THE STATE OF CRAFT BEER IN CATALONIA

2017

INTRODUCTION

Craft brewers are producers who, driven by a passion and love for natural beer, study it, make it and improve its quality and variety each day. We are small entrepreneurs who first began to develop this quasi-manual art in our country nearly 15 years ago and who are slowly growing this new sector which is overflowing with character and the potential for personalisation.

A specialised industry (bars, shops, training and tasting spaces, fairs and festivals) has begun to emerge from these micro companies which, in turn, has led to the creation of new distribution companies for both the finished product and the raw materials as well as new jobs in the production of both food and accessories.

The almost spontaneous emergence of the sector requires legal recognition and an association to safeguard brewers' interests, ensure product quality and promote the craft beer culture. For this reason, the association **GECAN**, Gremi d'Elaboradors de Cervesa Artesana i Natural, (the Association of Craft and Natural Beer Brewers) was first established in 2011.

What's more, this entirely new industry was accompanied by the first edition (there have since been seven!) of the **Barcelona Beer Festival** (BBF) in 2012. This festival brings together all the professionals and representatives in the sector and introduces them to the public amidst an atmosphere of celebration.

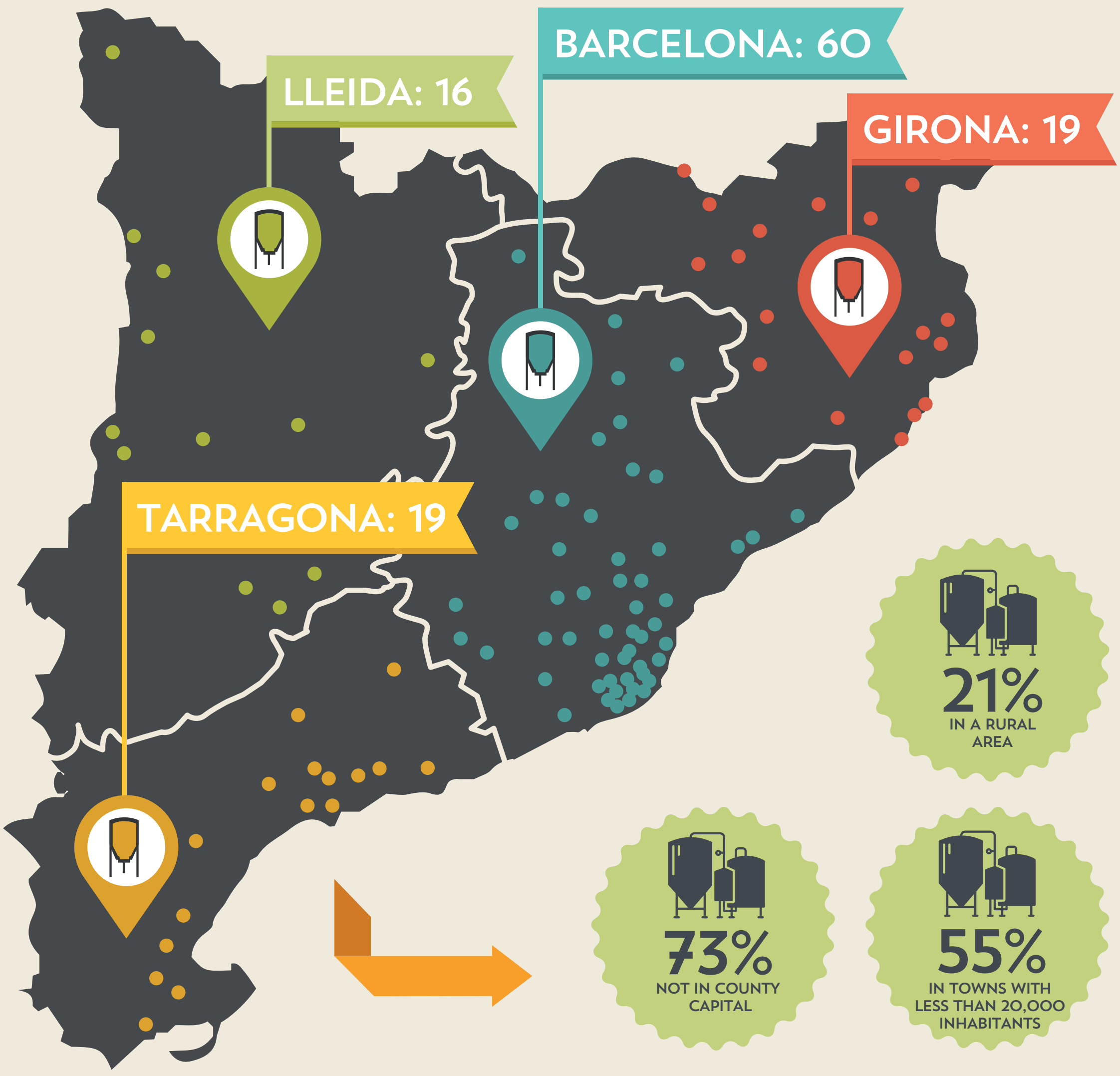
In 2017, we at GECAN and BBF decided to begin the first State of Craft Beer in Catalonia (Estat de la Cervesa Artesana a Catalunya) study with a large survey of all the factories listed on the Spanish food safety register up to the end of 2016 in order to obtain our own data and thus draw informed conclusions about where we are, where we're going, and, above all, with the aim of bringing the public closer to the wonderful world that is craft beer.

