

THE BI-ANNUAL PUBLICATION OF THE BREWERS OF EUROPE

# BREWUP

MAGAZINE  
ISSUE 6 - NOVEMBER 2023

**Lille**   
26-30 MAY 2024

## IN FOCUS:

HEADING TOWARDS LILLE 2024

HOP HARVEST 2023

BARLEY & CLIMATE CHANGE

## INSIDE THIS ISSUE

EU GREEN CLAIM DIRECTIVE

PRODUCT ENVIRONMENTAL FOOTPRINT

UPDATES ON PACKAGING POLICY

BEER FROM GREEN ENERGY:  
KAMENITZA AD IN BULGARIA BUILT ITS  
OWN SOLAR PARK



THE BREWERS OF EUROPE

# TABLE OF CONTENT

## BREWUP MAGAZINE





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Mathieu Schneider



<b>FOREWORD</b> .....	<b>5</b>
<b>TRIBUTE</b> .....	<b>7</b>
<b>IN FOCUS</b> .....	<b>8</b>
Climate change calls for adaptation of malting barley supply strategy in Europe .....	9
Hopfenernte 2023 .....	15
Hop harvest 2023 .....	20
Heading towards Lille 2024 .....	26
<b>SUSTAINABILITY</b> .....	<b>28</b>
EU Green Claim directive – likely not to be adopted before the end of the European Parliament .....	28
PEF (Product Environmental Footprint) helps brewers to opt for sustainability .....	30
Packaging policy .....	34
Beer cannot be the only alcoholic drink delivering on the packaging reuse and recycling targets. . . .	34
Why the EU must incentivise the keg, the ultimate sustainable packaging system. ....	36
Over to MEPs and the EU Member States to maintain high ambitions in the	
The new deposit refund scheme in Poland / Nowy system kaucyjny w Polsce .....	42
Beer from green energy: Kamenitza AD in Bulgaria built its own solar park. ....	44
<b>PROMOTING BEER</b> .....	<b>31</b>
The Belgian Beer World opens in the old Stock Exchange Building of Brussels .....	48
Beer tourism .....	50



# PRESIDENT'S FOREWORD

Dear Readers,

Beer's greatest asset is nature! This is where all our ingredients (water, the cereals which are then malted, the hops) are crafted, allowing brewers, brewsters and breweries to express their skills and art and empower consumers to enjoy the best beverage on earth! However, our environment is under threat. Climate change is having an impact on the raw materials (as you'll also see in our malt report).

This is why brewers have taken steps for years already in becoming more sustainable, to help reduce our environmental footprint and to ensure the world remains as green as it should. In this edition, you will read about how the European Commission is moving forward with its Green Deal and the impact it will have on breweries. Of utmost importance at the moment is the Packaging and Packaging Waste Regulation, which we introduced in our last edition. This crucial piece of legislation is making its way through the European Parliament and the Council and there remain many challenges for our sector, which stands as a pioneer and leader in sustainable packaging.

In this edition, you will also discover a preview of what the brewing community can expect in Lille, France, on the occasion of the 39th EBC Congress and 6th Brewers Forum ([www.lille2024.beer](http://www.lille2024.beer)), an event where more than one thousand representatives of the beer value chain are expected to come together. Sustainability will be at the heart of the conference, together with business trends, advice and the usual sharing of experiences, plus a few beers too. You will also be able to read about sustainability activities in Bulgaria, as well as how activities are popping up across Europe to boost beer tourism and promote our beautiful sector towards consumers.

Enjoy your reading and see you all in Lille from the 26th to the 30th of May 2024!

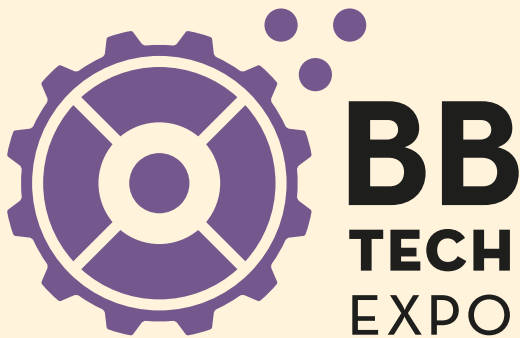
Best regards,



THE BREWERS OF EUROPE

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## A TRIBUTE TO PIERRE-OLIVIER BERGERON

As Pierre-Olivier Bergeron, Secretary General of The Brewers of Europe, embarks on the next chapter in his life, I would like to thank him on behalf of the association and the whole European brewing community for his longstanding commitment to defending and promoting beer and brewing sector.

Stepping down at the start of November after almost 15 years as Secretary General and over two decades at The Brewers of Europe, Pierre-Olivier leaves behind a well-established, highly reputed organisation on the Brussels scene. The list of achievements over this time is a long one, but it still seems fitting to pick out a few.

It is under Pierre-Olivier's leadership that The Brewers of Europe became a founding member of the European Alcohol and Health Forum, co-drafting its Charter and going on to become its leading committer. The landmark 7 Operational Standards marketing self-regulation commitment of The Brewers of Europe was in many ways the forerunner to many of the CSR commitments we see today and was critical in ensuring the European Audiovisual Media Services Directive recognise self- and co-regulation as a legitimate means of ensuring responsible beer advertising.

It was through the Proud to be Clear commitment from brewers to voluntarily label ingredients and calorie information, followed through by action, that beer and brewing have stood ahead of the other drinks sectors in our commitment to transparency, building bridges even with our most ardent critics within the NGO community.

During a time of unprecedented consolidation and expanding diversity within the European brewing sector, Pierre-Olivier helped to unite brewers under one banner, as an association that could legitimately and robustly represent and promote the interests of all of Europe's 10,000+ breweries. The clearest indication of this is the establishment of the European Brewers Forum as a destination event for all brewers. During his tenure we also saw the establishment of the annual Beer Serves Europe event, this year celebrating its tenth edition, as the place to be, welcoming Presidents of the Commission and the Council, European Commissioners and MEPs each year to celebrate the contribution of beer and brewing to Europe.

The last fifteen years have not always been smooth, with the 2008 financial crisis, the Covid shutdown and the recent energy crisis all placing stress on the beer sector and testing the agility of brewers and The Brewers of Europe to adapt. And all of this on top of a political landscape that is constantly evolving and undergoes an almost entire renewal with the EU elections every five years. A constant throughout this time has been The Brewers of Europe's support to a strong, pan-European, cross-party Beer Club within the European Parliament that over time has united hundreds of MEPs in support of the beer cause.

Of course, the impact someone has on an organisation can be measured in individual actions and numbers, but more important is the character and professionalism that Pierre-Olivier brought to The Brewers of Europe and the stamp he put on the organisation. Pierre-Olivier will be missed and we thank him for all his hard work, fantastic achievements and devotion to The Brewers of Europe. We wish him all the very best!





IN FOCUS

CLIMATE CHANGES  
HOP HARVEST  
LILLE 2024



# CLIMATE CHANGE CALLS FOR ADAPTATION OF MALTING BARLEY SUPPLY STRATEGY IN EUROPE

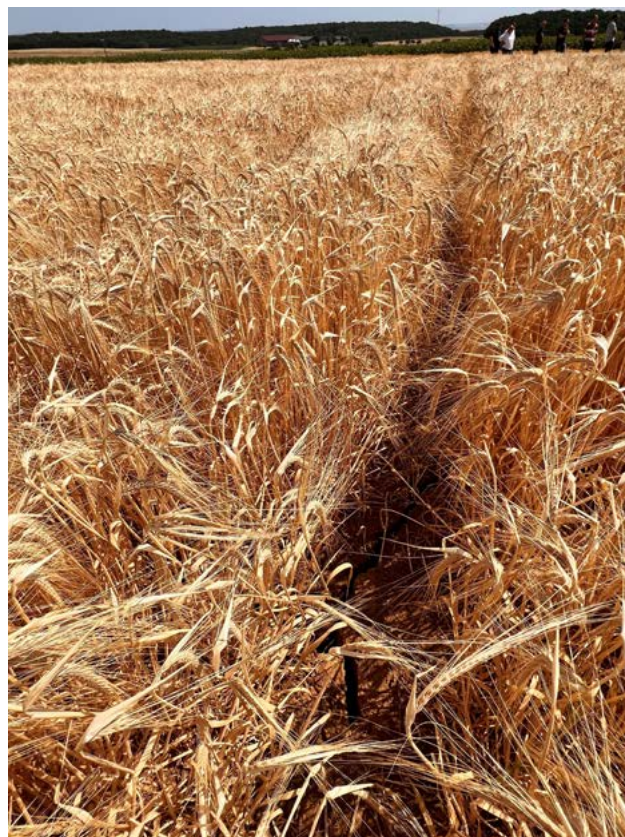
**BY WALTER KÖNIG,**  
MANAGING DIRECTOR, BAVARIAN BREWERS  
ASSOCIATION

At the start of 2023, expectations for a great European barley harvest ran high. However, quite rapidly, the worsened weather conditions led experts to revise their expectations negatively. The key culprit was a drought that affected almost all European barley producers (including the UK which now operates outside the EU). Though there was virtually no winter kill in Europe during crop year 2022/2023, in virtually the entire Continent, winter precipitation was unusually meager, followed by way too much, mostly localized rain in March and April. The key exceptions to the April rains were the Iberian Peninsula, Italy, Greece, and Turkey, where an early and severe heat wave had moved north from the Sahara Desert and evolved into a stationary heat dome.

Overall, precipitation in Europe during most of the current crop year remained quite variable and unreliable, with a hit-or-miss pattern causing huge differences in crop results, even in fields only a few miles apart, not just in aggregate yields but also in terms of plumpness and protein content. While some European fields were planted very early, many other fields, especially in regions with heavy April showers, were planted unusually late. After the rains, the weather flipped almost everywhere,



*Picture 1- The dryness during the grain filling phase has left its mark. The crops that were sown early were unable to develop their grains sufficiently due to a lack of water and nutrients.*



*Picture 2 - Due to the persistent rainfall in March and April, many crops could only be sown very late. The tillering was already in the dry phase so that the plants only pushed up a few spike-bearing stalks. Thin stand densities produce little yield.*

# IN FOCUS

with the stationary heat dome over southern Europe spreading northward. In most of the Continent, the ensuing drought caused some of the highest temperatures ever recorded, as well as many wildfires—even in the UK, Scandinavia, and the Baltics. The dry conditions continued throughout June and July, with only sporadic rains in some regions. As the topsoil became parched, the plants were unable to take up enough moisture, especially during the crucial kernel filling phase. Many crops even started to wilt on the stalks. As a result, analysts continued to lower the European crop forecasts week after week for virtually all agricultural commodities.

One of the few crops that have come out of this year's European heat caldron relatively unscathed are the winter barley varieties, both two- and six-row, which could finish their growth period early before the heat had a chance to decimate them. This was of particular value to France, the EU's largest grain producer, which also grows an unusually large share of its grains as winter crops. In addition, autumn-sown, two-row spring barley varieties fared reasonably well. As winters on the continent have become increasingly milder in recent years and barley breeders have brought spring barley varieties with improved winter hardiness properties onto the market, this cultivation practice, which was already established in France,

has now been extended to the malting barley powerhouse of Germany. The practice of sowing two-row spring barley varieties already in the fall, as a hedge against the seeming regularity nowadays of summer scorches, is rapidly gaining in popularity. It allows plants to absorb moisture opportunistically during their extended growing season and gives them a developmental head start before any drought can wreak havoc.

Most European barley fields that were started this year in the spring showed very mixed results at harvest time. When sowing malting barley in autumn, it is usually the case that crops sown late, i.e. not before the beginning/mid-November, are healthier and of better quality through the winter and thus have an advantageous start to the spring. However, the dry and warm fall of 2022 led many farmers to ignore the sowing recommendation. They took advantage of the good weather and soil conditions and sowed the seeds in October. Agriculture also goes through a learning curve with new cultivation techniques. And this year, farmers had to learn that the later the crops were sown, the better the harvest results.

In early July, some rainfall did occur in parts of Europe, including in several German regions, which ameliorated some of the most serious harvest losses, but they came much too late to reverse most of the drought damage.



*Pictures 3, 4 and 5 - The consequences of the sowing period, which lasted around 2 months (beginning of March to beginning of May), were a) ears with poor sorting at the regular harvest time, b) still green ears in July with good quality expectations due to late rainfall and c) sobering results with hidden and open growth and black fungus after the rain in August*



*Picture 6 - A detailed shot of the open growth and trim*

## FRANCE

In France, the farm agency FranceAgriMer pegged the country's total barley production in the 2022/2023 season at almost 12 million MT (other more optimistic sources report up to 12.78 million MT). This represents an almost normal value, carried by more than 9 million MT of winter barley, which turned out to be the country's largest winter barley crop since 2019. In a normal year, France exports about half its annual barley harvest for all uses, while its share of malting-quality barley for the production of beer and spirits rarely exceeds 2 million MT, most of which is used domestically. Though France was not spared many of the effects of the European heat dome, the country's unusually large share of winter crops, which could be harvested earlier than its summer crops, salvaged the country's overall harvest volume. Given the virtual collapse of commodity trades through the Black Sea ports, French farmers will have no problem this year emptying their silos before the 2023/2024 crop is ready.



