5 The (R)evolution of the Craft Beer Scene in Poland After 2010

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Abstract

The main aim of this work is to present the development of the craft beer scene in Poland, especially in the years 2010–2018 with an emphasis on the so-called "Polish craft beer revolution." After a period of an economic transformation in Poland in the 1990s and 2000s, when the brewers' scene experienced the domination by large foreign brewing companies in the privatization process and numerous small breweries were liquidated, in the period 2010–2018 the number of new breweries including contract breweries increased from 70 to 372. Based on the quantitative and qualitative investigation, the authors present the origins, causes, key trends, and effects of the "Polish beer revolution". In the first part of the chapter, we focus on the characteristics of the brewing industry in Poland since the 1990s regarding the background of the changes that occurred after 2010. The next part discusses the emergence and course of the craft beer revolution in Poland. Then, the brewing scene in Poland during the beer revolution is studied from a geographical point of view. The emphasis was put on the spatial distribution, intensity, and dynamics of the phenomenon in Poland's regions. The last part outlines the cultural and societal effects of the craft beer revolution in Poland.

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Introduction

While probably less known than some of its neighbors, Poland has been an important beer region on the world map. Beer has been widely produced for centuries, and Poles contributed to the beer culture through the invention of the Grodziskie beer style or by cultivating traditions connected with brewing the Baltic Porter. Nowadays, the country confirms its important status with leading statistics on the production and consumption of beer.

Since the beginning of the 1990s after the communist regime collapse, the Polish brewing industry evolved to being dominated by three concerns: Asahi, Carlsberg, and Heineken (earlier also SAB Miller). They control about 80% of the polish beer market. The entrance of large foreign breweries had an impact on the technology used for beer production, beer quality, as well as subsequently the assortment of beers available (Chlebicka et al. 2018).

According to resource partitioning theory, as an industry takes on an oligopolistic structure, it often produces more and more homogenous products, depending on the economic scale of production, distribution, and marketing (Swaminathan 1998; Nilsson et al. 2019). Although the world of beer styles is extremely rich, the most often produced and sold type in the twentieth and at the beginning of the twenty-first century in Poland was and still is the International Pale Lager. The prevalence of this type resulted in the creation of a niche market for beer brewed in different styles, popular among more demanding and aware clients who desire new tastes, quality, and styles of beer (Rao 2008). As a result, it led to the development of the phenomenon called "the craft beer revolution" in many countries including Poland (e.g., Carroll and Swaminathan 2000; Murray and O'Neill 2012; Patterson and Hoalst-Pullen 2014; Elzinga et al. 2015; Chlebicka et al. 2018; Esposti et al. 2017; Swinnen and Garavaglia 2018; Wojtyra and Grudzień 2017; Fastigi et al. 2018).

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The term “craft beer revolution” originated in the USA and is used to describe the changes in America’s craft beer market since 1965 when Fritz Maytag rejuvenated Anchor Steam Brewery (Acitelli 2013). The phenomenon was also the result of home brewing legalization in 1979. In the same period in the United Kingdom “The Campaign for Real Ale” (CAMRA) was founded. It was an independent voluntary consumer organization which was opposed to the growing mass production of beer and the homogenization of the British brewing industry. Nowadays, the craft beer revolution relates to the dynamically growing number of microbreweries, brewpubs, and contract breweries on the market, that are producing a new wave of craft beers that are in many ways the opposite of the popular mass-produced lager (e.g., Acitelli 2013; Hindy 2014; Elzinga et al. 2015). Beers appearing on the market are the variation of all beer styles according to official nomenclature (BJCP 2015). Many times historical types of beer are recreated and the brewers tend to use ingredients and additives that are less widely known. “The craft beer revolution” is both the increase in quantity in terms of the number of brewery entities on the market and the new unique types of beer (not the production scale) and the change toward the quality—new beer styles, supporting the quality and the relation between the maker and the product, with attention paid to ingredients, speciality, and uniqueness (Wojtyra and Grudzień 2017).

The main aim of this work is to present the development of the craft beer scene in Poland, especially in the years 2010–2018 with an emphasis on “the Polish craft beer revolution,” including an indication of the phenomenon origins, and the change in the number and spatial distribution of breweries over time. Analyzing these trends from a geographic perspective allows us to see which regions have to lead the “Polish craft beer revolution” that gained importance in 2011. Moreover, the work involved a discussion on the impact of the beer revolution on social and cultural aspects.

Due to its limited temporal dimension, the research on the Polish beer market has mainly been focused on the impact made by largest brewing companies in the country, namely, Kompania Piwowarska, Grupa Żywiec, and Carlsberg Poland (e.g., Huculak 2004; Boratyńska 2009; Borowska 2009; Gołaś and Ścibek 2010; Fudaliński 2013; Łoboś and Szewczyk 2013; Andrzejewska and Firlej 2013; Kopeć and Mitera 2014; Klimek 2014). Moreover, the literature examining the Polish craft beer scene is only just developing (Podeszwa 2015; Chlebicka et al. 2018; Łużak 2017; Maszkowski and Wysokiński 2017; Wojtyra and Grudzień 2017).

The study used statistical data from the Polish Central Statistical Office reports for the factors including the supply of the domestic market and the consumption of some consumer goods. As a starting material for the identification, characterization, and assessment of changes in the number and the locations of breweries “The Beer Map” was used. The map was founded by a group of Polish “beergeeks” famous for their development of the craft beer market in Poland. Furthermore, other information comes from the Polish Association of Homebrewers. The data were verified through Internet sources (Ratebeer, Untappd App, brewery websites, social media channels, etc.) and interviews with people associated with Polish breweries. The collected data on the Polish craft beer revolution is shown by way of charts and choropleth maps.

The remainder of this chapter is divided into five sections. In the next section, the Polish beer market has been characterized (types of breweries, main investors tycoons, production, and beer consumption) . In the second part, attention has been paid to the emergence and course of the craft beer revolution in Poland. The next section is devoted to present a geographical approach in Polish craft beer scene research. Then the cultural and social effects of the changes in the Polish beer market are discussed. Relevant conclusions are drawn at the end.

Background of Changes: Characteristic of Polish Beer Market

Brewing traditions are deeply rooted in Poland. Thanks to the Celts and Germans beer on Polish soil was known long before the arrival of the Slavs and Christianity, probably around the fifth century. As a separate branch of craft, brewing has been developing since the 14th century. However, over the centuries its role and consumption levels have changed significantly in comparison to stronger drinks such as wine and vodka (Szymański 2018).

Modern brewing history after the industrial revolution had a similar course on the Polish territories annexed by the Austria, Prussia, and Russia between the end of the eighteenth century and the end of World War I as in the rest of Europe. On each of these territories various breweries were established, with some “jewels in the crown” like the breweries in Elbląg, Żywiec, Okocim, or the Haberbusch and Schiele brewery in Warsaw (Puś 1984; Chlebicka et al. 2018; Szymański 2018). In the interwar period in the present territory of Poland, there were about 185 breweries, and production amounted to 2.6 million hL in 1929 which gave 9th place in Europe and 11th in the world. However, the consumption at the level of 8.5 L of beer per year was relatively low, and many breweries fell at that time. The Second World War had a crucial impact on Polish territory as well as on the breweries. The changes in the borders and the disappearing of many breweries were a direct consequence of the war rage. The economic reconstruction of the country after the conflict took decades, and the brewing industry was highly centralized by the state. Whereas in 1939 in Poland there were 91 breweries, in 1990 only 79 were active (Huculak 2010).

Undoubtedly, the Polish brewing industry after 1989 was part of strong global trends which resulted in the spectacular takeovers, the creation of large brewing groups, and the changes in production volume and supply, in the product quality and the model of its distribution, what follows in the measurable statistics concerning the consumption. The changes resulting from these strong globalization processes in the beer market in Poland led to having three major brewing companies account for over 82% of the volume of beer sales in the country (Huculak 2004). In 1990–2010 many small breweries collapsed or were incorporated into larger brewing companies. The process of consolidations and expansions of global beer corporations and privatization in Poland were similar to the situation in other Central and Eastern European countries (e.g., Swinnen and van Herck 2011; Howard 2014).

From the beginning of the twenty-first century until 2008 in Poland, there was a systematic increase in beer production (Fig. 5.1). In 2016, almost four times more beer was produced than in 1990. After the period of stabilization in 2007–2010, there was a successive increase in total beer production to over 40 million hL annually. According to the 2017 production data, Poland is ranked 3rd in Europe, behind Germany and the Great Britain (The Brewers of Europe 2018). The data include only entities employing more than 49 persons, thus the production volume coming from all small breweries is not included.

The beer consumption has been steadily increasing in the period between 1990 and 2017 reflecting the trends related to the production and distribution. Since the beginning of the 1990s, the consumption has increased threefold and after 2010 it has stabilized above 90 L per capita. According to the 2017 production data, Poland takes the 4th place, behind the Czech Republic, Austria, and Germany, with a value of about 97 L per capita (The Brewers of Europe 2018). Since the economic transformation in the early 90s, the beer sector in Poland experienced the highest dynamics of beer consumption in Europe. From 1990 to 2014 beer consumption changed from 30,5 to 98 L per capita. Firstly, it was an effect of a successful restructuring process and introduction of large investment programmes in the companies controlled by foreign investors. The marketing practices have been changed and the quality standard of beer has risen (Chlebicka et al. 2018). Secondly, between 1990 and 2017 a significant change in the alcoholic beverages model has been observed. Beer became the most popular beverage in the country, due to changes in consumer preferences favoring lower alcohol strength drinks (Fig. 5.2). Additionally, one of the main reasons for beer consumption growth is increasing incomes and standard living in Poland. The annual dynamics of the increase in GDP per capita in PPP between 1990 and 2017 was 6%.

