermarkets (Albert Heijn & C1000) and two liquor stores (Mitra & Gall & Gall) in the small town of Baarn. The second country was Belgium, with 132 strong beers being sold in one liquor store and three supermarkets (Delhaize, GB & Colruyt) in the city of Dendermonde. At the bottom of the list is Austria where six strong beers were found in four Vienna based supermarkets (Billa, Zielpunkt, Merkuhr & Gourmet Spar).

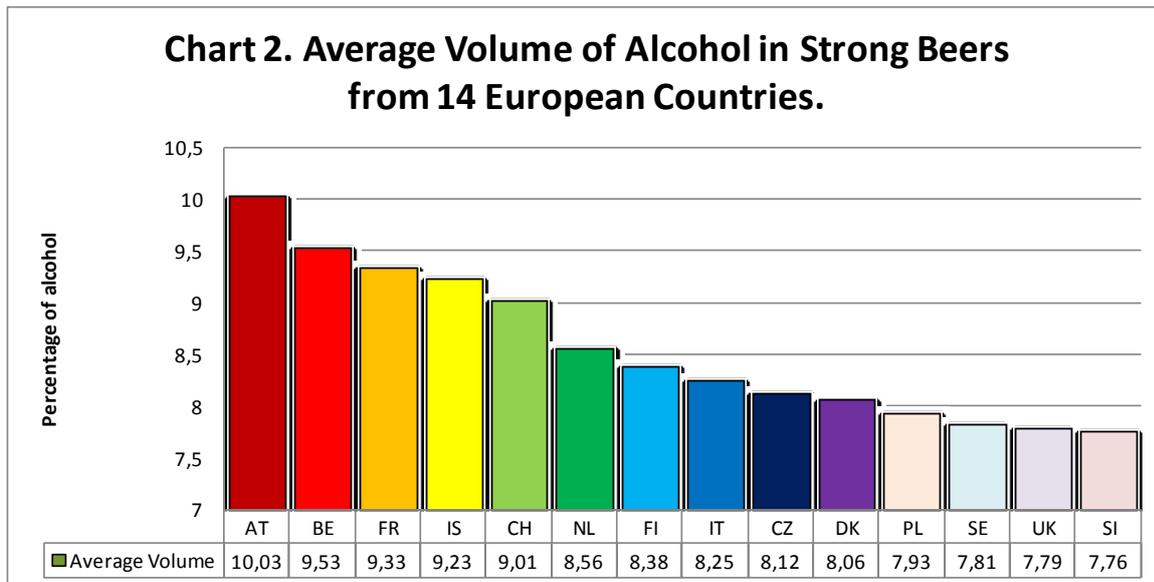
Table 2. List of participating countries and their abbreviations.

Country	Abbreviation
Austria	AT
Belgium	BE
Czech Republic	CZ
Denmark	DK
Finland	FI
France	FR
Iceland	IS
Italy	IT
Netherlands	NL
Poland	PL
Slovenia	SI
Sweden	SE
Switzerland	CH
United Kingdom	UK

On average the cheapest strong beers were found in Poland, where (converted to Euros) the average price per beer in four Warsaw supermarkets (Auchan, Carrefour Market, Tesco & Hala Kopínska) was € 0,86. The most expensive strong beers are found in Switzerland, costing an average of € 4,35 as calculated from findings in two supermarkets (Coop & Loeb), and one liquor store in the city of Bern. Chart 1 shows an overview of average prices of the participating countries.



Looking at the average volume of alcohol content of the found beers, it becomes apparent that some of the countries with low beer prices are also the countries with the highest levels of alcohol content per unit sold (Austria, Belgium and the Netherlands). On average, the highest amount of alcohol was found in strong beers from Austria (Avg. 10.03% in six beers found in four supermarkets). Second in volume is Belgium, where the mean volume of alcohol in beer with high levels of alcohol content was 9.53%. On average, the beer with the lowest amount of alcohol content of all the ‘strong’ beers were found in Slovenia, where the average volume of alcohol in strong beers sold at four supermarkets was 7.76%. Chart 2 gives an overview of the average alcohol volumes of the found strong beers in the participating countries.