*Picture 7 - In France in particular, but throughout Europe, winter barley had the most favorable weather conditions - dense stands and full grains before ripening guarantee good qualities and high yields.*

## NORTHERN EUROPE

Much of northern Europe—especially Sweden (normally producing a barley harvest up to 1.5 million MT/year), Denmark (normally up to 4.2 million MT/year; of which about 3.7 million MT is spring barley), and the Baltic countries of Lithuania, Latvia, and Estonia (normally some 1.4 million MT/year combined)—experienced persistent dry conditions. In Scandinavia, only Finland (usually about 1.45 million MT/year) and Norway (roughly 0.6 million MT/year) had normal harvest results this year. Especially Denmark is significant, because this country usually produces as much barley as the entire US which is 230 times the size of Denmark. Even as late as December 2022, most forecasters expected Denmark to produce a mini-

# IN FOCUS

mum of 4.12 million MT of barley (based on a count of planned barley acreage). After harvest, that assessment had been reduced to a very disappointing 3.1 million MT. This result is particularly painful for the German barley market which historically absorbs more than 30 percent of the Danish harvest. The effect is significant because Germany itself had a less than stellar harvest this year.

## SPAIN

Spain is usually the EU's third-largest barley producer (after France and Germany). It is also a barley exporter. But this year, Spain was probably the country most affected by climate change (as was its neighbor, Portugal, which, however, produces only negligible amounts of barley). By late August most publications agreed that the Spanish barley harvest was both a qualitative and a quantitative disaster, with an estimated production of only 4.1 million MT, of which only 2.25 million MT is spring barley. As a consequence, Spain will be a net importer of malting-quality barley this year, with the UK being its major source.

## GERMANY

While climate change in Spain emerged as a “stable” calamity, in Germany, global warming was having an alternating effect of both too much and too little rain with extreme temperatures, all at the wrong time. The current crop year clearly reflects this zig-zag pattern.



The excess early supply of moisture in many fields caused the barley plants to develop only shallow roots—there was no need for them to drill deep for water. This turned out to be a serious detriment around mid-April to early May when the stationary heat dome in southern Europe (see Spain above) started to spread northward.

Especially light, sandy soils quickly turned from water-logged to parched and cracked. Only fields with winter barley could be harvested early enough to produce satisfactory yields.

The heterogeneity of the German 2023 barley harvest is extreme, with both protein and plumpness values ranging from very low in some fields to very high in others. Therefore, averages mean almost nothing, even for individual regions; and the table in the attachment seeks to reflect this fact. This year's total harvest volume of spring-sown spring barley is about 1.5 million metric tons (MT), of which an unusually low share of only about 780,000 MT is of brewing quality. However, because of quality concessions by the trade, which cannot be captured statistically, the actual quantity processed by maltsters is likely to be slightly higher. For maltsters and brewers, there are only a few ways out of the dilemma: supplementing the brewing barley supply with scarce imports, accepting more winter brewing barley (much of it from France), or lowering their quality standards exceptionally for this crop.

## EASTERN EUROPE

Many of the key barley producing countries in Eastern Europe experienced similar conditions as the ones in Central Europe, including drought conditions and deluges at the wrong times. Their geographic location played a key role in their harvest results and crop reductions varied greatly.

## OUTLOOK

- It is becoming harder to cultivate barley, especially malting- and brewing-quality barley, in certain traditional barley regions of the world, such as Spain.
- The southern hemisphere producers, Australia and Argentina, are likely to assume larger roles in the future global barley supply.
- Changing agricultural practices such as planting spring barley in the fall in newly drought-prone regions are becoming more common.
- Winter brewing barley varieties might have to play a larger role in the future.
- Progressive climate change and political requirements demand an adaptation of the supply strategy for malting barley in Europe. Breweries are required to adjust their demand for winter malting barley, spring barley in autumn sowing and spring barley to minimize the risk of supply bottlenecks..



In addition, European barley (and hop) growers will have a much harder time staying competitive in world markets in the future, because of new regulations, called the EU Green Deal, which were formally adopted in July 2023. They mandate that, by 2030 relative to 2020 levels, farmers must reduce their use of fertilizers by 20 percent and their use of pesticides and antimicrobials, by 50 percent. The Green Deal also calls for the removal of 10 percent of existing farmland from agricultural production. Unfortunately, to date, there are only a few eco-friendly products on the market that could serve as functional replacements of the sometimes-toxic chemicals that farmers have been using as herbicides and pesticides on their crops in the past.

Finally, global barley reserves (carry-over stocks at the end of a consumption year) are dwindling and reaching dangerously low levels. Forecasts even from reliable sources, such as the USDA or the EU, about the present state of global reserves vary widely. Most experts peg them between roughly 18 and 25 million MT. The European Commission lists the European portion of this emergency fallback as slightly below 5 million MT, which, if accurate, represents only about 10 percent of the entire EU annual barley harvest...or a 5-week supply!



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# HOPFENERNTE

# HOP HARVEST REPORT

# 2023



# HOPFENERNTE 2023

**BY WALTER KÖNIG,**  
MANAGING DIRECTOR, BAVARIAN BREWERS  
ASSOCIATION

Bereits die Hopfenernte 2022 war global 19 Prozent niedriger als im Vorjahr ausgefallen. Dieser starke Einbruch der Erntemenge war der größere prozentuale Rückgang der Hopfenproduktion in den vergangenen Jahrzehnten. Obwohl die Anbaufläche annähernd gleich groß blieb, ging die weltweite Erntemenge um 24.200 Tonnen auf 107.000 Tonnen zurück. Dies war in erster Linie auf „extreme Witterungsbedingungen“ zurückzuführen, die allein in Europa für einen Rückgang von 17.800 Tonnen sorgten.

Nur die noch in den Kühllagern liegenden Bestände aus den guten Ernten der Vorjahre konnte die Versorgungssicherheit der Brauwirtschaft mit den gewünschten Hopfensorten gewährleisten.

## FLÄCHENENTWICKLUNG

Die Gesamtfläche der deutschen Hopfenanbauggebiete veränderte sich im Vergleich zum Jahr 2022 kaum. Betrachtet man die Flächendaten einzelner Hopfensorten und die Gesamtfläche der Rubriken Aroma-, Bitter- und Spezial-Aroma-Hopfen, werden zum Teil jedoch große Flächenverschiebungen deutlich. In Deutschland, dem größten Anbauggebiet Europas belief sich die Gesamtfläche im Jahr 2023 auf 20.629 ha. Dies entspricht einer minimalen Zunahme von 24 ha im Vergleich zum Vorjahr. Die flächenmäßig bedeutendste deutsche Hopfensorte Herkules wurde weiter ausgeweitet und auf 355 ha zusätzlich kultiviert. Die Gesamtfläche dieser Bitterhopfensorte steigt somit auf 7.498 ha. Herkules war somit erneut die weltweit größte Hopfensorte. Mit den Sorten Perle und Hallertauer Tradition bilden zwei Aromahopfensorten die flächenmäßig zweit- und drittgrößte Hopfensorten in Deutschland. Bei beiden Sorten gingen die Anbauflächen leicht zurück.

Damit setzte sich der Trend der vergangenen Jahre weiter fort: Aufgrund der hohen Nachfrage des weltweiten Marktes nach Bitterhopfen steigen diese Flächen bereits seit einigen Jahren und die Flächen an Aromahopfen werden reduziert.

Besonders erfreulich ist die Tatsache, dass neue klimatolerante

und gesündere Hopfenzüchtungen in den Markt eingeführt werden. Als Beispiel können die am Hopfenforschungszentrum Hüll gezüchteten Hopfensorten Tango (Aromahopfen) und Titan (Bitterhopfen) genannt werden. Die Sorte Tango konnte die Fläche im Vergleich zum letzten Jahr mit einer Flächensteigerung von 30 ha fast verdoppeln und die Sorte Titan bereits im ersten Jahr eine Fläche von knapp 100 ha erreichen.

Weltweit ging die Anbaufläche für Hopfen um rund 2.200 ha zurück, was in erster Linie an Flächenrodungen von Spezial-Aroma-Sorten in den USA liegt. Es wird erwartet, dass in den USA die nun frei werdenden Hopfenanbauflächen ebenfalls mit neuen klimatoleranten Bitterhopfensorten bepflanzt werden, um die steigenden Nachfrage auch aus dem US-Markt bedienen zu können.

## WITTERUNGSVERLAUF

Bereits das Frühjahr war lange kühl und außergewöhnlich nass. Häufige Niederschläge im März und April verhinderten oftmals ein Befahren der Hopfenfelder, sodass die Hopfenpflanzen einen verzögerten Wachstumsbeginn hatten und die Frühjahrsarbeiten zum Teil später und oft nur mit erheblichem Mehraufwand erledigt werden konnten. Von Mitte Mai bis Ende Juli, in der Hauptwachstumsphase, waren keine oder nur sehr geringe Niederschläge zu verzeichnen. Obwohl in den einzelnen Hopfenanbauregionen durchaus mehr oder weniger Regen fiel, muss doch insgesamt auch 2023 wieder als ein Trockenjahr für den Hopfen in ganz Europa bezeichnet werden.

Im Unterschied zum Vorjahr setzte Ende Juli aber dann eine feuchte und kühle Großwetterlage ein. Der von den Hopfenpflanzern sehnlichst erwartete Regen lies den Hopfen nochmal zu Kräften kommen und half die schon befürchtete Missernte zumindest in einigen Hopfenregionen zu verhindern. Die späten Regenfälle konnten zwar nicht mehr die bereits verpasste Ausbildung einer üppigen Hopfenpflanze wettmachen, allerdings konnten die bereits im Wuchs befindlichen Hopfendolden davon profitieren und sich ordentlich entwickeln.

Bereits während der Ernte zeigten jedoch erste Analyseergebnisse, dass die lange anhaltende Trockenheit und starke Hitze negative Auswirkungen auf die Bildung des Alphasäure-Gehalts einiger Sorten hatten.

Die Erhaltung der Pflanzengesundheit erforderte 2023 einen durchschnittlichen Aufwand. Im Frühjahr standen die Bekämpfung von falschem Mehltau und von Bodenschädlingen im Mittelpunkt, während in den trockenen Sommerwochen kein großer Krankheits- oder Schädlingsdruck auftraten. Ab Anfang August musste mit dem einsetzenden Regen das Aufkommen von falschem und echtem Mehltau sorgfältig beobachtet und behandelt werden.

	Erträge(t)		Alpha(t)	
	2022	2023	2022	2023
USA	46.351	47.000	5.200	5.500
Deutschland	34.406	41.000	3.725	4.400
China	6.014	6.500	430	470
Tschechien	4.452	6.000	170	220
Polen	3.424	3.700	321	330
Slowenien	2.283	2.600	118	150
Australien	1.824	2.000	279	290
Neuseeland	2.300	2.030	204	204
Spanien	1.000	948	112	108
Südafrika	715	740	103	102
Frankreich	380	749	27	33
Großbritannien	639	718	45	51
Kanada	525	525	53	53
Ukraine	158	158	8	8
Österreich	450	440	33	36
Russland	189	335	15	20
Argentinien	325	254	29	22
Belgien	242	252	21	24
Japan	202	202	25	25
Rumänien	185	225	17	24
Brasilien	175	180	15	16
Bulgarien	58	62	6	7
Slowakei	20	35	1	2
Serbien	12	20	2	4
IHGC	106.359	116.673	10.959	12.099

Tabelle 1: Ernteschätzung Welthopfenernte 2023 im Vergleich zum Vorjahr.

Quelle: IHB-Treffen vom 18.08.23, aktualisiert von HVG Germany

## ERSTE ERNTEERGEBNISSE

Die Ernteprogno­se der offiziellen deutschen Ernte-Schätzkommission, die die Bestände kurz vor der Ernte begutachtet ging von einer rund 10% unter einer Durchschnittsernte liegenden Erntemenge in Deutschland aus. Die bis zum Redaktionsschluss bekannten Abwaageergebnisse der geernteten Hopfenmengen sind zwar noch nicht endgültig, jedoch wird die Mengenprognose der Schätzkommission wahrscheinlich erreicht werden. Die sich bereits während der Ernte abzeichnenden niedrigeren Alphasäuregehalte, insbesondere bei den Hochalphasorten wurden durch die die Arbeitsgruppe Hopfenanalytik (AHA) hat zum Stichtag 15. Oktober 2023 bestätigt. Die von der AHA herausgegebene Tabelle ist die offizielle Grundlage für die Anwendung der Alpha-Klausel in Aromahopfen-Lieferverträgen und regelt die Berechnung der Preis- bzw. Mengenanpassung für den Fall, dass die Alphaklausel zum Einsatz kommt.