The brewing industry in Poland plays a significant role not only in the production and alcohol sales market but also in the entire economy. The influence of this sector on the agri-food industry is considered extremely important (Fudaliński 2013; Brewers of Europe 2018). The added value generated by the brewing sector in 2017 reached 19.4 billion PLN.[1] In 2017 the brewing sector generated indirectly about 157,500 jobs (Browary Polskie 2018).

Thanks to many sales outlets, high consumption per capita, good brand awareness of existing main breweries, and an increased wish for local and regional products, the situation on the Polish beer market is very good for brewers of all kinds. Intensive development is a result of the technological level raise in the industrial large breweries.

The growth was also possible thanks to a favorable tax regime for small producers established in the mid-1990s. Until 2018, reduced excise duty rates applied depending on the volume of beer sales throughout the year, with a breakdown of up to 20,000 hL, up to 70,000 hL, up to 150,000 hL and up to 200,000 hL of beer. Since 2018, there is only one threshold regarding the excise tax exemption distinguishing small breweries (producing up to 200,000 hL per year) and large (over 200,000 hL).

The abovementioned tax thresholds have become the basis of unofficial, but appearing in Polish literature, classification of breweries into three basic groups (Wojtyra and Grudzień 2017):

(1) small—annual production of up to 20,000 hL,
(2) medium—annual production at the level of 20,000 hL up to 200,000 hL,
(3) large—annual production at the level above 200,000 hL.

and contract/client breweries which are a completely different type described below (Fig. 5.3).

The rich diversity of names describing different breweries provides a challenge for the classification. We came across the following terms: local brewery, home brewery, traditional brewery, mini-brewery, regional brewery, and the like. In fact, in Poland one current definition of craft brewery or craft beer doesn't exist. Therefore, it appears that the proposed division shows the difference between breweries in Poland in an appropriate way.

Within the first group, we count small-scale breweries, including microbreweries, restaurant breweries, and brewpubs (Fig. 5.4). There is not one recognized definition of microbreweries in the field of research and the existing ones

[1] 1 USD = 3,8 PLN (2019-04-09).

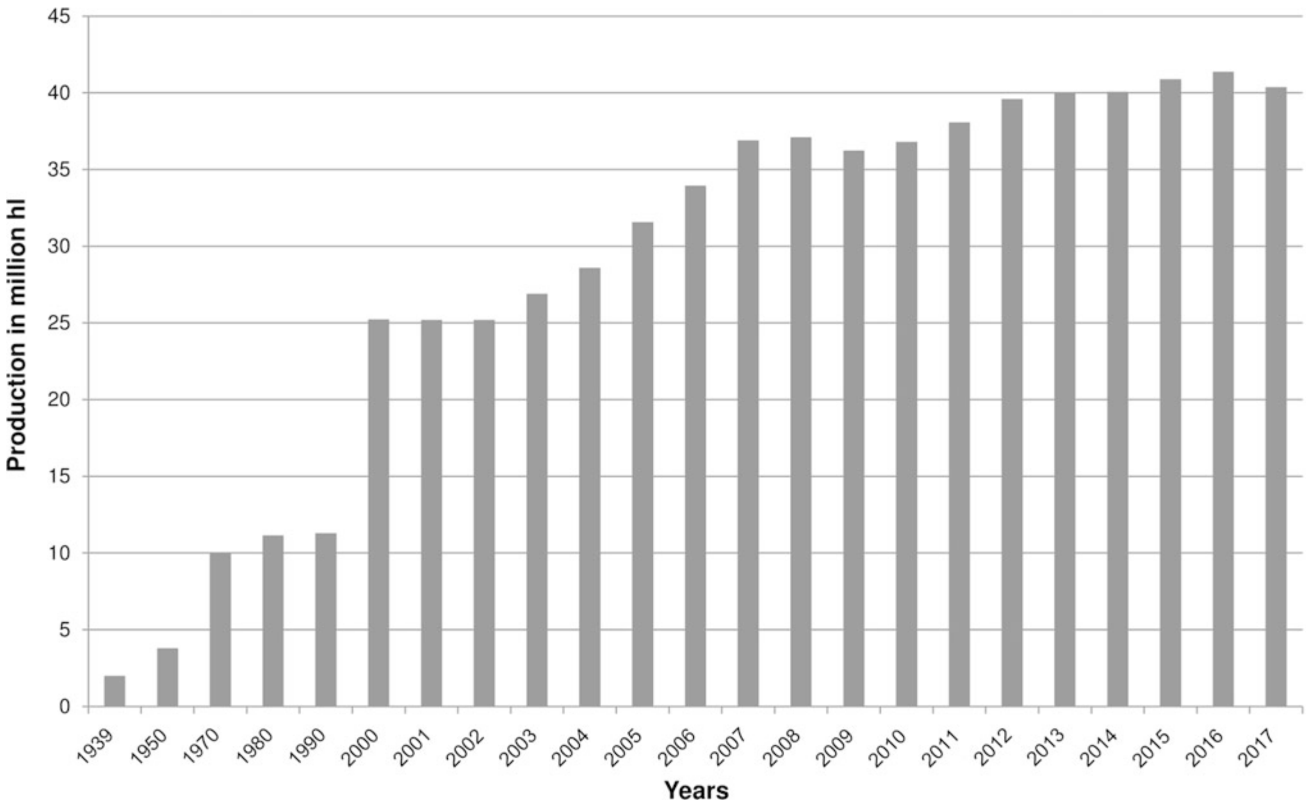


Fig. 5.1 Production of beer in Poland between 1939 and 2017. *Source* own elaboration based on Statistics Poland (2019) data, Boratyńska (2009) and Klimek (2014)

are extremely vague. Most often, it is described as a small, independent brewery, brewing beer on a smaller scale than large companies, paying close attention to the quality, a wide choice of ingredients, and the traditional brewing method. For the research, a microbrewery is usually a plant brewing beer within the limited annual volume. In our work it is 20,000 hL.

A restaurant brewery is a type of a small brewery which is the combination of a brewing plant with an eating-place. Brewing takes place in front of guests in one of the restaurant rooms and the beer itself, usually a draught one, is a part of the restaurant service, whereas it is rarely distributed outside an eating-place.

In Poland, a brewpub is associated with a pub which serves beer of its own production, and it does not have a special restaurant offer by the definition close to the view of Oliver (2011) according to which a brewpub is simply a brewery which serves and sells beer at the place of production.

Medium breweries in Poland, often called "regional breweries" are breweries that produce 20,000–200,000 hL of beer annually (Fig. 5.5). Nowadays 17 breweries belong to this group. All of them were founded before 2000 (including seven in the nineteenth century). Three of them were reactivated after 2010, during "the Polish beer revolution". Most of the medium breweries are members of the Polish Regional Breweries Association.

The three main players on the Polish beer market are included in the group of large breweries. Kompania Piwowarska—since 2016 part of Japanese Asahi group (earlier SAB Miler), Grupa Żywiec (part of Heineken), and Carlsberg Poland (part of Carlsberg), with over 82% share in the volume of total beer sales in the country are primarily responsible for the high production results, supplies, and the consumption of beer in Poland. The large breweries in Poznań ("Lech"), Białystok ("Dojlidy") and Tychy ("Tyskie Browary Książęce") belong to Kompania Piwowarska. Grupa Żywiec has five large breweries located in Elbląg, Warka, Cieszyn, Leżajsk, and Żywiec. Carlsberg Poland manages three large breweries established in Szczecin, Sierpc, and Brzesko. Other brewing companies in Poland that have kept an important market share are Browar Van Pur, Łomża, Perła Browary Lubelskie, and Browar Namysłów (Fig. 5.5). 20 of the 22 current large breweries were founded before 1990.

The last group, contract breweries are brewing initiatives producing beer using production capacities hired from a stationary brewery. Contract breweries have their own

