



STATE OF
CRAFT BEER

IN CATALONIA
2020



INTRODUCTION

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This technical report that we call the State of Craft Beer in Catalonia is reaching its **5th edition** - we have now been analysing this essential data to get a true snapshot of our sector and putting the spotlight on producers for five years running.

These five years of data collection give us a perspective that we did not have in the past, and this edition will show us graphics that make some of the key aspects and indicators of the evolution of our breweries very understandable.

As always, this work has been carried out in joint collaboration between the **Barcelona Beer Festival (BBF)** and the **Guild of Natural and Craft Beer Brewers (GECAN; Gremi d'Elaboradors de Cervesa Artesana i Natural)** and we have, once again, involved all the breweries producing craft beer in Catalonia that answered a long survey about the data from a complicated 2020 generously and in mass, highlighting the need for and usefulness of this wonderful tool that we now have at our disposal.

We must not forget that the pandemic has been a great conditioning factor and has affected many of the numbers that we are presenting today. After all, the greatness of beer is its ability to always show up in moments of social intensity, which have been very limited this year.

But, if Catalan craft beer breweries have shown us one thing, it is their capacity to adapt, resist and fight back with strength, union and companionship, with supportive projects from deep within and with joint motivation to move forwards together, making sure as a group that no one is left behind.

We offer you this **technical report of the State of Craft Beer in Catalonia** as a tool to explain and defend our position as a sector generating wealth, culture, work and energy.

Stay healthy, keep up the good work and see you soon!



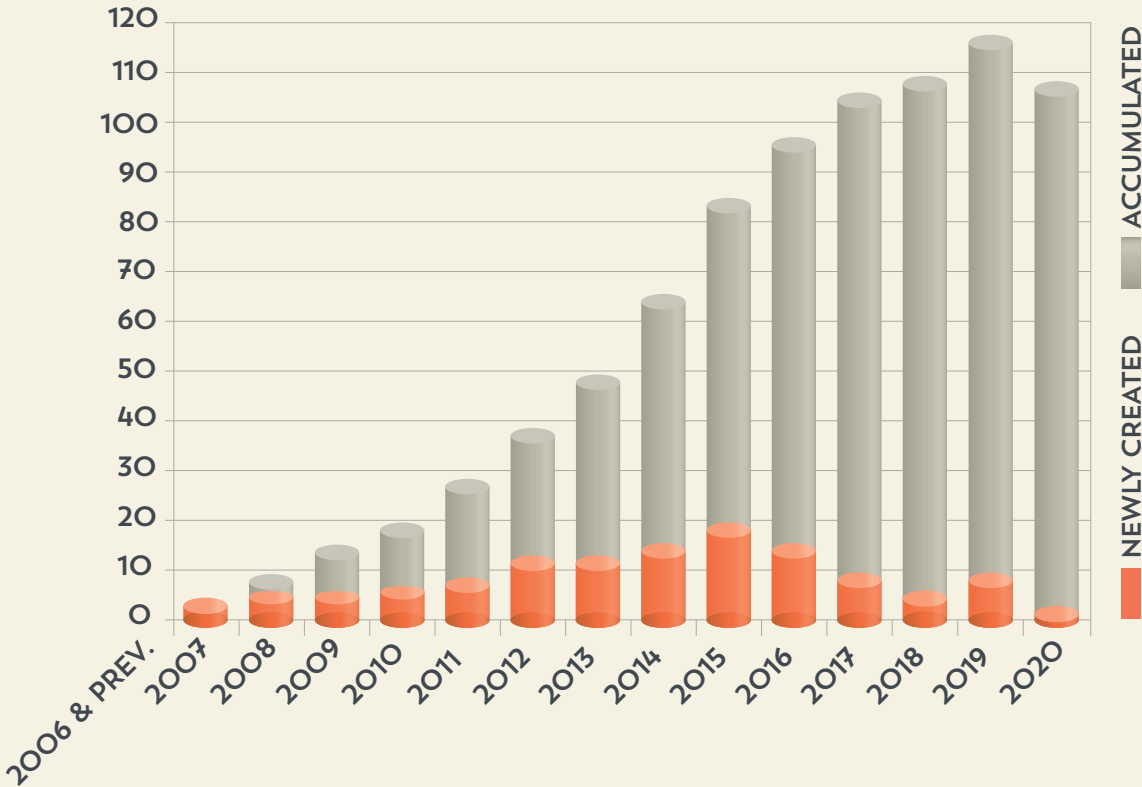
PARTICIPATING BREWERIES

This technical report has been written using 2020 data from all breweries producing craft beer 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 are currently **107** craft beer breweries operating in Catalonia, which represents 10 less than last year. 95 breweries responded to the survey (an **89%** response rate), of which five were not active. For this reason, this year's report is based on 90 complete responses.