## KLIMAWANDEL UND POLITISCHE VORGABEN FORDERN NEUAUSRICHTUNG

Der Hopfenanbau in Europa ist stärker vom Klimawandel betroffen als dies alle Prognosen in den Worst-Case-Szenarien erwarten ließen. Am stärksten sind Hopfensorten betroffen, die seit Jahrhunderten in Europa kultiviert werden und ihren Ursprung als Auwaldpflanzen haben. Sie sind mit nur flachen Wurzelballen ausgestattet und kommen mit den sich rasant verändernden Witterungsbedingungen, insbesondere mit längeren Trockenperioden und extremen Temperaturspitzen nicht mehr gut zurecht. In Extremjahren wie 2018, 2022 und auch in 2023 brechen die Erträge dieser „Landsorten“ teilweise bis 50% des langjährigen Mittels ein. Zudem schwanken die Inhaltsstoffe so stark, dass in Summe Ausfälle von rund 60% zum einer „Normalernte“ auftreten.

Betrachtet man die Sortenstruktur der deutschen und europäischen Anbauggebiete, so fällt auf, dass es bis in die 1970er Jahre wenig Sortenvielfalt und deshalb auch keinen Sortenwechsel gab. Erst mit den Züchtungserfolgen an den Hopfenforschungszentren in Tschechien, Slowenien und in Deutschland kamen in den 80er Jahren Zuchtsorten mit verbesserten Resistenz- und Ertragseigenschaften in den Boden. Diese fanden weltweit auch schnell den Weg in die Bierrezepturen der Braumeister und werden heute noch gerne eingesetzt.

Doch auch diese Sorten, wie beispielsweise Perle, Hallertauer Tradition oder Magnum sind mittlerweile in die Jahre gekommen und müssen aus Gründen der Versorgungssicherheit



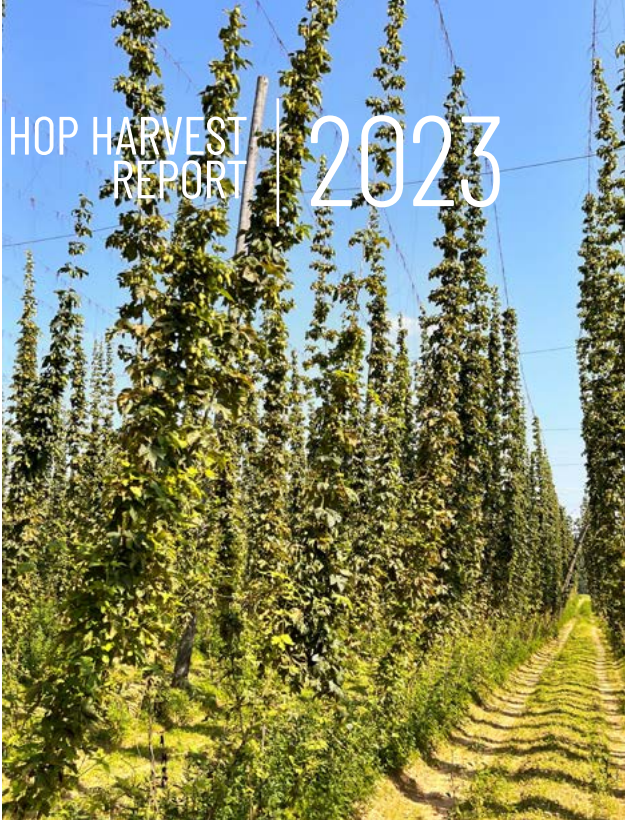
Anbaugesamt / Sorte	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
Niederschlag April	64.2	48.0	24.9	24.3	19.5	6.0	99.8	38.8	39.5	28.2	45.8	69.3
Niederschlag Mai	59.8	66.7	143.1	30.7	126.2	94.6	87.0	88.0	113.7	129.8	145.1	58.8
Niederschlag Juni	30.5	88.4	99.5	158.2	70.1	139.2	58.9	132.0	112.9	48.8	171.4	130.7
Niederschlag Juli	79.5	43.3	116.6	64.9	37.1	67.3	78.0	134.0	27.6	162.7	10.7	67.4
Niederschlag August	159.2	68.5	203.3	95.6	99.2	86.9	96.8	66.7	43.4	109.7	58.1	176.4
Gesamtniederschlag mm		659.6	897.8	723.4	691.5	767.2	784.9	844.4	663.5	781.9	873.2	905.1
Max °C	36.6	37.1	32.6	34.0	35.8	33.8	34.9	31.9	36.8	32.9	36.0	33.7
Tmax >= 25°C	66	80	52	49	62	79	55	51	63	37	46	52
Tmax >= 30°C	24	20	8	11	16	14	11	7	36	8	14	12
Alpha HPER	6.0	4.9	9.0	7.4	6.7	5.5	6.9	8.2	4.5	8.0	5.4	8.1
Alpha HSSE	4.5	3.3	6.4	5.2	4.4	3.5	4.6	5.2	3.2	4.7	3.3	5.1
Alpha HHTR	5.0	5.2	6.1	6.3	5.4	5.0	5.7	6.4	4.7	5.8	5.0	6.7
Alpha HNBR	8.0	6.4	10.5	9.1	8.1	7.4	7.8	10.5	5.4	9.7	6.6	9.9
Alpha HHKS	14.0	15.4	18.5	16.6	16.2	14.6	15.5	17.3	15.1	17.5	16.5	17.1

Anbaugesamt / Sorte	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Niederschlag April	36.3	14.4	39.1	118.1	27.7	103.9	122.1	50.9	21.8	23.2	38.2	30.7
Niederschlag Mai	66.0	155.8	137.9	50.1	163.2	111.6	96.3	62.5	67.2	99.4	63.9	111.2
Niederschlag Juni	104.0	140.5	109.2	110.6	54.5	116.8	90.1	72.7	39.6	78.4	118.0	82.8
Niederschlag Juli	229.4	104.8	136.2	129.5	108.3	54.0	141.9	107.6	64.3	103.3	81.1	106.8
Niederschlag August	90.3	198.1	57.8	92.9	116.7	166.4	172.3	60.3	16.1	101.9	82.3	81.2
Gesamtniederschlag mm	865.5	1026.9	894.1	884.2	969.4	866.3	992.5	690.2	487.8	1006.1	944.6	850.7
Max °C	35.1	33.6	32.6	32.2	34.7	34.5	34.6	32.5	38.0	33.1	32.3	33.3
Tmax >= 25°C	63	45	48	53	53	51	45	46	85	45	46	48
Tmax >= 30°C	11	12	7	11	9	15	7	9	30	10	11	7
Alpha HPER	9.6	7.5	9.2	8.5	7.9	6.2	7.8	6.4	3.9	8.6	7.0	8.1
Alpha HSSE	6.4	5.7	5.7	5.4	4.7	4.3	5.2	4.9	3.2	6.0	4.8	6.4
Alpha HHTR	7.1	6.5	6.8	7.5	6.0	4.8	6.3	6.3	4.1	7.2	6.3	7.1
Alpha HNBR	10.9	9.7	10.4	10.5	9.1	6.4	9.8	9.8	6.0	10.1	9.6	10.1
Alpha HHKS	17.2	16.1	17.3	17.3	16.1							

Tabelle 2: Durchschnittliche Alphasäuregehalte in Abhängigkeit von Niederschlag und Maximaltemperaturen in den Erntejahren 2000-2023

Quelle: Wetterstation Hopfenforschungszentrum Hüll/Hallertau Deutschland





*Bild 1: Die Nobelaromasorte Spalt Spalter im Anbaugebiet Spalt zählt zu den ältesten Landsorten des Saazer Formenkreises. Sie leidet extrem unter den Klimaveränderungen. Die Reben sind schmal, spitz und haben einen geringen Behang mit Dolden.  
Quelle Bild: Dipl.-Ing. Walter König*

durch leistungsfähigere und vor allem klimaangepasste Sorten substituiert werden.

Erntejahre mit extremen Witterungsverhältnissen zeigen, dass die Neuzüchtungen sowohl in ihrer Ertragsleistung als auch hinsichtlich der Konstanz ihrer Inhaltsstoffe erheblich klimatoleranter sind. Dies liegt nicht nur an den größeren und tiefer wurzelnden Wurzelsystemen, mit denen die Pflanzen längere Trockenperioden besser überbrücken können, sondern auch an einem effizienteren Umgang der Pflanzen mit Nährstoffen und verfügbarem Wasser.

## **GESUNDE HOPFENPFLANZEN SCHONEN UMWELT UND SICHERN ERNTEERGEBNISSE**

Ein wichtiger Faktor bei der Hopfenproduktion sind gesunde Hopfenpflanzen. Natürlich arbeitet die Züchtungsforschung ständig an der konventionellen Einkreuzung neuer Resistenzen, beispielsweise aus Wildhopfenstämmen, die weltweit gesammelt werden. Darüber hinaus gibt es einige Möglichkeiten, Hopfenpflanzen resilienter gegen Krankheiten und Schädlinge zu machen. Dies beginnt bei der richtigen Standortwahl für einen Hopfengarten, bei der schonenden und humusfördernden Bodenbehandlung und beim Einsatz von zertifiziertem, gesundem Pflanzgut aus sicheren Herkünften.



*Bild 2 und 3: Direkter Vergleich einer älteren Zuchtsorte und einer neuen Zuchtsorte aus dem Hopfenforschungszentrum Hüll auf identischem Standort.  
Bildquelle: Walter König*



Ein weiterer Faktor zur Stabilisierung der Hopfenerntemengen und der Hopfenqualitäten ist die Bewässerung. Während die Hopfenanbauflächen in den USA zu 100% bewässert werden können, ist die Bewässerungsquote in Europa viel kleiner. Allein in den deutschen Hopfenanbaugebieten können nur rund 20% der Flächen in den Wachstumsmonaten April bis September künstlich bewässert werden. Ein weiterer Ausbau der Bewässerungsquote ist von den Hopfenpflanzern zwar gewollt, zieht sich jedoch aus politischen Gründen seit Jahren hin.

Wie bereits oben ausgeführt wurde die Versorgungssicherheit und Qualitätsstabilität seit den 70er Jahren mit einem stetigen Sortenwechsel erreicht. Die Anpassung unserer Bierrezepturen an neue, klimatolerante, gesündere und leistungsfähige Hopfensorten muss deshalb stetig weiter gehen. Die Hopfenwirtschaft ist hier bereits in erhebliche Vorleistung getreten und hat auf eigenes Risiko neue Hopfensorten in den Boden gebracht. Die Erntemengen sind verfügbar und können auch für Brauversuche größerer Biermengen an Brauereien geliefert werden.

Die Offenheit und Bereitschaft sich mit neuen nachhaltigeren Hopfensorten zu beschäftigen, Brauversuche zum Erhalt der gewünschten Aroma- und Geschmacksausprägung des Biersortiments zu machen, und sich mit der Hopfenwirtschaft aktiv auseinander zu setzen, welche Hopfensorten alte Landsorten substituieren können, ist jedoch bei vielen Brauereien klein. Auch wenn dies anfangs Zeit und auch Geld kostet, wird eine kluge Versorgungsstrategie am Ende sogar Kosten senken und Qualität und Versorgungssicherheit steigern.

## VORKONTRAKTE NOTWENDIG

Nicht viele Brauereien haben die Möglichkeit einen größeren Hopfenvorrat zur Risikominimierung vor Versorgungsentgängen oder starken Preis- bzw. Qualitätsschwankungen in der Brauerei qualitätserhaltend zu lagern. Seit vielen Jahren hat sich hier in Europa das Vorvertragssystem etabliert und bewährt. In Zusammenarbeit mit dem Hopfenhandel, der die Hopfen in der Regel so lange in eigenen Kühllhäusern lagert, bis ihn die Brauerei für die Produktion abrufen, ist ein funktionierendes Vorratshaltungssystem entstanden. Hopfenkontrakte der Brauereien sind aber auch wichtige Signalgeber in die Hopfenwirtschaft und schaffen Kontinuität und Planungssicherheit in der gesamten Wertschöpfungskette.

