

THE BI-ANNUAL PUBLICATION OF THE BREWERS OF EUROPE

BREWUP

MAGAZINE ^D

ISSUE 3 - MAY 2022

INSIDE THIS ISSUE:

- **NEW EU AGRICULTURAL POLICY, WAR IN UKRAINE, RISING ENERGY PRICES... HOW WILL IT IMPACT THE BREWING SECTOR?**



THE BREWERS OF EUROPE



CONTACTS

The Brewers of Europe
 Rue Caroly 23 - 25 1050 Brussels Belgium
 Phone: +32 2 551 18 10
 info@brewersofeurope.org

OUR WEBSITES

www.brewup.eu
 www.brewersforum.eu
 www.brewersofeurope.eu
 www.brewing4.eu
 www.reconnect.beer

FOLLOW US

	brewup.eu		Brewersforum		TheBrewersofEurope
	brewup		the-brewers-of-europe-forum		the-brewers-of-europe
	@brewup_eu		@ForumBoe		@brewersofeurope
	@brewupeu		@brewersforum		

EDITOR

Mathieu Schneider



FOREWORD	5
140TH, 65TH AND 30TH ANNIVERSARIES OF MILESTONES OF THE BULGARIAN BEER SECTOR	6
INTERVIEW WITH THE UNION OF BREWERS IN BULGARIA'S PRESIDENT AND EXECUTIVE DIRECTOR / ЗА ПРАЗНИЦИТЕ И ДЕЛНИЦИТЕ НА БЪЛГАРСКИТЕ ПИВОВАРИ, БИРАТА И ОЩЕ НЕЩО.....	7
140 YEARS TOGETHER: KAMENITZA SUPPORTS THE COMMUNITY IN ITS HOMETOWN PLOVDIV / 140 ГОДИНИ ЗАЕДНО: КАМЕНИЦА ПОДКРЕПЯ ОБЩНОСТТА В РОДНИЯ СИ ПЛОВДИВ	10
SUPPORTING FOOTBALL / ПОДКРЕПА КЪМ ФУТБОЛА	11
IMPROVING CITY ENVIRONMENT / ПОДОБРЯВАНЕ НА ГРАДСКАТА СРЕДА.....	11
ENRICHING PLOVDIV SOCIAL AND CULTURAL LIFE / ОБОГАТЯВАНЕ НА ОБЩЕСТВЕНИЯ И КУЛТУРЕН ЖИВОТ НА ПЛОВДИВ.....	12
INTERVIEW WITH BBC STORYWORKS COMMERCIAL PRODUCTIONS ON THE BREWING AMBITION SERIES.....	15
KEEPING TRADITIONS ALIVE WITH EU-FUNDING.....	20
BREWERS FORUM AND 38TH EBC CONGRESS 2022 – PROGRAMME OVERVIEW	22
BREWERS FORUM NAMED OFFICIAL PARTNER EVENT OF THE EU GREEN WEEK 2022 ..	26
NEW EU AGRICULTURAL POLICY, WAR IN UKRAINE, RISING ENERGY PRICES... HOW WILL IT IMPACT THE BREWING SECTOR?	28
CZECH BEER CULTURE IS APPLYING FOR INSCRIPTION ON THE UNESCO WORLD HERITAGE LIST / ČESKÁ PIVNÍ KULTURA SE UCHÁZÍ O ZAPSÁNÍ NA SEZNAM DĚICTVÍ UNESCO	36
SUSTAINABILITY	38
DANISH DEPOSIT AND RETURN SYSTEM TURNS 20	38
KAMENITZA WITH MORE SUSTAINABLE PET BOTTLES / КАМЕНИЦА С ПО-УСТОЙЧИВИ ПЛАСТМАСОВИ БУТИЛКИ	43
CAN BLOCKCHAIN BOOST THE CRAFT BREWING INDUSTRY?.....	44
NEWS FROM BULGARIA	49
HUMAN RESOURCES ARE THE MOST VALUABLE CAPITAL FOR BULGARIAN BREWING INDUSTRY / ЧОВЕШКИТЕ РЕСУРСИ СА НАЙ-ГОЛЕМИЯТ КАПИТАЛ ЗА БИРЕНАТА ИНДУСТРИЯ В БЪЛГАРИЯ.....	49
KAMENITZA SUPPORTS NEW DADS IN BULGARIA / КАМЕНИЦА ПОДКРЕПЯ НОВИТЕ БАЦИ В БЪЛГАРИЯ.....	51





FOREWORD

Dear Brewers,
Dear Friends,

When prefacing the last edition of BrewUp Magazine I pointed out the many difficulties linked to energy prices and their impact on breweries and the supply chain. Unfortunately, the situation has worsened for many of us, starting with the people of Ukraine whose country has been further invaded by Russia and are facing a horrible human situation. Our thoughts are with them and with all the breweries in Europe who, amongst many other concrete initiatives, have shifted parts of their operations to provide assistance to Ukrainian refugees by offering first aid, financial and in-kind donations as well as sending food and beverages to Ukraine directly.

The consequences of the war and the economic sanctions on both sides will be far-reaching for the brewing sector as both Ukraine and Russia are major cereal producers and exporters. Also, energy prices are pursuing their escalation, with knock-on effects on the price of fertilizers, adding up to many question marks posed by the new Common Agricultural Policy, EU Farm to Fork Strategy's implementing objectives and the EU Green Deal. These challenges are intrinsically linked to both Europe's and brewers' sustainability agenda. Such important topics are thoroughly developed in this edition.

Europe's brewers are brave people and want to continue to believe in a bright future whilst facing the above, very big challenges. More than ever, we need to stand shoulder to shoulder. We need to nurture a positive mindset. In 2021, the Union of Brewers in Bulgaria duly celebrated important anniversaries. This edition reports on the events related thereto. Another very positive and important note is that 2022 will see brewers from across Europe and the world re-uniting in person at the 4th Brewers Forum and 38th EBC Congress in Madrid, Spain, between 29 May and 1 June. After months of alternate lockdowns and restrictions during which face-to-face events could not be held, the brewing community will happily occupy Madrid's Palacio Municipal IFEMA for three intense days of conferencing and exhibition, with unique opportunities for showcasing the latest research and innovations and allowing brewers to speak with each other and exchange experiences. Participants can expect a lot of knowledge sharing, many opportunities to meet with suppliers at the exhibition as well as occasions to discuss solutions on many fronts, not only in conference rooms, but also during coffee breaks, luncheons, social events and technical visits. The 4th Brewers Forum & 38th EBC Congress will coincide with the 100th anniversary of Cerveceros de España, the Spanish Brewers Association, and the 75th anniversary of the European Brewery Convention (EBC). EBC was founded in 1947, just after World War II, by brewers who understood that the only way for the brewing sector to be able to face such immense challenges as reconstruction at large and the considerably reduced availability of raw materials, was by getting together. This meant putting resources in common, sharing experiences, knowledge and talent and inventing collectively solutions for a new future for brewing. Once again in the history of Europe and the world, brewers are able to show their ability to exert solidarity amongst themselves and much beyond.

I wish you an interesting read!

Lasse Aho
President
The Brewers of Europe



140TH, 65TH AND 30TH ANNIVERSARIES OF MILESTONES OF THE BULGARIAN BEER SECTOR

INTERVIEW WITH THE UNION OF BREWERS IN BULGARIA'S PRESIDENT AND EXECUTIVE DIRECTOR



IN 2021, THE BREWING SECTOR IN BULGARIA CELEBRATED THREE EMBLEMATIC ANNIVERSARIES - 140 YEARS BULGARIAN BREWING INDUSTRY, 65 YEARS BULGARIAN BREWING SCIENCE AND 30 YEARS OF THE FOUNDING OF THE UNION OF BREWERS IN BULGARIA (UBB). WE DISCUSS THE DEVELOPMENTS AND TRENDS IN THE SECTOR WITH THE PRESIDENT OF UBB, VLADIMIR IVANOV AND THE EXECUTIVE DIRECTOR, IVANA RADOMIROVA:

MAY YOU SHARE WITH US WHICH, IN YOUR OPINION, ARE THE MOST IMPRESSIVE ACHIEVEMENTS OF THE BEER INDUSTRY IN BULGARIA?

Vladimir Ivanov Brewing in Bulgaria is a remarkable industry. 140 years ago, the brewery foundations were laid in our country as a symbolic cultural corridor connecting us with Europe and giving Bulgarians the confidence of modern people. Today, the wide portfolio of over 180 beer brands brewed in the country and their dozens of assortments, creative marketing, hundreds of millions of Euro for innovative capacities, green and social initiatives, shape the modern look of the Bulgarian brewing sector. Since the beginning of the privatization in 1994, capital investments in the industry amount to BGN.1.70 billion (€ 850 million).

But our greatest achievement and recognition is the fact that in 2021 almost 90% of Bulgarians rated the beer industry in the country extremely high. To this we should add the 8 awards of UBB from national competitions for social responsibility and overall economic and social contribution of the industry.

Ivana Radomirova The responsible practices of the brewing companies as employers and producers, the high quality products and the proactive initiatives of the Brewers' Union are of paramount importance for this impressive assessment. UBB is the only business association in the country that implements a sector wide program for sustainable development. Follow-

ing The Brewers of Europe initiatives, the most recent voluntary commitment of UBB is focused on the environmental sustainability and the circular economy. The website of UBB has a "green library" and an interactive calculator, where anyone can measure the positive impact of separate waste collection of beer packaging on the environment <https://pivovari.com/green-academy/calculator/>.

HAS THE CONSUMERS' PERCEPTION OF THE BEER CATEGORY CHANGED DURING THE PANDEMIC?

Vladimir Ivanov Regular research on the trends in consumer attitudes shows that the stereotypes about beer are gradually changing because of the scientific facts, the attitudes of new generations, their predominant interest in healthy lifestyle and the UBB info campaigns dedicated to the beer category and industry. A good example of the contribution of the Bulgarian Union of brewers in the development of these processes is the National Beer Academy, which won 4 national prizes, including two awards for educational innovation and ethical public communications.

Ivana Radomirova In the last 5 years, beer has been the most frequently consumed and preferred beverage in the country after bottled water. Even during the pandemic, the frequency of beer consumption remained at the level of 2019, which is a clear indication that Bulgarians are loyal consumers of the category. More than half of Bulgarians drink beer at least once a week, and 65% once a month. Every third Bulgarian claims that beer is the right drink for them, while among the active consumers this number is about 60%. Increasingly, women also prefer beer. In this context, it is important to emphasize the contribution of Bulgarian scientists to the development of brewing technology, product and related fields. In the last 10 years they have done 75 research projects in brewing science. Our most innovative research is on the microbiome of Bulgarian beer, which will be presented at the 38th EBC Congress in Madrid.



ANNIVERSARIES

IN THE BULGARIAN BEER SECTOR



WHAT IS THE SPECIAL SECRET INGREDIENT THAT HAS MADE BEER A FAVOURITE BEVERAGE FOR CENTURIES?

Vladimir Ivanov The love of brewers, which inspires them to combine knowledge, skills and experimental spirit, is the "invisible secret ingredient, that turns a small grain of barley into a wonderful amber drink to quench thirst and delight people without intoxicating them!" - The last is a quote from the church blessing ceremony on the occasion of the Day of Bulgarian Brewers - Ilinden.

Ivana Radomirova The relentless transformation of beer, that allows brewing to attract thousands of faces and billions of fans around the world. It's great that we are participants in this experience and journey!

ЗА ПРАЗНИЦИТЕ И ДЕЛНИЦИТЕ НА БЪЛГАРСКИТЕ ПИВОВАРИ, БИРАТА И ОЩЕ НЕЩО....

ПРЕЗ 2021 Г. ПИВОВАРНИЯТ СЕКТОР В БЪЛГАРИЯ ОТБЕЛЯЗА ТРИ ЕМБЛЕМАТИЧНИ ЮБИЛЕЯ - 140 Г. БЪЛГАРСКА ПИВОВАРНА ИНДУСТРИЯ, 65 ГОДИНИ ПИВОВАРНА НАУКА И 30 ГОДИНИ ОТ СЪЗДАВАНЕТО НА СЪЮЗА НА ПИВОВАРИТЕ В БЪЛГАРИЯ (СПБ). ЗА РАЗВИТИЕТО, ПРЕДИЗВИКАТЕЛСТВОТА И ТЕНДЕНЦИИТЕ В СЕКТОРА РАЗГОВАРАМЕ С ПРЕДСЕДАТЕЛЯ И С ИЗПЪЛНИТЕЛНИЯ ДИРЕКТОР НА СЪЮЗА НА ПИВОВАРИТЕ – ВЛАДИМИР ИВАНОВ И ИВАНА РАДОМИРОВАСА

МОЖЕ ЛИ ДА СПОДЕЛИТЕ КОИ СА НАЙ-ВПЕЧАТЛЯВАЩИТЕ ПОСТИЖЕНИЯ НА БИРЕНАТА ИНДУСТРИЯ В СТРАНАТА?