Now, in 2018, we feel encouraged to go back and expand this great survey: we have spoken to all the breweries again in order to update our data (we have seen some very interesting movements) and, furthermore, we have made the leap of reaching out to the final consumer in search of answers. We have been assisted by the Catalan government, the **Generalitat de Catalunya**, and, more specifically, by the Directorate-General for Agriculture, Livestock, Fisheries and Food (**Direcció General d'Agricultura, Ramaderia, Pesca i Alimentació**), whose support we would like to recognise and greatly appreciate.

We'd like to share our surprising findings with you!

PARTICIPATING BREWERIES

An analysis of the breweries producing craft beer in Catalonia was conducted for this section of the technical report using 2017 data. Registration with the RGSEAA, the General Health Registry for Food Businesses and Food, or the RSIPAC, the Catalan Health Register for Food Products and Industries was the main requisite. A total of 114 brewers were selected and 102 responses obtained. Such a large representation provides a highly accurate snapshot of the current state of craft beer. The technical report was based on an 89-question online survey using the specialised SurveyGizmo® software.

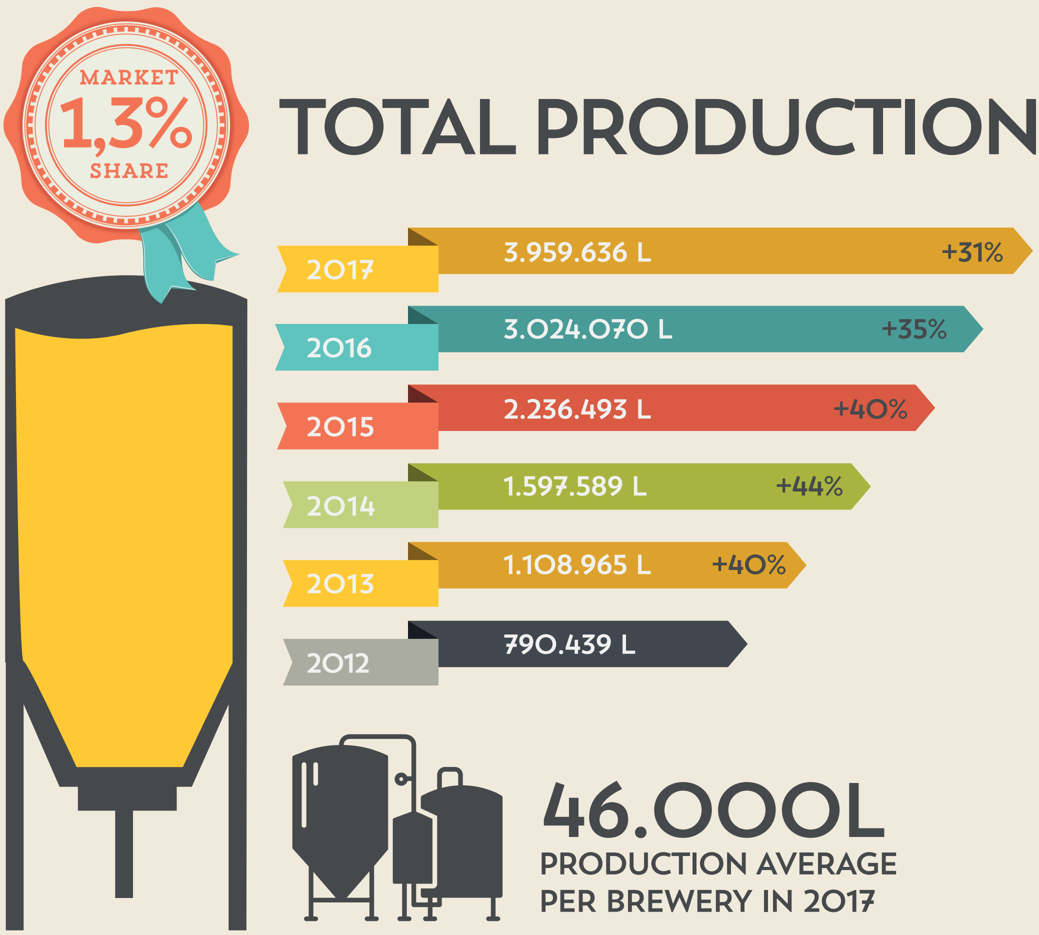


PRODUCTION EVOLUTION

The Catalan craft brewers who answered the survey produced a total of **3.9 million litres** of beer in 2017 – a 31% increase on 2016 production. Although lower than other years, this percentage is still very high.

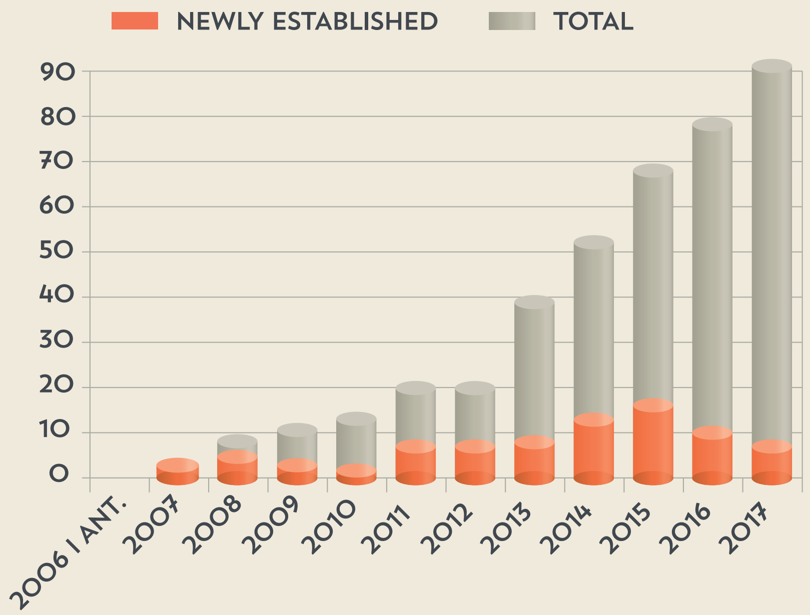
The average production per factory has increased to **46,000 litres** per brewery per year. This considerable 20% increase on 2016 is thanks to 10 new breweries opening this year, and it clearly demonstrates the growth of the craft beer sector in Catalonia.

