



2016

THE STATE OF

CRAFT BEER

IN CATALONIA

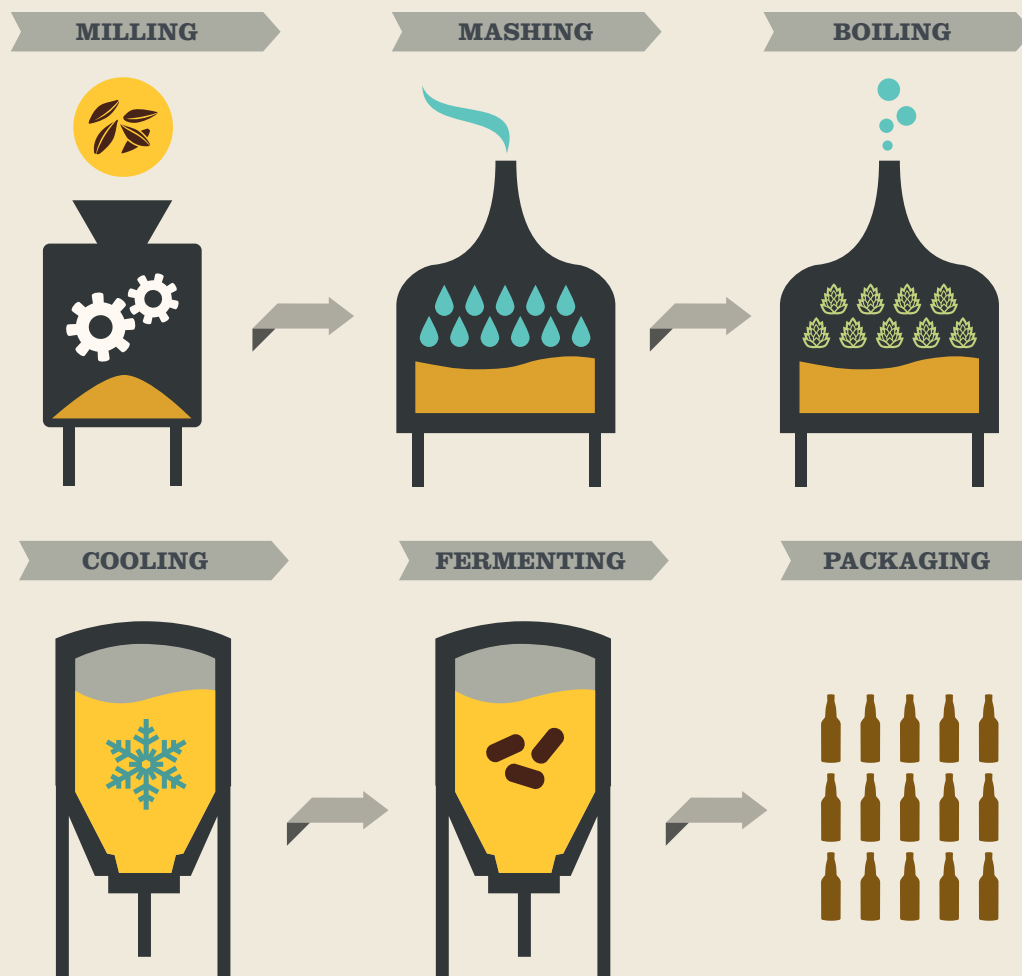
INTRODUCTION



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.

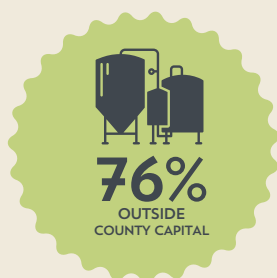


PARTICIPATING BREWERS

This study has been carried out through 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.