Вл. Ив. Пивопроизводството в България е забележителна промишленост. Преди 140 години у нас са поставени основите на пивоварната промишленост като своеобразен културен коридор, свързващ ни с Европа и даващ на бълга-



рина самочувствие, че е модерен човек. Днес широкото портфолио от над 180 произведени в страната марки бира и техните десетки асортименти, креативният маркетинг, стотиците милиони лева за иновативни мощности, зелени и социални инициативи, определят облика на българския пивоварен сектор. От началото на приватизацията през 1994 г. до днес капиталовите инвестиции в индустрията възлизат на 1 милиард и 350 млн. лева.

Но най-голямото постижение и признание за нас е фактът, че през 2021 г. почти 90% от сънародниците ни дават изключително висок рейтинг на бирения бранш в страната. Към това постижение следва да добавим и 8те награди на СПБ от национални конкурси за социална отговорност и цялостен икономически и социален принос на бранша.

Ив. Р. За тази впечатляваща оценка от най-съществено значение са действията на бирените компании като отговорни работодатели и производители, високото качество на продукта и проактивните инициативи на Съюза на пивоварите. Браншовата организация е единствената в страната, която осъществява обща за сектора програма за устойчиво развитие. Следвайки инициативите на Пивоварите на Европа, най-актуалният ангажимент на СПБ е фокусиран върху екологичната устойчивост и кръговата икономика. На сайта на СПБ има „зелена библиотека“ и интерактивен калкулатор, с който всеки може да изчисли как с разделното събиране на отпадъци от бирени опаковки може да влияе положително върху околната среда <https://pivovari.com/green-academy/calculator/>,

ПРОМЕНИ ЛА СЕ ПРЕЗ ПОСЛЕДНИТЕ ГОДИНИ ОТНОШЕНИЕТО НА ПОТРЕБИТЕЛИТЕ КЪМ БИРЕНАТА КАТЕГОРИЯ?

Вл. Ив. Изследванията за тенденциите в потребителските нагласи показват, че стереотипите за бирата, постепенно се променят предвид научните факти, нагласите на новите поколения, преобладаващия им интерес към здравословен начин на живот и информационно-образователните кампании, които СПБ развива в подкрепа на категорията и индустрията. Добър пример за принос на СПБ в развитието на тези процеси е Националната бирена академия, която спечели 4 национални награди, включително за образователна иновация и етични публични комуникации.

Ив. Р. През последните 5 години, след бутилираните води, бирата устойчиво е най-често консумираната и предпочитана напитка в страната. Дори по време на пандемията честотата на консумация на пиво се запази на нивото от 2019 г., което е ясна индикация, че българите са лоялни потребители на категорията. Повече от половината българи пият бира поне веднъж седмично, а 65% - веднъж месечно. Всеки трети българин твърди, че бирата е подходящата за него напитка, а при активните консуматори това важи за 60% от тях. Все по-често бира предпочитат и жените. В този контекст е важно да се подчертае приносът на българските учени за развитието на бирената категория и технология. През последните 10 години в областта на пивоварната наука са реализирани 75 научни изследвания. Най-авангардното последно изследване е за микробиома на българската бира, което ще бъде представено на 38 конгрес на EBC в Мадрид.

КАКВА Е СПЕЦИАЛНАТА СЪСТАВКА, КОЯТО ПРАВИ БИРАТА ЛЮБИМА НАПИТКА ОТ ВЕКОВЕ НАСАМ?

Вл. Ив. Любовта на пивоварите, която ги вдъхновява да съчетават знания, умения и експериментаторски дух, е онази "невидима и тайна съставка на пивото, която превръща малкото ечемичено зрънце в пенлива кехлибарена напитка, за да утолява тя жаждата и да весели хората, без да ги опива!" - последното е цитат от водосвета с благословията по случай Деня на българските пивовари - Илинден. Вярваме, че с оптимизъм, синергия и иновативен дух ще продължим да владеем магията на пивото, а има ли го вдъхновението на пивоварите - ще я има и любимата напитка!

Ив. Р. Нейната безспирна трансформация, която ѝ позволява да има хиляди лица и милиарди почитатели по целия свят. Страхотно е, че и ние участваме в това изживяване и пътешествие!

140 YEARS TOGETHER: KAMENITZA SUPPORTS THE COMMUNITY IN ITS HOMETOWN PLOVDIV

BY STELIYANA KASABOVA,
CORPORATE AFFAIRS MANAGER,
KAMENITZA AD



SUPPORTING FOOTBALL

Plovdiv, as the hometown of Kamenitza, plays a major role in its development. Over the years we have contributed to the development of the cultural and social life of the city. In 2021, when we celebrated 140 years since the founding of Kamenitza, we dedicated several special projects to Plovdiv. The first was to support the development and future of the 4 major football clubs in the city by donating part of Kamenitza's sales in the city and the region to them. Plovdiv is a strong football city and many of the great football talents and stars of Bulgaria started from there.



The duration of the football campaign was 2 and a half months. Football has always been part of Kamenitza's DNA. For each sale of Kamenitza 0.5 l. bottles, we collected money that after that would be donated to the football clubs.

The football clubs were really excited about the initiative and they supported it through a strong communication campaign in their online and social channels, calling their fans to get involved and support their favourite team, enjoying Kamenitza. The campaign was an example of one of not so many occasions when fans of competitors' football clubs stand together for a cause. In addition, special branded boxes were positioned on the training grounds of the respective clubs to facilitate the fans in the mechanism of the campaign - the collection of caps, because the amount of donated funds depended on the number of bottle caps collected for each team.

During the campaign in support of the future of football, more than BGN 10,000 were raised and donated to the 4 big football clubs. Through this campaign, we not only helped the development of clubs, but also managed to unite football fans in a common cause: together for the development of football, sports and active lifestyle in Bulgaria.

IMPROVING CITY ENVIRONMENT

The second project about Plovdiv was to improve the appearance of the city and build a more favourable urban environment through the production and donation to the Municipality of Plovdiv of a special large sign for one of the renovated city parks.



The project with the production and provision of an emblematic sign of one of the renovated city parks in Plovdiv was implemented by employees of Kamenitza. The sign showed the name of the park - Kamenitza Park, located opposite the microbrewery of Kamenitza for craft beers in Plovdiv. The sign depicted iconic buildings and places of Plovdiv, symbols of the city, which are also on the labels of each Kamenitza package. Kamenitza took full care of the design of the sign and its physical production. The park along with the sign were officially opened with a media event and representatives from Plovdiv Municipality and Kamenitza.

Providing a large and beautiful sign for the renovated city park in Plovdiv helped build a more favourable urban environment

for all residents, guests and tourists. Also, the sign depicting emblematic buildings-symbols of Plovdiv, contributing to the development of the cultural, historical and social image of the city. The official event for the opening of the park and the sign attracted the attention of the media in the city and received a great free media coverage. Providing the sign to the city park was a gesture on behalf of Kamenitza for all Plovdiv people and guests, making the city environment more beautiful and attractive, combining the modern look and feel of Plovdiv with its rich history, traditions and respect of the past.

ENRICHING PLOVDIV SOCIAL AND CULTURAL LIFE

Kamenitza dedicated a special exhibition to Plovdiv and its people. The exhibition was positioned at the city center for 3 months, telling the story of Kamenitza and Plovdiv, their development and special connection, and some of the most emblematic moments throughout the years. Besides that, Kamenitza paid tribute to its employees as well, showing their emotional stories on the exhibition boards. The project was supported by Plovdiv Municipality and local media. The exhibition attracted hundreds of people such as Plovdiv citizens, guests and tourists and helped them learn more about the first beer of Bulgaria and the most ancient city in Europe.

Continuing in this line of social projects, later in 2021 we published a very special book edition about Kamenitza's 140-year anniversary with the emblematic name: Every Sip Has a Story. The book about Kamenitza compiled for the first time 140 years of history, traditions, quality in brewing, and emotional stories of former and current Kamenitza employees. The book included not just the history of Kamenitza and Plovdiv, intertwined in time, but also the memoirs of a former employee, a travelogue of a current Kamenitza employee, beer recipes, a collection of medals, old labels and the most crucial asset of all – photos of a small part of Kamenitza employees today.

Currently, the book is part of the permanent exposition in Plovdiv History Museum, as well as in Plovdiv National Library. This is the first of its kind book about the history of the first beer in Bulgaria. All Kamenitza employees, Kamenitza customers, business partners, media, and Kamenitza friends received a copy of the book, because after all, it was dedicated to the people who helped Kamenitza be what it is today.

We truly believe that the anniversary book is an invaluable legacy that will teach the future generations invaluable lessons about bravery and responsibility, about courage and constant striving for excellence, about unification and the power of coming together for a better world.

140 ГОДИНИ ЗАЕДНО: КАМЕНИЦА ПОДКРЕПЯ ОБЩНОСТТА В РОДНИЯ СИ ПЛОВДИВ

ПОДКРЕПА КЪМ ФУТБОЛА

Пловдив, като роден град на Каменица, играе важна роля в нейното развитие. През годините сме допринесли за развитието на културния и обществен живот на града. През 2021 г., когато отбелязахме 140 години от основаването на Каменица, посветихме няколко специални проекта на Пловдив. Първият беше да подпомогнем развитието и бъдещето на 4-те големи футболни клуба в града, като им дарим част от продажбите на Каменица в града и региона. Пловдив е силен футболен град и много от големите футболни таланти и звезди на България са тръгнали именно оттам.

Продължителността на футболната кампания беше 2 месеца и половина. Футболът винаги е бил част от ДНК-то на марка Каменица. За всяка продажба на Каменица 0,5 л. бутилка, отделяхме пари, които след това щяха да бъдат дарени на футболните клубове.

Футболните клубове бяха наистина развълнувани от инициативата и я подкрепиха чрез силна комуникационна кампания в своите онлайн и социални канали, призовавайки феновете си да се включат и да подкрепят любимия си отбор, наслаждавайки се на Каменица. Кампанията беше пример за един от не толкова многото случаи, когато фенове на конкурентни футболни клубове застават заедно за кауза. Освен това, на тренировъчните площадки на съответните клубове бяха позиционирани специални брандирани кутии, които да улеснят феновете в механизма на кампанията – събирането на капачки, тъй като размерът на дарените средства зависеше от броя на събраните капачки от бутилки за всеки отбор.

По време на кампанията в подкрепа на бъдещето на футбола бяха събрани над 10 000 лв., които бяха дарени на 4-те големи футболни клуба. Чрез тази кампания не само помогнахме за развитието на клубовете, но и успяхме да обединим футболните фенове в една обща кауза: заедно за развитието на футбола, спорта и активния начин на живот в България.



ПОДОБРЯВАНЕ НА ГРАДСКАТА СРЕДА

Вторият проект за Пловдив беше подобряване на облика на града и изграждане на по-благоприятна градска среда чрез изработка и дарение на Община Пловдив на специална голяма табела за един от обновените градски паркове. Проектът с изработка и предоставяне на емблематичен знак на един от обновените градски паркове в Пловдив бе реализиран от служители на Каменица. Табелата показваше името на парка - Каменица Парк, намиращ се срещу микропивоварната на Каменица за крафт бири в Пловдив. Табелата изобразяваше емблематични сгради и места на Пловдив, символи на града, които са и на етикетите на всяка опаковка Каменица. Каменица се погрижи изцяло за дизайна на табелата и нейното физическо изработване. Паркът заедно с табелата бяха официално открити с медийно събитие и представители на Община Пловдив и Каменица.

Осигуряването на голяма и красива табела за обновения градски парк в Пловдив спомогна за изграждането на по-благоприятна градска среда за всички жители, гости и туристи. Също така, табелата, изобразяваща емблематични сгради-символи на Пловдив, допринесе за развитието на културно-историческия и социалния облик на града. Официалното събитие по откриването на парка и табелата привлече вниманието на медиите в града и получи страстно безплатно медийно отразяване. Предоставянето на табелата на градския парк беше жест от името на Каменица за всички пловдивчани и гости, правейки градската среда по-красива и привлекателна, съчетавайки модерния облик и усещане на Пловдив с неговата богата история, традиции и уважение към миналото.