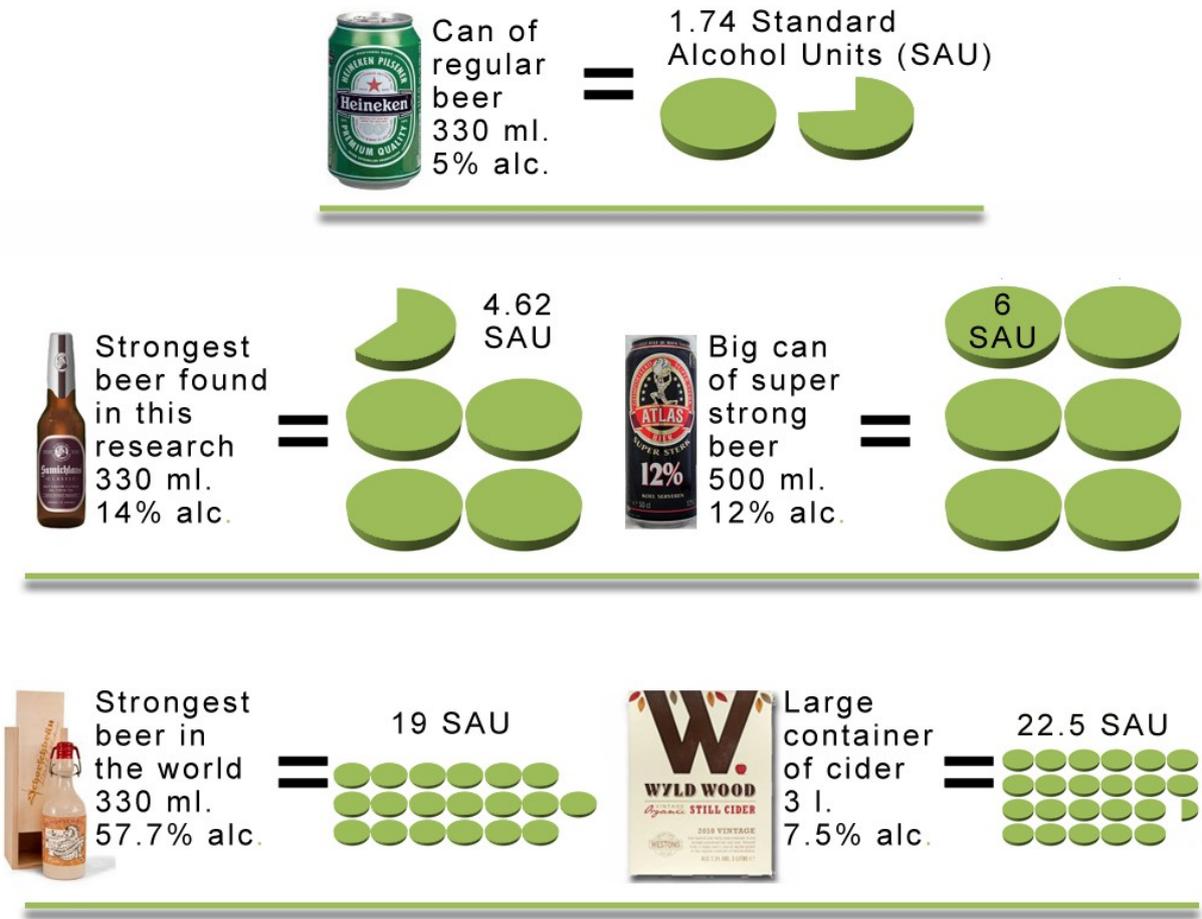


This research also analyzed the type of establishment in which beer with high levels of alcohol content is available for purchase. In general, the three types of establishments identified from the data are the following: supermarkets; liquor stores; and state monopolies. The average price per unit for beer with high levels of alcohol content in liquor stores was 28% higher when compared to supermarkets (€3.13 vs. €2.27), while the average price per unit found in state monopolies (Finland, Iceland and Sweden) was 16% higher (€3.70) compared to liquor stores. Additionally, the average price per unit in the state monopolies (€3.70) was 30% higher than the average price per unit of beer with high levels of alcohol content in all types of establishments in all countries studied, combined (€2.61).