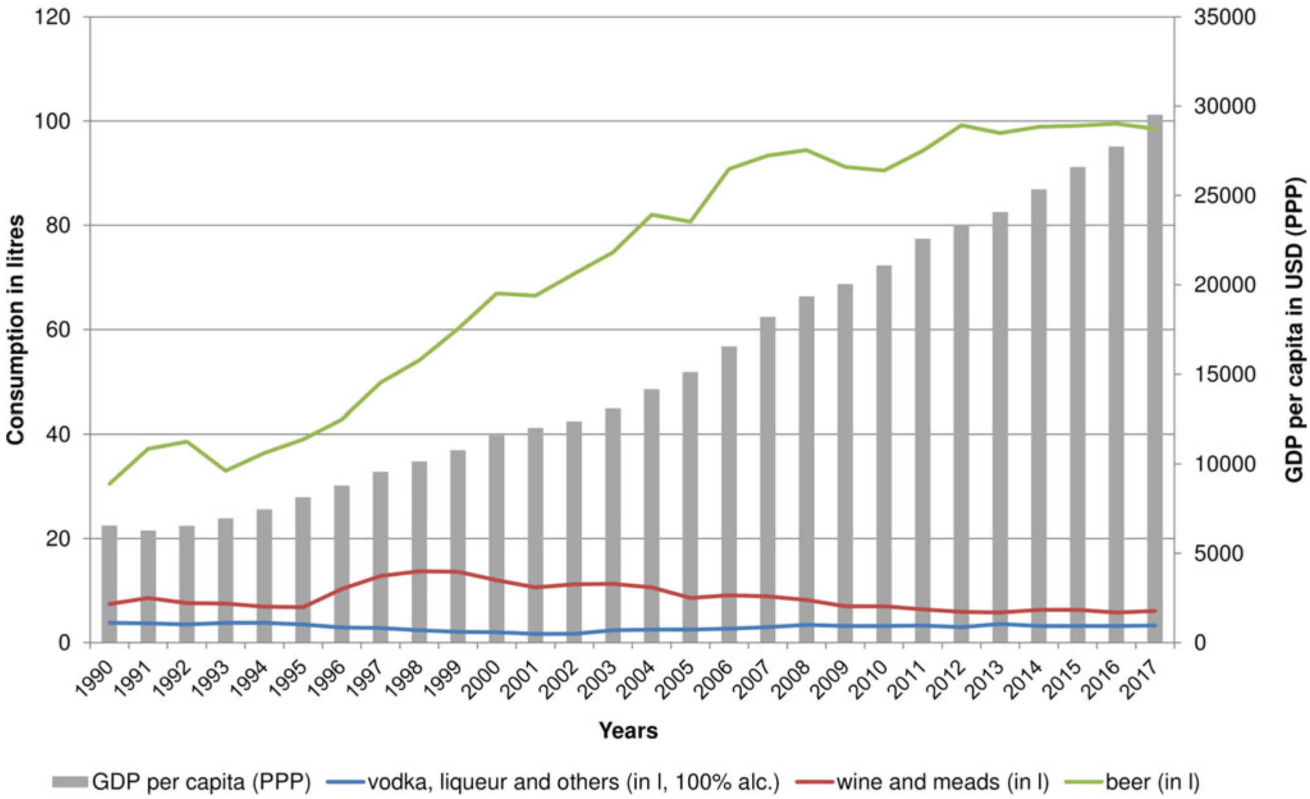


Fig. 5.2 Consumption of alcoholic beverages compared to GDP per capita in Poland between 1990 and 2017. *Source* own elaboration based on Polish Central Statistical Office and World Bank data

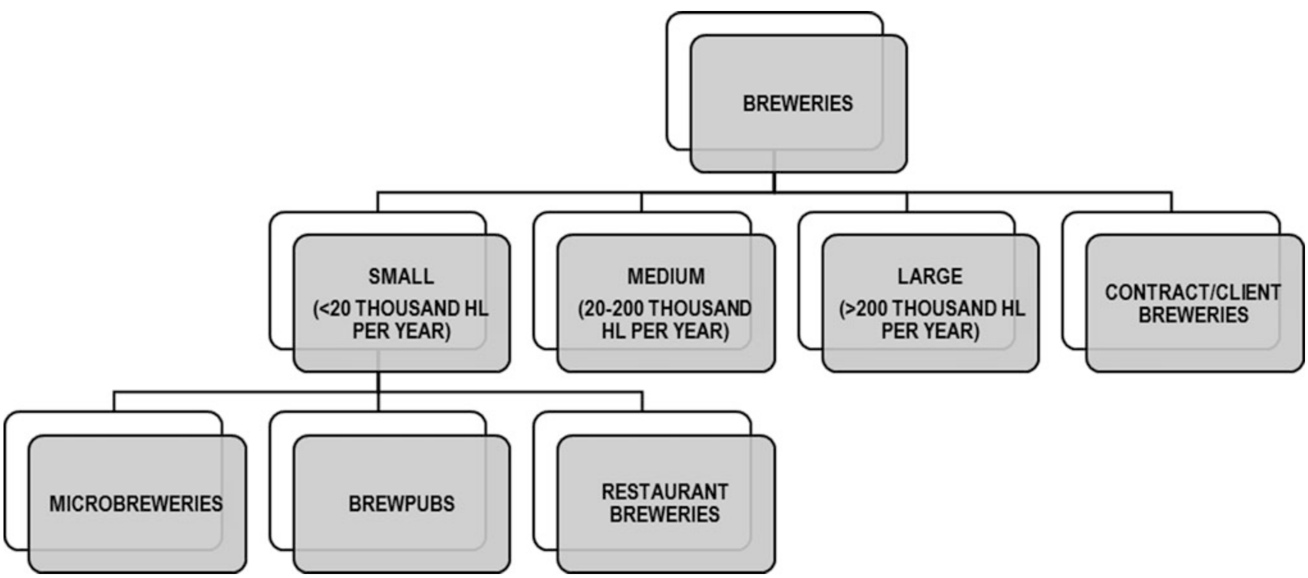


Fig. 5.3 Types of breweries in Poland. *Source* own elaboration

brewers who develop recipes and prepare beer independently. This form of brewing activity results in mutual benefits between a stationary brewery which does not fully use its production capacity and can rent it, and people who want to share their brewing ideas with a wider group. The contract brewery is the activity of brewers who have entered into a contract with one or several stationary breweries to periodically rent equipment and space to brew their own recipes.

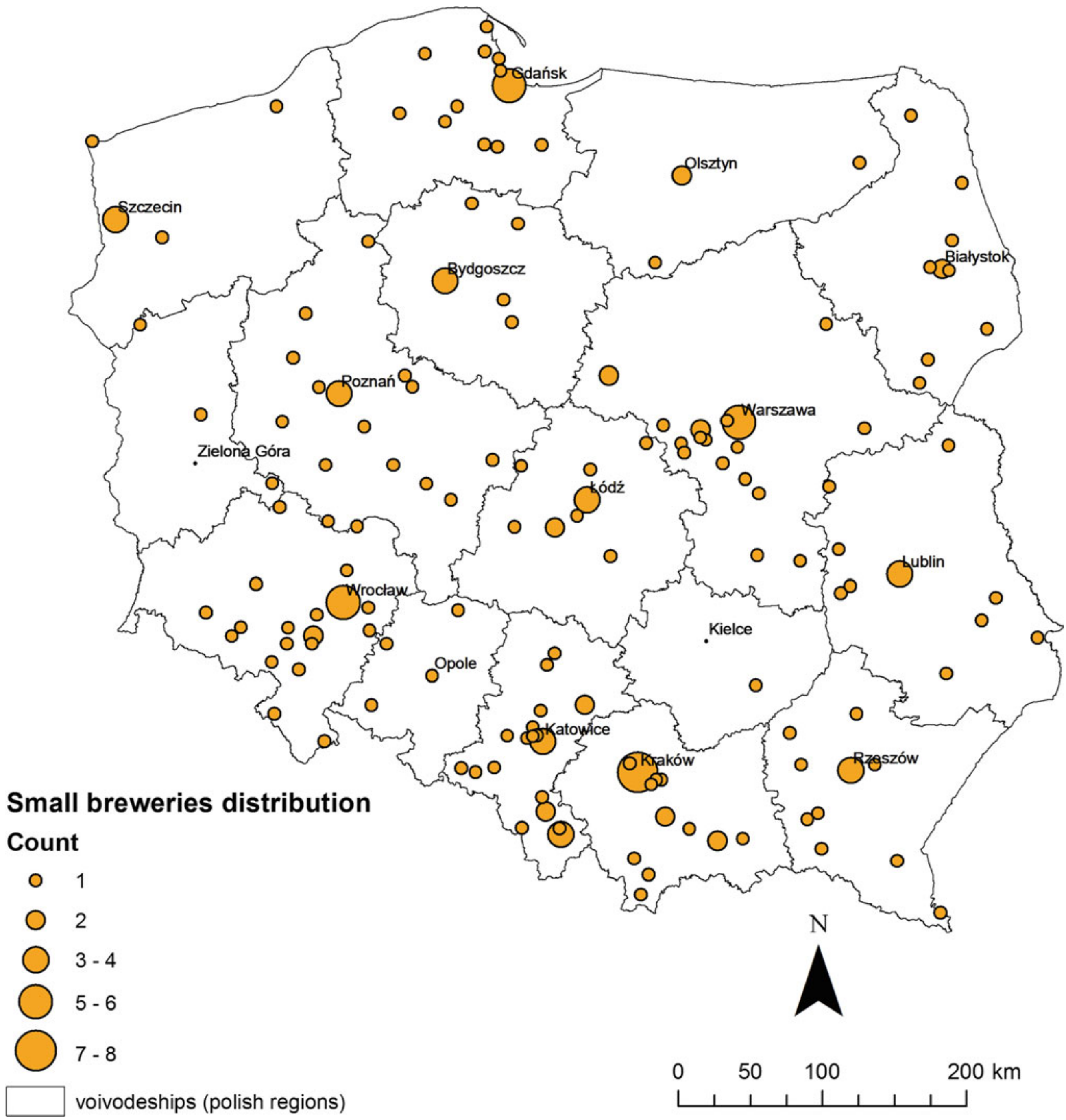


Fig. 5.4 Small breweries distribution in Poland in 2018. *Source* based on The Beer Map, data from browar.biz (Online: [The Beer Map] https://link.do/lvbI3, access: 2019-04-10, [browar.biz] https://www.browar.biz/forum/showthread.php?t=112045, access: 2019-04-10), and the authors own data collection