The technical report was carried out through a 112-question online survey using the specialised online survey platform Survio.

This is the first year that the brewery balance (newly created vs. closed) has come out negative. Only one new brewery has opened, whereas eleven have closed. The COVID-19 health crisis has hit small companies in the sector especially hard.



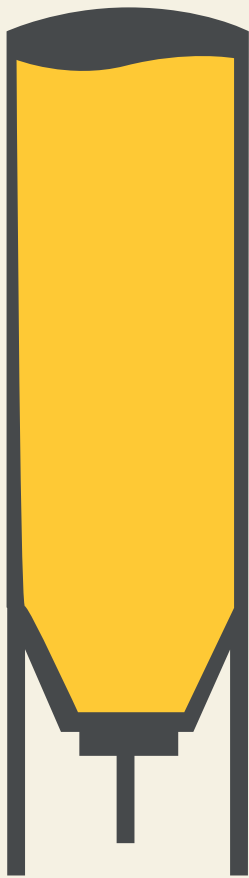
107
OPERATIONAL
BREWERIES

11
PROJECTS CLOSED
N 2020

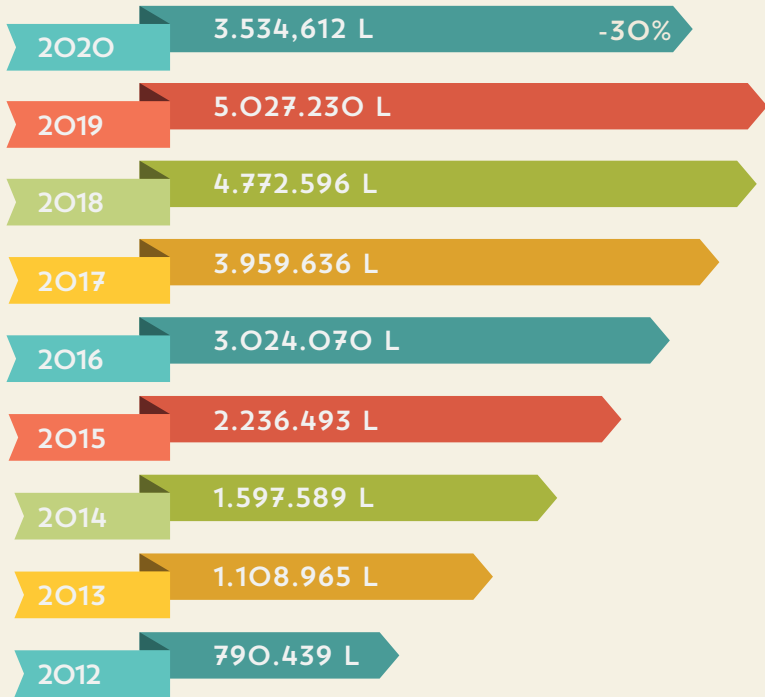
89%
RESPONSE RATE

PRODUCTION

The sector produced a total of **3,534,612 litres** in 2020, representing an almost 30% decrease on the 2019 production of 5 million litres. The health and social crisis caused by COVID-19 is clearly the cause of such a decrease in production. Months of lockdown and preventive measures in the hospitality industry (especially severe in Catalonia) have put small breweries at a large disadvantage.



TOTAL PRODUCTION



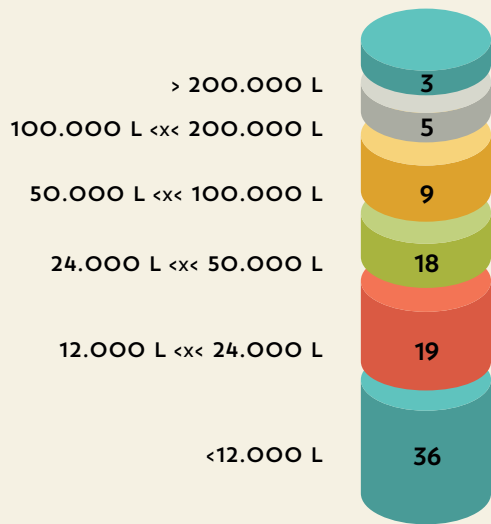
39.270 L AVERAGE PRODUCTION BY BREWERY IN 2020

Breweries made an average of 39,270 litres each, representing a 23% decrease on 2019. Compared to the 30% drop in production, this indicates that the impact has been greater on breweries producing higher volumes.