Nachdem eine Hopfenpflanze nach Neuanpflanzung bis zu drei Jahre benötigt, um in den Vollertrag zu kommen, ist ein

Sortenwechsel nur dann realistisch planbar, wenn mehrjährige Vorverträge für die neuen Sorten vorliegen oder wenn bestehende Verträge für neue Sorten geöffnet und zur substituierenden Lieferung freigegeben werden. Dies ist beispielsweise bei Bitterhopfenverträgen mit der Sorte Herkules durch die neue Sorte Titan möglich. Nur durch die Signalwirkung von Vorverträgen kann der Hopfenhandel den zukünftigen Bedarf an neuen Sorten ermitteln und ihn an die Hopfenpflanzler weitergeben. Fehlt das Vertragssignal, wird die Anbaufläche nicht ausgedehnt und die Menge für den Sortenwechsel bei Big-Bier-Rezepturen nicht vorhanden sein. Der Vorvertrag löst den Knoten des „Henne-Ei“ Zyklus auf.

So gilt mein Appell der Brauwirtschaft, den Sortenwechsel im Sinne einer weiterhin stabilen Versorgungsstrategie mit qualitativ hochwertigem Hopfen aus Europa voran zu treiben, offen für Versuche mit neuen Hopfensorten in Substitution von älteren Züchtungen oder Landsorten zu sein, und aktiv an einer nachhaltigen Hopfenproduktion in Europa mitzuwirken.



*Bild 4: Ab Ende Juli fiel ausreichend Niederschlag, sodass sich die wenigen Blüten an den oft dünnen Reben sehr gut zu großen Dolden ausbilden konnten. Leider bleiben die Alphasäuregehalte unterdurchschnittlich, die Aromaqualität ist jedoch sortenspezifisch und gut ausgeprägt.*

*Bildquelle: Walter König*

## HOP HARVEST 2023

**BY WALTER KÖNIG,**  
MANAGING DIRECTOR, BAVARIAN BREWERS  
ASSOCIATION

The 2022 hop harvest was already 19 percent lower globally than in the previous year. This sharp drop in harvest volume was the larger percentage decline in hop production in recent decades. Although the cultivated area remained almost the same, the global harvest fell by 24,200 tons to 107,000 tons. This was primarily due to “extreme weather conditions,” which caused a decline of 17,800 tons in Europe alone.

Only the stocks still in cold storage from the good harvests of previous years could guarantee the brewing industry’s security of supply with the desired hop varieties.

### AREA DEVELOPMENT

The total area of German hop-growing regions hardly changed compared to 2022. However, if you look at the data for individual hop varieties and the total area of the aroma, bitter and special aroma hop categories, large area shifts become clear in some cases. In Germany, the largest growing region in Europe, the total area in 2023 was 20,629 hectares. This corresponds to a minimal increase of 24 hectares compared to the previous year.

The most important German hop variety, Herkules, was further expanded and cultivated on 355 additional hectares. The total area of this bitter hop variety increases to 7,498 hectares. Hercules was once again the largest hop variety in the world. With the Perle and Hallertau Tradition varieties, two aromatic hop varieties form the second and third largest hop varieties in Germany in terms of area. Cultivated areas decreased slightly for both varieties.

This continues the trend of the past few years: due to the high demand of the global market for bitter hops, these areas have been increasing for several years and the areas of aromatic hops are being reduced.

What is particularly pleasing is the fact that new climate-tolerant and healthier hop varieties are being introduced onto the market. The hop varieties Tango (aroma hops) and Titan (bitter hops) bred at the Hüll Hop Research Center can be mentioned

as an example. The Tango variety was able to almost double the area compared to last year with an area increase of 30 hectares and the Titan variety reached an area of almost 100 hectares in the first year.

Worldwide, the area cultivated for hops fell by around 2,200 hectares, which is primarily due to the clearing of Spezia aroma varieties in the USA. It is expected that the now freed-up hop cultivation areas in the USA will also be planted with new climate-tolerant bitter hop varieties in order to be able to meet the increasing demand from the US market.

### WEATHER CONDITIONS

Spring has already been cool and exceptionally wet for a long time. Frequent rainfall in March and April often prevented access to the hop fields, so that the hop plants had a delayed start to growth and the spring work could sometimes be completed later and often only with considerable additional effort. From mid-May to the end of July, in the main growth phase, there was little or no rainfall. Although more or less rain fell in the individual hop-growing regions, overall 2023 must once again be described as a dry year for hops throughout Europe.

In contrast to the previous year, a damp and cool weather situation set in at the end of July. The rain, which was eagerly awaited by the hop growers, allowed the hops to regain their strength and helped prevent the already feared bad harvest, at least in some hop regions. Although the late rains could no longer make up for the lack of development of a lush hop plant, the hop cones that were already growing were able to benefit from it and develop properly.

However, early analysis results during the harvest showed that the long-lasting drought and intense heat had a negative impact on the formation of the alpha acid content of some varieties. Maintaining plant health required average effort in 2023. In spring the focus was on controlling downy mildew and soil pests, while there was no major disease or pest pressure in the dry summer weeks. From the beginning of August, with the onset of rain, the appearance of downy and powdery mildew had to be carefully monitored and treated.

## FIRST HARVEST RESULTS

The harvest forecast by the official German Harvest Estimation Commission, which assesses the stocks shortly before the harvest, assumed a harvest quantity in Germany that would be around 10% below the average harvest. The weighing results of the harvested hop quantities known at the time of going to press are not yet final, but the Estimation Commission's quan-

	Ertrage(t)		Alpha(t)	
	2022	2023	2022	2023
USA	46.351	47.000	5.200	5.500
Germany	34.406	41.000	3.725	4.400
China	6.014	6.500	430	470
Czech Republic	4.452	6.000	170	220
Poland	3.424	3.700	321	330
Slowenien	2.283	2.600	118	150
Australia	1.824	2.000	279	290
New Zealand	2.300	2.030	204	204
Spain	1.000	948	112	108
Suth Afrika	715	740	103	102
France	380	749	27	33
Great Britain	639	718	45	51
Canada	525	525	53	53
Ukraine	158	158	8	8
Austria	450	440	33	36
Russia	189	335	15	20
Argentina	325	254	29	22
Belgium	242	252	21	24
Japan	202	202	25	25
Rumania	185	225	17	24
Brasil	175	180	15	16
Bulgaria	58	62	6	7
Slowakia	20	35	1	2
Serbia	12	20	2	4
IHGC	106.359	116.673	10.959	12.099

Table 2: Harvest expectations for freshly harvested hops compared to the actual harvest quantities in previous years. Source: IHGC reports from July 2022 (plus current assessments prepared by HVG Germany, \*China data from April 2022))

ty forecast will probably be achieved. The lower alpha acid contents that became apparent during the harvest, especially in the high-alpha varieties, were confirmed by the Hop Analysis Working Group (AHA) as of October 15, 2023. The table published by the AHA is the official basis for the application of the alpha clause in aroma hop supply contracts and regulates the calculation of the price or quantity adjustment in the event that the alpha clause is used.

## CLIMATE CHANGE AND POLITICAL GUIDELINES DEMAND REALIGNMENT

Hop cultivation in Europe is more affected by climate change than all forecasts in the worst-case scenarios would have predicted. The most affected are hop varieties that have been cultivated in Europe for centuries and have their origins as riparian forest plants. They only have shallow root balls and can no longer cope well with the rapidly changing weather conditions, especially with longer dry periods and extreme temperature peaks. In extreme years such as 2018, 2022 and 2023, the yields of these "landraces" sometimes fall by up to 50% of the long-term average. In addition, the ingredients fluctuate so much that a total loss of around 60% of a "normal harvest" occurs.

If you look at the variety structure of the German and European growing regions, it is noticeable that there was little variety and therefore no variety change until the 1970s. Only with the breeding successes at the hop research centers in the Czech Republic, Slovenia and Germany did breeding varieties with improved resistance and yield properties come into the ground in the 1980s. These quickly found their way into master brewers' beer recipes around the world and are still popular today.

However, these varieties, such as Perle, Hallertau Tradition and Magnum, are now getting old and, for reasons of security of supply, must be replaced by more efficient and, above all, climate-adapted varieties.

Harvest years with extreme weather conditions show that the new varieties are significantly more climate tolerant both in terms of their yield and the consistency of their ingredients. This is not only due to the larger and deeper root systems, which allow the plants to better overcome longer dry periods, but also because the plants use nutrients and available water more efficiently.



Growing region/Variety	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
Precipitation April	64.2	48.0	24.9	24.3	19.5	6.0	99.8	38.8	39.5	28.2	45.8	69.3
Precipitation May	59.8	66.7	143.1	30.7	126.2	94.6	87.0	88.0	113.7	129.8	145.1	58.8
Precipitation June	30.5	88.4	99.5	158.2	70.1	139.2	58.9	132.0	112.9	48.8	171.4	130.7
Precipitation July	79.5	43.3	116.6	64.9	37.1	67.3	78.0	134.0	27.6	162.7	10.7	67.4
Precipitation August	159.2	68.5	203.3	95.6	99.2	86.9	96.8	66.7	43.4	109.7	58.1	176.4
Total precipitation mm		659.6	897.8	723.4	691.5	767.2	784.9	844.4	663.5	781.9	873.2	905.1
Max °C	36.6	37.1	32.6	34.0	35.8	33.8	34.9	31.9	36.8	32.9	36.0	33.7
Tmax >= 25°C	66	80	52	49	62	79	55	51	63	37	46	52
Tmax >= 30°C	24	20	8	11	16	14	11	7	36	8	14	12
Alpha HPER	6.0	4.9	9.0	7.4	6.7	5.5	6.9	8.2	4.5	8.0	5.4	8.1
Alpha HSSE	4.5	3.3	6.4	5.2	4.4	3.5	4.6	5.2	3.2	4.7	3.3	5.1
Alpha HHTR	5.0	5.2	6.1	6.3	5.4	5.0	5.7	6.4	4.7	5.8	5.0	6.7
Alpha HNBR	8.0	6.4	10.5	9.1	8.1	7.4	7.8	10.5	5.4	9.7	6.6	9.9
Alpha HHKS	14.0	15.4	18.5	16.6	16.2	14.6	15.5	17.3	15.1	17.5	16.5	17.1

Growing region/Variety	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Precipitation April	36.3	14.4	39.1	118.1	27.7	103.9	122.1	50.9	21.8	23.2	38.2	30.7
Precipitation May	66.0	155.8	137.9	50.1	163.2	111.6	96.3	62.5	67.2	99.4	63.9	111.2
Precipitation June	104.0	140.5	109.2	110.6	54.5	116.8	90.1	72.7	39.6	78.4	118.0	82.8
Precipitation July	229.4	104.8	136.2	129.5	108.3	54.0	141.9	107.6	64.3	103.3	81.1	106.8
Precipitation August	90.3	198.1	57.8	92.9	116.7	166.4	172.3	60.3	16.1	101.9	82.3	81.2
Total precipitation mm	865.5	1026.9	894.1	884.2	969.4	866.3	992.5	690.2	487.8	1006.1	944.6	850.7
Max °C	35.1	33.6	32.6	32.2	34.7	34.5	34.6	32.5	38.0	33.1	32.3	33.3
Tmax >= 25°C	63	45	48	53	53	51	45	46	85	45	46	48
Tmax >= 30°C	11	12	7	11	9	15	7	9	30	10	11	7
Alpha HPER	9.6	7.5	9.2	8.5	7.9	6.2	7.8	6.4	3.9	8.6	7.0	8.1
Alpha HSSE	6.4	5.7	5.7	5.4	4.7	4.3	5.2	4.9	3.2	6.0	4.8	6.4
Alpha HHTR	7.1	6.5	6.8	7.5	6.0	4.8	6.3	6.3	4.1	7.2	6.3	7.1
Alpha HNBR	10.9	9.7	10.4	10.5	9.1	6.4	9.8	9.8	6.0	10.1	9.6	10.1
Alpha HHKS	17.2	16.1	17.3	17.3	16.1							

Table 2: Average alpha acid content depending on precipitation and maximum temperatures in the harvest years 2000-2023  
Source: Weather station Hop Research Center Hüll/Hallertau Germany





*Image 1: The noble aromatic variety Spaltspalter in the Spalt growing region is one of the oldest local varieties of the Saaz variety. It is suffering extremely from climate changes. The vines are narrow, pointed and have a small amount of umbels.  
Source: Dipl.-Ing. Walter König*



## HEALTHY HOP PLANTS PROTECT THE ENVIRONMENT AND ENSURE HARVEST RESULTS

Healthy hop plants are an important factor in hop production. Of course, breeding research is constantly working on the conventional introgression of new resistances, for example from wild hop strains that are collected worldwide. There are also some ways to make hop plants more resilient to diseases and pests. This begins with choosing the right location for a hop garden, with gentle and humus-promoting soil treatment and with the use of certified, healthy planting material from safe sources.