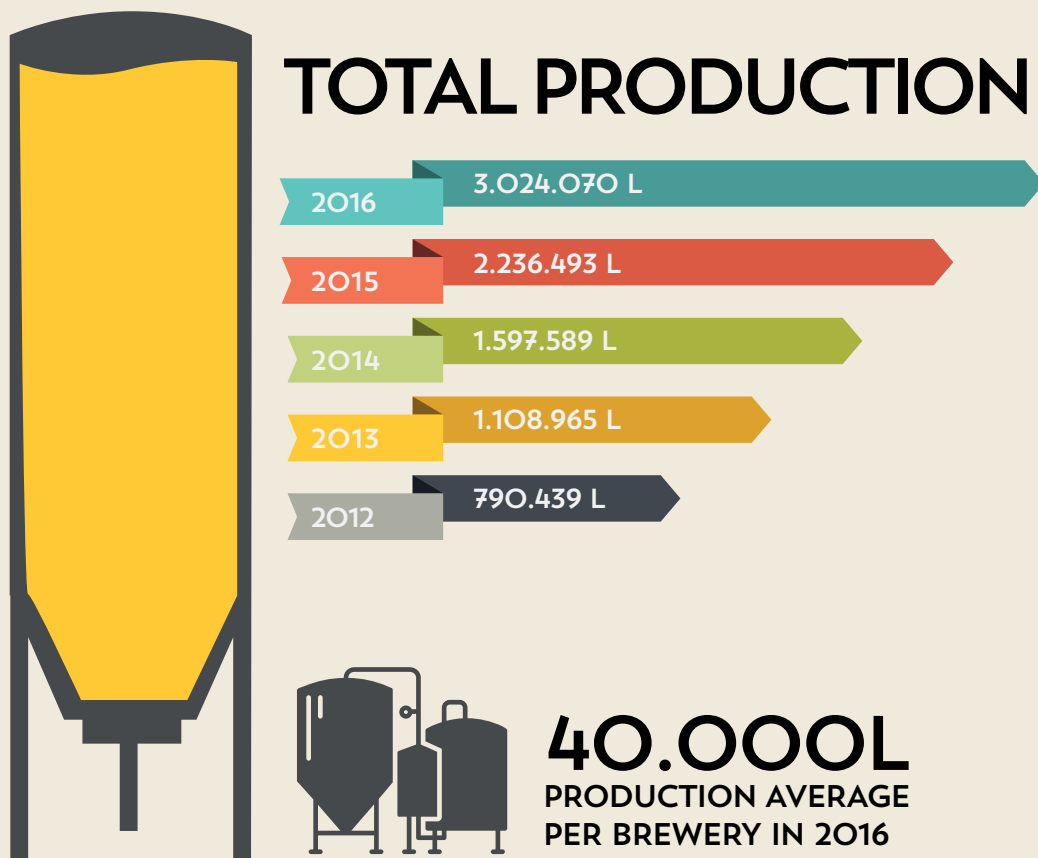
Craft beer is widely **distributed throughout the territory**. Data that reinforce this idea includes the finding that **76%** of the breweries are located in municipalities that are not county capitals and **62%** are located in cities with less than 20,000 inhabitants. On the other hand, nearly **20%** 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.