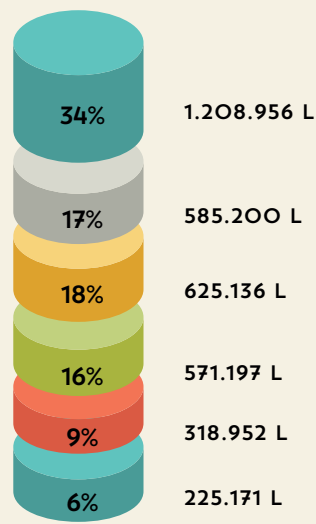


BREWERIES

BREWERY GROWTH BY PRODUCTION



Number of breweries divided by production volume



Percentage contributed to the total by each group of breweries

VARIATION IN THE NUMBER OF BREWERIES DIVIDED ACCORDING TO PRODUCTION VOLUME.

	2016	2017	2018	2029	2020
> 200.000 L	4	7	7	7	3
100.000 L <X< 200.000 L	3	4	5	6	5
50.000 L <X< 100.000 L	11	9	12	14	9
24.000 L <X< 50.000 L	12	18	20	21	18
12.000 L <X< 24.000 L	24	21	22	22	19
<12.000 L	28	27	27	29	36

PRODUCTS

2020 ↘ 979 DIFFERENT BEERS

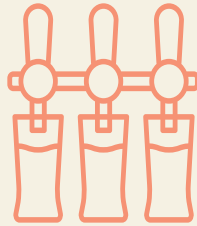
979 different beers were made in 2020. The average is 11 different beers. This figure has not changed significantly from 2019.



53%
LOCAL SALE
(-30KM)



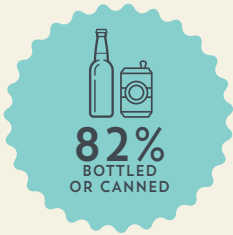
39%
LOCAL RAW
MATERIALS



47%
LOCAL SPECIALISED
SALES



17%
EXPORTS
(617.000L)



82%
BOTTLED
OR CANNED



18%
STORED
IN BARRELS



18
USE LOCAL
MALT



28
USE LOCAL
HOPS

68 breweries (75%) had an online shop in 2020, against just 19 the previous year. The situation of the pandemic has led them to seek this direct sales channel. Of the breweries that sell online, sales by this means represented **8%**.



MARKET AND PRODUCTION SHARE

The more than 3.5 million litres produced by craft beer breweries in Catalonia represent **0.7%** of the total beer production share. Taking into account the higher market value of craft beer compared to industrial beer, the turnover of €37.1 million represents a market share of **1.5%**. If we compare the 2019 figures to those of this year, it is clear that the economic crisis caused by COVID-19 has hit small breweries very hard.



0,7% PRODUCTION SHARE



1,5% MARKET SHARE

OCCUPATION

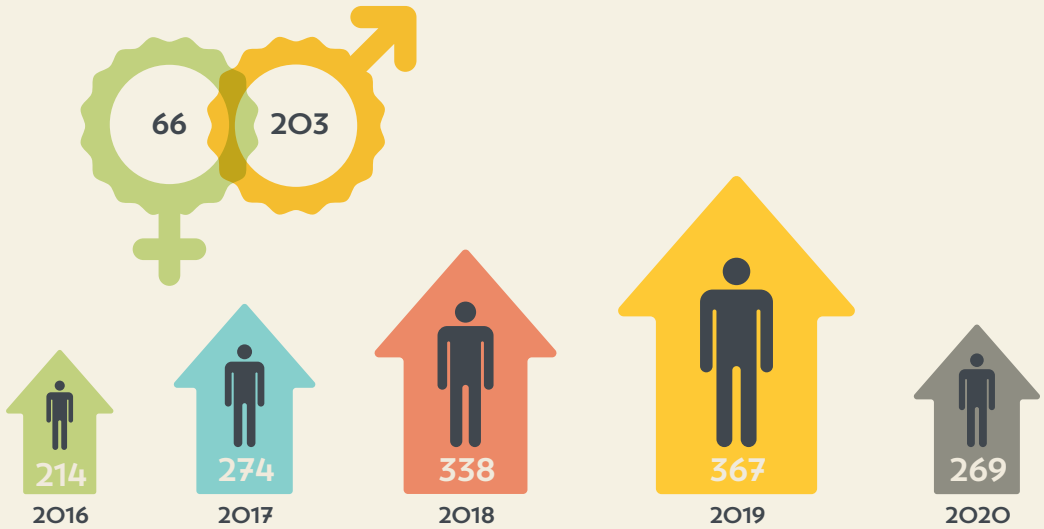
CONTRIBUTION TO THE ECONOMY

Craft beer in Catalonia generates 269 direct jobs in breweries. 98 jobs have been lost compared to 2019, showing a 26% decrease in the capacity to generate jobs.

