



We, craft brewers, are those producers who, driven by passion and love for natural beer, study, elaborate and improve the quality and variety of this beverage each day. We are the small entrepreneurs who first began to develop this almost manual art in our country for the last 15 years, and who have the ability to grow this new sector little by little, a sector filled with so much character and capacity for personalization.

Around these micro-companies a specialized trade has been woven (bars, stores, training and tasting spaces, fairs and festivals) which, in turn, has led to the creation of new distribution companies for both the finished product and raw materials, together with producers of these materials, both food and accessories.

The almost spontaneous generation of the sector demanded legal recognition and an association that would oversee the interests of the brewers and the quality of their products, and that would also foment the culture of craft beer. In 2011, the association **GECAN "Gremi d'Elaboradors de Cervesa Artesana i Natural"** (Association of Craft and Natural Beer Brewers) was first established.

And in 2012, accompanying this entirely new industry, came the first edition (and there have now been six!) of the **Barcelona Beer Festival (BBF)**, a beer festival that brings together all the professionals and agents of the sector and presents them to the greater public within the framework of a festive.

Now, in 2017, with the sector already established, we want to lead a call out to people, to curious consumers and beer drinkers in general, to get to know craft beer and to incorporate and love this product in their day to day lives, not only as an exception to their norm.

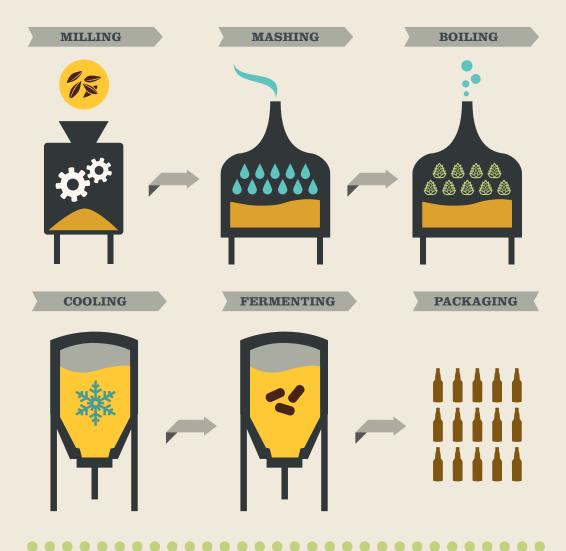
This was when we at **GECAN** and **BBF** first decided to begin the first study of the "**Estat de la Cervesa Artesana a Catalunya**" (the State of Craft Beer in Catalonia), with a large survey of all factories that have sanitary registration in Spain (up to the end of 2016), in order to obtain our own data and thus draw informed conclusions about where we are at, where we are going, and above all, with the aim of bringing the public closer to the wonderful world of craft beer.



## CRAFT BEER PROCESS

It is a beverage resulting from the alcoholic fermentation, by means of selected yeast, of a must from barley malt and/or other grains (minimum 80% of the base load), to which hops are then added followed by a process of elaboration under the control of a master craftsman brewer that consists of at least 6 stages: **grinding**, **maceration**, **cooking**, **cooling**, **fermentation** and **bottling**, all carried out in the same facility. The boilers volume cannot exceed 75 hectolitres and the company is bound by the limitations of a micro-company or small SME.

The human factor prevails over the mechanical in its manufacturing, which results in the obtainment of an individualized final result, something that does not occur when manufacturing is done in large quantities. During its preparation, pasteurization is not allowed, a fact that makes it natural.



### PARTICIPATING BREWERS

This study has been carried out though an analysis of those brewers that produce craft beer in Catalonia. Registration with the **RGSEAA** has been as the founding requisite, and a total of **105 brewers** have been extracted. **95 responses** have been obtained, a high representativeness that provides a highly accurate snapshot of the current state of craft beer.

The study was carried out using an online survey of **82 questions** using the specialized **SurveyGizmo**® software.





Craft beer is widely **distributed throughout the territory**. Data that reinforce this idea includes the finding that **76**% of the breweries are located in municipalities that are not county capitals and **62**% are located in cities with less than 20,000 inhabitants. On the other hand, nearly **20**% of craft brewery projects are **located in rural areas** (populations of less than 2000 inhabitants). The provincial distribution indicates that practically **50**% are located in the province of Barcelona, while the other 50% has a fairly even distribution among the other three provinces.





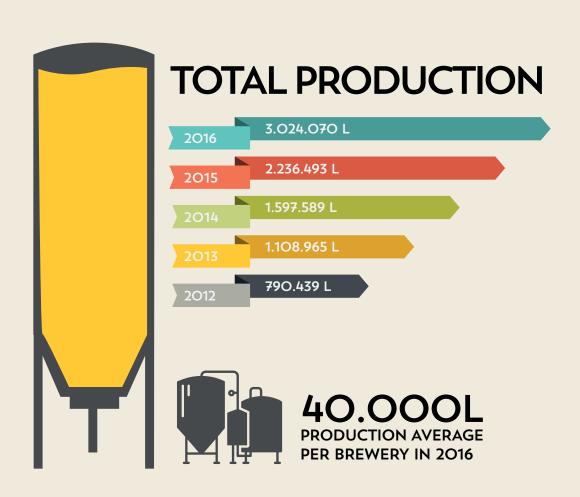




## PRODUCTION EVOLUTION

Adding together the entire production of Catalan craft brewers in 2016, **3 million litres** were produced. The production data from 2012 was also collected and it has been possible to observe a continuous annual growth of **40%**. Within 4 years, the production of the sector has almost quadrupled. The number of factories has also increased significantly, although with more moderate growth rates. The study has shown that it is increased from 39 in 2012, to 105.