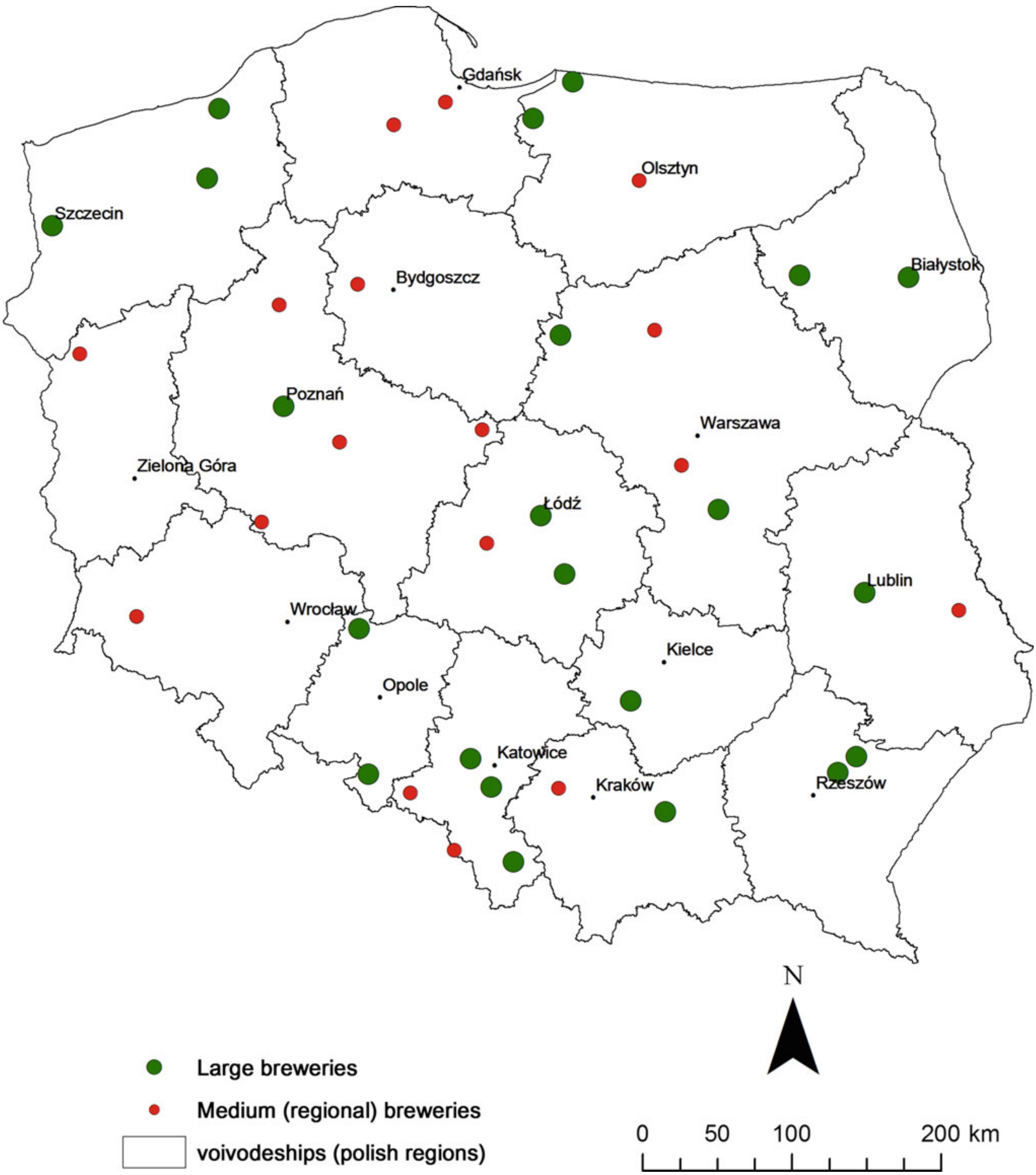


Fig. 5.5 Large and medium (regional) breweries distribution in Poland in 2018. *Source* based on The Beer Map and the authors own data collection

In fact, microbreweries, restaurant breweries, brewpubs and, rarely, medium (regional) breweries produce craft beers. The growing number of these microbreweries are intrinsically a part of the rising Polish craft beer revolution.

The Emergence of the Craft Beer Revolution in Poland

The Polish beer industry since the 2010s has been gradually perceived among the important craft beer markets in the world. After two decades (1990–2010) when the Polish beer market was dominated by large foreign investors the trend has changed for small breweries.

The establishment of the first contract brewery "Pinta" is the commonly accepted beginning of the craft beer revolution in Poland.[2] The brewery Pinta started on 28th March 2011.[3] They were responsible for the introduction of the first new-wave craft beer on the Polish market called "Atak Chmielu" (Hop Attack) in the American India Pale Ale style. It was the first beer in this style on Polish market ever. It is important to emphasize that the Pinta owners were experienced homebrewers and they decided to commercialize the products of their hobby.

The period after 2011 is manifested by the dynamic development of craft breweries led to the increase of the number of breweries (Table 5.1, Fig. 5.6), and the sales of craft beer have been steady and growing, even if their share in total volume is low. The Polish craft beer revolution also describes an increase in the consumers' interest and demand for the products of small craft breweries (microbreweries, brewpubs, restaurant breweries) , and a series of social, cultural, and economic effects resulting from this phenomenon.

The number of breweries in Poland has grown dramatically, from 70 in 2010 to 372 in 2018. The growth has been particularly impressive in the years 2014–2016. In subsequent years, the recorded increases were also clear, even if not so high. However, the number of new breweries in the market grew regularly. Between 2010 and 2018 the average annual increase was 23%. What's more, in comparison to 1990s, the growth in the number of breweries excluding contract and clients breweries was also impressive—from 65 in 2010 to 238 in 2018. In the meantime only 9 breweries were closed in Poland. Moreover, in comparison with 2010, the number of large breweries did not change, so only small brewers are responsible for the growth.

[2]Depending on the data, sometimes an ephemeral initiative called Stary Kraków (Old Cracow) operating in the years 2005–2007 is cited as the first contract brewery; yet, its foundation was not successful and did not bring external results.

[3]Online: http://www.browarpinta.pl/en/about-us.html; access: 2019-05-10.

The contract breweries dimension in the Polish beer revolution is worth to emphasize. While in 2010 there was no brewing entity of that type, in 2018 there were 119 of theirs. Most of these are activities started with home brewers who decided to commercialize their hobby, because of the low entry and exit barriers. The contractors don't need to buy and utilize an expensive brewing installation.

The period 2010–2018 allowed to observe market development trends with the increase in the number of newly established contract breweries, as well as of those companies that did not succeed and were forced to suspend or end their activities. The small scale of production and sales, as well as growing competition and consumers' requirements, became an obstacle in maintaining profitability. For some, contract initiatives would have often been a short adventure for home brewers who wanted to present their skills and products with commercial brewing. For others, contract activity was just a stage on the way to opening their own microbrewery, e.g., Bazyliszek Brewery, Kraftwerk Brewery, Waszczukowe Brewery, Inne Beczki Brewery, Kazimierz Brewery.

The development of all the breweries has been boosted by the dynamic sales of craft beers in Poland. All of the newly created breweries focus on the brewing of new wave beer, referring to the tradition of the "beer revolution" and present a wide portfolio of beers in various styles, especially the top-fermented beers. Sales figures doubled each year until 2018, when the first signs of market slowing were noted. Currently, craft beers have about 0.5% share in the total sales of volume beer in Poland.[4]

The number of new beer brands that appeared in Poland after 2013 is impressive (Fig. 5.7). In 2018 the number of beer premieres exceeded 2000 unique products. The most popular groups of styles are India Pale Ales (530), Pale Ales (296), Stouts (266), Sour Ales (163), and also Barrel Aged Beers (202). The most fertile breweries present about 40 new beers annually. The innovation dynamics have also been replicated by the three main brewing companies which started to diversify a portfolio and gradually introduced a new style. However, their offer is still sparing in comparison to craft breweries.

According to the Brewers Association, collaboration is a hallmark of the modern craft brewing scene and is one of the strategies that allows craft breweries to compete successfully against large brewing concerns (Nilsson et al. 2018). International cooperation in brewing in Poland is also growing every year. The number of cooperative brews at national level in 2018 amounted to 65 and it was four times higher than in 2015. While in 2015 there were 12 international cooperative brews, 59 have been registered in 2018.

[4]Online: [Nielsen Report] https://www.nielsen.com/pl/pl/insights/reports/2018/beer-revolution.html, access: 2019-04-12.

Table 5.1 Number of breweries in Poland in 2010–2018 *Source* based on The Beer Map and the authors own data collection

Type of brewery		Year								
		2010	2011	2012	2013	2014	2015	2016	2017	2018
large breweries	Total	22	22	22	22	22	22	22	22	22
	Newly opened	0	0	0	0	0	0	0	0	0
	Closed	0	0	0	0	0	0	0	0	0
Medium (regional) breweries	Total	15	15	15	14	14	16	16	17	17
	Newly opened	0	0	0	1	0	2	0	1	0
	Closed	0	0	0	2	0	0	0	0	0
Microbreweries and brewpubs	Total	9	9	11	14	23	40	62	82	103
	Newly opened	0	0	2	3	9	17	22	21	22
	Closed	0	0	0	0	0	0	0	1	1
Restaurant breweries	Total	19	27	34	49	54	71	77	87	96
	Newly opened	1	8	7	16	6	17	7	10	11
	Closed	0	0	0	1	1	0	1	0	2
Contract and client breweries	Total	5	6	11	17	38	61	92	103	134
	Newly opened	3	1	6	11	24	33	42	29	40
	Closed	0	0	1	5	3	10	11	18	9
Total (no contract and client breweries)	Total	65	73	82	99	113	149	177	208	238
	Newly opened	1	8	9	20	15	36	29	32	33
	Closed	0	0	0	3	1	0	1	1	3
Total (contract and client breweries included)	Total	70	79	93	116	151	210	269	311	372
	Newly opened	4	9	15	31	39	69	71	61	73
	Closed	0	0	1	8	4	10	12	19	12

Prior to 2010, there was no relationship between the Polish craft beer sector growth and the domestic production of malt and hops. The wish to be linked to local suppliers by the brewing market newcomers after 2010 led to the increased interest in Polish hop varieties and malt use, helping Polish hop plantations which suffered economically in the 2000s. The use of historical and experimental Polish hops, e.g., Izabella, Oktawia, Tomyski, Iunga, Magnat, Puławski, Zula, or Polish Cascade appeared on the market.[5]

The combination of a few interrelated dimensions has played a key role in the emergence of Polish craft beer revolution:

- growing popularity of hand-made, good quality, and niche products,
- globalization and related glocalization and neolocalism, justifying the penetration of markets, products, innovations, as well as the society's response to the quantity and quality of mass products; goods produced in connection with the local community (Siemieniako et al. 2011; Holtkamp et al. 2016; Bell 2017),
- a need of variety among the consumers because of mass-produced and standardized on big scale concerns beers ("anti-mass production movements;" Hayagreeva 2008),
- the development of the Internet and other alternative communication channels what follows to the diffusion of innovation,
- an increase in consumers' income, rich people have started to search for new, better products; they wanted to signalize their higher financial status,
- Millennials generation (Moore et al. 2016), young adults live and think completely differently than previous generations, they use the opportunity to choose, look for flavors, and are not afraid of experiments,[6]
- as in the USA, the craft beer revolution was born in craft breweries which were a result of interest in homebrewing (Chlebicka et al. 2018).