When analysing the average alcohol volume of beer with high levels of alcohol content sold at the different store types, a comparable balance is evident. On average, strong beers sold at liquor stores contain more alcohol (Avg. 9.08%) than those sold in supermarkets (Avg 8.59%) and slightly less alcohol is contained in the strong beers sold at state monopolies (Avg. 8.47%). Furthermore, the overall average volume of alcohol in beer with high levels of alcohol content found in Europe (Avg. 8.56%) closely resembles the average volume sold in supermarkets (Avg 8.59%). It is also apparent that there is a greater selection of beer with high levels of alcohol content in liquor stores than in the supermarkets within the same country. On average, liquor stores in the Netherlands, Belgium, Italy and Switzerland sold 33 different beer products with high levels of alcohol content, while supermarkets sold on average 19.

The data on the size and types of containers for beer with high levels of alcohol content proved valuable as well. The research indicated that the containers of beer with high levels of alcohol content 330ml bottles or 500ml cans. While the last category has been criticized for containing more than one standard alcohol unit in a container that cannot be closed, our research also identified even larger containers. For instance the Chimay Bleue Millesime, a vintage beer from 1999, is available in a 1500ml bottle that looks like a Champaign bottle. However, the largest container found in this research was the UK's three litre cider container. Thirsty consumers can choose between a three litre box or plastic bottle that looks like it contains lemonade instead of a cider with a high alcohol volume of 7.3-7.5%.

Figure 1. An overview of the Standard Alcohol Units (UK) found in different containers.



For this study we also analyzed the country locations where beer with high levels of alcohol content were found to be available. Two highly popular names in brewing that were found ubiquitously throughout Europe were Guinness and Leffe. Guinness is produced by Diageo and was found in stores in Belgium, the Netherlands, Italy and the Czech Republic. Leffe is a product of AB INBEV and was found in the Netherlands, Belgium, France, Slovenia and the Czech Republic. Other big brewers whose high alcohol beers were identified in this research are: Heineken (Amstel Sterk), Bavaria (Bavaria 8.6), Anheuser-Busch Inbev (Hoegaarden Grand Cru), AB Imbev (Bud Premier Select), Carlsberg (Elephant, Masterbrew) and Royal Unibrew (Giraf, HC Andersen Eventyr, FAXE, Ceres Strong Ale).

Strikingly enough, some unexpected smaller brands and products were found in many different countries as well. For example the Belgium pale ale Duvel, produced in a family-owned and operated brewery was found in 7 countries: Slovenia, Belgium, the Netherlands, France, Iceland, the Czech Republic, and the United Kingdom. The Belgium Tripel beer Westmalle was also found in seven countries. Other brands that appeared frequently and in various countries were: Bush, Chouffe, Chimay, La Trappe, and Gordon.



In the introduction of this report the question is posed whether the super strong beers are 'collector items for bon vivant beer enthusiasts' or rather the drink of choice for problem drinkers who want as much buzz for their buck as possible. While such a question is difficult to answer from a non-representative research sample, we can get an idea by looking at the type of beer, the packaging and the pricing. Discerning readers may have already found that many of the brands mentioned in the paragraph above are from Belgium. Belgium has a long history of crafting various beers, such as Pale Ale, Dark Beer, Dubbel, Tripel and Quadrupel beer. Such beers are often marketed with slogans that intend to persuade consumers that the product is not merely for quenching your thirst, but to take a good moment, sit down and enjoy. Arguably, this bon vivant life style can be said to describe the high end beer collector more than the problem drinker.

If we argue that problem drinkers aim especially for cheap booze, it becomes somewhat easier to differentiate between the two. The data from this research suggests that the least expensive beers with high levels of alcohol content are sold at supermarkets. But what about the vast majority of the other strong beers, can they be divided between the drunkard's beverage and the collector's trophy? When we look at the packaging we may be able to differentiate. Most of the beer with high levels of alcohol content found for this study was brewed traditionally and, although the bottles detail much about the brewing process, they do not make a showcase of the percentage of alcohol. We did not find headline-grabbing beers as mentioned in the introduction. However, there are a number of exceptions that pop out of the aisles and scream 'super strong' at shoppers.

