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New experiences in the Italian craft beer market: opportunities for development in the Piedmont Region

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Abstract

The purpose of this study is to assess new pathways for the niche markets of IGA beers in Piedmont, Italy. Specifically, this study aims to analyse the supply and demand side for these products to evaluate the opportunities for developing enogastronomic tourism experiences. First, available public statistics on microbreweries were analysed to map their diffusion in Piedmont. Then, a survey was prepared to assess consumers' opinions about these products, with a total of 336 consumers participating in the study. The main results show that, while craft beers are well-known and frequently bought by consumers, IGA beers are still not very widespread. Anyhow, consumers showed positive attitudes towards locally produced products thus highlighting that there is a space for developing new tourism experiences related to these local specialities. Finally, the study shows that consumers would be interested in buying them and paying more than traditional beers.
***Keywords**: craft beer, Italian Grape Ale, consumer behaviour, beer tourism.*

1. Introduction

In the last years, European beer production has been characterized by a steady trend with a total of 342 million hectolitres produced in 2021 (The Brewers of Europe, 2022). The most important European producing country is Germany with 85,4 million HL followed by United Kindom (38.3 million HL), Poland (38.2 million HL), and Spain (38.1 million HL). Italy is eighth in the European production ranking, with a beer quantity of 17,6 million hectolitres. Differently from the average European trend, Italian beer production is continuously growing from 2015 to 2021, except in 2020 for the Covid pandemic. About the active European brewers, an increase was recorded in the last seven years from 7,847 in 2015 to 12,704 in 2021. In Italy, active breweries increased from 688 in 2015 to 827 in 2021, reaching the maximum number of operators with 874 in 2018 (The Brewers of Europe, 2022). They deal with a large pool of consumers: data on alcohol consumption show that 36.2 million people consume alcohol, of which 50.5% consume beer (ISTAT, 2020). Although Italy is sixth in the European beer consumption ranking with an amount of 20,8 million hectolitres consumed in 2021, it is among the last European countries in terms of consumption per capita with 35 litres compared to, for example, Austria (101 litres) and Germany (89 litres) (The Brewers of Europe, 2022). Consumers' beer preferences in Italy are distributed as follows: 49.1% Main Stream, 26.2% Premium, 14% Specialties, 7.5% Private Label, 1.5% Economy (Assobirra, 2016).

In recent years, in an international market dominated by a few multinational companies, craft beers have been gaining market share. Craft breweries are independent, they have limited production volumes with higher differentiation capacity. They attract consumers who demand products more committed to sustainability issues and who are willing to pay higher prices for goods in line with their philosophy of life (Durán-Sánchez et al., 2022; Rosburg and Grebitus, 2021). According to data from the American Brewers Association there has been an increase in the number of microbreweries in Europe and United States (Murray and O'Neill, 2012), which had 3,000 microbreweries in 2014 (Matthews and Patton, 2016). In particular in Europe, 2,300 microbreweries in France have been registered in 2021, followed by UK with 1,755 and Switzerland with 1,288. In Italy, there has been strong growth in microbreweries, from 540 (2015) to 814 (2021) (The Brewers of Europe, 2022; Assobirra, 2022). Italy does not have a long tradition in craft beer production and the branch of microbreweries is relatively recent, in fact, this phenomenon is defined as a 'new Made in Italy' (Acanfora, 2009), which conventionally started in 1996 with the opening of the craft breweries Birrificio Italiano and Baladin (Musso and

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Drago, 2013). In July 2016, the Italian Parliament (DDL no. 1328-B) produced a definition of craft beer, i.e. that *"produced by small independent breweries, without undergoing pasteurisation and microfiltration processes during the production phase".* Moreover, craft beer is considered an element of protection and enhancement of a territory to stimulate local economies (Schnell and Reese, 2009) also through tourism (Kraftchick et al., 2014; Slocum, 2015; Fletchall, 2016; Alonso and Sakellarios, 2017; Cortese et al., 2017). Considering the structure of the sector, three classic segments can be counted (Altis-UNIONBIRRAI, 2015): microbreweries, dedicated exclusively to the production of craft beer (brewing and kegging); brewpubs, companies dedicated to the production of beer with consumption mainly on site; beer firms, companies own one or more recipes but production takes place in facilities owned by third parties. Considering instead the final products, according to Slow Food (2012), four types of craft beer 'made in Italy' can be identified: chestnut beers; beers with cereals such as spelt, kamut and enkir; beers with typical local ingredients (Volpedo peaches, Sorrento lemons, etc.); and beers linked to the world of wine: the use of wine grapes, grape must and barriques.This last category was indicated by the Certification Programme of Beer Judges as the first internationally recognised Italian beer style with the label 'Italian Grape Ale', i.e. "*a communion between beer and wine promoted by the great local availability of different grape varieties in the territory. They can be an expression of the territory, biodiversity and the brewer's creativity*" (Strong and England, 2015). These niche market could be important opportunities for rural development, the multifunctionality of local farmers, as well as enogastronomic experiences.