2017 was a year of growth for the whole of the beer sector with average consumption increasing by more than 2L/person/year to reach a total of 48.2L/person/year. This means that beer consumption in Catalonia in 2017 corresponded to 2.94Mhl, giving craft beer a market share of **1.3%**.

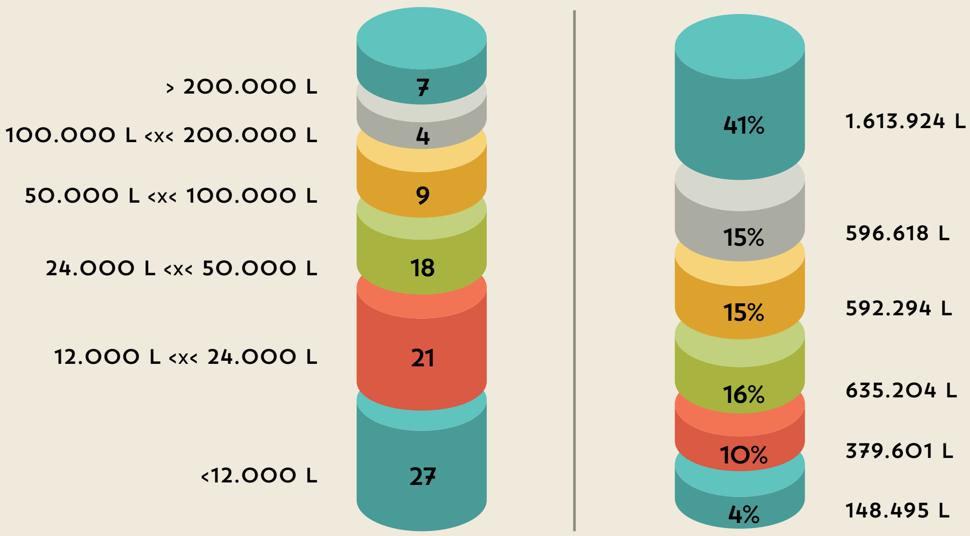


BEER PRODUCTION

CREATION OF BREWERIES



FACTORY SIZE & PRODUCTION



OCCUPATION

CONTRIBUTION TO THE ECONOMY

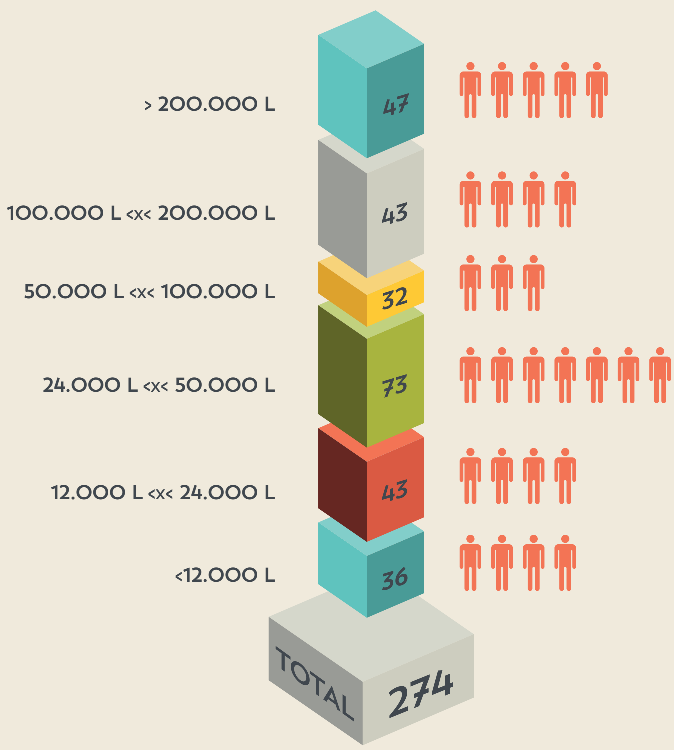
Craft beer in Catalonia has directly created **273 jobs in breweries**. Likewise, we mustn't forget all the other jobs created in the value chain, such as those in the agricultural sector, distribution and final sales. **59 new jobs** (a 27% increase) were generated in 28 different breweries in 2017.