ОБОГАТЯВАНЕ НА ОБЩЕСТВЕНИЯ И КУЛТУРЕН ЖИВОТ НА ПЛОВДИВ

Каменица посвети специална изложба на Пловдив и неговите хора. Изложбата беше разположена в центъра на града в продължение на 3 месеца, разказвайки историята на Каменица и Пловдив, тяхното развитие и специална връзка и някои от най-емблематичните моменти през годините. Освен това, Каменица отдаде почит и на своите служители, като показва емоционалните им истории на изложбените табла. Проектът бе подкрепен от Община Пловдив и местни медии. Изложбата привлече стотици хора като пловдивчани, гости и туристи и им помогна да научат повече за първата бира на България и най-древния град в Европа.

Продължавайки в тази поредица от социални проекти, по-късно през 2021 г. издадохме едно много специално книжно издание за 140-годишната на Каменица с емблематичното име: Всяка глътка има история. Книгата за Каменица събра за първи път 140-годишна история, традиции, качество в пивоварството и емоционални истории на бивши и настоящи служители на Каменица. Книгата включваше не само историята на Каменица и Пловдив, препле-

тени във времето, но и мемоарите на бивш служител, пътепис на настоящ служител в Каменица, рецепти за бира, колекция от медали, стари етикети и най-важното богатство от всички – снимки на малка част от служителите на Каменица днес.

В момента книгата е част от постоянната експозиция в Историческия музей на Пловдив, както и в Народната библиотека в Пловдив. Това е първата по рода си книга за историята на първата бира в България. Всички служители на Каменица, клиенти на Каменица, бизнес партньори, медии и приятели на Каменица получиха екземпляр от книгата, защото все пак тя беше посветена на хората, които са спомогнали Каменица да бъде това, което е днес.

Наистина вярваме, че юбилейната книга е безценно наследство,

което ще научи бъдещите поколения на безценни уроци за храбростта и отговорността да си първи, за смелостта и постоянния стремеж към съвършенство, за сплотеността и силата да се обединяваме за един по-добър свят.



FOR MORE INFORMATION:

Steliyana Kasabova

Corporate Affairs Manager

Kamenitza AD

steliyana-vladimirova.kasabova@molsoncoors.com

www.linkedin.com/in/steliyana/

INTERVIEW

WITH BBC STORYWORKS COMMERCIAL PRODUCTIONS ON THE BREWING AMBITION SERIES



INTERVIEW OF MARK GAVHURE (PARTNER MANAGER AT BBC PROGRAMME PARTNERSHIPS, BBC STUDIOS AND THE SERIES LEAD OF THE BREWING AMBITION SERIES) AND KATHERINE STOKES (SERIES PRODUCER AT BBC PROGRAMME PARTNERSHIPS, BBC STUDIOS AND THE SERIES PRODUCTION LEAD FOR THE BREWING AMBITION SERIES)

BY THE EDITOR

In June 2021, at the final session of the Online Brewers Forum, Marverine Cole, award winning journalist, broadcaster and beer sommelier, announced the launch of The Brewers of Europe series, produced for The Brewers of Europe by BBC StoryWorks Commercial Productions, about beer and brewers that would be filmed over 12 months. Can you tell us why and how the BBC StoryWorks team approached the storytelling of beer and brewers through this series?

Katherine Stokes: We wanted to find out and present the hidden, unexpected stories of the beer industry. Brewing as a craft has an immensely rich heritage, which many people are not aware of unless they are in the industry already, so within every film we made sure we tapped into this history, as well as the personalities and values of the fascinating characters that work in this industry. We wanted each film to reveal an unexpected story of brewing – things that really strike and engage audiences. Stylistically, the films are shot in an artistic, abstract way, creating a sensory experience at the same time as delivering the desired story, with a strong focus on the characteristics of the different locations and natural sound of the brewing process. Each film features 1 – 3 key characters through whom we come to understand the unique history and identity of each brand.



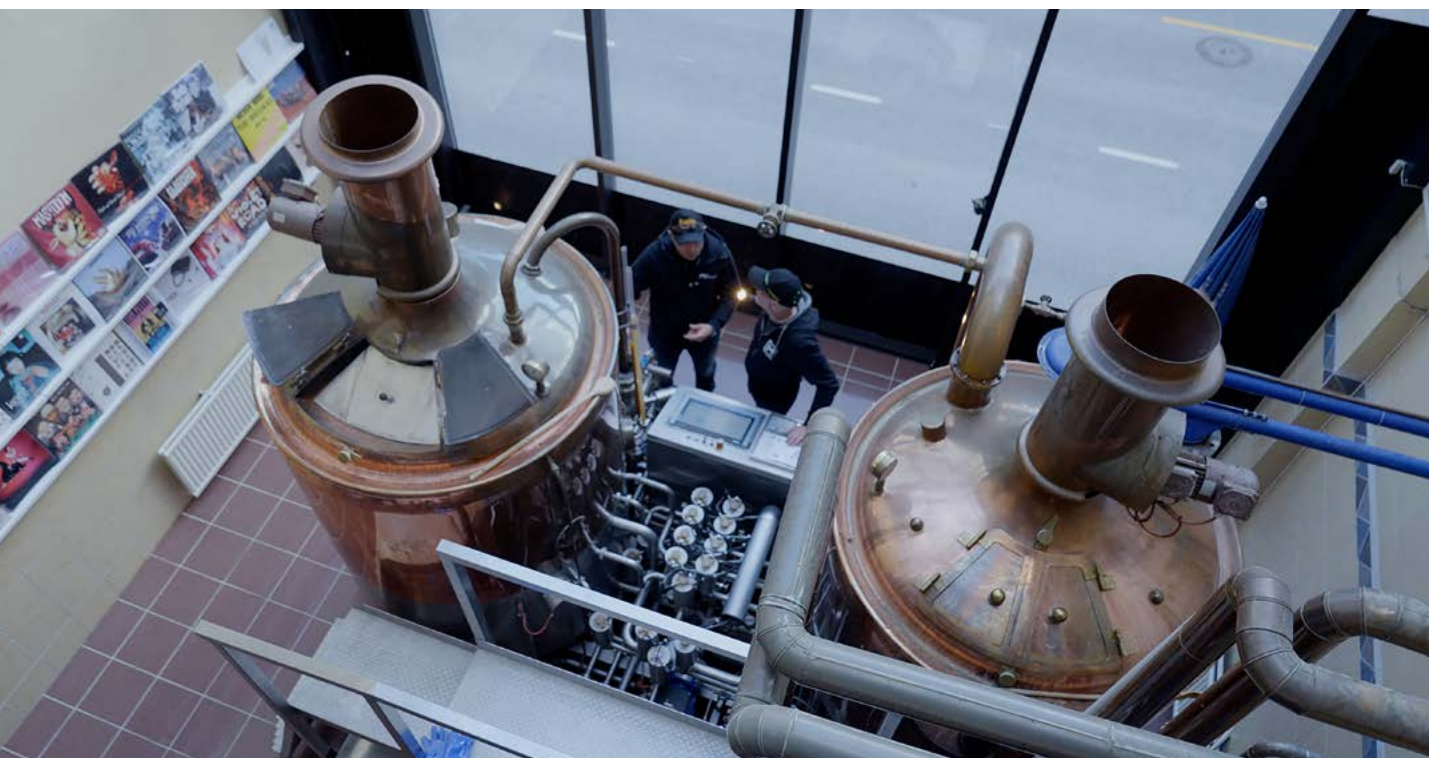
Mark Gavhure: The pandemic has changed our ways of life and despite being impacted by the lockdowns, the brewing industry had continued to be very dynamic. We wanted to celebrate its heritage, innovation, thrive for sustainability as well as the people at the heart of local social impact. Science, innovation and artisanship are really what make beer and its key ingredient is certainly its people and the passion behind it.

In this series for The Brewers of Europe, you've worked on a series of short documentary-style films, filmed at different locations across Europe and even in New Zealand, interviewing staff of small breweries, family breweries and large breweries alike. What are the common elements you identified?

Katherine Stokes: There were certainly many more commonalities than was expected at the onset of the series. Regardless of the topics being covered in each film, or the person being interviewed, what inevitably came across so strongly was the passion of the people working behind the scenes. From master brewers and farmers to engineers and business owners, what is always evident as a theme is the genuine dedication to both creating their beer and respecting the natural environment in which they operate. Another commonality is the relationship between the breweries and the localities in which they are based – often the history of the company and the local area are strongly interwoven, and for many, a commitment to their surrounding communities continues to this day.

A few commonalities can be found in your series. I'll start with one, which is the complexity of the product and its link with tradition and, yet, innovation. What will audiences learn about that?

Katherine Stokes: Balancing tradition with innovation is certainly a key aim for the brewers featured in The Brewers of Europe series. Although they might seem like conflicting priorities, many of the breweries see innovation as an intrinsic part of their heritage. From day one, they have been trying new things to develop and improve what they make – whether that's experimenting with a new ingredient or trying to make their manufacturing more sustainable – at the same time as preserving the unique aspects that have made their product such a success and give it such a clear identity. Mark Gavhure: Speaking of tradition, most of the breweries we produced films for were almost the oldest institution in the locality. Many still employ the same ingredients as they did in the past, while also creating jobs for young staff and scientists. In this way they are contributing to employment, acting as a centre of culture and innovation within local communities; while still tying strongly with tradition.



Another element is the connection between beer and nature, through its main ingredients that are water, malted cereals and hops which all come from nature. All the brewers are mentioning the importance of protecting mother nature and doing things sustainably. Was this something that surprised you?

Katherine Stokes: We are all becoming more conscious of reducing our impact on the planet, and brewers are no exception. As brewers are so reliant on a selection of key ingredients (some of which are sourced within walking distance to the breweries themselves), they often have a particularly keen awareness of the health of their local environment and understand the importance of trying to protect it. Their futures are intertwined with those of the ecosystems they rely on to make their beer and preserving them is one of their clear focus points.

Mark Gavhure: In addition to sourcing ingredients locally, which is very important especially among smaller breweries, some brewers are also reusing their ingredients for different purposes, creating new products out of it.

Whilst caring for the planet is of course vital and part of brewers' DNA, another important aspect all brewers in the films you have produced for members mentioned is the connection with people, consumers, the community. Did you also feel that social hub role played by breweries in your interviews?

Katherine Stokes: The connection that brewers in The Brewers of Europe series have with their local communities is very clear. In one of the films we produced, we explore how the foundation of the brewery in the 1800s is one of the reasons that their city is such a thriving place today. In another, we hear how a local cooperative of farmers (and all their family and friends!) comes together every year to partake in an epic harvest of hops. The location of the brewery is a source of local pride and a focal point for the surrounding community.

We can really feel the enthusiasm of the brewers for their beers and their art in the Brewing Ambition series. People usually don't know how artful it is to brew beer. The series will be presented at the Brewers Forum / EBC Congress on the 31st of May, in Madrid, Spain, in a seminar entitled "In the love of beer". Do you think brewers should be bolder on beer and brewing, making it known to consumers, being more vocal about what it takes to brew the perfect beer?



Mark Gavhure: All the series we produce at BBC Programme Partnerships are aimed at drawing out the elements of industries that are most fascinating, in terms of heritage and culture, the environment, and innovative technologies – brewing has it all. However, the stories we tell are only effective and memorable when they are centred on the human stories behind these industries. Audiences are hard wired for stories that convey emotion. In our research we knew the ingredients and processes would interest audiences, but we quickly discovered the brewing industry is very lucky in that it has a unique set of characters who are incredibly passionate about both the science and art of brewing. Beyond the beautiful images, this extensive human resource is really the key from a storytelling perspective and a big part of what makes Brewing Ambition so memorable.

Katherine Stokes: It was an incredible experience to encounter so many amazing stories and people from different places.

Mark Gavhure: The industry naturally lends itself to great stories as it uses lots of processes that aren't well known by people. The Brewing Ambition series aims to demystify these by putting people front and centre of the stories.

Finally, whilst the Brewing Ambition series will be published as of the 26th May 2022, are you already planning for another round? And if yes, where would you love to film and what angles would you like to approach?

Mark Gavhure: We do believe there's scope for further stories about the Brewing industry across Europe and beyond, delving deeper into the heritage of beer, particularly in those geographies that weren't covered this time around, as well as stories exploring diversity and inspiring more people to get into brewing. If you have a story we'd be happy to hear more about it. Reach us at: brewers-series@bbc.com

Brewing Ambition is an online series presented by The Brewers of Europe and produced for them and their members by BBC StoryWorks Commercial Productions. You can view the whole series at www.brewingambition.com from 26th May 2022.