The consumption of craft beers is an exemplification of the neo-localism, phenomenon that originates from the renewed need of individuals to re-establish a connection with the local territory (Levitt et al., 2023). In fact, locally produced beer stimulates a greater sense of local ownership and independence (Garavaglia, 2015; Aquilani et al., 2015; Schnell and Reese, 2009; Garavaglia, 2010; Fastigi et al., 2015b). This is reflected in the shift from a mass and industrial approach to a slower one, in line with the Slow Food philosophy (Garavaglia, 2015), aimed at learning in tasting and the pleasure of savouring different and new flavours (Schnell and Reese, 2009; Fastigi et al., 2015a; Donadini and Porretta, 2017; Garavaglia, 2015). The behaviour and habits of beer consumers are the subjects of numerous studies (Donadini and Porretta, 2017; Lerro et al., 2020; Carbone and Quici, 2020; Massaglia et al., 2022; Merlino et al., 2020; Pilone et al 2023; Rivaroli et al., 2019; Rivaroli et al., 2020) aimed at defining craft beer marketing and promotion strategies. One of the relevant elements for consumers is authenticity, understood as a guarantee of product quality, service quality, transparency and traceability (Hernandez-Fernandez and Lewis, 2019; Verhaal and Dobrev, 2022). Finally, craft beer production is also identified as an opportunity for the development of beer tourism experiences in the production area (Gajić et al., 2021; Steinbach et al., 2023). In this context, microbreweries must become highly specialised, holding out the hope that consumers will be willing to pay the right price for such products (Jackson, 1999; Ferrero, 1987), determined by the uniqueness of the production process and the particular characteristics of the final product (Cannatelli et al., 2017). A study illustrating the organisational and management models of craft brewers in Italy (Sicily), shows a substantial dependence on imported malts, hops and yeasts and a limited use of local raw materials. These results evidence critical issues concerning the supply of raw materials, suggesting the implementation of strategies for the development of the craft beer industry (Alfeo et al 2020).

The objective of this study is to investigate the niche market for craft beers, in particular the Italian Grape Ale type, in Piedmont, northwest Italy. The specific aim is to analyse the supply and demand for these products and their potential in terms of beer tourism. To achieve this goal, the state of the art of this market was studied. First, the analysis includes an evaluation of available public statistics on microbreweries to map their diffusion in Piedmont, as well as their characteristics, products and experiences offered. As far as the analysis of the demand is concerned, a survey was conducted to assess consumer opinions on these products.

2. Materials and methods

In order to carry out the investigation of the supply side, open available statistics on craft and IGA beers in Italy and Piedmont were used. Data available on the database Microbirrifici.org (Microbirrifici, 2023) were used as it is the most complete database of microbreweries and craft beers in Italy. This database collects information such as producer name, location, start year, and typologies of craft beers. Data for Italy and Piedmont were selected and extracted on 4 July 2023, then they were processed according to descriptive statistics techniques. Following this approach, it was possible to obtain the distribution of microbreweries in Italy and Piedmont as well as the offer of IGA beers.

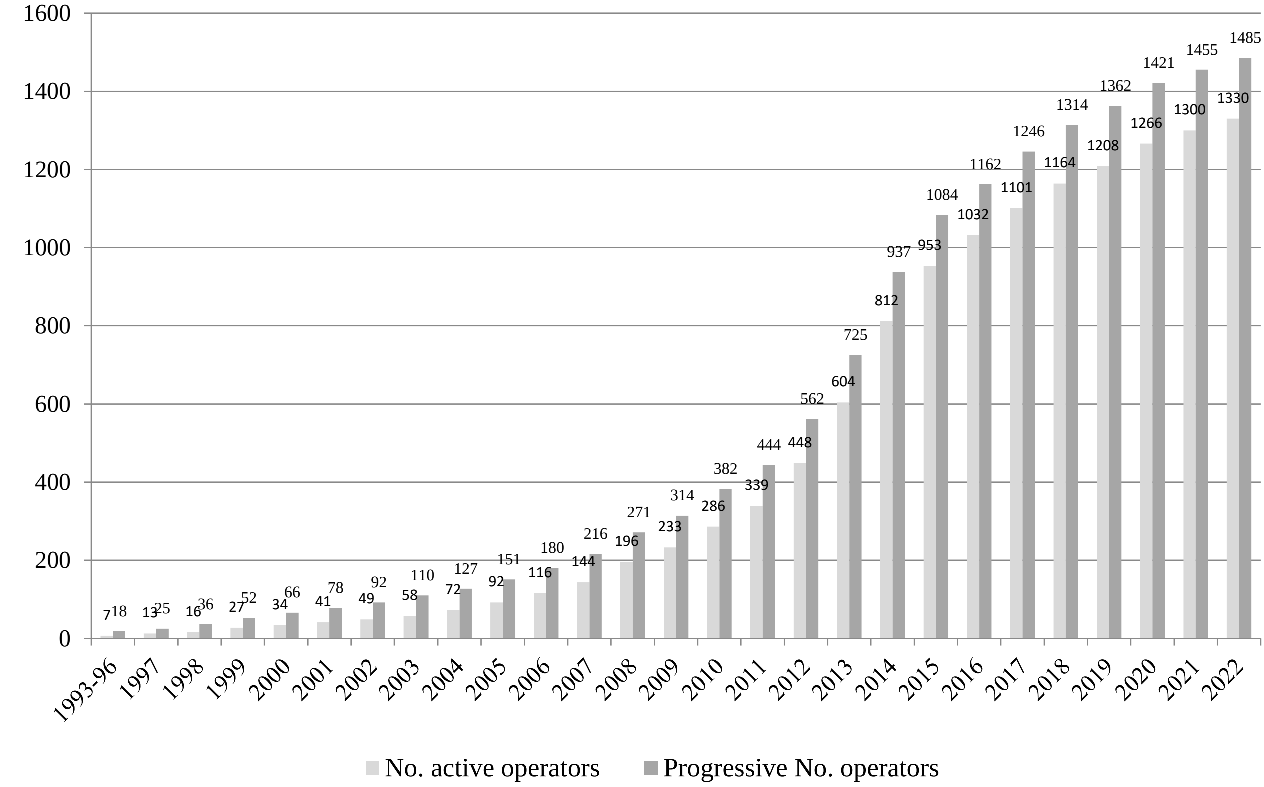
Regarding the analysis of the demand side, a survey was prepared with Google Forms and distributed through online channels to Piedmontese consumers. The questionnaire included 43 questions related to beer consumption habits, current expenditure for beer, knowledge of different types of beers, preference and willingness to pay for them, as well as questions about local products and beer tourism experiences. A total of 336 completed answers were collected and used for descriptive statistical analysis.