26 brewers indicated that they have had difficulty recruiting specialised staff, mainly in sales.

57 breweries also organise high economic impact **cultural tourism** activities which 27,605 people have participated in this year.

If we divide the total production of craft breweries by the number of workers, we can see that each worker produces 14,500 litres. However, this figure varies considerably depending on the size of the brewery. In the industrial beer sector, each worker generates around 600,000 litres. We can therefore conclude that craft beer generates up to **40 times more jobs** per litre produced throughout the whole country.

JOBS



TYPES OF BEER

2017 1032 DIFFERENT BEER STYLES

In 2017 were brewed 1032 different beer styles. The average is 12 different beers per brewery (normal selection and special beers)

65% BEER BOTTLED AND CANNED

35% BEER STORED IN KEGS

38% BEER AGED IN BARRELS

7% BREWERIES STORE BEER IN CANS

51% LOCAL SALES (>30KM)

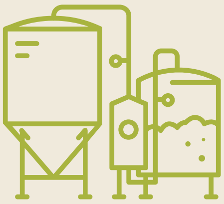
33% LOCAL RAW MATERIALS

47% SPECIALISED ESTABLISHMENTS

18% EXPORTED (713.000L)

BREWERY PROFILES

NANO-BREWERY
LESS THAN 24,000 LITRES/YEAR



48 BREWERIES (56% OF TOTAL)

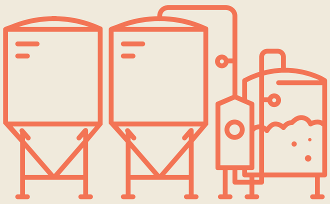
528.000L PRODUCED
(13% OF TOTAL)

1.6 WORKERS / BREWERY

11,000L AVERAGE / BREWERY

40% LOCAL RAW MATERIALS	68% LOCAL SALES (-20KM)	88% USE THE WORD "CRAFT"	THE MAJORITY ARE RURAL BREWERIES

MICRO-BREWERY
BETWEEN 24,000 AND 100,000 LITRES/YEAR



27 BREWERIES (31% OF TOTAL)

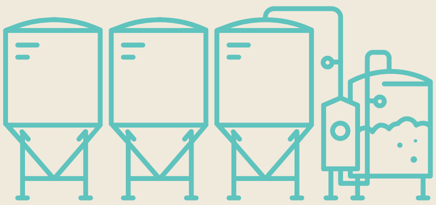
1,227,000L PRODUCED
(31% OF TOTAL)

3.9 WORKERS / BREWERY

45,500L AVERAGE/ BREWERY

26% LOCAL RAW MATERIALS	71% LOCAL SALES (-20KM)	100% ORGANISE TOURIST ACTIVITIES	THE MAJORITY ARE IN TOWNS WITH LESS THAN 20,000 INHABITANTS

SMALL -BREWERY
MORE THAN 100,000 LITERS/YEAR



11 BREWERIES (13% OF TOTAL)

2,210,000L PRODUCED
(56% OF TOTAL)