[5]Online: [Portal Spożywczy] http://www.portalspozywczy.pl/alkohole-uzywki/wiadomosci/coraz-wiecej-polskich-odmian-chmielu,135496.html; access: 2019-05-10.

[6]Online: [Birofilia Report] https://birofilia.org/uploads/oryginal/5/0/9ab7e22e_birofilia_raport_millenialsi_a.pdf, access: 2019-04-12.

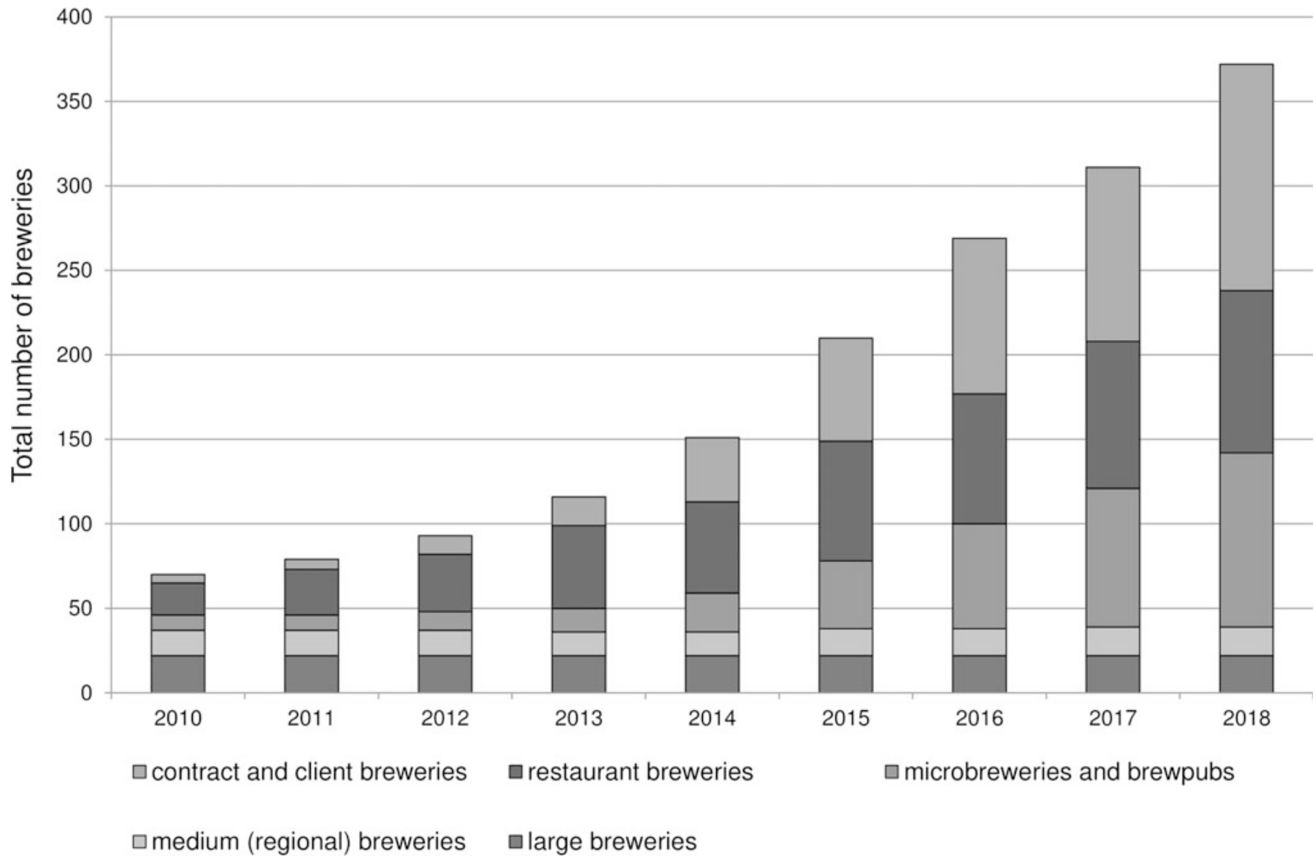
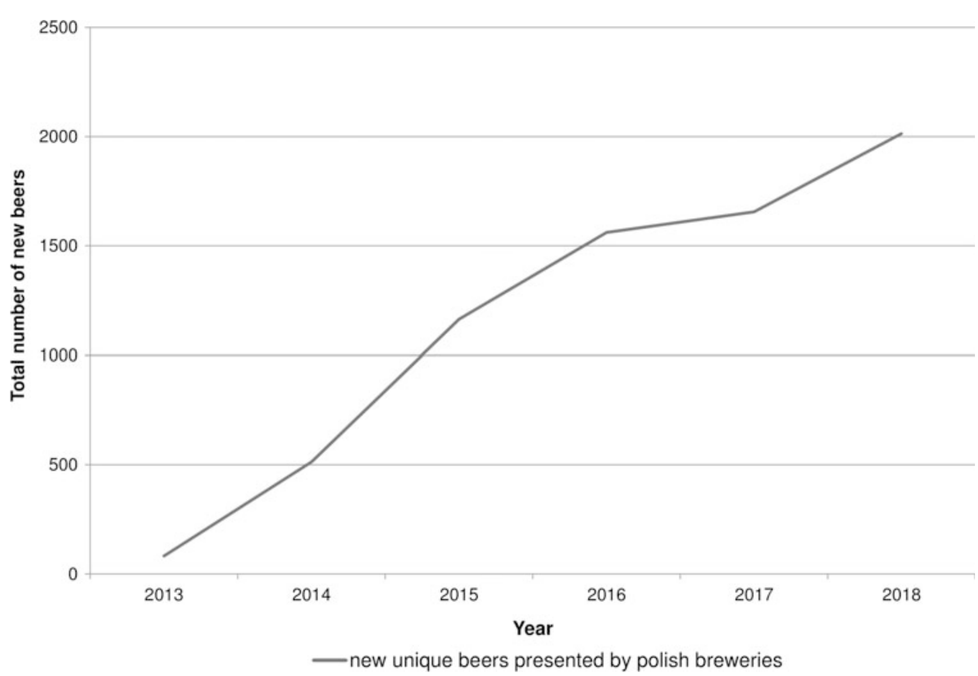


Fig. 5.6 Change in the number of breweries in Poland during Polish craft beer revolution. *Source* based on The Beer Map and the authors own data collection

Fig. 5.7 Unique beers presented annually by Polish breweries on Polish beer market between 2013 and 2018. *Source* Piwna Zwrotnica Blog



People who drink craft beer prefer that beverage instead of mass-market lager for a lot of reasons, including its greater variety in terms of styles and flavors; the independent, local, creative and small-scale nature of that industry (Nilsson et al. 2018). Therefore, the reasons are similar to the origin of emergence the craft beer revolution in other countries, e.g., Italy, the USA or Spain. In countries where good quality beer is commonly accessible, the craft beer revolution develops more slowly and has distinct strategy, e.g., in Germany or Czech Republic.

Polish Craft Beer Revolution–Geographical Approach

The Polish beer revolution impact is also visible in terms of geography (Figs. 5.8 and 5.9). Breweries created until 1990, and especially 20 of them whose creation dates back to the nineteenth century are clearly evenly spread throughout Poland. It might be said that each region had its own brewery. Small clusters of breweries were distinguished by regions such as the Wielkopolskie voivodeship, and Śląskie voivodship,[7] as well as the region around Warsaw (the capital of Poland).

In the period of the beer revolution after 2010, the breweries increased especially in the proximity of urban agglomerations. It should be noted that the beer revolution occurs primarily in richer regions, hence in the peripheral areas of the country. Especially in the east of Poland, there are much fewer breweries (compare to Fig. 5.10). The Warmińsko-Mazurskie, Lubuskie, and Opolskie voivodeships remain a relative beer desert on the map of Poland.

Taking into account the number of breweries per 100,000 inhabitants in individual voivodships, it should be stated that peripheral voivodships are characterized by the highest rate: in the south Śląskie and Dolnośląskie, in the north Pomorskie, and in the east Podlaskie and Mazowieckie. On the other hand, the lowest number of breweries per capita is in Lubuskie and Świętokrzyskie voivodeships (Fig. 5.11).

The regions whose capitals are the largest cities in Poland prevail in the statistics. In Mazowieckie voivodeship it is Warsaw (1st place in terms of the number of all inhabitants), in Małopolskie–Kraków (2nd place), in Dolnośląskie–Wrocław (4th), in Pomorskie–Gdańsk (6th). The lowest number of breweries per capita lies in regions whose capitals are relatively small cities, e.g., in Świętokrzyskie–Kielce (17th place), in Lubuskie–Zielona Góra (24th), and Gorzów Wielkopolski (30th; Central Statistical Office 2018). Therefore, the most intense beer regions are located in the south of Poland where the population density is also the highest. Most breweries, usually restaurants, are created in large urban centers (Warszawa, Gdańsk, Kraków, Wrocław, Poznań; Fig. 5.12), due to the customer base and supply level.

