STATE OF CRAFT BEER

IN CATALUNYA

2019

INTRODUCTION

This technical report entitled The State of Craft Beer in Catalonia with 2019 data is the fruit of the collaboration between **Barcelona Beer Festival (BBF)** and the **Guild of Natural and Craft Beer Brewers (GECAN)**. For the fourth year running, we have surveyed all the breweries in Catalonia, analysed the data they provided and drawn the following conclusions.

We send a long survey to all of these employees in Catalonia at the end of each financial year. It really is a lot of questions, so we thank everyone for their patience and widespread collaboration. This year, it has been more complicated than ever to find the right moment to contact and encourage everyone involved to take the time to get back to us what with the shadow of the pandemic that loomed over February and March. The temporary postponement of the BBF, the strictest lockdown and the cease of almost all economic activity and production meant that we had to leave the survey on 2019 data for a later date, even though we had a feeling it would be good for production levels and consolidating the sector.

We didn't stop working over lockdown, redesigning the survey to include an emergency section to analyse the impact of COVID-19 on breweries' activities and passing the information up to make their needs and voices heard. We presented this COVID dossier digitally to the relevant authorities who both welcomed us and listened to what we had to say.

And, once more, we were convinced of the need to survey breweries to obtain all the 2019 data we present below to know where we are (or where we were before the COVID nightmare) from a point of view of production as the economic driver of the sector.

We can now talk about consolidation with the 2019 data in hand. There has been a 5% increase overall with the significant creation of new projects. Production has also risen, new jobs have been generated and sales have increased. What's more, and to round off our observations, through virtual talks (we made time!) and a few visits (when lockdown eased), we were able to see that several breweries had made plans to refurbish their facilities, fitted equipment to improve the bottling process or even increased their production capacity.

Everything pointed towards a big 2020, with the sector emerging and drawing strength during a severe economic crisis. Breweries have shown themselves capable of adapting to all types of adversity with a fighting spirit. We know they will make it through this terrible 2020 and, little by little, begin to regain strength and reach the stability they once had. We believe it as much as we need and desire to see it.

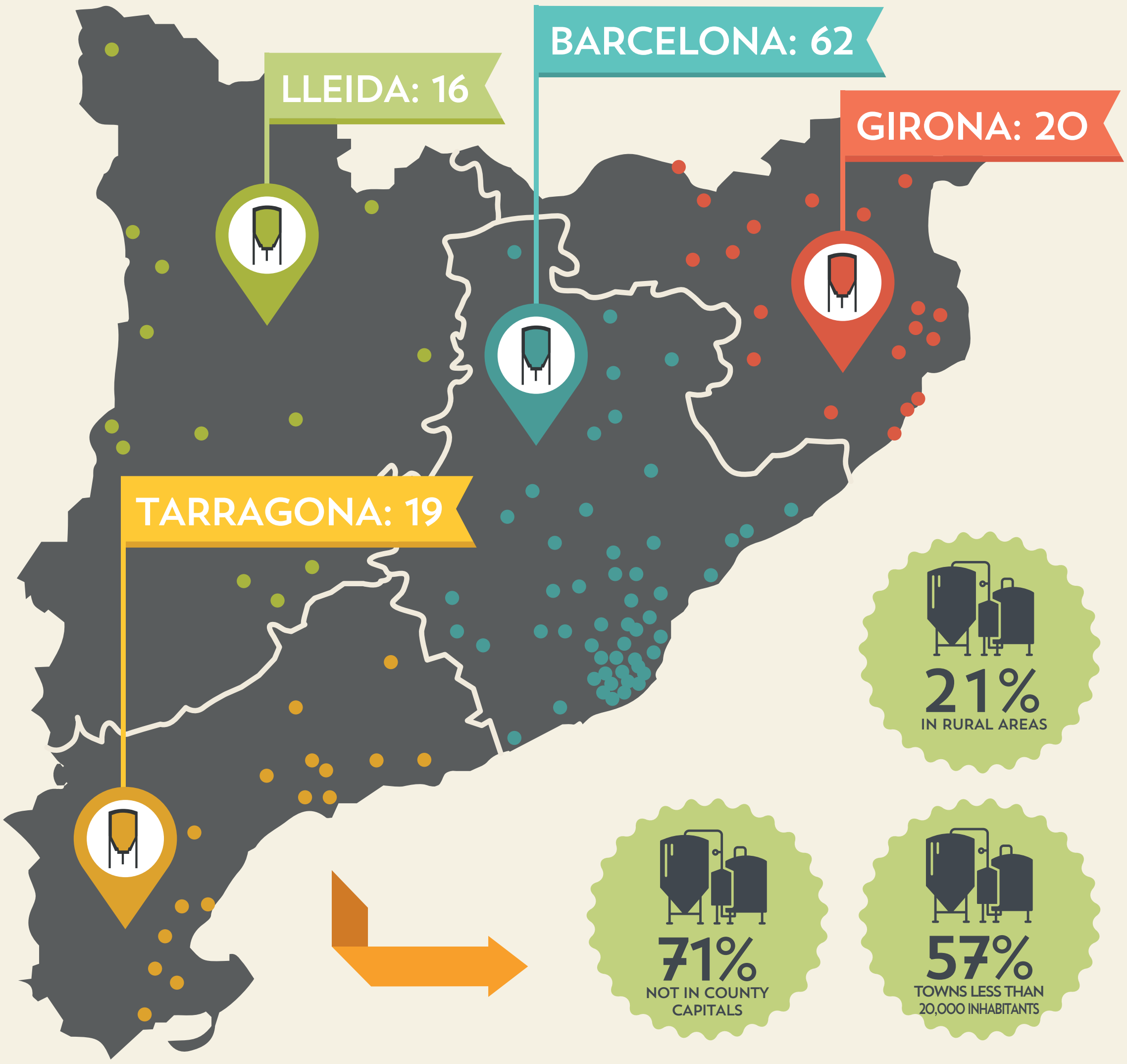
Thank you to everyone for making it possible.