KEEPING TRADITIONS ALIVE WITH EU-FUNDING

BY HANNES HEIDE, MEMBER OF THE EUROPEAN PARLIAMENT FROM AUSTRIA
AND MEMBER OF THE EP BEER CLUB



Photo: viastas / Shutterstock.com

The beer culture is a part of Europe's heritage. It is unmatched in its diversity of brewing arts and products. Additionally, beer has a profound impact on the European economy. In total, 2.3 million jobs depend on the beer market, including those in agriculture, production, distribution, and sales. Major brewing unions are fierce competitors for regional breweries, therefore, financial support through European Funds like EFRE (European Regional Development Fund) is very important for these companies. Also, subsidies from the Corona Recovery Fund were very much needed, regarding the declined sales of many breweries due to Covid lockdowns.

EU-INVESTMENTS IN REGIONALITY AND SUSTAINABILITY

Since the market has changed, the focus on regionality has never been stronger than it is now. In the last few months, I've visited many local breweries in Austria and found that EU funds are crucial for sustainable changes. EFRE and the Just Transition Funds are two EU Funding Tools that will assist EU regions as well as small and medium-sized businesses in their green transition. To preserve regional varieties of beers, these smaller businesses are particularly important. In Austria, eight family-owned and regionally located breweries have come together to form the "CulturBrauer" association, an organization focusing on preserving brewing traditions using local ingredients. It is precisely this circular economy that will be of great importance in the future. The European Union also plays an important role in preserving beer diversity.



MEP Hannes Heide enjoying a fresh beer in a typical Austrian "Wirtshaus"

THE SOCIAL AND CULTURAL IMPORTANCE OF BEER

However, the cultural importance of beer does not only lie in its long history, diversity and excellent craftsmanship. Beer is a cultural asset that brings people together, strengthens commonalities and sometimes allows to overlook differences. The heart of this connecting ability is the "Wirtshaus"-tradition, as we call it in Austria. It is more than simply meeting friends in a pub, at least in my home region, the Salzkammergut, it is deeply rooted in keeping traditions alive and showcasing cultural heritage. The last two years have been very demanding for "Wirtshäuser" across Europe. In 2020, beer sales fell by 40% and many family-run businesses had to close. These companies are not only local employers, but an invaluable link for the cohesion of a community. After the long dry spell caused by the pandemic, people's desire for a communal meeting point is stronger than ever. As one of the initiators of the European Capital of Culture 2024 in Bad Ischl, I would like to give the art of brewing from the Salzkammergut a special place amid our diverse cultural program. Moreover, the revitalization of "Wirtshäuser" and the regular gatherings of locals at so-called "Stammtischen" will be featured as a special project component.

At a glance



Programme of day 1



	Sunday, 29th of May 2022	Monday, 30th of May 2022	Tuesday, 31st of May 2022	Wednesday, 1st of June 2022	Thursday, 2nd of June 2022
Morning		Brewers Forum & 38th EBC Congress Conferences and tradeshow Location: IFEMA Palacio Municipal	Brewers Forum & 38th EBC Congress Conferences and tradeshow Location: IFEMA Palacio Municipal	38th EBC Congress Conferences and tradeshow Location: IFEMA Palacio Municipal	Technical visits** 08:30 to 12:30
Afternoon		09:00 to 19:30	09:00 to 19:00	09:00 to 18:00 Technical visits* 08:30 to 12:30	
Evening	Opening Party Plaza Madrid As of 19:00	Free evening	Networking Evening Museo de Ferrocarril (Railway Museum) As of 20:00	EBC Closing Ceremony Fabrica de Tapices (Royal Tapestry Factory) As of 20:00	

*Technical visits

Only for 2-day attendees

One choice among:

- Heineken Brewery (Algete/Madrid)
- Cervecería Península (Alcobendas/Madrid)
- Ardagh Group, (Valdemorillo, Madrid)

**Technical visits

Only for 3-day attendees

One choice among:

- Mahou-San Miguel (Alovera/Guadalajara)
- Ball Beverage Packaging Iberica SL (Guadalajara)
- Cervezas Las Cibeles (Leganes/Madrid)

MONDAY, 30 MAY 2022					
10:00-10:30	Welcome coffee				
10:30-12:00	EBC Congress		Brewers Forum		
	Impact of hops on sensory aspects in brewing	Hops, beer & Biomedical research	Towards carbon-zero brewing: a contribution to a greener planet <small>#EU GREEN WEEK</small>	Beer brewed with spirits and wine, how does it work?	Beer tourism: How to boost beer routes and local tourism
12:00-14:00	Inauguration Plenary				
14:00-15:00	Lunch				
	Sponsored Presentations and workshops				
15:00-17:00	EBC Congress		Brewers Forum		
	Impact of barley and malt on sensory aspects in brewing	The art and science of dry-hopping	Making your brewery greener at all stages. Case-studies from breweries and consultants <small>#EU GREEN WEEK</small>	In the love of beer – telling the story of beer and how wonderful it is.	Beer and hospitality – how they support each other – brewpubs and revenues for pubs and bars
17:00-19:30	Poster Session				



#EUGREENWEEK
30 MAY - 5 JUNE 2022

NEXT GEN EU



Programme of day 2



Programme of day 3



TUESDAY, 31 MAY 2022						
9:00-11:00	EBC Congress		Brewers Forum			
	Biochemistry of hop flavour & aroma I	Technical excellence for sustainable brewing <small>#EU GREEN WEEK</small>	Non-Alcoholic beers - From the fermentation tanks to the market	Developing and implementing Inclusion & Diversity policies in breweries	"Do-It-Yourself" Marketing - selling your authenticity story with limited resources, time and skills	Diversifying your export markets: do not put all your eggs in the same basket (China and Europe)
11:00-11:30	Refreshment break					
11:30-13:00	EBC Congress		Brewers Forum			
	Sustainability and raw materials	Technical excellence for sustainable brewing II <small>#EU GREEN WEEK</small>	Non-alcoholic beer: what it takes to make if worth for a brewery?	Wood and beer, from and beyond the barrel	Sustainability and marketing - how to maximise the green element of your brewery in your story telling <small>#EU GREEN WEEK</small>	
13:00-14:30	Lunch					
	Sponsored Presentations and workshops					
	<i>Frozen liquid yeast for optimization of yeast programs in the brewing industry</i> Workshop offered by CHR Hansen	<i>The innovative use of the Technology Infusion Spiral® within the brewing industry for the development of new products or the improvement of existing ones</i> Presentation offered by OIS	<i>Mashing Machine Learning</i> Workshop offered by Specshell	<i>Take control of your beers and see how easy it is</i> Workshop offered by Biomerieux	<i>Jumbo Filter as new alternative for beer clarification - Sterile Filtration</i> Presentation offered by PS Filtracion	
14:30-16:30	EBC Congress		Brewers Forum			
	Biochemistry of hop flavour & aroma II	Brewing and microbial bio-engineering	Kveik yeast and Kveik beer - the future of the industry?	The role of enzyme in modern beer production - What do they bring to beer and the brewer?	e-commerce for breweries - how to ride the wave and generate growth?	
16:30-17:00	Refreshment break					
17:00-18:30	Plenary					
18:30-19:00	Snacks and Beers					
20:00	Networking Evening at the Railway Museum					

WEDNESDAY, 1 JUNE 2022	
9:00-11:00	EBC Congress
	Technology of specialty beers and other fermented products Developments in analytical methodology
11:00-11:30	Refreshment break
11:30-13:00	EBC Congress
	Flavour fine-tuning with wood Malt production and quality
13:00-14:30	Lunch
14:30-16:30	EBC Congress
	Continuous improvement in no-alcohol and low-alcohol beer quality
16:30-17:00	Refreshment break
17:00-18:00	Closing Plenary
20:00	EBC Closing Ceremony at Tapestry Museum



BREWERS FORUM NAMED OFFICIAL PARTNER EVENT OF THE EU GREEN WEEK 2022

Coinciding with the 2022 Brewers Forum in Madrid and running from May 30 to June 5, EU Green Week is the annual event for European environmental showcases and debates amongst policymakers, NGOs, business and other stakeholders from Europe and beyond. Its theme this year is 'EU Green Deal - Make it Real', with events looking at the circular economy, zero pollution, and biodiversity.

With ten hours of presentations and debate dedicated to environmental sustainability over the first two days of the Brewers Forum and EBC Congress, it should therefore come as no surprise that the European Commission awarded this year's Forum and Congress the status of Official Partner Event of EU Green Week 2022.

The EU Green Deal, its signature environmental initiative, is one of the six cross-sectoral priorities of the European Commission, and Europe's brewers have a vital role to play. Through a 'grain to glass' strategy, pioneering and innovative leadership in cutting emissions and waste reduction and interconnections throughout the value chain, the Brewers Forum and EBC Congress is a key opportunity for brewers, suppliers, distributors and retailers to share experiences and bring people together for sustainability and the good of the planet.


#EUGREENWEEK
30 MAY - 5 JUNE 2022


Next
Gen
EU


KNOWLEDGE CENTRE
BREWUP
BY THE BREWERS OF EUROPE


Visit now brewup.eu
to get the best European knowledge to

BREW - MARKET - ADVOCATE

 brewup.eu

 [@brewup_eu](https://twitter.com/brewup_eu)

 [brewup](https://www.linkedin.com/company/brewup)

 [@brewupeu](https://www.instagram.com/brewupeu)

BREWUP IS
POWERED BY





NEW EU AGRICULTURAL POLICY, WAR IN UKRAINE, RISING ENERGY PRICES... HOW WILL IT IMPACT THE BREWING SECTOR?

BY THE EDITOR

BARELY FIVE MONTHS HAVE PASSED SINCE THE EUROPEAN UNION (EU) ADOPTED ITS NEW COMMON AGRICULTURE POLICY (CAP) AND THE WORLD LOOKS VERY DIFFERENT TO WHAT IT WAS BACK THEN. AND IT IS CERTAINLY AGAIN DIFFERENT NOW THAT YOU READ THIS ARTICLE TO THE TIME WHERE IT WAS FINALISED (15 APRIL). THE WAR IN UKRAINE HAS DRIVEN THE MARKET FOR CEREALS AND ENERGY IN ALL DIRECTIONS, SHOWING HIGH VOLATILITY FOR ALL ECONOMIC OPERATORS, INCLUDING THE BREWING SECTOR. THIS LED THE EUROPEAN UNION LEADERS TO COMPLETELY RE-THINK THE EU'S STRATEGY IN TERMS OF DEFENCE, ENERGY, AND ALSO FOOD POLICY, SOME POLICYMAKERS AND STAKEHOLDERS CALLING FOR ADJUSTING THE CAP TO THE NEW SITUATION.

A COMPLICATED BASELINE SITUATION: THE NEW COMMON AGRICULTURAL POLICY AND TENSIONS ON ENERGY AND FERTILISERS

THE NEW COMMON AGRICULTURAL POLICY: RISKY AMBITIONS

The new CAP must be read in conjunction with the EU Green Deal and its Farm to Fork Strategy which aim at making Europe greener in all aspects and has set ambitious targets in terms of biodiversity, decreased use of pesticides (of 50% by 2030) and fertilisers (of 20% by 2030), reduction of carbon emissions, increased organic production (at least 25% of the EU's agricultural land by 2030), increased fallow land surface... Whilst the entire agri-food sector agrees with the ambitions of protecting



the planet and fighting against climate change, two major studies had shed light on the potential negative impacts of the Farm to Fork Strategy and the CAP on crop production in the EU. The first report to cast some doubts emanated from the European Commission's Joint Research Centre and stressed the risk of "a

decline in EU production and variations in prices and income for selected agricultural crops"¹. Looking at crop production specifically – which is of higher interest for brewers – the report goes further by pointing to a 4% decrease in cereals area and a 11% decrease in cereals yields that would lead to a 15% decrease in supply. Barley production in the EU already slightly decreased in 2021/2022 (52 million tonnes) compared to 2020/2021 (54 million tonnes), a trend that could be further accelerated by the