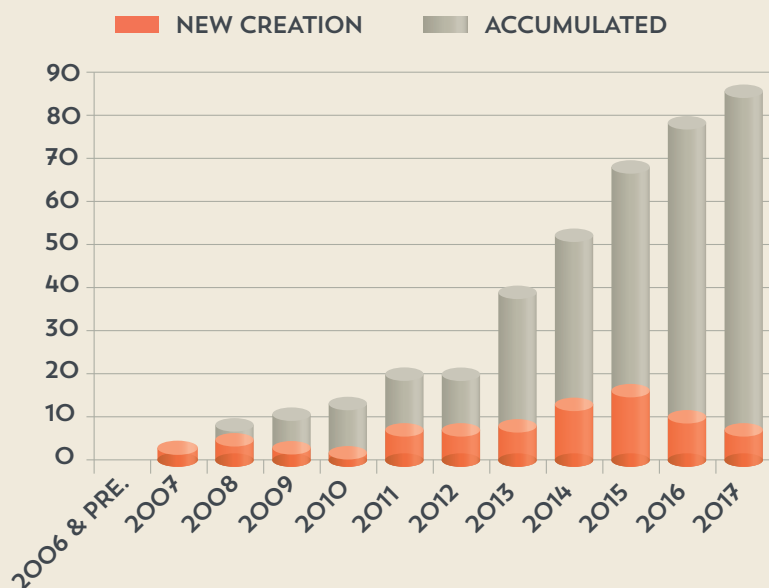
BEER PRODUCTION

CRAFT BEER

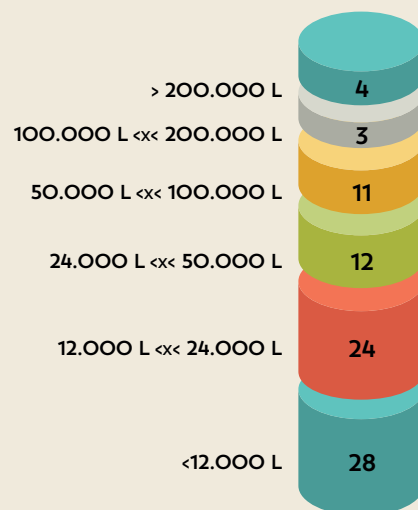


1.08% OF 279 MILLION LITRES
TOTAL BEER CONSUMPTION IN CATALONIA

CREATION OF FACTORIES



FACTORY SIZE 2016

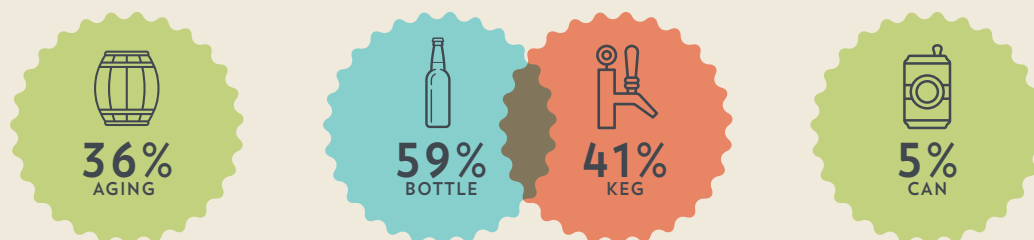


TYPES OF BEER

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**.



OCCUPATION

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.