PARTICIPATING BREWERIES

This technical report has been prepared using 2019 production data from craft beer breweries in Catalonia. The RGSEAA (General Health Registry for Food Businesses and Food) and RSIPAC (Catalan Health Register for Food Products and Industries) were used as a basis, as well as small establishments (brewpubs) that mainly sell the beer they produce to the end consumer on the premises.

There is a total of 134 establishments registered (eight more than last year), 17 of which were either no longer active in 2019 (three more than last year) or are producing beer for large breweries rather than craft beer. 107 responses were obtained from the remaining 117 (91% answer rate). Nine of these came from breweries that were not active in 2019, but which may be in future years. For this reason, the report is based on 99 complete responses.

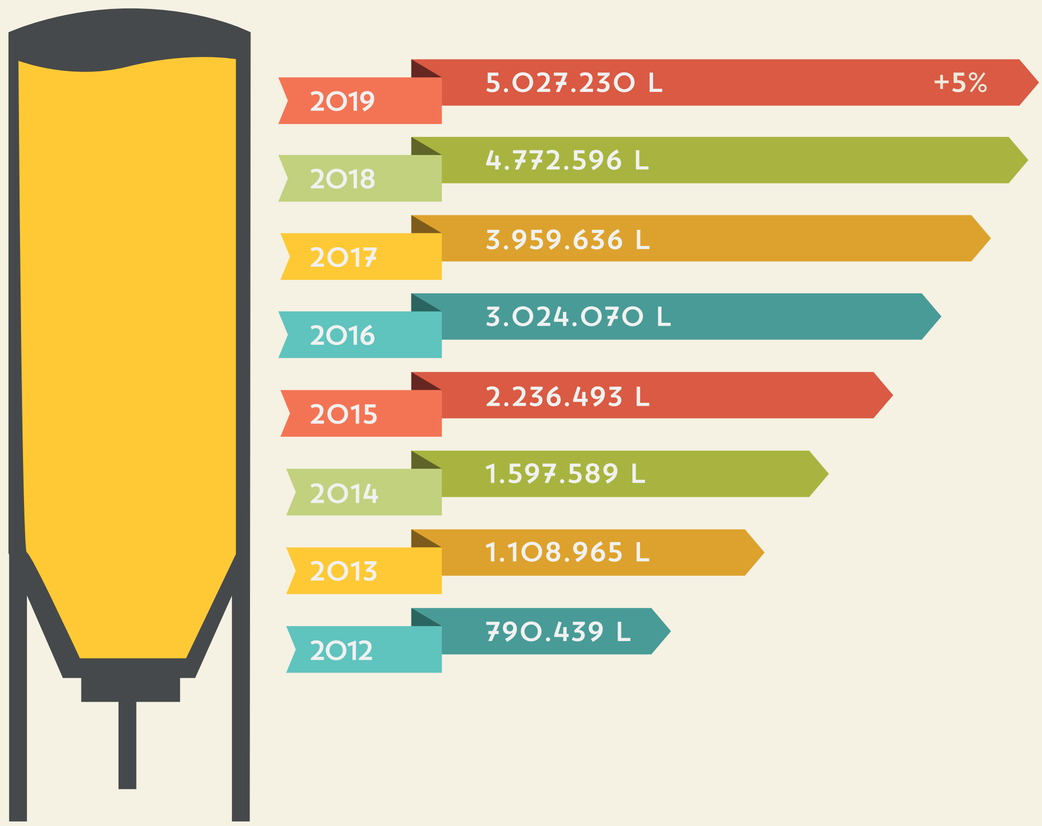
This technical report has been produced from a 105-question online survey using the specialised SurveyGizmo® software.