A similar situation applies to contract breweries which are established mainly in the largest cities. Region capitals such as Warsaw, Kraków, Poznań, and Wrocław dominate the scene. Nonetheless, further observations permit to establish where contract breweries effectively brew and how they manage their distribution.

From the geographical point of view the location of breweries in Poland, it can be noticed that they are usually located in cities (in 78% of cases), especially in large cities (in 42% in cities over 100,000 inhabitants), and also in regions with the highest level of socioeconomic development.

The location of breweries may also be associated with the function of the town where they are created, in particular with the tourist function. The southern part of Poland, with a high density of breweries, is a largely mountainous area with outstanding natural and tourist qualities. Some breweries use in their identity those beneficial factors, e.g., Miedzianka Brewery, Ursa Maior Brewery. In the Śląskie voivodeship brewers may refer to the industrial traditions of the region (Upper Silesian Industrial District).

While it is quite typical in Polish comparisons to make the division between the "rich" western Poland and the "poor" eastern part, this distinction is not clearly marked among brewers, since breweries are founded in all regions. Additionally, there are also no clusters of breweries in places associated with the occurrence of raw materials for beer production, such as the Lubelskie voivodeship or Opolskie voivodship where hops are cultivated (Central Statistical Office 2018).

Cultural and Societal Effects of Craft Beer Revolution in Poland

The changes that occurred in the Polish beer market have been made possible by the openness and growth of the economy, the influence of foreign examples, the availability of communication channels, increased people's mobility, as well as the high degree of acceptance to changes by the consumer. These changes in consumer patterns, thanks to the increase of income, larger spread of beer drinkers age, as well as more frequent presence of beer in households, created favorable circumstances for new entrants.

During the craft beer revolution in Poland the spread of beer festivals and the approach of various breweries to public openness responded to a demand for increasing beer tourism in Poland. The presence of beer from smaller

[7]Polish administrative regions of the highest row.

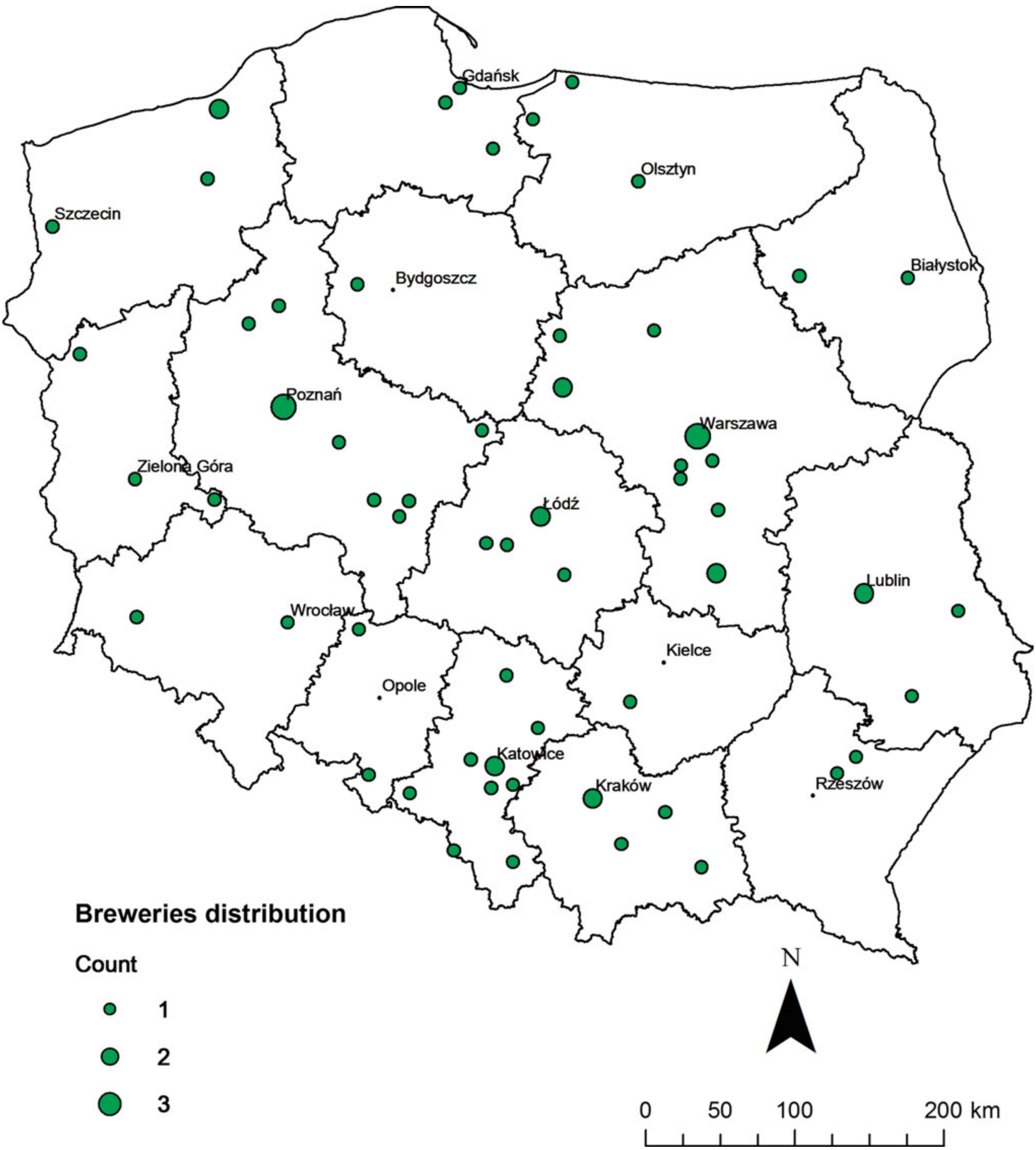


Fig. 5.8 Breweries distribution in Poland in 2010. *Source* based on The Beer Map and the authors own data collection

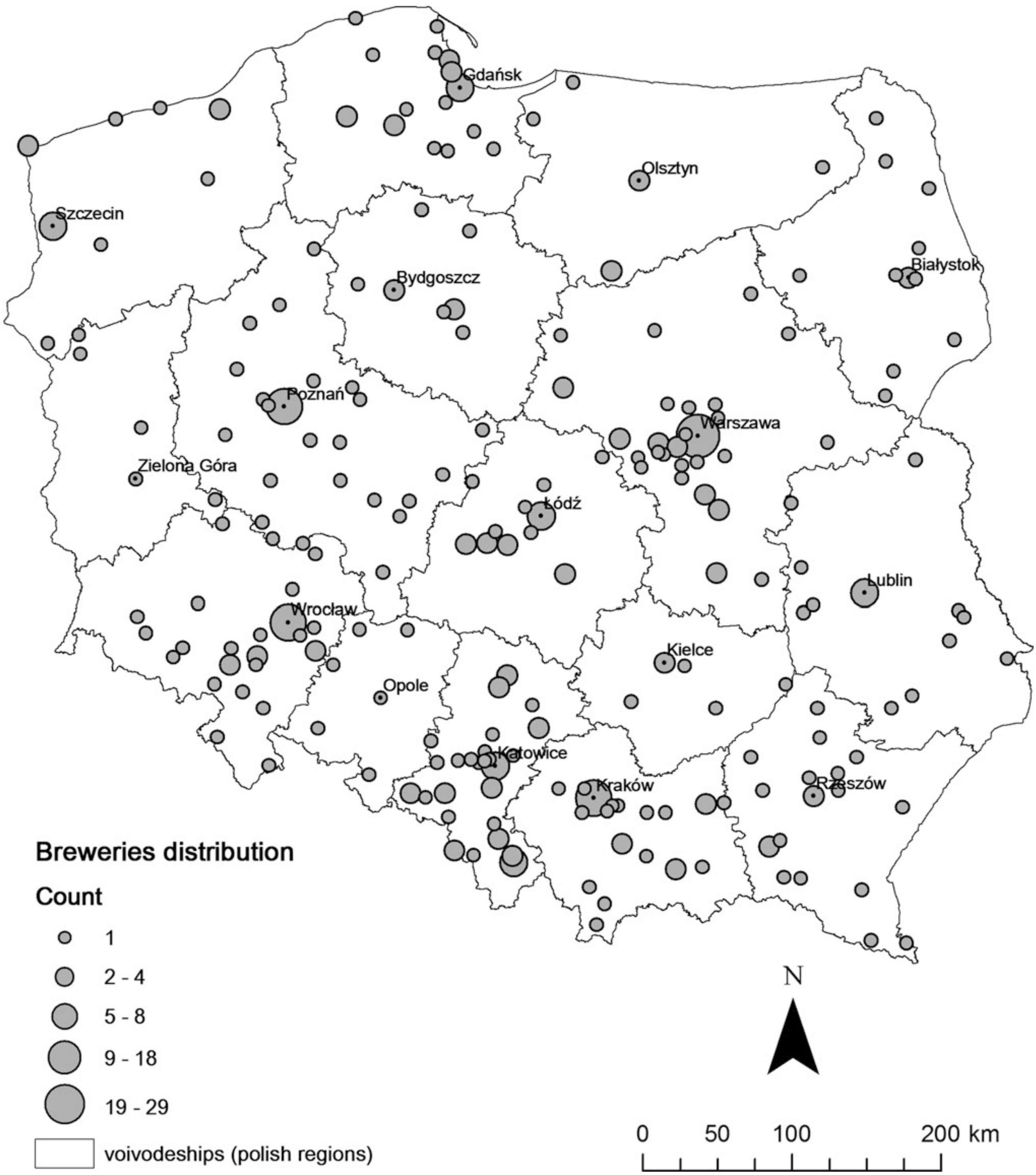


Fig. 5.9 Breweries distribution in Poland in 2018. *Source* based on The Beer Map and the authors own data collection