1 Barreiro Hurlé, J., Bogonos, M., Himics, M., Hristov, J., Perez Dominguez, I., Sahoo, A., Salputra, G., Weiss, F., Baldoni, E. and Elleby, C., Modelling environmental and climate ambition in the agricultural sector with the CAPRI model, EUR 30317 EN, Publications Office of the European Union, Luxembourg, 2021, ISBN 978-92-76-20889-1, doi:10.2760/98160, JRC121368 (accessed online on 12 April 2022: <https://publications.jrc.ec.europa.eu/repository/handle/JRC121368>)

new CAP. The fears have also been echoed in another study², published early January 2022 by the Wageningen University (Netherlands). This study looked into four different scenarios, including one scenario accounting for at least 25% of the agricultural land being under organic production (scenario 3) and another scenario accounting for *inter alia* a 50% reduction in the overall use of pesticides and a 20% reduction of fertilisers (scenario 4). Scenario 3 foresees a 42% decrease in wheat production³ and a 24% decrease in hop production, associated with a 76% and 80% price increase respectively. The impact of scenario 4 is less drastic than that of scenario 3, but still leads to a production decrease of 15% (for wheat) and of 21% (for hops), with a 6% decrease in hop prices due to the impact on hop quality (*"The quality of the product (bitter acid content) may be reduced due to the increased severity of the symptoms of diseases and pests on hops cones"*). The findings from the Wageningen University echo concerns already flagged by hop growers during the harvest 2021⁴. Not only scholars and consultants were worried by the possible negative impact of the CAP, but so were – and still are – farmers: *"The Farm to Fork Strategy is likely to have a negative impact on hop production. We are especially worried about the European Commission's plans to decrease the use of pesticides both in the number of substances and in quantities, if no suitable alternatives are put forward. Today, hop growers in Europe have to deal with an annual high pressure of many pests and diseases – downy mildew, powdery mildew, hop aphids, spider mites, flea beetles, alfa snout weevil and quite a few other minor pests. Yet, the number of available substances to tackle them is already very limited. For some minor pests, there have not been any substances we could use for some time now. It is important to stress that hop growing is very advanced in the use of pesticides. We are working with modern technologies, monitoring the pressure of pests and diseases, and using the plant protection products (PPPs) only when needed and only in the volume needed. The same applies to the spraying machines. Having said that, we believe that further reduction of available plant protection products will lead*

2 Bremmer, J., Gonzalez-Martinez, A., Jongeneel, R., Huiting, H., Stokkers, R., & Ruijs, M. (2021). Impact assessment of EC 2030 Green Deal Targets for sustainable crop production. (Report / Wageningen Economic Research; No. 2021-150). Wageningen Economic Research. <https://doi.org/10.18174/558517> (accessed online on 12 April 2022: <https://www.wur.nl/en/news-wur/Show/Green-Deal-probably-leads-to-lower-agricultural-yields.htm>)

3 Barley production was not tested in the Wageningen University report

4 See article on "Malt and hops preliminary report 2021" in the second issue of BrewUp Magazine, published 15 November 2021, <https://brewup.eu/publications/beerup-magazine-issue-2-november-2021>

Photo: Botond Horvath / Shutterstock.com

to lower yields and poor hops quality. In addition to the lack of suitable alternatives for PPPs and according to the Wageningen University Impact assessment study, the pressure to increase organic production would lead to a reduction of the total production of hops in Europe," stated Mr Zdenek Rosa, chairman of Copa-Cogeca's Working Party on Hops⁵.

THE CRISIS OF THE ENERGY PRICES AND ITS DISRUPTIVE IMPACTS ON THE BREWING ECONOMY: FERTILISERS, BUT NOT ONLY

In addition to the new CAP and the threats it represents for the EU agri-food sector, the looming energy crisis also impacts the brewing sector. A lot of commodities and manufactured goods have become more expensive because of the extremely volatile energy prices: packaging material, brewing equipment, not to mention the cost of energy alone (heating the brew kettle...) and breweries across Europe are suffering from these tensions. This led Mr Lasse Aho, President of The Brewers of Europe and

⁵ COPA-COGECA represents farmers and agri-cooperatives in the EU

Mr Peter De Schouwer, President of Euromalt to send a letter to the EU Commissioner for the Internal Market, Mr Thierry Breton, in February 2022, to alert him about the risks posed for a European brewing industry already seriously hit by lockdowns and other Covid-19 pandemic restrictions. In addition to the commodities directly impacting breweries in their daily life, the increased energy prices have led to an increase in the price of fertilisers, most of which are nitrogen-based, and to tensions in availability as well (year-on-year, the price of fertilisers increased by 210%, according to Green Markets North America Fertilizer Price Index). Whilst barley, and especially malting barley, can grow and reach the targeted protein content without much addition of fertilisers, wheat needs fertilisers to reach an appropriate level of protein content (be it for feeding the planet or for brewing beer). With the decreased availability and increased prices, the tension in the market has been particularly high. It will be further increased by the 20% reduction in fertiliser use targeted by the Farm to Fork Strategy. Therefore, even before Russia invaded Ukraine on the 24th of February, the landscape was pretty uncertain.

THE WAR IN UKRAINE AND THE GLOBAL SITUATION: ON TOP OF A HUMAN DISASTER, ADDITIONAL PROBLEMS FOR THE BREWING SECTOR

The human costs of the war in Ukraine have been disastrous and as the fighting continues, more and more pain is inflicted on the country and its population. The European Union and other countries, such as the United States, Australia, Japan and many more reacted by imposing sanctions, with Russia then reciprocating the sanctions, using different tools. One of them being energy supply and another fertiliser production.

INCREASED PRICES OF FERTILISERS, POSSIBLY IMPACTING PRODUCTION VOLUMES

In 2019, Russia produced 50 million tonnes of fertilisers, accounting for 13% of the world's production, making it the world's top fertiliser exporter (9 billion Dollars) and covering up to 30% of EU needs, showing the importance of this player for the EU's agricultural policy. If we add the exports from Ukraine and Belarus, this amounts to 43% of the total fertilisers used in the EU (average 2018-2020). Because of these threats, the fertiliser prices increased by 40% in a month (from mid-February to mid-March), according to Green Markets North America Fertilizer Price Index. The increase is also caused by trade restrictions imposed on Russia (or applied voluntarily by shipment companies) and by the extremely volatile energy market prices (as natural gas is a critical feedstock in producing nitrogen-based fertiliser), a trend which preceded the invasion of Ukraine as explained above. The volatility of the energy prices further increased with Germany turning off the Nord Stream 2 pipelines which was meant to secure gas supply to the country for the next decades, whilst the United Kingdom and the US banned imports of Russian oil and gas. Whilst the EU Member States have not embarked on such a ban, the option is still under consideration and could have huge implications. Despite a recent decline (Dated 22nd of March) in energy prices as markets were reassured by the EU not following up with the US and UK and a decreased demand of energy in China, stabi-



lity has not been achieved yet and the ongoing developments in Ukraine may still lead to fluctuations on the prices. In any case, European breweries and their malt suppliers still fear chaos in terms of energy supply and availability of reasonably priced fertilisers which may have disastrous consequences for the sector should the EU or Russia wish to escalate further in terms of sanctions.

HEAVY TENSIONS ON CEREAL PRODUCTION AND TRADE

Before the Russian invasion, the Food and Agriculture Organisation (FAO) had already warned the world about a risk of starvation because of lower expected crop in 2022. Countries like China indeed announced the 2022 harvest would be very poor due to weather conditions. Wheat can only grow in specific areas in the Northern hemisphere, and Ukraine and Russia account together for 29% of world wheat exports. Ukraine alone accounts for 15% of barley exports globally. Both cereals form the basis of almost all beers produced in the world and the war in Ukraine, cumulated with the poor harvest and

increased demand, led to a price explosion for cereals. Before the war started, wheat price had increased by 30% year-on-year (22 February 2021/22 February 2022). Since the Russian invasion, the price rose a further 20%, leading to an almost all-time high. The same pattern also holds true for barley prices. The price explosion can be explained by the poor harvest in some countries, the economic sanctions against Russia and the impact of the sanctions and the war in Ukraine in terms of trade and shipments. Concerning the long-term, it is expected that Ukrainians will not seed much in 2022 and that the next harvest will therefore be much lower, impacting negatively the supply and therefore, again the prices. Some European countries have currently introduced export control mechanisms for cereals in an effort to anticipate the market disruptions. The expected low wheat and barley harvest in Ukraine is not the only factor that should be monitored. Firstly, Russia announced it will restrict its crop exports to "friendly countries" (i.e. the countries which did not take any sanctions against them). Then, Ukraine is not only a massive wheat and barley producer, but it is also Europe's largest sunflower producer and what will not be seeded and harvested in Ukraine will have to be compensated for in the European Union with farmers allocating some

of their areas to that crop (to the detriment of other crops, for example barley). Also, the poor harvest in some countries (i.e. China, see above) means the demand for feed barley, and thus the prices, will increase, making it more attractive to seed and grow feed barley instead of malting barley (which was always more expansive, and thus more attractive to farmers, than feed barley). As a consequence, the EU area dedicated to growing malting barley might decrease in 2022/2023.

WHAT WILL BE THE IMPACT FOR EUROPEAN BREWERS?

In Europe, reports concerning production are not so alarming for 2022, as the EU is self-sufficient in terms of wheat and barley production and because it hosts a number of malting companies which should have enough cereals at their disposal to produce the malt brewers need. Moreover, preliminary reports suggest the conditions are good and show some optimism for a good harvest in 2022. Of course, nothing is certain at this stage as weather conditions can change and negatively impact the harvest. However, the predicted difficulties with use of fertilisers (be it because of the new CAP or the price increase and reduced availability) might also impact the harvest and crop production in 2022/2023. Added to the potential tension in crop production (areas attributed to other crops, higher demand for feed barley), this may lead to additional price increases which will affect breweries and production costs. This must be read in conjunction with the increased prices of energy and the direct (costs of heating...) and indirect (costs of production of packaging material, transportation...) effects it will also exert on the supply and distribution chain. Mr Zdenek Rosa, chairman of Copa-Cogeca's Working Party on Hops, concurs and also predicts challenging times ahead on the hops side: "The war in Ukraine has worsened the situation for hops growers by further increasing the already very high energy and agricultural input costs (wire, steel and wood, hop technology, fertiliser costs which have risen four times since last year, fuel). Rising costs are threatening the viability of hops growers who had fixed their sale prices in pre-contracts. In addition to the rise in production costs, exporting to Russia, Ukraine and Belarus is de facto impossible. The suspension of payment mechanisms, a lack of truck capacity to Russia, halting beer exports and a downturn in beer production in European breweries due to problems in sourcing malt and other materials from former suppliers are likely to diminish the demand for hops beyond the three countries."



#IN FOCUS

NEW EU AGRICULTURAL POLICY, WAR IN UKRAINE, RISING ENERGY PRICES... HOW WILL IT IMPACT THE BREWING SECTOR?

WHERE COULD THE EU AND THE BREWING SECTOR BE HEADING TOWARDS?

THE EU WORKING ON ITS ENERGY INDEPENDENCE

History repeats itself and has shown that every time the European Union was facing a vital threat, it made major steps forward to overcome the challenges. With war back on European ground and the economic sanctions against Russia, the European Union is facing a severe existential crisis which led its political leaders to discuss, in a special informal meeting of EU Heads of State and Government held in Versailles, France, under the auspices of the French EU Presidency, how it can ensure its energy, defence and food independence from the rest of the world and its current suppliers. The main topic was of course the energy policy. For the last decades, the dependence of many Member States on Russian gas and oil increased dramatically. The first step was to develop, within a couple of



days, a new plan entitled "REPowerEU: Joint European action for more affordable, secure and sustainable energy" which aims at the EU becoming independent from Russian fossil fuels by 2030, starting with gas. This short- to medium-term policy aims at diversifying gas supplies, increasing the development of renewable energies and replenishing gas stocks (90% fill rate before winter 2022-2023). In addition to this, EU State Aid rules can be used by Member States to provide short-term support to companies affected by high energy prices. This plan will be developed and agreed by May 2022. In the informal meeting of EU Heads of State and Government on 10-11 March, Member States also stressed the importance of reducing strategic dependencies in critical sectors by fostering industrial initiatives and a robust trade policy, and by strengthening EU research and innovation capabilities. Raw material is one of the critical sectors identified by Heads of State and Government, rightly so as data and analysts suggest.

A CHANGE OF APPROACH BY THE EUROPEAN COMMISSION AND MEMBER STATES CONCERNING THE CAP?

Member States, as well as the European Commission, have reacted swiftly to the new geostrategic situation by working on short-, medium- and long-term solutions to cut energy dependence and ensure EU industry can work as undisrupted as possible. Many Member States are working on national policies to support industries hit by the knock-on effects of the war in Ukraine, especially the most exposed. Some voices have also been heard in capital cities and in Brussels to ease the CAP by adjusting it to the new context. Whilst policymakers do not want to abandon the objectives of greening European agriculture and contributing positively to achieving the Green Deal targets, they are very aware food safety in Europe might be challenged by an inadequate implementation of the Common Agricultural Policy, potentially making parts of Europe's food policy reliant on imports. At times where the EU needs to rethink its global ambitions and is striving more than ever towards strategic independence, it is key that the European agri-food sector be given the means, resources, and support to fill European plates. Or to fill the glasses when it comes to beer. The next months will be crucial to shape not only the fate of Ukraine, but also what the EU food and drink policy and landscape will look like.