PRODUCTION

The sector produced a total of **5,027,230 litres** in 2019, representing a **5.3%** increase on 2018 production. 2019 saw the highest rate of brewery creation in several years with a grand total of eight, a figure comparable to the beginning of the craft beer movement ten years ago. The growth of the sector was therefore due to already existing projects becoming stronger.

TOTAL PRODUCTION



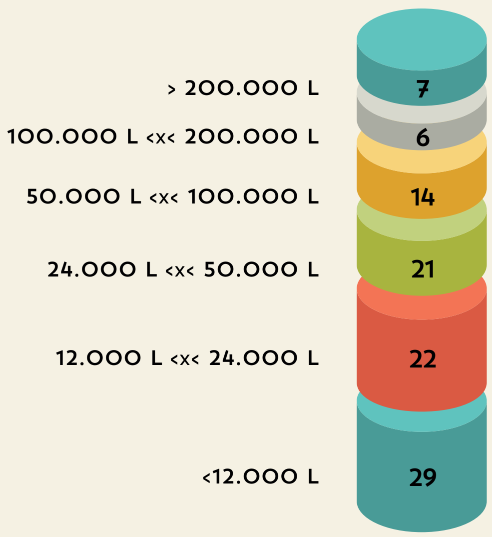
50.780 L

PRODUCTION AVERAGE PER BREWERY IN 2019

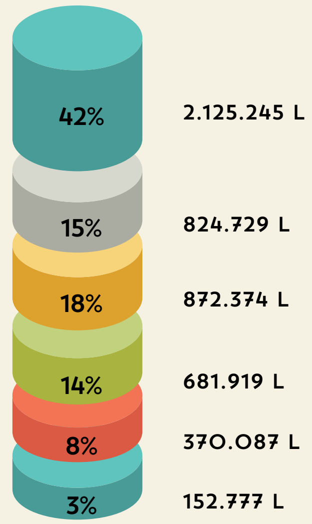
This figure is slightly lower than in 2018, which is explained by the creation of several new breweries.