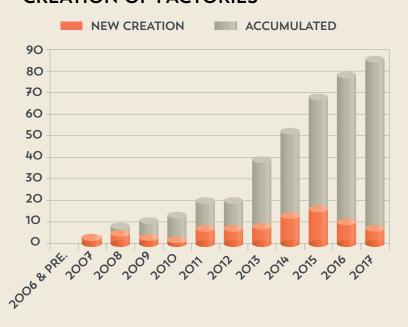
Factory sizes are also significant. Although new factories have been created, the average production per factory has continued to grow. In 2016, this amounts to more than **40,000 litres** per factory/year. Likewise, almost half of these breweries produce less than **24,000 litres** per year and it is the 7 factories producing more than **100,000 litres** that increase the average significantly.



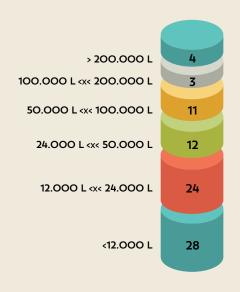




### **CREATION OF FACTORIES**



### **FACTORY SIZE 2016**



# TYPES OF BEER

Recently the sector has been making significant efforts to support the **use** of local raw produce. Currently, one third of the breweries have direct links to the Catalan farming area. New projects linked to hop and barley cultivation territories are emerging, as well as to the industry involved in the transformation of these products (especially malting factories).

One of the characteristics of craft beer is the **creativity and the variety** of brewed beers. In 2016, the breweries as a whole produced **901 different beers**; an endless palette of styles, flavours and aromas.

Craft beer also delves into the roots of tradition. Following one of the international creative axes of the beer sector, being a country with a wine-growing past, there is a lot of experimentation going on (more than a third of the breweries) in the aging of beer in **wooden barrels**.











Craft beer in Catalonia has directly created **214 jobs** that are widely scattered throughout the territory. Analysing the production data, it has been concluded that the process of producing craft beer means that each worker produces an average of **14,000 litres per year**. OR if put another way, every litre of craft beer requires **7 minutes'** attention from the brewers. Compared to beer in general, the amount of time dedicated to craft beer is more than 40 times greater than the time required for the same volume unit of industrially produced beer.



### TIME FOR THE ELABORATION OF 1 BOTTLE



CRAFT BFFR

2,26 MINU PER BOT

PER BOTTLE OF

INDUSTRIAL BEER

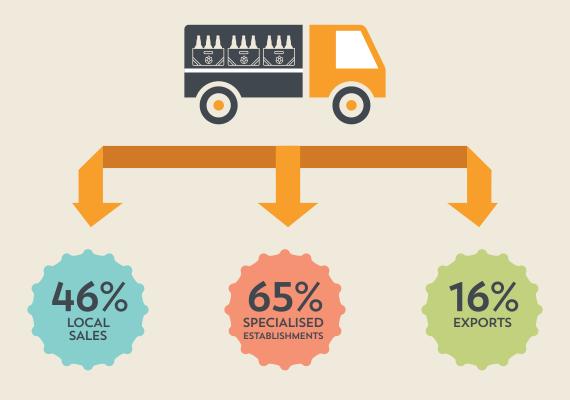
O,O5 PER BOTTLE OF



Analysing the sales of craft beer, the fact that 46% of sales are made locally (less than 30 km from the factory) is significant, while on the other hand, 65% of the product is sold in specialized establishments, which highlights the importance of a point of sale where there is a sense of knowledge and care for the product in an integrated way within the sector, joining forces to enable the diffusion of a good beer culture.

The clearest indicator that Catalonia has become a reference for international beer attraction is the **high volume of exports**. A specialized product with high added value, which means that about **16**% of the beer is exported to **28** different countries.

The brewers **promote proximity**, thus **94.6**% promote guided tours and **89.3**% provide tastings at their facilities. In this way, they become a **beacon of tourist attraction** within their surrounding environment, and partnerships are generated with tourism agencies and other hotels and restaurant establishments in their area.





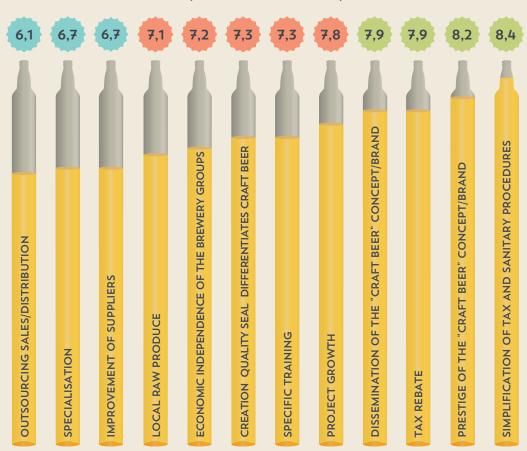
In undertaking self-analyses in terms of the future, the sector is **optimistic**. The vast majority responds affirmatively to three-year time cycles to questions such as "the market share will be expanded", "we will increase production", "we will expand facilities" and "we will hire more personnel".

In order to ensure these are met, the main items to be developed are the "simplification of tax and health procedures", "prestige in the **craft beer** concept/brand" and a "tax rebate". All of these, and the activities that underlie achieving them, must be tackled collectively and are part of **GECAN**'s framework of actions.

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### **3 YEAR PROSPECTS**

(SCORE FROM O TO 10)





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