Another factor for stabilizing hop harvest quantities and hop qualities is irrigation. While hop growing areas in the USA can be 100% irrigated, the irrigation rate in Europe is much smaller. In the German hop-growing regions alone, only around 20% of the areas can be artificially irrigated in the growing months of April to September. The hop growers want a further expansion of the irrigation quota, but it has been dragging on for years for political reasons.

As already stated above, security of supply and quality stability have been achieved with a constant change of varieties since the 1970s. The adaptation of our beer recipes to new, climate-tolerant, healthier and high-performance hop varieties must therefore continue steadily. The hop industry has already made



*Images 2 and 3: Direct comparison of an older breeding variety and a new breeding variety from the Hüll Hop Research Center at the same location.*

*Image source: Dipl.-Ing. Walter König*

considerable advance payments here and has brought new hop varieties into the ground at its own risk. The harvest quantities are available and can also be delivered to breweries for brewing trials of larger quantities of beer.

However, the openness and willingness to deal with new, more sustainable hop varieties, to carry out brewing experiments to maintain the desired aroma and taste of the beer range, and to actively engage with the hop industry to find out which hop varieties can replace old local varieties is low at many breweries. Even if this initially costs time and money, a clever supply strategy will ultimately reduce costs and increase quality and security of supply.



*Image 4: From the end of July there was enough rainfall so that the few flowers on the often thin vines were able to form large umbels. Unfortunately, the alpha acid levels remain below average, but the aroma quality is variety-specific and well developed.*

*Image source: Dipl.-Ing. Walter König*

## PRELIMINARY CONTRACTS NECESSARY

Not many breweries have the opportunity to store a larger supply of hops in a quality-preserving manner to minimize the risk of supply bottlenecks or strong price or quality fluctuations in the brewery. The pre-contract system has been established and proven here in Europe for many years. In collaboration with the hop trade, which usually stores the hops in their own cold storage facilities until the brewery calls them up for production, a functioning storage system has been created. Breweries' hop contracts are also important signals in the hop industry and create continuity and planning security throughout the entire value chain.

Since a hop plant needs up to three years to reach full yield after being newly planted, a variety change can only be realistically planned if there are multi-year preliminary contracts for the new varieties or if existing contracts for new varieties are opened and released for substitute delivery. This is possible, for example, in bitter hop contracts with the Hercules variety through the new Titan variety. Only through the signaling effect of preliminary contracts can the hop trade determine the future need for new varieties and pass this on to the hop growers. If the contract signal is missing, the cultivation area will not be expanded and the quantity for changing the variety of big beer recipes will not be available. The preliminary contract breaks down the knot of the "chicken-egg" cycle.

My appeal to the brewing industry is to promote the change of varieties in the sense of a continued stable supply strategy with high-quality hops from Europe, to be open to experiments with new hop varieties as a substitute for older varieties or local varieties, and to actively participate in sustainable hop production in Europe.





## THE 21ST EBC STANDARD MALT IS NOW AVAILABLE!

The EBC standard malt is a pale malted barley providing actual assistance to around 150 maltsters, brewers or independent/sector laboratories of the world. It can be used for checking the results of test methods described in Analytica-EBC or for calibration of apparatus (e.g. Friabilimeter) or other methods (flow injection, near infrared reflectance etc.). The 21st Standard Malt has been accepted after analysis by the Analysis Committee of the European Brewery Convention and now replaces the 20th Standard Malt (issued in 2019).

**THE EBC STANDARD MALT IS SOLD IN CANS OF ~0,650 KG NET WEIGHT FOR 28,00 EUROS (€) EXCLUDING CHARGES.**

Order can be placed to IFBM-Qualtech group (VANDOEUVRE LES NANCY, FRANCE)

The standard malt is usually shipped to foreign customers within 2 weeks (EU) or within 3 weeks (out of EU) in situation where IFBM is organizing the delivery once an official purchase order has been received\*.

\* Please note that mean delivery time may be lengthened by specific procedures of customer's import, customs inspection of goods, by specific rules set up by transport carrier in periods of COVID-19 or during the summer period in July and August. For this reason, we request to customers to anticipate as far as possible their urgent needs of EBC standard malt.



More information on the 21st EBC Standard Malt and order procedure can be found here:

[www.europeanbreweryconvention.eu/21st-EBC-Standard-Malt](http://www.europeanbreweryconvention.eu/21st-EBC-Standard-Malt)



IFBM

# HEADING TOWARDS LILLE 2024

Lille, North of France capital city, will be the host of “Lille 2024”, the nickname of the 39th EBC Congress and 6th Brewers Forum where the European (and international) brewing sector will meet for three-days of scientific and business conferences as well as a trade show and some networking evenings (around a beer, or more), including visits of iconic breweries. North of France is a historic and future-oriented beer region: home of the famous “Bière de Garde”, it is also France second hop-growing region behind Alsace and home to a few hundreds of small breweries which popped like mushrooms over the last 20 years. “Lille 2024” will be organised at Lille Grand Palais, the conference centre located in the middle of the city (5-minute walk from the two international stations, and 10-minute walk from the iconic Grand Place). The overall programme of the 5-day event (starting on the 26th of May, closing on the 30th of May) will be disclosed by the end of October on the event’s brand new website ([www.lille2024.beer](http://www.lille2024.beer)), the programme of the conferences in January and registration will open in February 2024. We are looking forward to see you all in Lille next year!





26-30 MAY 2024

THE BREWERS FORUM

39<sup>TH</sup> EBC CONGRESS

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# EU GREEN CLAIM DIRECTIVE – LIKELY NOT TO BE ADOPTED BEFORE THE END OF THE EUROPEAN PARLIAMENT

**BY ANNA-MARIA DE SMET**

(SENIOR DIRECTOR: REGULATORY AND PUBLIC AFFAIRS,  
THE BREWERS OF EUROPE)



In March 2023 the European Commission proposed common criteria against greenwashing and misleading environmental claims. Under the proposal, consumers will have more clarity, stronger reassurance that when something is sold as green, it actually is green, and better quality information to choose environment-friendly products and services. Businesses will also benefit, as those that make a genuine effort to improve the environmental sustainability of their products will be more easily recognised and rewarded by consumers and able to boost their sales – rather than face unfair competition. This way, the proposal will help establish a level playing field when it comes to information about environmental performance of products.

A Commission study from 2020 highlighted that 53.3% of examined environmental claims in the European Union were found to be vague, misleading or unfounded and 40% were unsubstantiated. The absence of common rules for companies making voluntary green claims leads to 'greenwashing' and creates an uneven playing field in the European Union's market, to the disadvantage of genuinely sustainable companies.

According to the proposal, when companies choose to make a 'green claim' about their products or services, they will have to

respect minimum norms on how they substantiate these claims and how they communicate them.

The proposal targets explicit claims, such as for example: 'CO2 compensated delivery', 'packaging made of 30% recycled plastic' or 'ocean friendly'. It also aims to tackle the proliferation of labels as well as new public and private environmental labels. It covers all voluntary claims about the environmental impacts, aspects or performance of a product, service or the trader itself. However, it excludes claims that are covered by existing European Union rules, such as the organic food logo, because the current laws already ensure that these regulated claims are reliable. Claims which will be covered by new European Union regulatory rules, will be excluded for the same reason.

Before companies communicate any of the covered types of 'green claims' to consumers, such claims will need to be independently verified and proven with scientific evidence. As part of the scientific analysis, companies will identify the environmental impacts that are actually relevant to their product, as well as identifying any possible trade-offs, to give a full and accurate picture.

Several rules will make sure that claims are communicated clearly. For example, claims or labels that use aggregate scoring of the product's overall environmental impact, will no longer be permitted, unless set in European Union rules. If products are compared with others, such comparisons should be based on equivalent information and data.

The proposal will also regulate environmental labels. There are currently at least 230 different labels and there is evidence that this leads to consumer confusion and distrust. To control the proliferation of such labels, new public labelling schemes will not be allowed, unless developed at European Union level, and any new private schemes will need to show higher environmental ambition than existing ones and get a pre-approval to be allowed. There are detailed rules about environmental labels in general: they must also be reliable, transparent, independently verified, and regularly reviewed.

The Green Claims Directive proposal is subject to the approval of the European Parliament and the Council. The European Parliament will adopt its position on the Environmental Claims Directive in March 2024. If negotiations with the Council of the European are necessary because of divergent views, there will be only a small chance of succeeding before the European elections. This would mean that the legislative work on the proposal would only be resumed in the second half of 2024 under a new Commission and a new European Parliament.



# PEF (PRODUCT ENVIRONMENTAL FOOTPRINT) HELPS BREWERS TO BE OPT FOR SUSTAINABILITY

**BY ANNA-MARIA DE SMET**

(SENIOR DIRECTOR: REGULATORY AND PUBLIC AFFAIRS,  
THE BREWERS OF EUROPE)



## WHAT IS PEF?

The Product Environmental Footprint method measures and communicates about the environmental performance of products across their whole lifecycle (i.e. from raw material procurement to disposal), relying on scientifically sound assessment methods agreed at international level.

The method was developed by the European Commission in large multi-stakeholder approach with research institutions, NGOs, and sustainability experts from all industry sectors.

16 environmental impacts, including climate change, and impacts related to water, air, resources, land use and toxicity.

The general PEF method may be complemented with product-specific calculation rules enabling comparison of environmental performances between similar products and companies active in similar sectors. These are referred to as Product Environmental Footprint Category Rules.

In December 2021, the European Commission adopted a [Recommendation](#) on the use of Environmental Footprint methods. The use of the Environmental Footprint method is already foreseen in the context of several European Union policies and legislation such as the Taxonomy Regulation, the Green Consumption Pledge or Green Claims. The European Commission is further exploring how to use PEF in other policies.

## THE PRODUCT ENVIRONMENTAL FOOTPRINT APPROACH IS THE BETTER APPROACH

European brewers believe in empowering people with facts to make informed decisions. For that reason, Europe’s brewers have been voluntarily rolling out ingredients listing and calorie information in full accordance with European Union law, on label and on-line.

Consumers like clear, consistent, honest communication. That’s why The Brewers of Europe developed Beer Product Environmental Footprinting Category Rules (PEFCRs)

Consumers can only be empowered to take informed decisions if there is a level playing field of comparable information.

PEF responds to the demand for standardisation and comparability of the environmental performance of products. Standards already exist to assess the environmental impact of products (e.g. ISO14044:2006 for LCA - Life Cycle Assessment). However, due to the universal applicability of such standards, there is scope for interpretation and questions of interpretation which can impair the consistency and comparability of the results. For us brewers it is important that we eliminate “cherry picking” (selecting calculation approaches that e.g. favour for example one packaging type over another) and therefore “do not fight about the environmental matrix, but compete around the solution”.

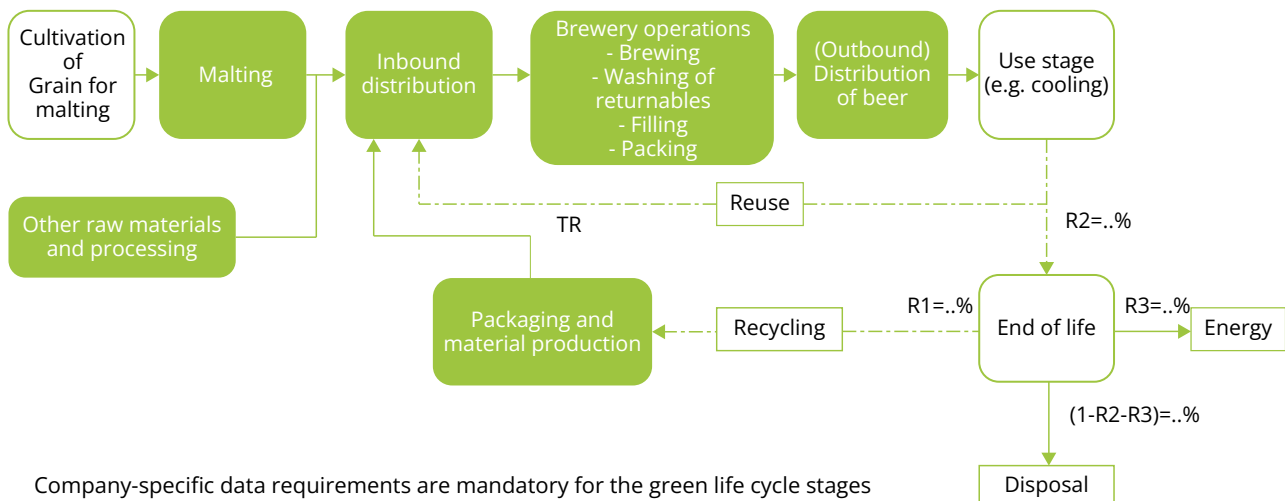
PEF has been developed based on existing standards and methods, but it is more detailed and prescriptive than previous guidance. For example, the PEF guidance specifies the impact assessment methods to be used for each environmental impact

**Commissioner for Environment, Fisheries and Oceans,  
Virginijus Sinkevičius:**

“The EU Environmental Footprint methods are the most reliable, comparable and verifiable way to know the real environmental footprint of a product or organisation to date. Europeans are increasingly aware of their own environmental footprint, and many want to make environmentally friendly choices in their daily lives. These methods will help to improve environmental performance and help achieve a truly clean and circular economy.”

category, tables the circular footprint formula which eliminates “cherry picking” when it comes to end-of-life modelling approaches, and specifies the required data for each product category. Due to these characteristics, the comparability of results calculated according to the PEF method is better than in previous methods.