BREWERIES

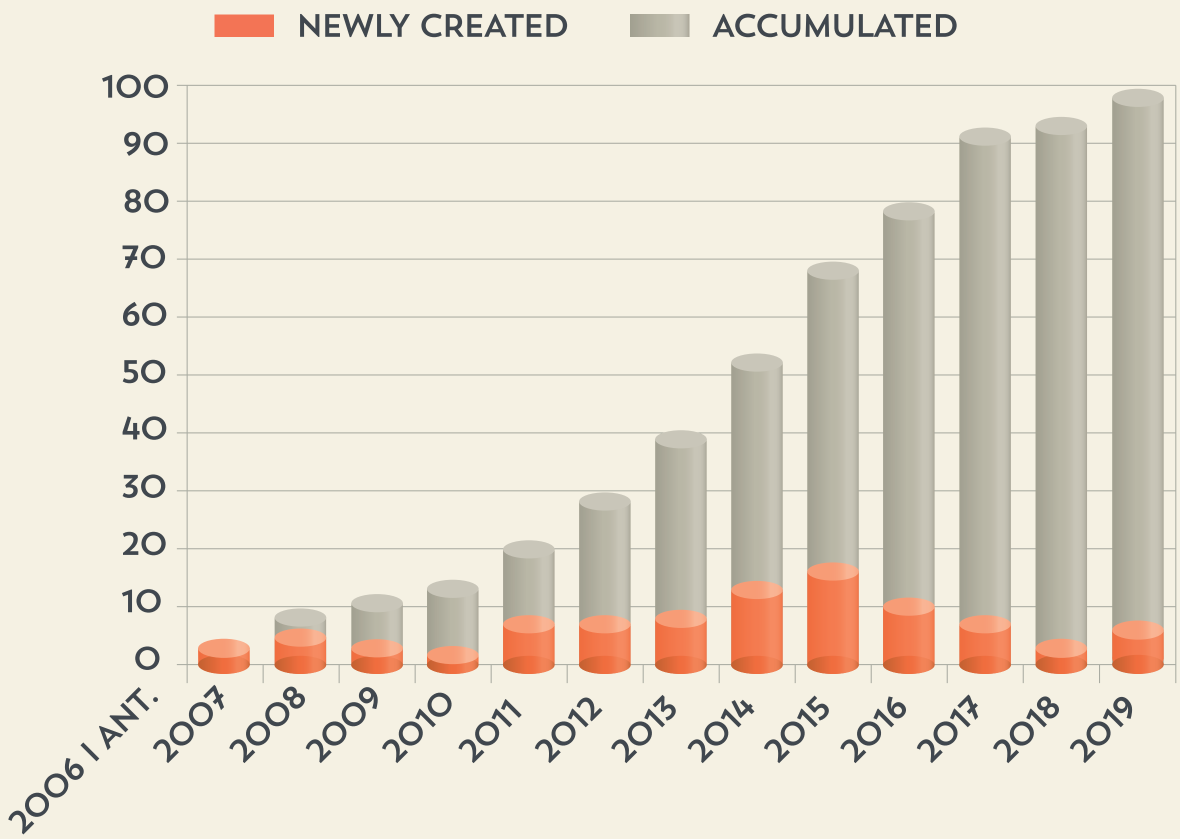
BREWERY GROWTH BY PRODUCTION



Brewery groups according to litres produced



Percentage contributed to total litres produced by each factory.



BREWERIES

NANOBREWERY
LESS THAN 24,000 L PER YEAR

COMBINED TURNOVER OF €4.8 MILLION

TOTAL PRODUCTION OF 522,864 L
(10% PRODUCTION)

117 DIRECT JOBS
(2.3 EMPLOYEES ON AVERAGE)

AVERAGE OF 10,250 LITRES PER BREWERY

51 BREWERIES

MICROBREWERY
BETWEEN 24,000 L AND
100,000 L PER YEAR

35 BREWERIES

TOTAL PRODUCTION OF 1,554,293 L
(31% PRODUCTION)

COMBINED TURNOVER OF €14.3 MILLION

AVERAGE OF 44,400 LITRES PER BREWERY

3,9 EMPLOYEES

SMALL BREWERY
MÉS DE 100.000L ANUALS

13 BREWERIES

TOTAL PRODUCTION OF 2,949,974 L
(59% PRODUCTION)

8.7 EMPLOYEES

AVERAGE OF 226,900 LITRES PER BREWERY

COMBINED TURNOVER OF €27.1 MILLION

PRODUCTION QUOTA & MARKET SHARE

The more than five million litres produced by craft beer breweries in the country make up **0.9%** of the total beer production quota. If we compare the highest value in the craft beer market to that of industrial beer, the €46.2 million turnover makes up a market share of almost **2%**.

0,9% PRODUCTION QUOTA

2% MARKET SHARE

PRODUCTS

2019 1083 DIFFERENT BEERS

1083 different beers were produced in 2019. Each brewery produces an average of 11 different beers (fixed range and special editions).