One third will be difficult to recover as they correspond to breweries closing, but we hope others will be recovered as restrictions ease.

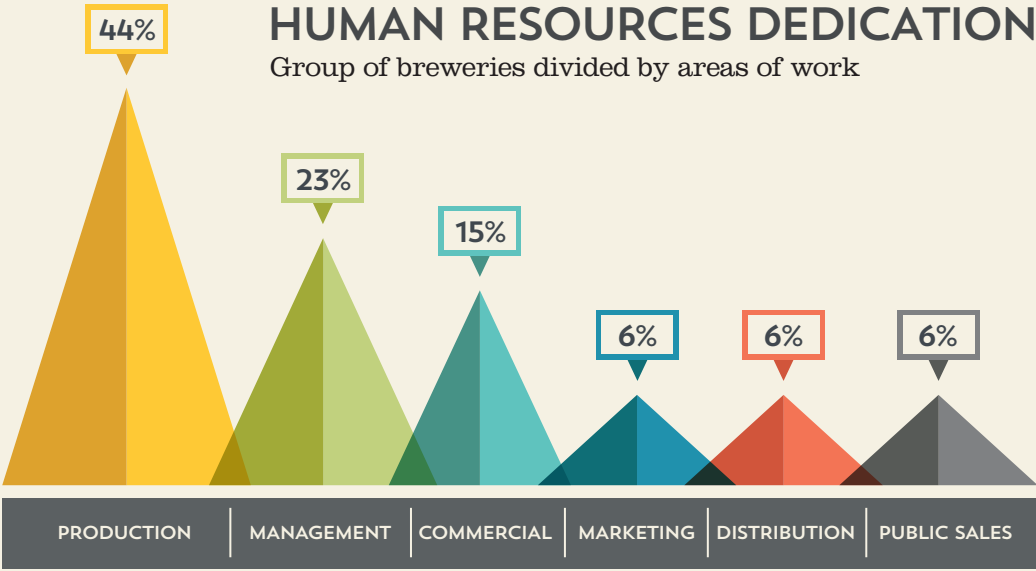
All the other occupations in the value chain, such as in the agricultural sector, distribution and final sales, must also be added.

66, or **25%**, of the 269 jobs belonged to women, representing the highest value since we have been producing the report. This is a positive trend on the long journey to equality in the workplace.



HUMAN RESOURCES DEDICATION

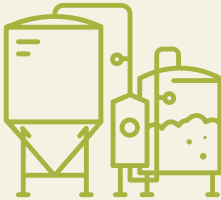
Group of breweries divided by areas of work



BREWERIES

NANOBREWERY

LESS THAN 24,000 L PER YEAR



TURNOVER OF €5 MILLION

TOTAL PRODUCTION OF 544,123
(15% PRODUCTION)

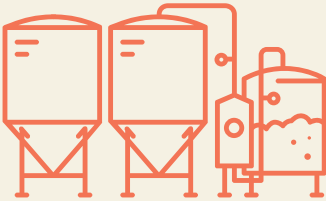
116 DIRECT JOBS
(2.1 PEOPLE ON AVERAGE)

9890 LITRES PER BREWERY ON AVERAGE

 **55 BREWERIES**

MICROBREWERY

BETWEEN 24,000L & 100,000L PER YEAR



27 BREWERIES

TOTAL PRODUCTION OF 1,196,333
(34% PRODUCTION)

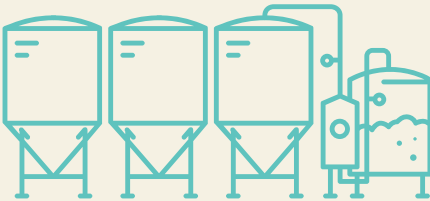
TURNOVER OF €10.3 MILLION

44,310 LITRES PER BREWERY ON AVERAGE

 **95 DIRECT JOBS** (3.5 PEOPLE ON AVERAGE)

SMALL BREWERY

MORE THAN 100,000 L PER YEAR



8 BREWERIES

TOTAL PRODUCTION OF 1,794,156
(51% PRODUCTION)