The Brewers of Europe is committed to continue working with the European Union institutions and other interested parties to further develop the PEF.



Company-specific data requirements are mandatory for the green life cycle stages



### BEER PEF CR (PRODUCT ENVIRONMENTAL FOOTPRINT CATEGORY RULES)

The European Commission defined rules to establish PEF category rules (PEFCR), a ruleset describing how to calculate the environmental footprint of a specific product group. The resulting rules are applicable in the entire EU-27 and EFTA<sup>1</sup> markets. The Beer PEF CR, e.g. defines when primary data must be used and how different packaging types must be taken into account. As the coordinator of the Technical Secretariat, The Brewers of Europe made a vital contribution to the development of the PEF CR Beer released in July 2018 and valid until end 2021. On 1st November 2023, a light review of the Beer PEF CR was launched. The representative product is recalculated on the basis of updated mandatory datasets as released by the European Commission. A public consultation on the light reviewed PEF CR is expected to take place end 2023/beginning 2024. In line with the process for adoption, an independent third-party review panel will assess the final draft before it is submitted to the European Commission and Member States.

<sup>1</sup> EFTA = Iceland, Liechtenstein, Norway and Switzerland

### BEER ON-LINE PEF CALCULATOR FREELY AVAILABLE TO BREWERS MEMBERS OF THE BREWERS OF EUROPE NATIONAL ASSOCIATION MEMBERS'

The Brewers of Europe PEF calculator allows companies to obtain a comprehensive overview of their product's environmental impacts. It is easily accessible, also by non-experts. The calculator incorporates all datasets and impacts indicators as defined by the Beer PEF CR and thus reduces the need for further external assistance. The environmental impacts calculated with this tool are compared with the European benchmark. On the basis of the results delivered by the calculator, an improvement action plan for the analysed product can be rolled out with respect to the choice, e.g. of ingredients and their production and supply; of packaging used; of processes applied; of transport organisation. The calculator equally allows the user to identify if a reduction of the impact in one stage will cause an increase of the impact in other stages, or in the same stage but on other impact categories. Brewers who would like to access The Brewers of Europe on-line calculator for free should submit an application through the national brewers' association member of The Brewers of Europe.

#### Win - Win - Win

Product environmental footprint contributes to build a circular economy and to foster a better environment for green business.



- identifies hotspots throughout the life cycle stages of beer
- stimulates 'green' innovation
- guarantees a science-based, objective environmental performance assessment
- allows for fair 'green' competition



- responds to consumer expectations
- becomes better aware of the product environmental impact
- guarantees an informed choice for truly environmentally friendly products



- better use of resources
- less emissions
- less pollution
- less waste
- healthier habitats



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BREW UP MAGAZINE



# BEER CANNOT BE THE ONLY ALCOHOLIC DRINK DELIVERING ON THE PACKAGING REUSE AND RECYCLING TARGETS

BY SIMON SPILLANE,  
DIRECTOR, THE BREWERS OF EUROPE

EUROPEAN CASE LAW LONG AGO ESTABLISHED THAT BEER COMPETES WITH WINE AND OTHER ALCOHOLIC BEVERAGES ON THE DRINKS MARKET. SO WHY THEN, DO DRAFT VERSIONS OF THE PACKAGING AND PACKAGING WASTE REGULATION (PPWR) PROPOSALS – CURRENTLY UNDER DISCUSSION IN THE EUROPEAN PARLIAMENT AND COUNCIL WORKING GROUPS – DISCRIMINATE AGAINST BEER?



While many reasons have been given, none justify the full exemptions being proposed for other alcoholic beverage categories, whether for reuse targets or for participation in recycling collection schemes. The European Commission's original proposal loosely justifies the discrimination by referring to "the nature of the products and differences in their production and distribution systems." Elsewhere, though, it insists on the need to assure equal treatment between operators.

Reuse, recycling and comprehensive reuse and recycling collection systems are nothing new to the beer sector. More than half our beer volumes in the EU are sold in reusable packaging (though this varies from country to country and brewer to brewer).

The rest of the beer? This is typically sold in recyclable packaging, using recycled content that is collected at impressive rates. We don't stand still either: we're moving to get those numbers even higher!

So yes, we brewers come at this from a strong starting point. But business as usual is not sustainable in this day and age. There is too much packaging waste across the beverage industry and the EU's overall objectives can't be met if the job is only left to those already doing the job – that would give other sectors a free pass! Nor should we lose sight of the fact that beverage packaging is just one part of the packaging that is currently so visible in our society.

We get it this is not easy, and that change takes time and costs money. We know it because brewers have gone through this. We've invested in new technologies, sourced alternative energy and redesigned our production, distribution and collection systems to improve the sustainability of our entire brewing systems. Sensible transition times are needed. Objectively justified exemptions may be the order of the day in some cases, also for environmental reasons. But the cost of doing nothing is far greater!

Every sector faces challenges, but that does not mean the proposal should favour some categories over others. The draft version of the PPWR does just that. It gives some alcoholic products – but not beer – exemptions from reuse targets and mandatory deposit return systems (DRS). And it does so without any legal or environmental justification. Who can seriously argue that a beer can should be part of a collection system, but if the same can were to contain an alcopop or even wine (yes, that's a thing now!), then suddenly it can't?

Europe needs a level playing field in packaging legislation, where beer and other alcoholic beverages play by the same rules, with everyone contributing fairly to reaching the targets and supporting the collection systems.

We believe brewing can have a positive impact on the planet. We are committed to working with EU decision-makers and the packaging supply chain to ensure that the PPWR will support the wider EU sustainability agenda.

The European Parliament and the Member States in the coming days and weeks have a critical role to play now to bring the Commission's proposal towards an ambitious and intelligent final piece of legislation. The overall objectives are already there, but the right details are not. As the saying goes, the devil is in the detail and a key starting point for getting some of those details right now will be ensuring there are no free riders. This must be a collective effort and, for brewers, that means our competitors must also pull their weight. That is fair for brewers, citizens and the environment!

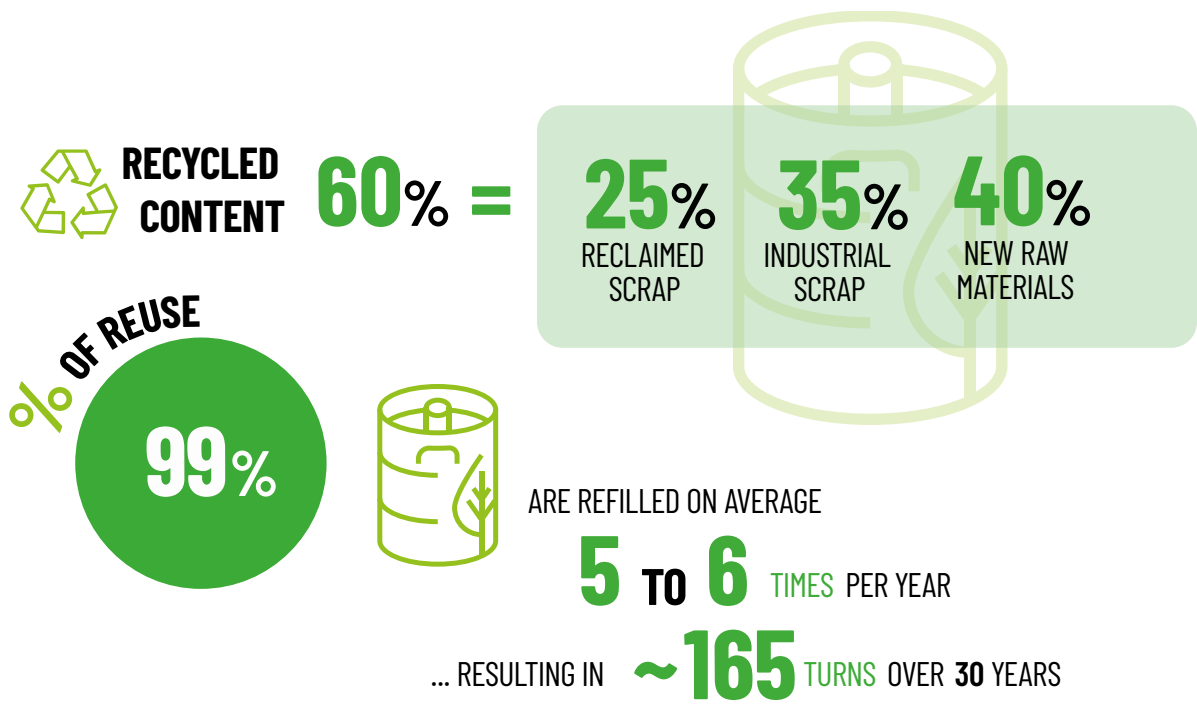


# WHY THE EU MUST INCENTIVISE THE KEG, THE ULTIMATE SUSTAINABLE PACKAGING SYSTEM

**BY SIMON SPILLANE,**  
DIRECTOR, THE BREWERS OF EUROPE



WITHOUT PACKAGING, THERE IS NO BEER. IT'S AS SIMPLE AS THAT. AS BREWERS, WE NEED ROBUST AND AIRTIGHT CONTAINERS TO HOLD, TRANSPORT AND SERVE THE PRODUCT. AND WE NEED TO DO IT WHILE KEEPING IT SAFE, HYGIENIC AND OF THE HIGHEST QUALITY.



Kegs are a key part of our packaging mix. They represent around 15% of the overall beer volumes in Europe. With a lifespan of over 30 years, these large containers can be collected and reused over 150 times before being recycled for further use. Kegs are the ultimate sustainable packaging system for drinks – and they should be encouraged.

Whilst the draft Packaging and Packaging Waste Regulation (PPWR) has bold and laudable aims, these best-in-class containers risk being sidelined and disincentivised in the proposed legislation.

Most kegs in on-trade establishments carry between 20 and 50 litres, but without a revised wording in the PPWR, they could still be measured as a single packaging unit just like any bottle, can or small container. With one keg potentially holding the same

volume as two hundred 25cl bottles, this measurement calculation would have the perverse effect of encouraging companies to switch towards multiple smaller reusable packaging units in order to hit targets, inevitably creating more waste.

Of perhaps even more concern, unless they are captured by the definition of sales packaging, beer kegs may not even count towards brewers' attainment of sales packaging reuse targets alongside reusable glass bottles.

If we are to avoid needless waste, we should incentivise kegs. That means, for the purpose of measurement, converting them into volume or into equivalent smaller packaging units. It also means, as containers with direct contact with the beer, unlike crates and pallets, ensuring that they be captured by the definition of sales packaging, not the definition of transport packaging.

We brewers are proud of our pioneering role in promoting reusable, recyclable and recycled packaging and the successful collection schemes that have been set up to ensure beer containers are reused or recycled. We are also committed to working with MEPs and Member States to ensure that the EU's sustainability agenda works for all. That means changing the draft PPWR so it is fair for brewers, citizens, and the environment.



Read more:  
<https://brewersofeurope.eu/a-briefing-note-on-beer-kegs/>

**OVER TO MEPS AND THE EU MEMBER STATES TO MAINTAIN HIGH AMBITIONS IN THE PPWR WHILST IRONING OUT THE CREASES IN THE EUROPEAN COMMISSION'S PROPOSAL**

**BY SIMON SPILLANE,**  
DIRECTOR, THE BREWERS OF EUROPE

Manufacturing of packaging is an important economic activity in the European Union, but regulatory approaches differ from one Member State to another, which creates obstacles that prevent the EU's internal market from fully functioning. Packaging is also a key environmental concern. The increased use of packaging, coupled with low re-use and recycling rates, hampers the development of a low-carbon circular economy.