EBC MANUAL OF GOOD PRACTICE BEER FILTRATION AND STABILISATION (completely revised edition)



AVAILABLE FOR SALE ON WWW.CARLLIBRI.COM

ALSO AVAILABLE AT THE BREWERS FORUM / EBC CONGRESS,
29 MAY - 01 JUNE 2022, MADRID, AT BOOTH P21 FOR 99,99€

To purchase at the booth during the Brewers Forum/EBC Congress, please ensure you've got your invoicing data (including VAT number)!

CZECH BEER CULTURE IS APPLYING FOR INSCRIPTION ON THE UNESCO WORLD HERITAGE LIST

THE CZECH BEER CULTURE IS A NATIONAL TREASURE AND IT DESERVES RECOGNITION, YET IT IS STILL NOT PART ON THE UNESCO WORLD HERITAGE LIST. THIS IS WHY THE CZECH ASSOCIATION OF BREWERIES AND MALT HOUSES HAS FILED AN APPLICATION FOR THE INSCRIPTION OF 'BEER CULTURE AS A PHENOMENON OF CZECH FOLK CULTURE/ TRADITIONAL FOLK CULTURE OF THE PILSNER REGION' ON THE LIST OF INTANGIBLE CULTURAL HERITAGE THIS YEAR.

The Czech beer brewing industry has both a rich past and present. It is also associated with a lively social life. The unique tradition of Czech lager production and the use of Czech malt and Saaz hops are known around the world. The art of local brewers and the brewing profession as such are also famous. All this together with the Czech pub also defines the Czech beer culture.

'Beer is so much more than just a drink. Czech pubs have always been the centre of cultural and social life. This is where history was written. This is where anniversaries are celebrated, relationships are established, where football and hockey fans gather, and where people look for skilled workers. They are our present, past and future. This was confirmed by a survey conducted by the Nielsen Admosphere agency in December last year. 97 percent of all respondents consider beer culture to be a part of our history and tradition,' says Chairman of the Czech Association of Breweries and Malthouses František Šámal.

This is why the Czech Association of Breweries and Malt Houses filed the application from the Pilsner Region, the place of origin of the Czech



CZECH BEER AND MALT ASSOCIATION

lager, which was first brewed here 180 years ago. Another application is prepared for the South Bohemian Region.

The Czech-Moravian Association of Mini-Breweries has also joined the initiative for inscription on the list of intangible cultural heritage. This association consists of the smallest breweries from regions all over the Czech Republic.

'The great expansion of small breweries is clear proof of the pride and tradition of beer brewing in our country. Beer that is produced and consumed in the same place, namely in a local pub, strengthens social and cultural life in the region,' says Michal Voldřich, President of the Czech-Moravian Association of Mini-Breweries, confirming the meaningfulness of the intention.

The Czech Association of Breweries and Malt Houses unites breweries, malt houses and other institutions that are directly or indirectly involved in the production of beer in the Czech Republic. Members also include hop growers, producers of beer glass, labels, technological and technical equipment for the brewing sector, educational institutions and other entities. The association is continuing a tradition that reaches back to the second half of the 19th century.



ČESKÁ PIVNÍ KULTURA SE UCHÁZÍ O ZAPSÁNÍ NA SEZNAM DĚDICTVÍ UNESCO

ČESKÁ PIVNÍ KULTURA PATŘÍ MEZI NÁRODNÍ POKLADY A PRÁVEM JÍ NÁLEŽÍ UZNÁNÍ. PŘESTO ZATÍM NENÍ NA SEZNAMU SVĚTOVÉHO DĚDICTVÍ UNESCO. ČESKÝ SVAZ PIVOVARŮ A SLADOVEN PROTO LETOS PODAL NÁVRH NA ZAPSÁNÍ „PIVNÍ KULTURY JAKO FENOMÉNU ČESKÉ LIDOVÉ KULTURY“ DO SEZNAMU NEMATERIÁLNÍCH STATKŮ TRADIČNÍ LIDOVÉ KULTURY PLZEŇSKÉHO KRAJE.

České pivovarnictví má nejen bohatou tradici, ale i současnost. Je s ním navíc spojený i živý společenský život. Ve světě je známá jak unikátní tradice výroby českého ležáku, tak používání českého sladu a žateckého chmele. Pověstný je rovněž um místních sládků i pivovarské profese jako takové. To vše spolu s českou hospodou definuje také českou pivní kulturu.

„Pivo totiž již dávno není pouze nápoj. České hospody jsou odjakživa centry kulturního a společenského života. Zde se psaly dějiny. Zde se slaví výročí, navazují vztahy, fandí se fotbalu a hokeji nebo hledají řemeslníci. Představují naši minulost, současnost i budoucnost. Potvrdil to i průzkum agentury Nielsen Admosphere z loňského prosince. 97 procent všech respondentů považuje českou pivní kulturu za součást naší historie a tradice,“ řekl k tomu předseda Českého svazu pivovarů a sladoven František Šámal.

Český svaz pivovarů a sladoven proto podal přihlášku v Plzeňském kraji jako kolébce vzniku českého ležáku, který zde poprvé uvařili před 180 lety. Další přihláška je už navíc připravena pro kraj Jihočeský.

K iniciativě zápisu na seznam nemotného kulturního dědictví se připojil také Českomoravský svaz minipivovarů. Ten sdružuje ty nejmenší pivovary, které jsou v regionech celé České republiky.

„Velký rozmach malého pivovarnictví je jasným důkazem hrdosti a tradice pivovarství v naší zemi. Pivo, které je vyrobeno a vypito na stejném místě, tedy v místní hospodě, utužuje společenský a kulturní život v regionu,“ potvrdil smysluplnost záměru Michal Voldřich, prezident Českomoravského svazu minipivovarů.

Český svaz pivovarů a sladoven sdružuje pivovary, sladovny a další instituce, které se přímo či nepřímo podílejí na výrobě piva v České republice. Mezi členy jsou rovněž chmelaři, výrobci pivního skla, etiket, technologických a technických zařízení pro pivovarský sektor, vzdělávací instituce a další subjekty. Svaz přitom navazuje na tradici, která sahá až do druhé poloviny 19. století.



SUSTAINABILITY

DANISH DEPOSIT AND RETURN SYSTEM TURNS 20



By Louis Honoré Kommunikationschef, Bryggeriforeningen /
Head of Communications, Danish Brewers' Association

20 years ago, the Danish Brewers' Association and the retail sector established "Dansk Retursystem" - the Danish deposit and return system for collection and recycling of bottles and cans with deposit labels. However, this was by no means an easy undertaking.

On one side of the negotiating table were the breweries, which competed against one another and which were also suppliers to the other side of the table - the retailers - which also competed against one another.

It was a minefield of conflicting interests, but, if the system was to work, neither the involved lines of business nor the various types of packaging could be favoured. And at the same time this new, private business was not allowed to make money, with profits going back into the system. This was the task that the Danish Ministry of Environment wanted to have solved.

"We found a solution. We had a common goal about creating a system that would be easy for consumers, flexible towards the producers and shops and also good for the environment. For this reason, I believe that Denmark today has the world's best deposit and return system, and it is without comparison the greatest success I've been involved in bringing about in the course of my 25 years in the industry," says Niels Hald, CEO of the Danish Brewers' Association.

FEES HAVE FALLEN MARKEDLY

It was the breweries that became the owners of the Danish deposit and return system while the retail sector is part of the board along with other stakeholders. The Danish deposit and return system's profits are earned in the following ways:

- Producers and importers pay a fee per item of packaging for the empty items of packaging to be handled in shops, collected and sent for recycling.
- Sale of collected bottles and cans.
- Deposits that have not been cashed in.

The size of the fees is determined by the type of packaging; what is the cost of its journey through the system and what is the recycling value of the material that it is made of?

The system is so efficient that, over the past six years, the fees have been reduced by around 70 %, helped on the way by higher prices on collected bottles and cans. And this has actually happened while the return percentage has risen markedly to no less than 93 %.

ROOM FOR IMPROVEMENT

In this anniversary year, the Danish deposit and return system managed to become the first Danish example of the fact that circular economy can provide a positive economic result. It became efficient enough, and aluminium prices rose enough, to make the part that involves cans make a profit, which meant that the fee for all cans ended up at zero.

"Now the next target is to bring about a circular economy that's equally favourable when it comes to plastic and glass. In order to help us with this target, we're hoping for a birthday present from the politicians," says Niels Hald.

Initially, the politicians gave "Dansk Retursystem" the exclusive right to operate the Danish deposit system for bottles and cans on a non-profit basis.



"This gives us the time and room to make investments in green, user-friendly and efficient solutions - also for consumers. Every third year the system must be evaluated, which is fair enough. But it also means that, in theory, the Danish deposit and return system can be shut down with a three-year warning," says Niels Hald, and highlights the fact that such a short notice makes it difficult to obtain loans on favourable terms and is inexpedient when it comes to operation that is supposed to go on developing in a way that is kind towards the climate and more convenient to consumers.

"This is why we're looking for a system that'll continue until it may be terminated - with a six-year notice - and we'd like to see an evaluation every third year. With such a helping hand, our deposit and return system would go on being the best in the world, and it would serve to inspire the companies that are now about to make an effort to live up to their producer responsibility," adds Niels Hald.

SUSTAINABILITY

BE CAREFUL WITH INCLUDING MORE PACKAGING

In order to live up to the future Danish producer responsibility, the companies that are responsible for recycling marmalade plastic buckets, cans, washing powder bags, etc. will no longer be those that dispose of used packaging – today it is the municipalities. The responsible part will be the one that has manufactured the packaged product – even though it may still be the municipality that collects the waste from the consumer.

Exactly because our deposit and return system works as well as it does, it may be tempting for well-meaning producers to make an effort to include new packaging in the system. However, the Danish Brewers' Association believes that we must be very careful when it comes to making the good people of "Dansk Retursystem" concentrate on other types of packaging than those in which they are experts – packaging for beer, water, juice, etc. – because it requires very different solutions to receive, collect and recycle, for instance, jam jars, olive oil bottles and milk cartons.

"But we're pleased to open our doors to our deposit and return system and to our 20 years of experience, so other producers can be inspired to live up to their producer responsibility and create new circular success stories. We're extremely proud of being at the head of an industry which, in collaboration with the retail sector, ensures circular economy through reutilisation in spite of the various commercial interests that exist. But it is, indeed, also because others can learn from the mistakes and hurdles we've had to overcome on the way to circularity," says Niels Hald.



The Beer Brewing Guide EBC quality Handbook for small breweries

The new practical book every small brewery should read to improve quality and practices.

Authored by
Chris and Nancy McGreger.

Available at <https://brewup.eu/publications/ebc-beer-brewing-guide>
and at the Brewers Forum / EBC Congress
29 May - 01 June 2022, Madrid, at booth P21

- 49,99€ (excl. shipment costs when applicable)
- 44,99€ for members of The Brewers of Europe (excl. shipment costs when applicable)

To purchase at the booth during the Brewers Forum/EBC Congress, please ensure you've got your invoicing data (including VAT number)!



**TELL US ABOUT
YOUR SUSTAINABILITY INITIATIVES!**

Brewers across Europe are pioneers in sustainability. Recycling glass and cans, innovating packaging, reusing water, building solar farms, upcycling potential waste as secondary products and cutting transport emissions, they have led the way in making brewing more environmentally friendly.

So, what are you doing to help the planet?

We're cataloguing the many initiatives that brewers and businesses operating in the beer value chain have launched over the years. Make sure yours is included! If you have found a way to integrate environmental sustainability in your operations, we would love to know more and to promote your efforts.

**GET ONTO BREWING4.EU
AND REGISTER YOUR
SUSTAINABILITY INITIATIVES
SO WE CAN COLLECTIVELY
TELL THE STORY OF HOW
BEER AND THE BREWING
VALUE CHAIN ARE LEADING
THE WAY IN ENVIRONMENTAL
SUSTAINABILITY**



**KAMENITZA WITH MORE
SUSTAINABLE PET BOTTLES**

By Steliyana Kasabova, Corporate Affairs Manager,
Kamenitza AD

In 2021 Kamenitza changed the design of the PET bottles of three of its main brands – Kamenitza, Burgasko, and Astika.

The main reasons for the change of the design were to respond to two important trends: first, to use less plastic material, and second, to make the bottles more convenient for the consumers.

As a result of the change, less plastic material was used for the bottles and for their caps and the neck plastic labels of Burgasko and Astika brands were removed as well. These changes led to the following:

- 12.5 tons saved paper per year
- 300 saved trees per year
- 41.3 tons less plastic used per year

The new PET bottles not only have a more distinctive design and look, but also, they are more friendly to the environment, thanks to the sustainable packaging solutions of Competek which worked in collaboration for the design with Gentlebrand. As a company which strives to make a positive imprint, Kamenitza will continue to work in the direction to create innovations that are important and valuable for the consumers and for the environment.