214 JOBS



TIME FOR THE ELABORATION OF 1 BOTTLE

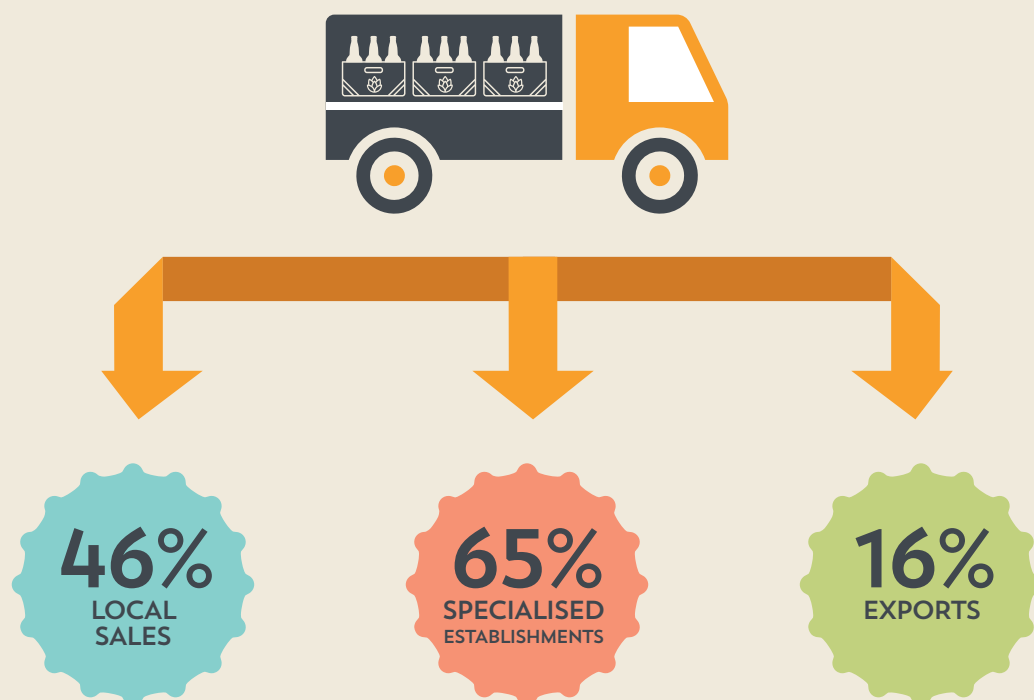


SALES

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.



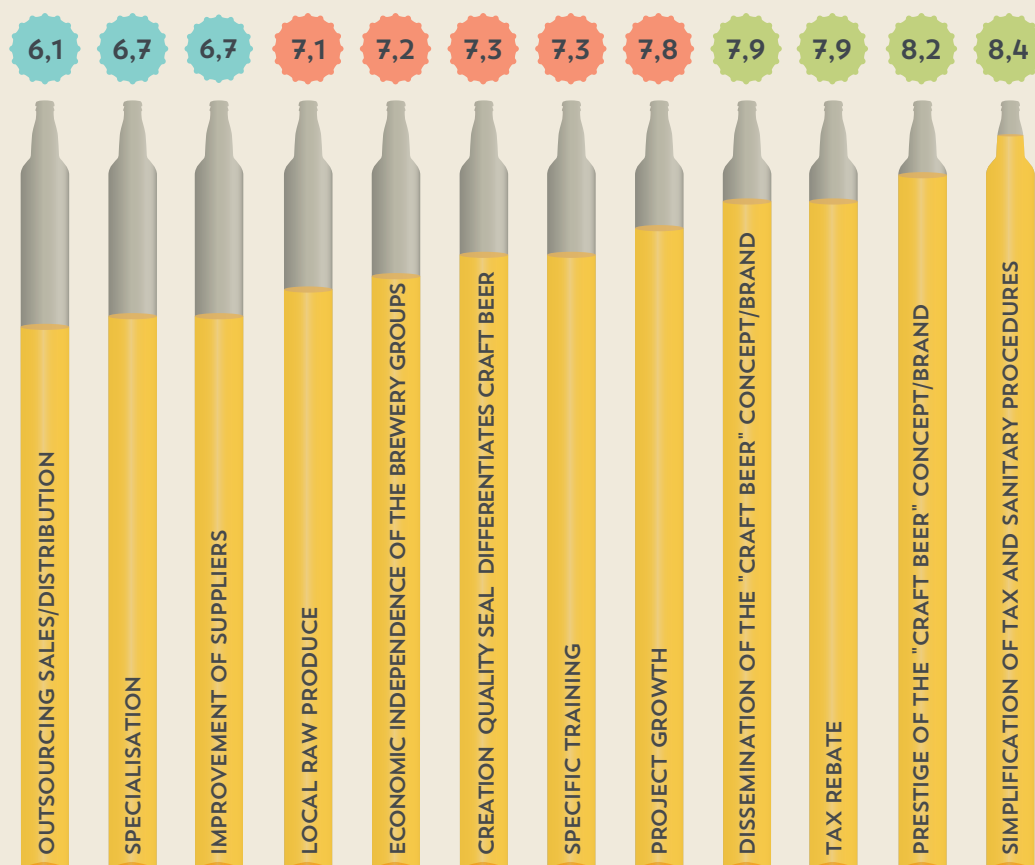
THE FUTURE

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 **GEKAN**’s framework of actions.

3 YEAR PROSPECTS

(SCORE FROM 0 TO 10)





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