Such beers often also have very distinctive 'tough' names, like Gulpener Gladiator, Grolsch Kanon, La Demon and La Guillotine. Some of the names might even be considered to be offensive, such as the 'Brugse Zot' (Flamish for Bruges' Drunkard) or 'Delerium Tremens' (Medical name for an acute episode of delirium that is caused by alcohol withdrawal). An example of a beer blatantly advertising its super strong status is the French 'Belzebuth Extra Forte' with its brightly coloured label at the neck of the bottle merely stating '13% Alc.Vol.' in bold letters. It may be a rule of thumb that products with labels prominently showcasing 'extra strong' and their high percentage of alcohol are more likely to be consumed with the intent of 'getting



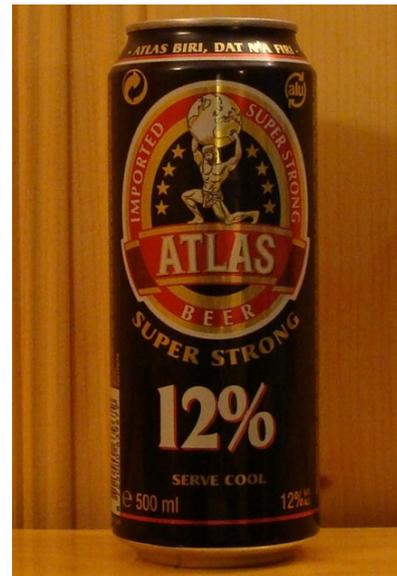
drunk' rather than to savour and enjoy responsibly. If this rule of thumb is accurate, then this research revealed the availability of much more strong beers intended for the bon vivant beer enthusiast than products simply intended to get drunk. Of the last variety some more examples include Amstel Strong (500ml cans with 7.5% alcohol), Atlas Super Strong (500ml cans with 12% alcohol) Hollandia Extra Strong (500ml cans with 7.9% alcohol), Ceres Strong Ale (330ml bottle with 7.7% alcohol, sold as three pack) and Faxe, Extra Forte (1 litre container with 10% alcohol).

Discussion

This research was meant to be preliminary and exploratory. To our knowledge, there is no documentation on the trend of beers with high levels of alcohol content throughout Europe. Indeed this report by EUCAM has taken the first steps to change this. By no means do we claim that the findings are representative for Europe as a whole. Even in the participating countries, we cannot guarantee that our findings are representative for all beer with high levels of alcohol content available. Furthermore we cannot make conclusions regarding how the data pertaining to beers with high levels of alcohol content relate to beers with smaller levels of alcohol content. Finally, because we have no longitudinal data, it is impossible to determine the existence of increasing access to beer with high levels of alcohol contents.

Conclusion

This unprecedented analysis of beers with high levels of alcohol content in 15 European countries indicates the ease in availability of 'strong' beers throughout Europe. Beer containing more than 7% alcohol is found in especially large quantities in liquor stores; however, their presence is also pervasive in supermarkets and state monopolies. The differing volumes of alcohol found in this research varied between 7% to 14%; however, the notorious alcohol volumes of 41% or more were not found. On average, beer in Austria, Belgium, and France had the highest alcohol content (10.03%, 9.53%, 9.33%, respectively). Alarmingly Austria and Belgium are also two countries where beer with high levels of alcohol content is available relatively inexpensively (average per unit price of €1.90 and €2.02, respectively). However, the average beer with high levels of alcohol content at the least expensive price were found in Poland (€0.86), closely followed by the Czech Republic (€0.94). The highest selection of beer with high levels of alcohol content was found in the Netherlands (158), followed by Belgium (132). Price per unit of 'strong' beer was found to be highest in state monopolies, cheaper in liquor stores, and cheapest in supermarkets. Furthermore, the state monopolies sold the beer with the least amount of alcohol, closely followed by supermarkets, while the highest amount of alcohol was found in beer sold at liquor stores. While the beverages were most often contained in 330ml bottles or 500ml cans, some larger containers were also found, most notably the three litre bottles of cider with an alcohol content of 7.3-7.5% from the United Kingdom. Because we do not have any data on the level of consumption and the type of consumers, we cannot make any