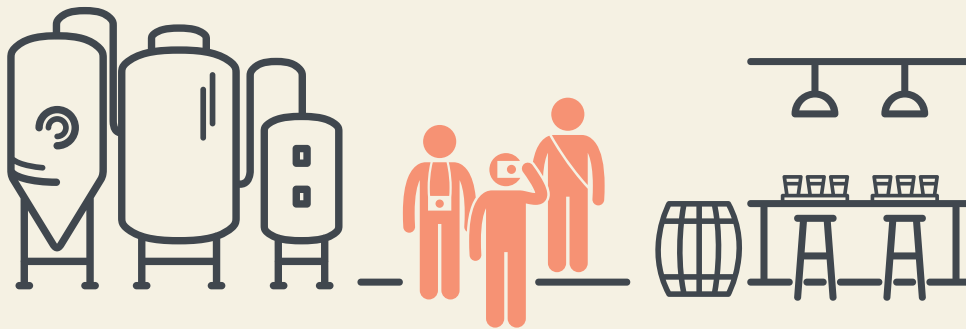
58 DIRECT JOBS
(7.3 PEOPLE ON AVERAGE)

TURNOVER OF €13.3 MILLION

 **224,270 LITRES PER BREWERY ON AVERAGE**

BEER TOURISM

Beer tourism is key to the future of the sector. In a country where wine tourism is so popular, interest in craft beer and how it is made is creating a whole tourist circuit and bringing lots of value to the area. This trend has clearly been on the rise over recent years. Nevertheless, the pandemic has put the brakes on it this year, and we hope beer tourism will recover as quickly as possible.



A total of **15,125** people participated in these activities, which only represents **30%** of the figures from 2019. This figure is coherent with several months of lockdown and even more without tourism.



COVID-19

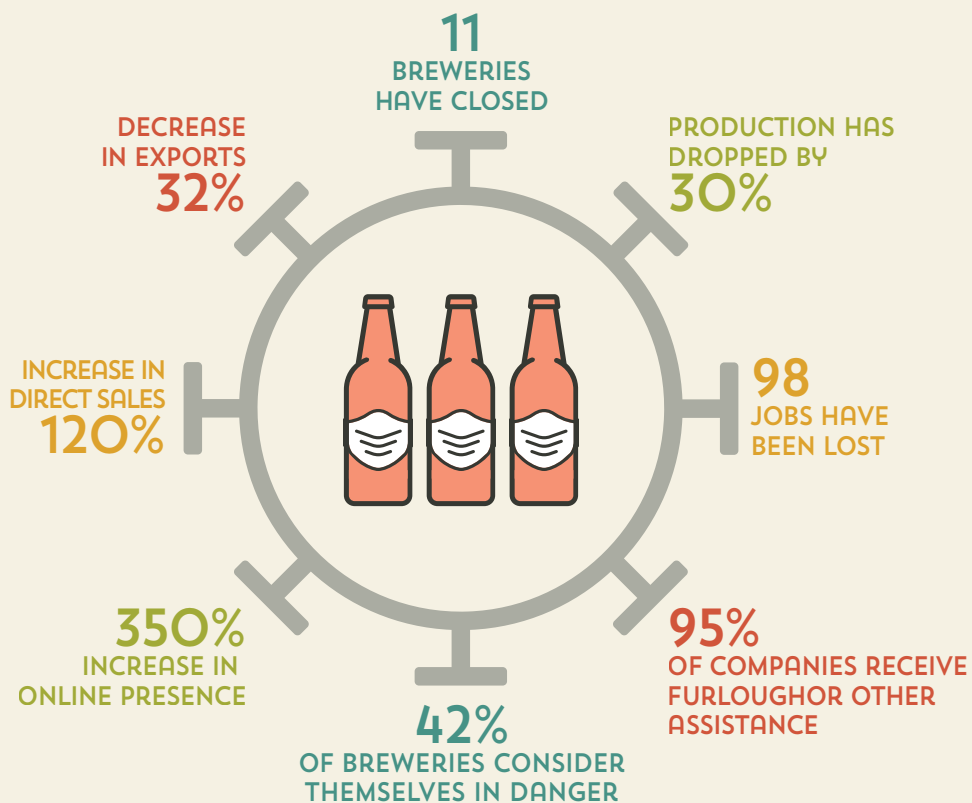
The COVID-19 health crisis that began in March 2020 and the subsequent economic crisis caused by lockdowns and social distancing has been very disruptive to society in general and to the craft beer sector in particular, and we must bear it in mind to better understand this technical report.

After the first three months of lockdown (June 2020), we elaborated a first dossier to measure the impact of the crisis which produced devastating data and suggested that this would be a very hard year for the sector. You can consult it here.



Download the Covid Craft Beer 2020 dossier at:
www.barcelonabeerfestival.com/dossier-covid-cervesa-artesana-2020

Below, we present the main data showing its effects on the sector this year:





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