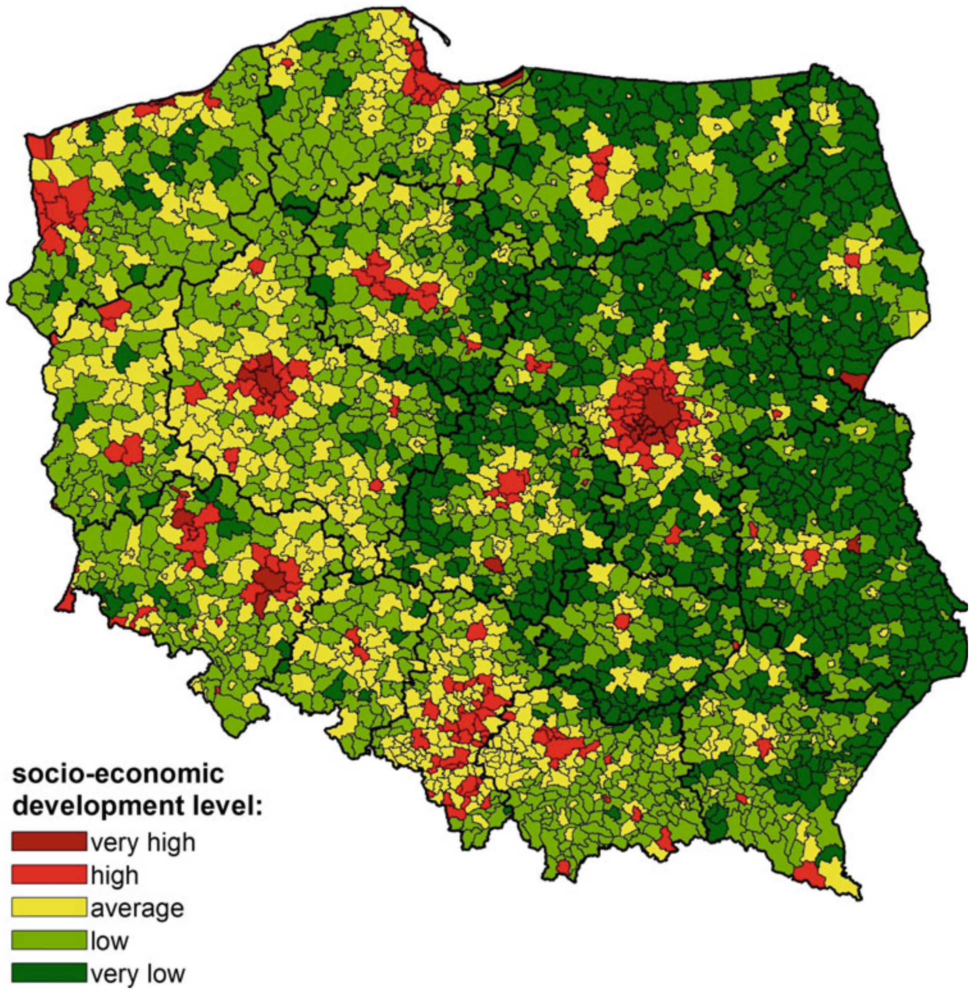


Fig. 5.10 Socioeconomic development level in Polish communes in 2016. *Source* Perdał (2018)

breweries has gone beyond beer festivals to fuel other food and regional events. The wide availability of gatherings, as well as the easy spread of information through the Internet permitted to respond to increasing demand from the public. This was followed and complemented by the opening of specialized shops (554 in 2018) and the offer increase in bars, largely thanks to multitaps (636 in 2018).

According to researchers most beer tourism driven trips took place various times during a year, they are mainly day trips (58%), with visits of regional, national, and local breweries. The main motivation is the discovery of new beers, and related places. The main source of information about beer market is the Internet (Charzyński and Podgórski 2017).

The growing number of festivals across the country have also lead to their larger geographical presence and for many of them changing their role. These changes concerned the introduction of talks, presentations, open contests, or homebrewers battles. Also, the attitude of local authorities changed from reluctance to support or tolerance. The number of new Polish nationwide beer festivals increased every year since 2010 (Fig. 5.13). From 9 existing in 2013 there were 48 beer focused events in 2018. Some of them became known in whole Europe, e.g., Warsaw Beer Festival or Wrocław Good Beer Festival (taking place at football stadiums).

The proximity allowing to meet people who are responsible for creating beer by the consumers enhances the craft beer culture and stimulates a producer, a crafter, a manufacturer, to be close to beer drinker. In the biggest competition in Poland for craft breweries "Kraft Roku" held in Poznan, a craft beer is defined as a product of a brewery where a brewer is known by its full name.

The benefit of such close relationship proved to be effective when in 2018 Inne Beczki Brewery was founded by crowdfunding only in 11 days. Stakeholders deposited 400,000 PLN. So far, no other entity starting a business in Poland has been able to collect such a sum in the same way.

In the absence of widespread popular books in polish and scarcity of popular magazines ("Piwowar" is the only magazine for homebrewers in Poland) the Internet and social media have been key factors in the propagation of

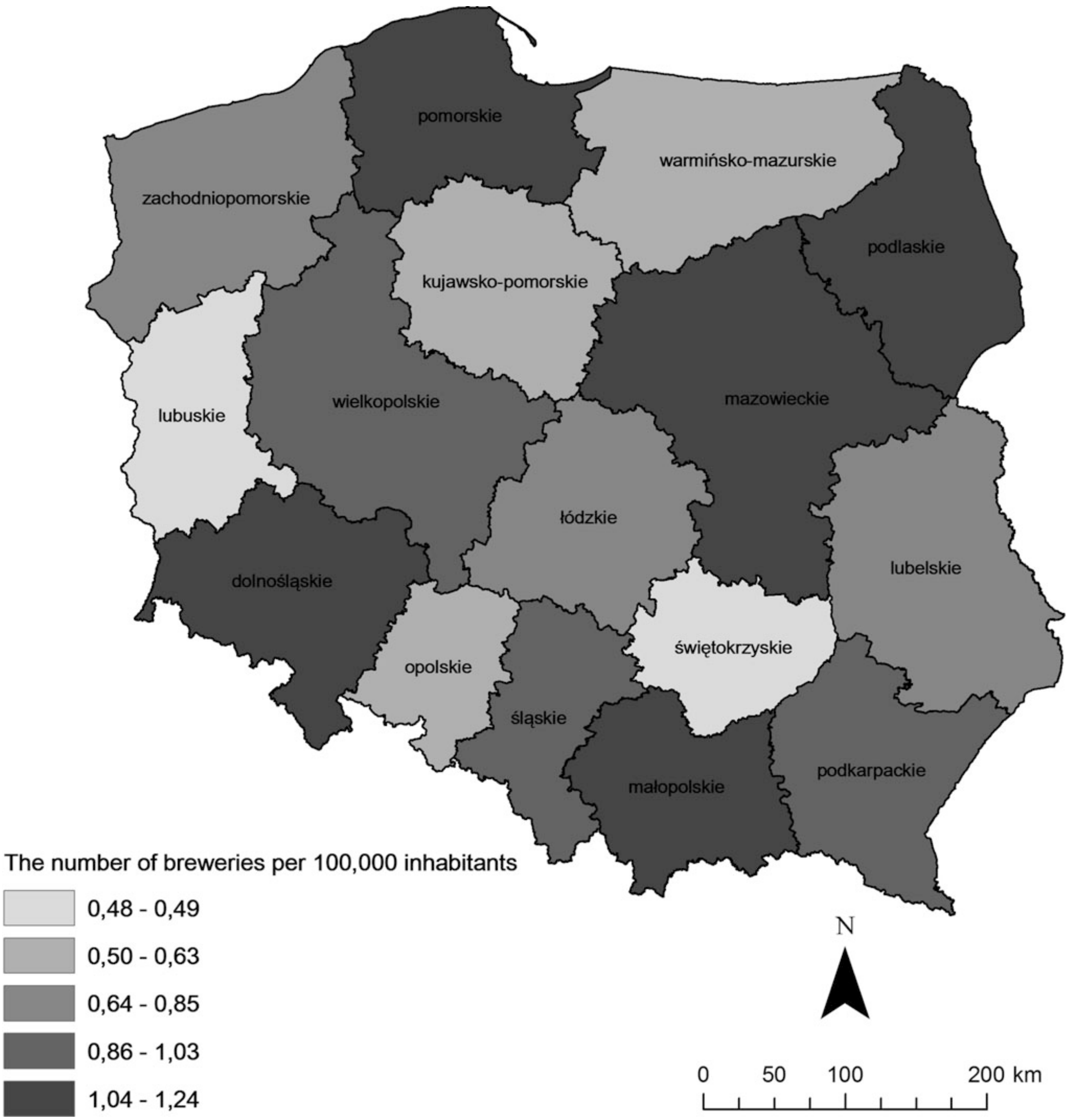


Fig. 5.11 The number of breweries per 100,000 inhabitants in Poland regions in 2018. *Source* own elaboration

beer knowledge and exchange of experiences among beer drinkers. The creation of internet forums, blogs, and social media-specific channels filled an existing gap, as well as matched the speed of information delivery, crowdsourcing, and interconnectivity among beer drinkers and breweries Acitelli (2013) claims that collaboration was particularly valuable for the early home and commercial craft brewers.