**КАМЕНИЦА С ПО-УСТОЙЧИВИ
ПЛАСТМАСОВИ БУТИЛКИ**

През 2021 г. Каменица промени дизайна на PET (пластмасовите си) бутилките на три от основните си марки – Каменица, Бургаско и Astika.

Основните причини за промяната на дизайна бяха да се отговори на две важни тенденции: първо, да се използва по-малко пластмасов материал и, второ, бутилките да се направят по-удобни за потребителите.

В резултат на промяната се използва по-малко пластмасов материал за бутилките, както и за направата на техните капачки и бяха премахнати гърлените етикети на марките Бургаско и Astika. Тези промени доведоха до следното:

- 12.5 тона спестена хартия на годишна база
- 300 спасени дървета на година
- 41.3 тона по-малко използвана пластмаса

Новите PET бутилки не само имат по-отличителен дизайн и външен вид, но и са по-щадящи към околната среда, благодарение на устойчивите опаковъчни решения на Competek, които работиха в сътрудничество за дизайна с Gentlebrand.

Като компания, която се стреми да остави положителен отпечатък, Каменица ще продължи да работи в посока създаване на иновации, които са важни и ценни за потребителите и за околната среда.

12.5 tons
saved paper per year

300
saved trees per year

41.3 tons
less plastics per year



CAN BLOCKCHAIN BOOST THE CRAFT BREWING INDUSTRY?

BY DR. JACK BUFFINGTON, DIRECTOR OF
SUPPLY CHAIN AND SUSTAINABILITY,
FIRST KEY CONSULTING

INITIALLY PUBLISHED ON FIRST KEY CONSULTING
WEBSITE: CAN BLOCKCHAIN BOOST THE CRAFT
BREWING INDUSTRY? - FIRST KEY CONSULTING



Despite the growth of craft breweries over the past 15 years, the global beer market worldwide is largely defined by its consolidation; according to a Business Wire article, the 2021 global beer industry is valued at nearly a half a trillion dollars, with the four largest brewers equal to approximately a quarter of the total volume¹. This trend toward industry consolidation is not isolated to beer, as is evident at the supermarket, with only ten large food companies being responsible for a large majority of the 100,000 SKUs in a supermarket, despite the perception that these separate brands are manufactured and distributed by different companies². Retailers have grown, not through an assortment of product variety through a myriad of suppliers, but rather through supply chain efficiency via large manufacturers with a wide portfolio of their own product offerings. This has led to a synergistic supply chain relationship between large manufacturers and retailers to distribute products at the highest quality, the lowest cost, and the most efficient information system transactions. In supply chain, we call this a *frictionless supply chain*, growth through improvements in how products are forecasted, ordered, and distributed. While a limited number of craft brewers can beat the odds through getting their products on the shelves of the largest retailers through their distributors, the distributor can only make so many small bets on craft beer, with a larger mindset focused toward safer, higher volumed transactions of larger brands with its retail partners. For example, Walmart has over 4,600 grocery stores in the U.S. out of the almost 40,000 in total, and it commands 26% of the total grocery volume. Craft breweries have a difficult time winning in these consolidated supply chain and retail systems. What, if anything, can craft brewers do about this? Since 2005, the craft beer industry has grown significantly, over 300%. But more recently that growth has stalled, and even fallen, with a 9% decline from 2019 to 2020, and a market share drop from 13.6% to 12.3%³. And yet, despite the limited growth in the

¹ Businesswire, 2021. "2021 Global Beer Market and the Impact of COVID-19: Market Volume, Value and Dynamics for Past Five Years". April 22. Found at: <https://www.businesswire.com/news/home/20210422005588/en/2021-Global-Beer-Market-and-the-Impact-of-COVID-19-Market-Volume-Value-and-Dynamics-for-Past-Five-Years---ResearchAndMarkets.com>.

² Mattison, Lindsay (2021). "10 of the Biggest Food Companies Basically Own Every Grocery Item You Buy." *Open Wide Eats*. July 6. Found at: <https://www.wideopeneats.com/biggest-food-companies/>

³ Morris, Chris (2021). "Despite Zoom happy hours and day drinking, 2020 wasn't a great year for craft brewers". *Fortune*. April 6. Found at: <https://fortune.com/2021/04/06/craft-brewers-2020-sales-market-share-closings-beer-independent-brewers-association/>

present and possibly into the future, there are 9,000 craft breweries, a lot of providers within a shrinking market. This topic of "what to do about craft?" has been one of great concern in the sector, with most opinions focused on restoring Craft *originality* and *authenticity*. This seems like a logical response, and yet, at the same time, it is nearly a mathematical impossibility to achieve a restoration of Craft's roots when there are now 9,000 breweries rather than just a few hundred or so. This sense of *originality* and *authenticity* is leading to an expansion of product offerings beyond Hazy IPAs and Chocolate Porters to Double Barrel Aged Sour Ales or Imperial Stouts because the industry grumbles that its millennial consumer "won't drink the same beer twice". Predictably, while most craft brewers see themselves as going after the 87-88% of the market commanded by the big brewers, unless they adjust to the new world of frictionless supply chains they may find themselves fighting amongst themselves for the much smaller share of the pie currently attributed to Craft. The moral of the story is this: craft brewers need to develop strategies to focus on transactional efficiencies, or a so-called frictionless supply chain as a way to competitively grow market share, as much, if not more than creating the next unique beer offering. I know that this sort of statement is a form of heresy to many in the craft sector, but the numbers don't lie: the market, enabled by the present state supply chain system, may have hit *Peak Craft* in the year 2020.

Before concluding that the craft beer sector is relegated to being a niche player in the U.S. beer market due to these challenges, think again: what if there is an emerging solution that could level this transactional playing field, enabling the 9,000 craft breweries to compete with the largest manufacturers in the world? There is such a solution on the horizon called *blockchain*, a decentralized centralized ledger system to enable companies to transact across their supply chains more fluidly. A solution that has become popular relating to cryptocurrency, such as its use as a payment method that the *Threes Brewing* in Brooklyn, has launched, or *Downstream Beer*, based in Ireland, that offers the self-proclaimed, "world's first blockchain beer" through full traceability of its brewing methods. Both of these applications in blockchain technology as first-generation technologies will be useful in the craft brewing industry, but likely not sufficient to gain market



share over the larger brewers. Instead, blockchain needs to be applied to create a *transactional supply chain* system rivaling the traditional supply chains of today, from planning to sourcing to production to distribution and retailing. It is to achieve a 21st century frictionless supply chain that can compete against the big players.

Think about how a decentralized beer supply chain driven by these cryptoplatforms could be a gamechanger in the beer business, leveling the playing field where craft competes with big brewers. On the front end of the brewing process, a blockchain platform could enable smaller craft breweries to procure raw materials and transportation services through creating virtual economies of scale through pooling arrangements through local or even regional craft breweries. Through a *centralized-decentralized* transactional ledger system, barley growers could transact directly with these craft brewers, as easily as the larger farmers do today with Anheuser Busch InBev and MolsonCoors, in a similar efficient, cost-effective manner. A blockchain transactional system of centralized-decentralized could make it as seamless for a barley farmer to procure with a large brewer as it would 50-100 craft breweries. Likewise, the retail environment could fragment as well in an efficient manner that would allow smaller craft breweries to be competitive in selling in smaller retail outlets versus today's dominance of large brands at large retailers. This would be accomplished through a centralized-decentralized ledger transactional system that allows decentralized supply chains to operate in a similar manner as these larger relationships have as their advantage. In comparison to others, the beer business is behind the curve in the use of blockchain technology as an industry solution; in comparison, the transportation sector has had an industry consortium focused on the development of blockchain for a few years now (Blockchain in Transport Alliance, or BiTA), and even a well-known executive from a top company as its leader (Dale Chrystie from FEDEX). There is a strategy, not only to develop and implement process and technology standards, but to collaborate across competitors (e.g. UPS and FEDEX) for the betterment of the supply chain. In contrast, the beer industry has no BiTA nor Dale Chrystie to drive change, leaving any initiative taken on by a company to be proprietary and siloed. Imagine the possibilities of a centralized/decentralized ledger-transactional system for the beer industry that would provide *transactional economies* of scale for the craft breweries given their current state! Given the stagnant forecasts of this segment over the next decade or so, this could become the most important initiative in its history!



Can blockchain save the craft beer industry in the 2020s? The answer to this question depends on the craft community's understanding of the problem that it currently faces: if it continues to believe that the answer is in Craft's roots from the 2000s, it will continue to head in the wrong direction. In contrast, if it believes that it already makes great products, and needs to become more proficient from a supply chain and retail standpoint, this could become a rallying point toward reinforcing the collaboration that the craft community has long prided itself on, rather than finding themselves forced to compete over a limited market share amongst 9,000 breweries. The technology around blockchain is relatively simple, and easy to outsource to technology professionals. In contrast, the industries that are truly leading in this space, such as the U.S. transportation sector, understand that it is the development of new processes and business relationships that can drive change, but is more difficult to achieve from a strategic standpoint. Leaders within the craft brewing industry must establish a new direction that doesn't compromise the quality, originality, and authenticity of its beer, but enables its distribution from transactional improvements in the supply chain from sourcing to production to distribution. If Craft can envision this as a vision, it will crack the code of how it will grow in the 21st century. www.firstkey.com



Consultants to the Brewing Industry
30 years | 50 countries

FirstKey.com



Digitalise.
mashing

Optimise.
process

Control.
quality

S I B A

by **S P E C S H E L L**

SPECHELL INLINE BREWING ANALYSER (SIBA) is a patented, fully automated inline technology that gives brewers a real-time insight into the mashing process without the need for manual sampling.



NEWS FROM BULGARIA

HUMAN RESOURCES ARE THE MOST VALUABLE CAPITAL FOR BULGARIAN BREWING INDUSTRY

By the Union of Bulgarian Brewers /

At the beginning of 2022, the Union of Brewers in Bulgaria (UBB) was awarded first place in the category "Human Resources" and second place in the category "Society" in the first competition for corporate social responsibility of the Ministry of Labour and Social Policy. The award is for the contribution of the brewing organisation in the development of social dialogue in the beer industry. The Minister of Labour emphasised the importance of collective bargaining, as a best practice for cooperation between employers and trade unions. For over 20 years, the Union of Brewers and its social partners from the national trade unions have periodically signed collective labour agreements. It upgrades labor legislation and leads to better working conditions, higher wages, quality jobs and other important benefits for workers. "Human resources are the most important capital of the beer industry in Bulgaria. It is our great achievement that in pandemic conditions we not only maintained employment in the sector, but even created new jobs. Brewers make committed efforts to invest in human

resources development and increase of employee salaries. The average insurable earnings in the industry have increased by 7% compared to 2020 and continue to be among the top seven highest in the country.

Almost 90% of Bulgarians rate highly the brewing industry in the country, due to the responsible employer, social and production practices established in the sector. This assessment is an even bigger motivation for the UBB to continue to lead with social responsibility campaigns. In 2022, efforts are focused on sustainable development, green initiatives and the circular economy.

For more information see www.pivovari.com

ЧОВЕШКИТЕ РЕСУРСИ СА НАЙ-ГОЛЕМИЯТ КАПИТАЛ ЗА БИРЕНАТА ИНДУСТРИЯ В БЪЛГАРИЯ

В началото на 2022 г. Съюзът на пивоварите в България (СПБ) беше отличен с приз за първо място в категорията „Човешки ресурси“ и второ място в категорията „Общество“ в първия конкурс за корпоративна социална отговорност (КСО) на Министерството на труда и социалната политика. Наградата е за приноса на пивоварната организация в развитието на социалния диалог в бирената индустрия. Министърът на труда специално подчерта значението на браншовото колективно трудово договаряне, като най-добра практика за сътрудничество между работодатели и синдикати.



Вече над 20 години Съюзът на пивоварите и партньорите им от националните синдикални организации периодично подписват браншови колективен трудов договор. С него се надгражда трудовото законодателство и се постигат договорености за по-добри условия на труд, заплащане, качествени работни места и други важни за работещите придобивки. „Човешките ресурси са най-големият капитал за бирената индустрия в България. За нас е голямо постижение, че в условията на пандемия не само запазиме работната заетост в сектора, но дори открихме нови работни места. Всички пивовари полагат целенасочени усилия да инвестират в развитието на човешките ресурси и да повишават трудовите доходи на своите работници и служители. Средният осигурителен доход в бранша също е нараснал със 7% в сравнение с 2020 г. и продължава да е сред първите седем най-високи в страната.“ коментира Ивана Радомирова – изпълнителен директор на СПБ. Почти 90% от българите дават много висок рейтинг на пивоварната индустрия в страната, именно заради утвърдените в сектора най-добри работодателски, социални и производствени практики. Тази оценка още по-силно амбицира СПБ да продължи да е лидер в кампаниите за социална отговорност. През 2022 г. усилията са фокусирани върху устойчивото развитие, зелените инициативи и кръговата икономика.