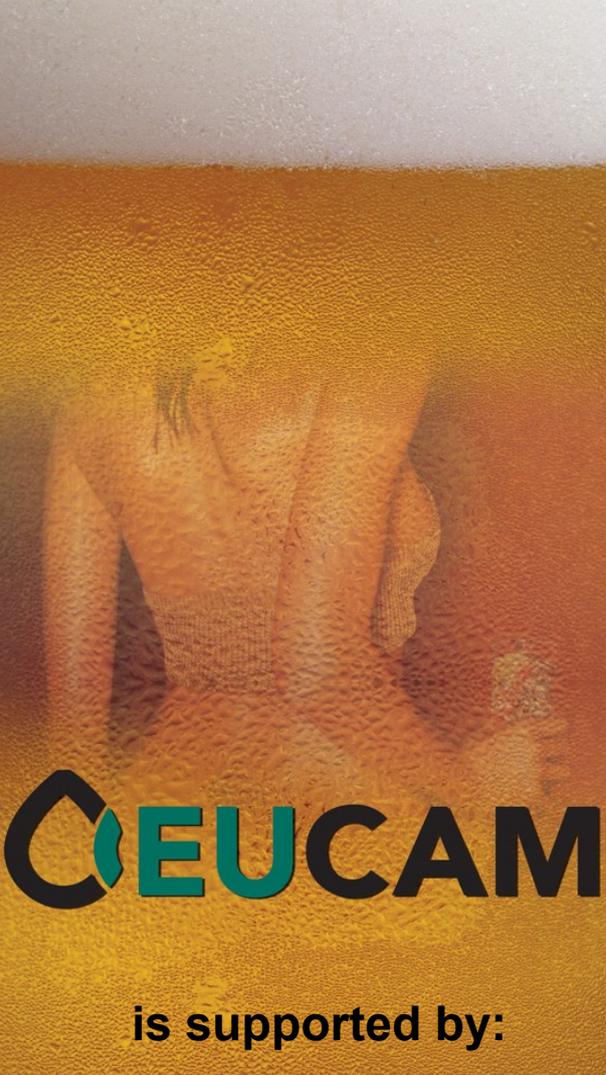
Above a picture of a can of Atlas Super Strong. On the previous page a Slovenian store display of Duvel (photo by Sandra Radoš Krnel) and at the bottom a picture of a bottle of Belzebuth Extra Forte (photo by monsieur Burns @Flicker).

conclusions concerning a propensity of beer with high levels of alcohol content to contribute to irresponsible alcohol consumption. However, looking at the packaging, the size, and the price per unit of the containers from our data sample, it seems that a few outliers of the 734 identified products are overtly aimed at contributing to quick and inexpensive consumption which consequently leads to drunkenness.

Recommendations

Because a higher amount of alcohol content can contribute to health problems we suggest the following recommendations in changes to current policy:

1. Irresponsible drinking behaviour can be curbed by raising the prices of beer with high levels of alcohol content. Alcohol can be taxed according to the alcohol content by volume in a container. Jurisprudence for such measures can be found in the United Kingdom, where in October of 2011 the High Strength Beer Duty was introduced ("HSBD," 2011). This is a tax that is compounded on the already progressive duty system on alcohol. This means that the higher amount of alcohol in a beverage, the higher the duty.
2. Binge drinking might be deterred by reducing the size of containers. While 330ml beer bottles containing 6% of alcohol already contain two standard alcohol units, the 500ml cans of beer with very high levels of alcohol content exceed even six standard alcohol units per can ("Units Calculator," 2012). Governments are advised to prohibit the packaging of alcoholic products that exceed more than two standard alcohol units effectively forcing producers to reduce the size of their containers.
3. Raise the barrier for people to buy beer with a high level of alcohol content and lessen the availability. The first step to do this is the removal of all alcohol, or even strong alcoholic beverages from the supermarkets. If people are not not exposed to alcoholic products while shopping for groceries, then they are less inclined to buy alcoholic products.



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