Written blogs, e.g., Minibrowary.pl, MalePiwkoBlog, or Beervault, and later videoblogs drove the presentation of all new beers entering the market and creating thereby a space for "beergeeks". These descriptions have been complemented by stories related to events, such as new festivals, brewery tours or premieres of new beers propelled the interest in beer. Consequently, social media became a lively

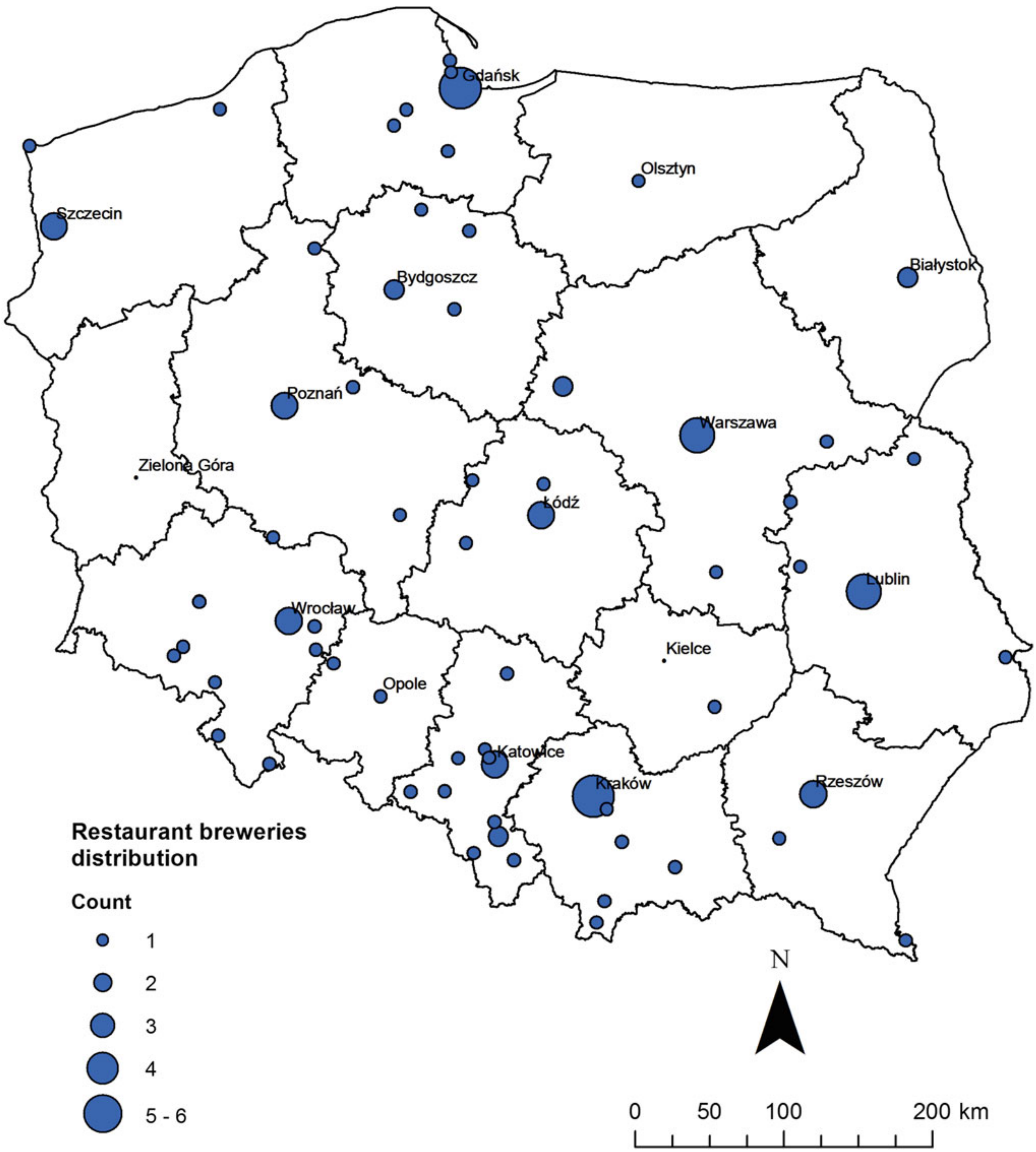


Fig. 5.12 Restaurant breweries distribution in Poland in 2018. *Source* based on The Beer Map and the authors own data collection

forum for exchange on those items and further enhanced the beer Internet scene.

Among these trends, the Polish blog and its corresponding Youtube Channel "Blog Kopyra" (115,200 subscribers and 45,515,529 views—April 2019), became an absolute leader at world level. Its author, Tomasz Kopyra—international beer judge, brewer, created in 2009 a formula of videos where alternatively were given news about the most recent beers, global trends, summaries of events. The blog and films have evolved over time and other blogs included video material; however, no other channel has found an equal echo among beer drinkers.

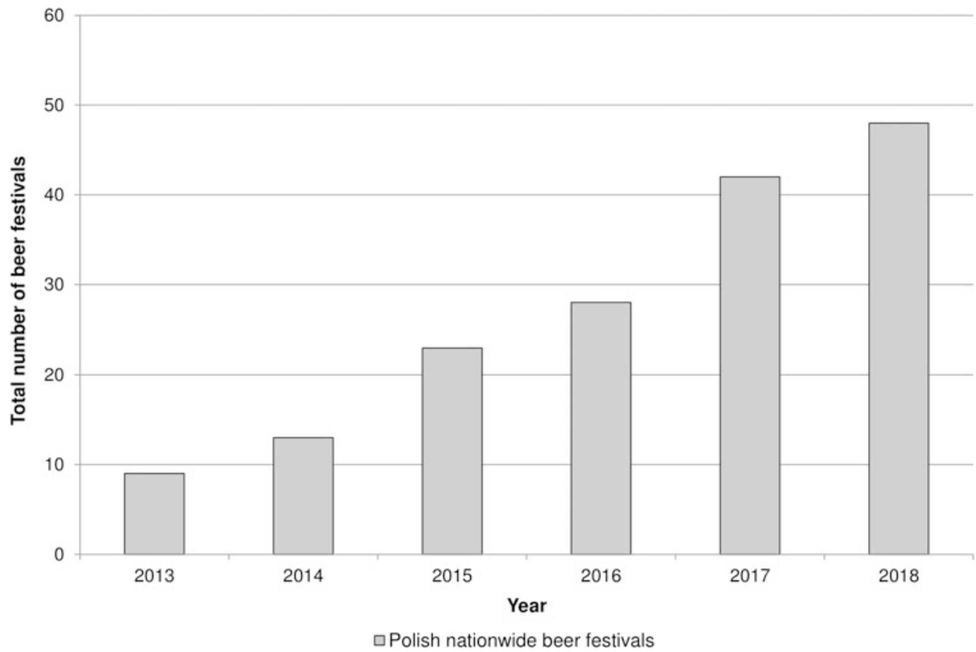


Fig. 5.13 Number of beer festivals in Poland in period 2013–2018. *Source* Piwna Zwrotnica Blog

The reinforcement of the public activities has also been an aim for the Polish Homebrewers Association (1,200 members in 2018[8]). The association and its members through the Internet platform and mainly at local events has resulted in a domestic certification programme for beer judges, numerous sensory trainings, enhancing the home-brewers competitions and the realization of the BJCP exam in Warsaw. In October 2017 the association inaugurated its official seat in Warsaw where further education activities have been foreseen.

Education for brewers in Poland has been present at various food technology faculties and at industry conferences and trainings. Going beyond the existing conferences and short courses, official postgraduate studies open to all have been launched in 2016 by the University of Life Sciences in Wroclaw and the Agricultural University in Cracow, and in 2018 at the University of Opole.

Conclusions

The number of breweries in Poland grew from 28 to 199 in just 8 years (2010–2018) due to the "beer revolution." A new phenomenon also emerged, such as the appearance of contract breweries in large scale—companies producing beer on hired brewing installations in existing stationary breweries. In the described period around 130 contractors set up the brewing business. Polish craft beer revolution is also linked with the expansion of home brewing, the emergence of new beer festivals, specialty shops and pubs selling craft beer, as well as growing importance of the cultivation of a new hop variety, etc.

Moving from homebrewing to commercial production was accompanied by an offer diversification in the market and a continuous evaluation of present beers by consumers on social media. High quality beers, from rare and most often more expensive ingredients (special yeast strains, malt, hops varieties imported from around the world) compared to mainly lager beers, also helped in creating a good image of diversity appealing to consumers.

However, the "beer revolution" is primarily a qualitative change changing the perception of beer and still has a small impact on the overall production and sale of beer in Poland, but a much larger in the related industries, such as graphic design, labeling, communications, and distribution.

The cultural trends related to beer tourism, consumer awareness, and communication channels have been essential in changing the geographical perspectives of brewers. Looking at the trends presented in this chapter the authors forecast that these microbreweries may become a noticeable player on the beer market, as it was the case of the United States and several Western European countries. This is confirmed by the growing interest in craft brewing in the media, the increasing consumers' awareness on beer varieties and the public authorities' activities toward breweries.

[8]Online: https://birofilia.org/historie/rok-2018-w-pspd.html, access: 2019-04-13.

The market evolution through this period was overall very positive for Poland, leading to a diversity increase of beers, higher investments in marketing tools and changing the image of beer among consumers and media all over the country. However, the craft beer market in Poland is still a growing and developing market, even if there are some first signs of stabilization, moving it to the phase of maturity such as: reducing the growth rate of new contract breweries, transforming part of contract brewers into physical breweries, organizing market players in a new association.

The existing problems that still need to be addressed refer to the relatively low awareness about the product among a large part of consumers, beer brands overload, the lack of regularity in the product taste, problems with quality. Craft beers are still very expensive beverage in Poland. The cheapest craft beers cost around 4 times more than most lager beers on the market and the situation did not change between 2011–2018. These are problems which small breweries should focus on in the near future in order to best use the "beer revolution" effect.

Different forecasts undertaken by larger brewers show an unfavorable situation for Poland, in demographic terms, due to a population decrease resulting from the low birth rate. No indicators allow predicting a change in those trends, especially in view of new breweries announcing the start of their activities in 2019.

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