8.1 WORKERS / BREWERY

201,000L AVERAGE / BREWERY

17 DIFFERENT BEERS ON AVERAGE EACH YEAR	28% OF THE BEER IS EXPORTED	35% LOCAL SALES (-20 KM)

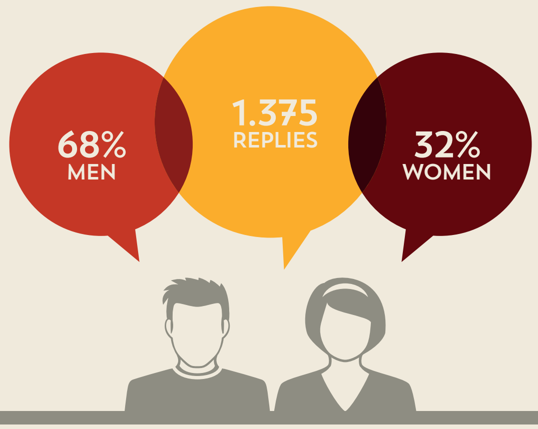
THE FUTURE

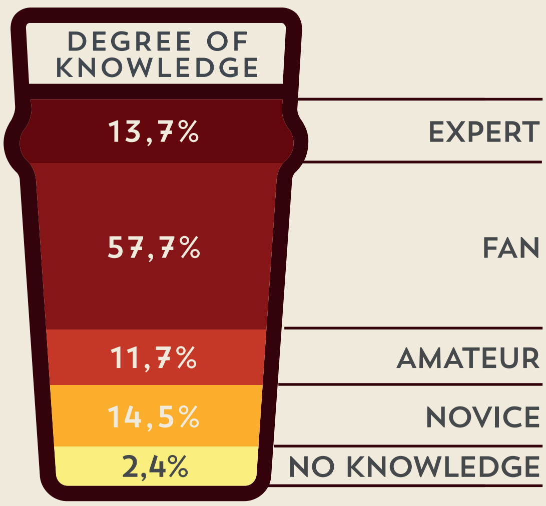
When asked about the importance of the different parts of their beer project, the brewers highlighted four items with a score of more than 8 out of 10: simplifying tax and health procedures, the craft beer concept/brand prestige, tax reduction and the economic independence of beer groups.

In the future, the majority of breweries aspire to increase production, market shares and staff numbers. Nevertheless, they also indicate that they don't believe the future holds selling their products in supermarkets or specialising in a particular style.

FUTURE PROJECTS	YES	MAYBE	NO
INCREASING PRODUCTION	74%	23%	3%
INCREASING EXPORTS	49%	22%	29%
HIRING MORE STAFF	56%	24%	21%
EXPANDING FACILITIES	54%	18%	28%
ATTENDING MORE FAIRS/FESTIVALS	30%	42%	28%
WELCOMING MORE TOURIST ACTIVITY	49%	31%	20%
INCREASING MARKET SHARES	69%	27%	4%
SELLING ON LARGE STORES	24%	24%	52%
SPECIALISING IN FIXED STYLES	17%	34%	49%

GENERAL PUBLIC





BEER CONSUMPTION	2017	2013
OCCASIONAL	10%	41%
1-2 PER MONTH	20%	15%
1-2 PER WEEK	37%	25%
+3 PER WEEK	33%	19%

LOCAL VS IMPORTED BEER	2017	2013
ONLY LOCAL	4,4%	7,4%
MOSTLY LOCAL	41,3%	21,2%
HALF-AND-HALF	42,2%	22,3%
MOSTLY IMPORTED	8,0%	25,7%
ONLY IMPORTED	0,1%	4,3%
DON'T KNOW	4,0%	19,1%

PERCEPTIONS OF CRAFT BEER

BAD	0,1%
POOR	1,0%
ADEQUATE	3,9%
GOOD	37,5%
EXCELLENT	57,5%

CRAFT BEER CONSUMPTION

51% AT HOME

49% HOTELS, RESTAURANTS AND CATERING

PLACE OF PURCHASE

81% SPECIALISED SHOPS

32% SUPERMARKETS

12% ONLINE

REASONS FOR PURCHASE

71% CURIOSITY TO TASTE SOMETHING NEW

66% KNOWING THE BREWER / BREWERY

42% EXPERT STAFF GUIDANCE

19% LABEL DESIGN

10% RATINGS ON BEER-APPS

CRAFT BEER VALUES

82,2% QUALITY PRODUCTS

63,5% LOCAL PRODUCTS

57,2% DIFFERENT PRODUCT STYLES

42,5% INDEPENDENT PRODUCTS

35,8% GASTRONOMIC PRODUCTS

26,0% SUSTAINABLE PRODUCTS

7,0% FASHIONABLE PRODUCTS

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