The European Commission's [Industrial Strategy for Europe](#) underlined the importance of the internal market for the EU's competitiveness and prosperity. Council conclusions of December 2020 welcomed the Commission's intention to ensure all packaging be reusable or recyclable in an economically feasible way by 2030 and to reduce packaging, over-packaging and therefore packaging waste.

The European Parliament's response to the Commission's latest [Circular Economy Action Plan](#) urged the Commission to table a proposal that includes waste reduction measures and targets, requirements to reduce excessive packaging, and measures to improve recyclability and minimise the complexity of packaging, increase recycled content, phase out hazardous and harmful substances, and promote re-use without compromising food safety and hygiene standards.

A draft law, the so-called Packaging and Packaging Waste Regulation (or PPWR) was eventually adopted by the European Commission on 30 November 2022, as part of the [Circular Economy Package](#). It updates the legislative framework for packaging and packaging waste by giving Member States and businesses adequate support to achieve waste reduction targets. It also seeks to implement review clauses already included in the previous amendment to Directive [94/62/EC](#). It introduces amendments to Regulation [2019/1020](#) laying down rules and procedures for compliance with and enforcement of EU harmonisation legislation on products, as well as to Directive [2019/904](#) addressing single-use plastics.

Whilst meeting the targets and obligations laid down in any final legislation will be a challenge, the brewing sector's commitment to a sustainable future for beer is real. We recognise the responsibility we have to deliver, within a good functioning EU Single Market, on an ambitious EU-wide environmental sustainability agenda, including for packaging and packaging waste. Notwithstanding, the Commission's proposal also holds some provisions which can be qualified as mis-targeted, disproportionate, discriminatory and not supportive of the Single Market or overall environmental ambitions. The brewing sector wishes to see:-

- Respect for the fundamentals of packaging waste legislation, which are the improvement of the environmental performance of packaging and the free circulation of packaging and packaged goods in all Member States;
- Respect for the Rule of Law; and
- A level playing field in the PPWR amongst alcoholic beverages.

The European Parliament is scheduled to vote on the proposal in the week of 20-24 November during its Plenary session in Strasbourg. With a view thereon, The Brewers of Europe has been reminding the Members of the European Parliament of our 8 key asks and campaigning intensively against the discrimination of beer versus other alcoholic beverages with regard to the targets and obligations in the PPWR





# THE KEY ASKS OF THE BREWERS OF EUROPE ON THE FUTURE EU PACKAGING AND PACKAGING WASTE REGULATION

## PIONEERS IN SUSTAINABLE PACKAGING

Europe has a rich range of beers, all coming in different shapes and sizes. Packaging, whether it's glass bottles, aluminium cans, or kegs, is essential for beer. That's why brewers have innovated and invested over many years to make our packaging ever more sustainable, ensuring our sector has a positive impact on the planet.

We take our responsibility seriously to minimise the environmental impact of beer packaging throughout the lifecycle by reducing, reusing and recycling. The Brewers of Europe supports the overall goals of the Packaging and Packaging Waste proposal as we strive for a more circular economy, but legislation must support the EU Single Market and be non-discriminatory, proportionate, and enforceable.



## OUR KEY ASKS

1

### CREATE A LEGAL LEVEL PLAYING FIELD

It is neither legally nor environmentally justified to grant an automatic EU-mandated exemption from reuse targets or mandatory DRS for most alcoholic beverages except beer. European brewers therefore call for a level playing field amongst alcoholic beverages in the EU's packaging and packaging waste legislation.

2

### SET TARGETS AT THE MANUFACTURER LEVEL

It is superfluous and distorts competition within the internal market to impose reuse targets at the distributors' level, as the responsibility for the achievement of any distributors' targets will ultimately fall on the manufacturers. The beverage manufacturer should additionally have the option to implement any targets across its full product portfolio rather than per category of drink or per packaging type.

3

### INCENTIVISE THE USE OF KEGS

Excluding beer kegs, which can have a lifespan of thirty years, from the measurement of sales packaging reuse targets, or failing to take their size into account in the reuse target calculation, would discourage use of one of the best practise examples of reusable beverage packaging. A large volume of beer in the hospitality sector is sold on draught, meaning that kegs represent on average nearly fourteen percent, by volume, of EU beer packaging. Kegs should neither be considered as transport packaging nor counted as single packaging units without their volume being taken into account.



**4**

### **BUILD ON BEST PRACTICE**

Overly prescriptive new rules or governance must not provoke the dismantling of well-functioning existing collection systems, be they well-established reuse systems set up and supported by the brewers in many countries or efficient recycling collection systems already in place in others.

**5**

### **USE EXEMPTIONS TO SUPPORT PACKAGING SUSTAINABILITY**

Exemptions must be provided for small enterprises that, for example, are committed to packaging sustainability but may only have one, non-reusable but recyclable packaging line. Reuse targets should also not be imposed on producers of beverages in packaging that is already collected and recycled at a high rate. This is essential to also avoid endangering the supply of post-consumer recyclable material provided by successful collection systems to the recycling industry.

**6**

### **MANDATORY LABELLING MUST BE CLEAR**

Deposited packaging should only bear a deposit label and not additional waste sorting pictograms. Having both indications confuses rather than helps the consumer in correctly returning the empty packaging for recycling or reuse. Furthermore, the application of digital markings should only be considered when technology can truly ensure serialisation. In the Single Market, the tracking of individual packaging requires a common data standard, a common data set and common tracking modalities. This technological roll-out should precede any decision on mandatory digital labelling.

**7**

### **ANY BANS SHOULD BE EVIDENCE-BASED**

Restricting certain packaging formats which are 100% recycled and recyclable runs counter to the objectives of the legislation. Furthermore, this is not justified from a life cycle perspective. For example, the use of 100% recycled shrink wraps has the lowest carbon footprint when compared to available alternatives.

**8**

### **PROVIDE TIME AND CLARITY FOR CHANGE**

It is important to ensure realistic timelines to enable a smooth transition to the enforcement of new rules throughout the packaging value chain. Operators need clarity on the detailed legislation and the lead-in time to replace packaging equipment and/or to change distribution systems. For example, neither deposit return schemes nor reuse infrastructure are set up overnight and hence a five-year lead-in time is required.

**The European brewing sector is committed to collaborating with EU decision makers and the packaging supply chain to ensure that the forthcoming packaging and packaging waste Regulation will contribute to the wider EU sustainability agenda.**



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POLAND

## THE NEW DEPOSIT REFUND SCHEME IN POLAND

### By the Polish Brewers

This August, the Parliament adopted the amended act on packaging management and packaging waste which introduces the legal basis for operations of the container-deposit scheme. In line with the new regulations, the scheme should be launched on 1 January 2025 and will be mandatory for stores with a floor area in excess 200 m<sup>2</sup>, which account for barely 20% of all stores in Poland. Other, smaller stores will be able to voluntarily join the scheme. The system will cover plastic bottles of up to 3 l, reusable glass bottles of up to 1.5 l, and metal cans of up to 1 l. Each of these containers will be subject to an added deposit whose value will be specified by the Ministry of Environment (it will probably total from PLN 0.5 to 1, what equals to EUR 0.1-0.2). Handing back a packaging subject to the deposit-refund scheme, the consumer will receive cash reimbursement. Stores subject to the deposit-refund scheme will need to make contracts with an operator who will be handing over collected packaging to producers, after their processing. This will enable meeting of the requirements of the EU Directive on the use of the recycle to produce new packaging. New regulations are also introducing packaging recovery limits. At least 77% of packaging placed on the market must be collected in the first year of the scheme's operation. Otherwise, producers will face a penalty, or the so-called packaging fee which may account for up to PLN 25/kg of waste (approx. EUR 5.5).

Despite the fact that introduction of the deposit-refund act was long anticipated (the legislative process is more than two years behind the schedule), producers have received it with concern. Questions raised while parliamentary efforts lasted included the very short launch timeline, while many argued that no country so far has managed to go live with the scheme in less than 2 years. Unfortunately, none of these proposals have been taken into consideration by the government majority. Consequently, operators placing packaging subject to the deposit scheme, including breweries associated in the Union of Brewing Industry Employers, are pinpointing numerous shortcomings of the act.

"The new scheme covers two types of packaging: metal cans and reusable bottles. Bundling the latter ones with disposable

packaging is a mistake, because such packaging is not waste - it will be refilled and placed on the market again. An effective returnable bottle collection scheme that has been operating in Poland for years will be ultimately dismantled by the new act. Producers will need to redesign their operations, sign multiple new contracts with stores and intermediaries, or operators. The vision of the packaging fee being imposed on producers who fail to meet the required collection levels by January 2025 is looming large. This would mean that the launch of reusable packaging is not profitable, what would be a loss to the environment and consumers.” said Bartłomiej Morzycki, the General Director of ZPPP Browary Polskie.

## NOWY SYSTEM KAUCYJNY W POLSCE

### Browary Polskie

W sierpniu br. Parlament uchwalił nowelizację ustawy o gospodarce opakowaniami i odpadami opakowaniowymi, która wprowadza podstawy prawne dla funkcjonowania systemu kaucyjnego dla opakowań po napojach. Zgodnie z nowymi przepisami, taki system powinien zacząć działać od 1 stycznia 2025 roku i obowiązkowo znajdą się w nim sklepy o powierzchni powyżej 200 m<sup>2</sup>. To tylko 20% wszystkich placówek handlowych w kraju. Pozostałe, mniejsze sklepy, będą mogły dołączyć do systemu na zasadzie dobrowolności. Systemem objęte będą: plastikowe butelki o pojemności do 3 l, szklane butelki wielokrotnego użytku o pojemności do 1,5 l oraz metalowe puszki o pojemności do 1 l. Do każdego z tych opakowań będzie doliczana kaucja, której wysokość określi Ministerstwo Środowiska (prawdopodobnie będzie wynosiła między 0,5 a 1 złoty czyli 0,1-0,2 EUR). Oddając opakowania objęte kaucją, konsument otrzyma zwrot pieniędzy w gotówce. Sklepy objęte systemem kaucyjnym będą musiały podpisać umowę z jednym z operatorów, którzy zajmą się przekazywaniem odebranych opakowań producentom, po ich przerobieniu. Dzięki temu możliwe będzie spełnienie wymogów unijnej dyrektywy dotyczącej wykorzystywania recyklatu przy tworzeniu nowych opakowań. Nowe przepisy wprowadzają również limity odzysku opakowań. Już w pierwszym roku funkcjonowania systemu (2025) należy zebrać minimum 77 proc. opakowań



wprowadzonych na rynek. W przeciwnym razie producenci będą musieli płacić karę, czyli tzw. opłatę opakowaniową, której wysokość może sięgnąć maksymalnie 25 zł/kg odpadów (ok. 5,5 EUR).

Mimo, że wprowadzenie ustawy kaucyjnej było długo oczekiwane (ponad dwuletnie opóźnienie procesu legislacyjnego), producenci przyjęli je z obawami. W toku prac parlamentarnych podnoszono m.in. kwestię zbyt krótkiego terminu na uruchomienie systemu, wskazując że w żadnym kraju dotychczas nie udało się tego zrobić w mniej niż 2 lata. Niestety, żadna z poprawek nie została uwzględniona przez większość rządową. W rezultacie, wprowadzający opakowania objęte kaucją, wśród nich browary zrzeszone w Związku Pracodawców Przemysłu Piwowarskiego, zwracają uwagę na szereg mankamentów ustawy.

„Mamy dwa rodzaje opakowań objętych nowym systemem: puszki aluminiowe i butelki wielokrotnego użytku. Wrzucenie tych drugich do jednego worka z opakowaniami jednorazowymi jest błędem, ponieważ nie są one odpadem – ich celem jest ponowne napełnienie i wprowadzenie na rynek. W Polsce od lat funkcjonuje efektywny system zbiórki butelek zwrotnych, a nowa ustawa całkowicie go rozmontuje. Producentów czeka przemodelowanie działalności, podpisanie mnóstwa nowych umów ze sklepami i pośrednikami w postaci opera-

tora. Realne jest widmo nakładania opłaty opakowaniowej na producentów, którym nie uda się w styczniu 2025 roku osiągnąć wymaganych poziomów zbiórki. To może oznaczać brak opłacalności wprowadzania opakowań wielokrotnego użytku, czyli stratę dla środowiska i konsumentów.” – Bartłomiej Morzycki, dyrektor generalny ZPPP Browary Polskie.