За повече информация вж. www.pivovari.com



KAMENITZA SUPPORTS NEW DADS IN BULGARIA

By Steliyana Kasabova, Corporate Affairs Manager,
Kamenitza AD

The demographic challenge with an ageing population and low birth rate is big in Bulgaria. Therefore, in the year when Kamenitza marked its 140-year anniversary, we wanted to contribute to a social cause that is close to the hearts of the people.

The idea came from Kamenitza employees. We decided to support the long-standing campaign of one of the national radio stations in the country, Radio Vitosha, and their morning talk show - "More Bulgarians for Bulgaria". The campaign helps families and young couples who want to have a baby or have reproductive problems. Kamenitza contributed to the campaign 14 000 BGN (7 000 EUR) which were used to buy equipment for a hospital in Kamenitza's hometown Plovdiv.

Another campaign close to this topic that we organized was "Kamenitza for Dads". For more than 141 years Kamenitza has been a part of the life of every Bulgarian. As the oldest beer in Bulgaria, which still exists today, we wanted to support the main Kamenitza consumers in the most exciting moment in a man's life - the moment they become a father, further strengthening the bond between Kamenitza and its fans. Every man who became a father in 2021 and who registered on our website won a case of 24 bottles of Kamenitza 330 ml. This is one of the most emotional periods in the life of every man, but also the most engaging and committing one. That is why Kamenitza decided to give every dad the opportunity to share this occasion with his friends over a glass of beer.

Kamenitza employees actively participated in the development of the campaign concept and its implementation. We were happy that employees of the company from each department were involved in the delivery of the beer to all registered fathers, which contributed to an even more personal approach of the campaign to the consumers of Kamenitza. More than 300 employees of the company from all over the country participated directly and were personally engaged with the campaign. The forecast for newborns in 2021 was about 58,000 according to information from the National Statistical Institute, and our campaign received over 21,000 unique registrations of men

who became fathers last year. Practically with this campaign every 3rd father in Bulgaria in 2021 got a case of Kamenitza beer. We are proud that Kamenitza stood next to those new fathers in this very emotional moment of their life.

The campaign received a great response from our customers and consumers. The fact that we received over 21,000 unique registrations spoke a lot about the impact of the campaign. Hundreds of fans have posted and continue to post photos in comments below the posts on Kamenitza Facebook page, as well as send us emails thanking us for the beer and for contributing to this beautiful and so important occasion.

We believe that through this campaign Kamenitza managed to touch its fans in a unique way and win new ones, demonstrating its support for all new fathers. That is why we will continue the campaign in 2022 as well.



*24 броя Каменица 330 мл. Пиво на участие има стандартен лед, стандартна бляда през 2021 г. Ако си мъж от 18+ години, регистрирай се на kamenitza.bg до 31.07.2022 г. и Каменица ще ти помогне да отпразнуваш този момент с приятелите си, като ти достави 24 броя Каменица 330 мл. Не се изисква покупка за участие. Изображенията са с илюстративна цел. Пълни правила на kamenitza.bg.

КАМЕНИЦА ПОДКРЕПЯ НОВИТЕ БАЦИ В БЪЛГАРИЯ

Демографският проблем със застаряването на населението и ниската раждаемост е голям в България. Затова в годината, когато Каменица отбеляза своята 140-годишнина, искахме да допринесем за една социална кауза, която е близка до сърцата на хората.

Идеята бе на служители на Каменица. Решихме да подкрепим дългогодишната кампания на едно от националните радиа в страната, Радио Витоша, и сутрешното им токшоу, а именно – кампанията „Повече българчета за България“. Кампанията помага на семейства и млади двойки, които искат да имат дете или имат репродуктивни проблеми. Каменица допринесе към кампанията с 14 000 лева (7 000 евро), които бяха използвани за закупуване на оборудване за болница в родния град на Каменица - Пловдив.

Друга близка до тази тематика кампания, която организирахме, беше „Каменица за татко“. Повече от 141 години Каменица е част от живота на всеки българин. Като най-старата бира в България, която съществува и до днес, ние искахме да подкрепим основните потребители на Каменица в най-вълнуващия момент в живота на един мъж – момента, в който става баща, засилвайки още повече връзката между Каменица и нейните фенове. Всеки мъж, станал баща през 2021 г. и регистрирал се в нашия сайт, получаваше стек от 24 бутилки Каменица 330 мл. Това е един от най-емоционалните периоди в живота на всеки мъж, но и най-ангажиращият и отдаден. Затова Каменица реши да

даде възможност на всеки татко да сподели този повод с приятелите си на по чаша бира.

Служителите на Каменица участваха активно в разработването на концепцията на кампанията и нейното изпълнение. Радвахме се, че служители на компанията от всеки отдел се включиха в доставката на бирата до всички регистрирани татковци, което допринесе за още по-личен подход на кампанията към потребителите на Каменица. Повече от 300 служители на компанията от цялата страна участваха пряко и бяха лично ангажирани с кампанията.

Прогнозата за новородени през 2021 г. бе около 58 000 по информация на Националния статистически институт, а кампанията ни получи над 21 000 уникални регистрации на мъже, станали бащи през изминалата година. На практика с тази кампания всеки 3-ти баща в България през 2021 г. се сдоба с чаша бира Каменица. Гордеем се, че Каменица застана до тези нови бащи в този много емоционален момент от живота им.

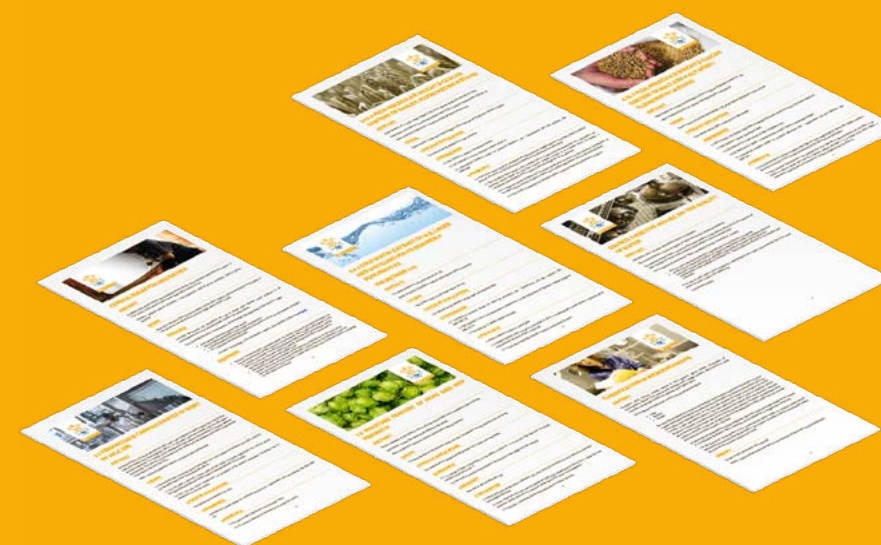
Кампанията получи голям отзвук от нашите клиенти и потребители. Фактът, че получихме над 21 000 уникални регистрации, говори много за въздействието на кампанията. Стотици фенове публикуваха и продължават да публикуват снимки в коментари под публикациите във Facebook страницата на Каменица, както и да ни изпращат имейли с благодарности за бирата и за приноса към този красив и толкова важен повод.

Вярваме, че чрез тази кампания Каменица успя да докосне своите фенове по уникален начин и да си спечели нови, демонстрирайки подкрепата си към всички нови татковци. Ето защо ще продължим кампанията и през 2022 г.



ANALYTICA - EBC

THE EUROPEAN REFERENCE ANALYTICAL
METHODS FOR BREWERIES BY EBC
EXCLUSIVELY AVAILABLE ON [BREWUP.EU](https://www.brewup.eu)



Price Scheme	Price (excl. VAT)
Yearly subscription	109€
Multi-users account (2-5 users)	69€
Multi-users account (6-10 users)	59€
Multi-users account (11+ users)	54€
Individual methods	29€

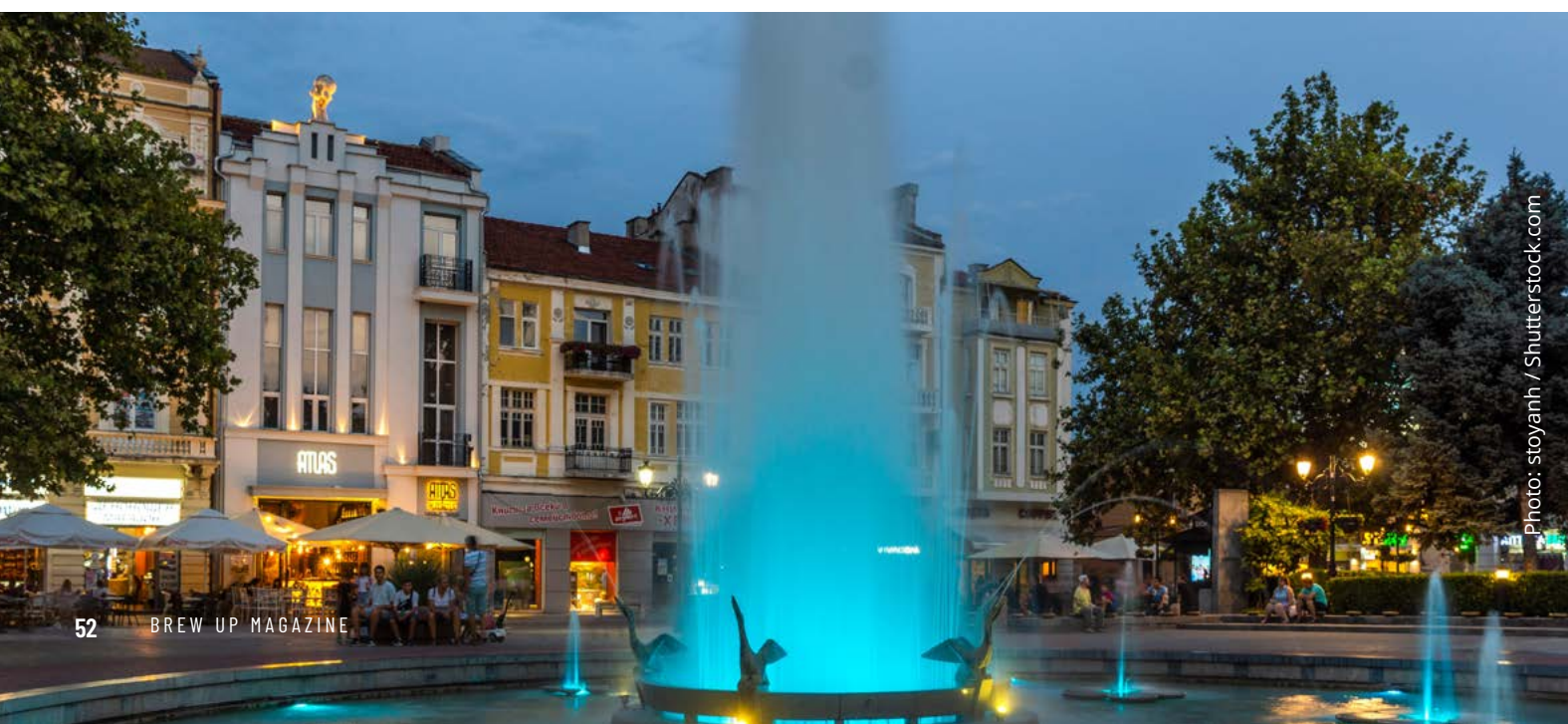


Photo: stoyanh / Shutterstock.com



BREWERS FORUM

21-23 MAY PRAGUE 2023

**BREWERS
FORUM**
21-23 MAY
PRAGUE 2023
JOIN US

Join us next year for the next edition of the Brewers Forum in the wonderful Prague (Czech Republic)! 2-days of conferences and meeting with suppliers, followed by technical visits in historical beer places and of course, lots of networking opportunities in one of the richest beer countries of the world!"

STAY TUNED!



brewersforum.eu

@ForumBoe

[brewersforum](https://www.facebook.com/brewersforum)

@brewersforum

[the-brewers-of-europe-forum](https://www.linkedin.com/company/the-brewers-of-europe-forum)



THE BREWERS OF EUROPE