51%
LOCAL SALES
(-30KM)

40%
LOCAL RAW
MATERIALS

47%
LOCAL SALES IN
SPECIALISED SHOPS

18%
EXPORTS
(905,000 L)

66%
BOTTLED
+ CANNED

34%
ON TAP

51%
BARREL-AGED

25
BREWERIES STORE
IN CANS

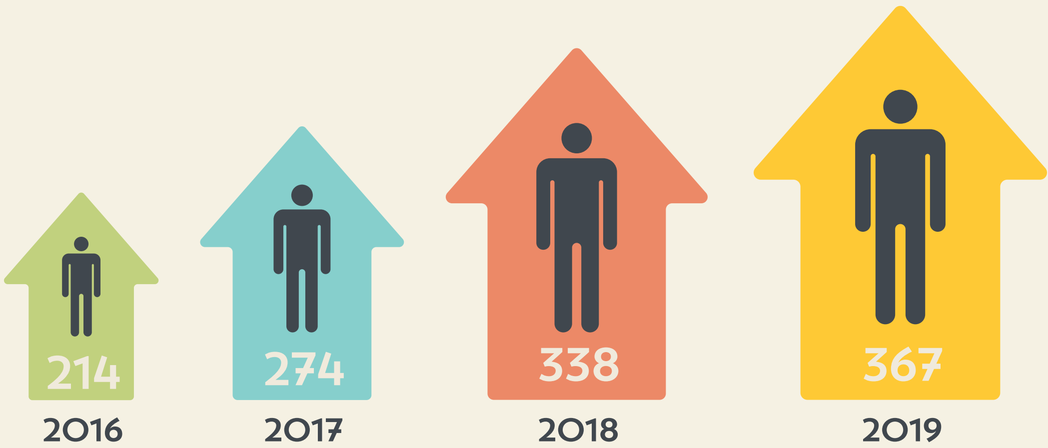
17
USE LOCAL MALTS

26
USE LOCAL HOPS

OCCUPATION

CONTRIBUTION TO THE ECONOMY

Craft beer has created 367 direct jobs in breweries in Catalonia. All of the other occupations in the value chain must be added to this figure, such as those in the agricultural sector, distribution and final sales. 29 new jobs were generated in 23 production centres (+9%).



In the 2018 edition, we introduced a specific question about job positions at breweries. We found two professional profiles that we are continuing to study this year: Production Manager (often referred to as Master Brewer) and Sales Manager (or Commercial Director).

PRODUCTION MANAGER

- 65% of breweries have one.
- Profile: male (90%), normally between the ages of 30 and 40.
- Educated to degree level and vocational training.
- Average annual gross salary of between €20k and €30k.

The average salary increases as the brewery produces more litres.

SALES MANAGER

- 32% of breweries recognise this position. It is a partial duty of one of the employees.
- Profile: male, normally between the ages of 40 and 50.
- Usually educated to degree level.
- Average salary: Less than €20k or between €20k and €30k gross per annum. The average salary increases as the brewery produces more litres.

BEER TOURISM

Beer tourism is becoming increasingly important in Catalonia as is the case in other nearby countries with a longer beer tradition. In this country where enotourism is very popular, interest in craft beer and how it is made is generating a tourist circuit and bringing a lot of value to the region.

FACILITY VISITS **71** BREWERIES

TASTINGS **55** BREWERIES

BEER-MAKING WORKSHOPS **10** BREWERIES

CULTURAL ACTIVITIES **29** BREWERIES

A total of 50,714 people participated in these activities, which means that an average of more than 700 people take part in activities at each brewery every year.

29 HAVE A PHYSICAL SHOP

40 HAVE A TASTING AREA

19 SELL ON THEIR OWN WEBSITE

COVID19

While we were preparing and writing this technical report on the state of craft beer in 2019, the situation of the sector (and society in general) was clearly affected by the health crisis caused by COVID-19. Although the complete data set has not been analysed in this study, we felt it important to include the preliminary conclusions we reached during lockdown [MAY 2020] that will greatly condition economic activity in 2020. For those who are interested in learning more, you can find a version of the COVID 2019 DOSSIER online.

95%
95% OF COMPANIES FURLOUGHED

85%
HAVE STOPPED BUSINESS

77%
HAVE STOPPED PRODUCTION

84%
84% SEE COMPANY VIABILITY JEOPARDISED

DOWNLOAD DOSSIER COVID19

GREMI D'ELABORADORS DE
CERVESA ARTESANA I NATURAL

gecan@gecan.info
www.gecan.info

BARCELONA BEER FESTIVAL

info@barcelonabeerfestival.com
www.barcelonabeerfestival.com

Oh my Beer DESIGN www.ohmybeer.cat