# BEER FROM GREEN ENERGY: KAMENITZA AD IN BULGARIA BUILT ITS OWN SOLAR PARK

BY KAMENITZA

THE FACILITY IS THE COMPANY'S LATEST MAJOR INVESTMENT ON THE PATH OF SUSTAINABLE DEVELOPMENT AND IS THE FIRST ON SUCH A SCALE FOR MOLSON COORS EUROPE



## THE SOLAR PARK OPENING

The first completed stage of the construction of a solar park of one of the largest brewing companies in Bulgaria, "Kamenitza" AD, part of Molson Coors Beverage Company, was officially opened at the end of September, 2023, in Haskovo, Bulgaria. The solar park covers an area of over 13,000 square meters and generates 30% of the electricity required for the operation of the brewery. The facility is the latest major investment of Kamenitza AD in the direction of sustainable development - over EUR 1.5 million invested in 2022. It is also the first solar park of this scale in Molson Coors Europe. In the coming years, the park's area will be expanded and the electricity generated will increase.

The special event, in addition to the media, was attended by a number of officials, representatives of state and local authorities, including Desislava Stoyanova, Deputy Minister of Labour and Social Policy, Tanya Georgieva, Deputy Minister of Agriculture and Food, Stanislav Dechev, Mayor of Haskovo Municipality, Maria Valcheva, Deputy Mayor of Haskovo Municipality, Mariana Valcheva, Director of the Regional Inspectorate of Environmental Protection and Water Management Haskovo, Ivana Radomirova, Executive Director of the Union of Brewers



in Bulgaria, and Vladimir Ivanov, President of the Union of Brewers in Bulgaria. During the official opening, guests had the opportunity to visit the solar park and, under strict safety measures, to see the photovoltaic panels located on the roofs of the buildings in person. The event continued with tours of the brewery, during which master brewers and other experts from the factory told interesting information about the brewing, packaging and logistics processes.

“The project of building the solar park on the territory of our brewery in Haskovo is part of our strategy for sustainable development and is a natural continuation of our efforts towards the implementation of sustainable business solutions that have added value not only for our business, but also for the environment and society as a whole. In recent years, we have purposefully worked towards purchasing only green energy, and with the investment in building our own solar park of this scale, we believe we will contribute to the transition to a more sustainable economy and transformation of our country. In the coming years, we foresee the installation of solar panels on an additional area of more than 5,000 square meters, thus confirming our aspiration to be leaders and pioneers in the introduction of sustainable solutions on the Bulgarian beer market, as we have proven our

innovative spirit many times over the years,” said Vladan Matic, CEO of “Kamenitza” AD, during the official opening.

## GOALS OF THE SOLAR PARK

The solar park is part of the company's global long-term sustainable development strategy, Our Imprint, which all Molson Coors companies around the world follow. The strategy is focused in three main directions: caring for the people, including the employees, consumers, customers, suppliers, partners and society; caring for the planet, where its efforts are focused on using fewer resources, reducing carbon emissions, creating sustainable packaging that can then be reused, recovered and recycled; and the third pillar of the strategy is the responsible consumption of alcohol – the company believes that only when consumed in moderation, beer drinkers could truly enjoy their favorite beers. The project with the construction of the solar park is the latest major investment in reducing the company's negative imprint on the environment. Kamenitza is always looking for different solutions in this direction and many trends today are aimed specifically at the use of energy and resources from renewables.





### LEADERSHIP IN SUSTAINABLE SOLUTIONS

“Kamenitza” AD has always demonstrated its leadership in the beer market with various innovations, including in the direction of sustainable development and green solutions with care for the environment. There are a number of examples in this direction, among the most significant is the commissioning of the first anaerobic reactor for wastewater treatment for the beer industry in Bulgaria. It has the function of generating biogas, which is fed back into the production process. The treatment of the wastewater of other companies in the Northern Industrial Zone of the city is another example of a contribution to the environment and communities, as this is a voluntary commitment that “Kamenitza” AD has made and is following as part of its sustainable development strategy. The company’s ambition is to minimize the amount of water used in the entire production cycle and per hectolitre of beer. In this regard, the company says that innovations and technological solutions introduced in production in recent years have already resulted in a sustain-

ned downward trend - water consumption has been reduced by more than 20% relative to 2016. All programs, initiatives and progress on the sustainability strategy of the company can be found in the company’s Sustainability Report.

### CONSISTENT EFFORTS FOR REDUCTION OF ENERGY CONSUMPTION

The company invested significant resources to improve the energy efficiency of the production base in Haskovo. As a result, the energy used per unit of production was reduced by more than 9%. In 2022, the brewery managed to reduce by 26% the heat energy used for brewing a unit of wort. In 2019, the factory successfully introduced the ISO 50001:2018 standard for the implementation of an energy management system and sustainable development. It controls the consumption of energy and fluids necessary for production and sets the short-term and long-term programs and projects for improvement and optimization. In 2022, a recertification audit was conducted, which confirmed that the energy management and sustainable development system implemented by the brewery is fully efficient and meets the requirements of the applied standard. With this the brewery team was recognized for good organizational and management processes, operational solutions, data collection and analysis. Another project of reduction of energy is the creation of the so-called FEWER team. It was created in 2017 and its name is an acronym of the words Fuel, Electricity, Water, Emission Reduction. Its purpose is to track and analyze energy and resource consumption daily, manage deviations and identify new opportunities to improve performance. The structure is developed at the local and regional level and all production managers and process engineers actively participate in it.



## HASKOVO – BREWERY №1 FOR 2022 IN MOLSON COORS

The introduction of various innovations in the brewing process at Haskovo Brewery have elevated it to №1 position in Molson Coors' annual ranking of breweries worldwide for 2022. It includes all of the organization's major breweries worldwide, which

number more than 21 and are located on two continents. The ranking evaluates each brewery's performance against certain metrics and set goals on an annual basis - quality, safety and environmental, process efficiency and optimization, declining resource consumption trend, process reliability and overall performance, and more.

### MORE ABOUT KAMENITZA AD

"Kamenitza" AD is one of the leading brewing companies in Bulgaria, part of the international Molson Coors Beverage Company. The company has more than 142 years of experience, history and traditions, setting the foundation of the brewing industry in Bulgaria. Beer is at the heart of Kamenitza, and the passion of the employees for brewing is what turns the grain of barley into an amber liquid. The company's extensive portfolio includes some of the most beloved beer brands such as Kamenitza, Burgasko, Astika, Staropramen, Stella Artois, Corona, Beck's, Guinness and others.

The company operates a brewery in Haskovo and a microbrewery for hand-crafted beers in Plovdiv. One of its priorities is to do business in a responsible and sustainable way and to engage its employees and partners in initiatives that increase the business' positive environmental and social footprint. To be first choice for employees, customers and consumers is the ambition that drives the company forward.

For more information, visit [www.kamenitzacompany.bg](http://www.kamenitzacompany.bg).

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# THE BELGIAN BEER WORLD OPENS IN THE OLD STOCK EXCHANGE BUILDING OF BRUSSELS

BY THE BELGIAN BREWERS



ON EST OUVERT!  
WE ZIJN OPEN!  
WE ARE OPEN!



COME AND EXPERIENCE THE IMMERSIVE EXPERIENCE CENTER ON THE RICHNESS OF BELGIAN BEER CULTURE, WHICH IS ON UNESCO'S LIST OF CULTURAL INTANGIBLE HERITAGE.





Dublin has its Guinness Store House, Amsterdam, the Heineken Experience, but Brussels' Belgian Beer World is a generic, multi-brand and diverse journey through the unique cultural heritage of Belgian beer. About a hundred breweries, large and small, contributed to the overarching story. On two floors, various aspects of Belgian beer and its rich culture are highlighted in an interactive and playful way.

As soon as you enter the building, the wow factor begins. The intention was to give the building its former soul with a complete renovation and make it a meeting place for residents and international visitors in the heart of the historical in city center. The monumental building is now accessible at street level via a new entrance when walking down from the Grand Place. The public gallery on the first floor being is breathtaking. The ground plan possesses a cruciform shape, as in a church, with an elongated nave and the transept. Where the two spaces meet the columns visually enhance the architectural masterpiece. Two tall windows of the transept let in plenty of daylight. The 'sky' windows in the roof were restored allowing an abundance of daylight to enter. The original wooden floor was replaced by a



new granito with a piece of art integrated, designed by Valérie Mannaerts. On this level visitors can also enjoy a meal in the permanent restaurant or grab a beer or coffee in the Café.

The entrance of Belgian Beer World is also located on this level. You can buy your ticket online ([www.belgianbeerworld.be](http://www.belgianbeerworld.be)) or do this at the desk. The interactive visitor journey is revealed on two floors and all the topics linked to Belgian beer culture are explained step by step, from cultural-historical to technical aspects. The main conclusion is that in Belgium this all leads to a great diversity in beer styles and flavors. The visitor will experience this journey in six thematic spaces. They will be invited to participate, to discover and to experience the various aspects of Belgian beer culture. Many interactive tools are used to reveal the knowledge of beer to the visitor. After two floors, one needs time to digest all these interesting and breath-taking stories in the

highlight of the visit: the rooftop sky bar "The BEERLAB". Here everybody can savor a beer (included in the entrance ticket) and taste a variety of 49 beers on draft and 98 in bottles. Visitors and beer lovers can enjoy the exceptional view on the historical Brussels' city center.

## PROMOTING BEER



FRANCE

### BEER TOURISM

By Jan Lichota

HOSTING AN INTERNATIONAL CONFERENCE RELATED TO BEER IN FRANCE AT THE START OF THE RUGBY WORLD CUP IS NOT A BAD IDEA WHEN IT COMES TO FEELING A PLEASANT INTERNATIONAL ATMOSPHERE SURROUNDED BY PEOPLE ENJOYING BEER. HOWEVER, THIS ONE WAS NOT RELATED TO SPORTS FANS AND THEIR DRINKING PREFERENCES, BUT TO TOURISM AND BEER.

In mid-September 2023, the University of Lille hosted the interdisciplinary conference **“Beer Territories”: Tourism Promotion and Sustainable Development,** with the aim of studying the best ways to further integrate the brewing activity into the tourism identity of a territory.

During two days, academics from different fields, as well as tourism and beer professionals, gave an overview of local experiences and research projects highlighting the relationship going beyond gastronomy tourism at four workshops and three roundtables.

The industrial and historical heritage of the north of France was the background of the presentations, outlining to the attendees the rich history in Lille and all the region, known for beer, textiles, and coal mines. The way of merging all these elements has also been shown in the design projects for the Louvre-Lens museum surroundings, allowing to present beer, food products, or restaurants in a modern way. Those elements also served as a good starter to introduce the European Region of Gastronomy and the role beer may play in its promotion.

Examples from the United States, Canada, and the United Kingdom, as well as practical experiences of beer tour organisations in France and those of Brazilian tourists in Europe, served afterwards to benchmark those regional initiatives and ways to attract tourists. How tourists position beer for their trip choice—various answers were shared thanks to research done in Burgundy and the UK.

But how may brewers and regions cooperate? Perspectives and experiences vary very much, as was shown with the activities done in Alsace, the north of France, Brussels, and Catalonia. The emphasis in each of them has been very different, allowing for ideas for other places to develop their own projects. Additional insights on wine tourism experiences in Alsace and Burgundy also enhanced the knowledge provided.



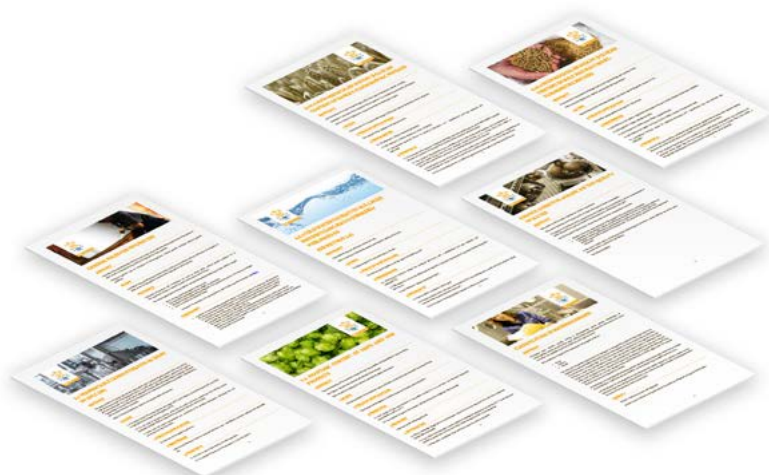
The importance of travel and cross-cultural fertilisation to develop interest in craft beers has also been economically proven thanks to the research done in Italy. The discussions that followed gave additional insights from the experience in the US and other European countries. The final discussion focused on sustainability and the opportunities that brewers of all sizes may still seize to improve the tourism experience.

While proceedings of the event are still to come, if you come to Lille for the Brewers Forum and EBC Congress, take a close look at Louis Pasteur’s statue to discover the link between science and beer, and also look for the first brewing tourism label “Heritage Beer”.



## ANALYTICA - EBC

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