3. Findings and Discussion

3.1. Microbreweries in Piedmont

Conventionally, 1996 is indicated as the birth year of craft beer in Italy (Musso and Drago, 2013**)**, when the sector consisted of 8 microbreweries and 10 brew pubs. Subsequently, in the last two decades, the phenomenon of microbreweries in Italy has increased considerably. At the end of 2022, a total of 1,330 microbrewery operators were still in operation. Figure 1 reports the number of active brewery operators in Italy, as well as the progressive number of breweries (active and closed). The graph shows a great increase in the number of breweries especially marked in the period 2011-2016. While in the last three years, the growth was less marked probably due to the Covid-19 outbreak. During the whole period 1993-2022, 155 closures were recorded, representing 10.44% of total openings, and the number of business ventures increased steadily until 2022, with a substantial increase in microbreweries (332/578) and brewpubs (224/297) and beerfirms in the period 2012/2014 (Cortese et al., 2017).

Figure 1. Evolution of the number of beer operators in Italy between 1993 and 2022.



Source: Authors' elaboration on database microbirrifici.org (accessed on 4 July 2023)

In Piedmont, at the end of 2016, 104 enterprises were operating: 59 microbreweries, 17 brew pubs and 27 beerfirms. These numbers increased by the end of 2022 to 118 enterprises, 67 microbreweries, 21 brewpubs and 30 beer firms, mainly concentrated in the provinces of Turin (42) and Cuneo (27). The distribution of breweries for each Piedmontese province are reported in Table 1.

With reference only to the IGA beers production, the distribution of breweries, as well as the number of IGA beers produced for each Italian region is reported in Table 2. The available data underline how the IGA production involves all Italian regions, Valle d'Aosta excluded, with a more marked sensitivity demonstrated by companies operating in Piedmont (19 breweries with 34 IGA beers), Lombardy (20; 26), Tuscany (14; 17), Veneto (10; 19) and Campania (10; 18). While Lombardy is the first region for breweries, Piedmont is indeed the first region for the number of IGA beers produced.

Table 1. Distribution of Piedmontes breweries in 2023

Piedmontese province	No.
Turin	42
Cuneo	27
Alessandria	15
Novara	11
Asti	8
Biella	7
Vercelli	4
Verbano Cusio Ossola	4
Total	**118**

Source: Authors' elaboration on database microbirrifici.org (accessed on 4 July 2023)

Table 2. No. of breweries that produce IGA beers and No. of IGA beers produced by Italian region in 2023.

Region	IGA Breweries	IGA Beers
Abruzzo	8	10
Basilicata	2	2
Calabria	2	3
Campania	10	18
Emilia Romagna	8	12
Friuli Venezia Giulia	3	3
Latium	7	9
Liguria	5	6
Lombardy	20	26
Marche	5	8
Molise	2	2
Piedmont	19	34
Apulia	9	12
Sardinia	4	10
Sicily	8	11
Tuscany	14	17
Trentino	3	8
Umbria	5	11
Veneto	10	19
Total	**144**	**221**

Source: Authors' elaboration on database microbirrifici.org (accessed on 4 July 2023)

The results highlight that IGA beer production interests all Italian regions, especially in Piedmont. In particular, the enterprises of Turin and Alessandria provinces are more sensitive in IGA production and related recipes, respectively with 5 breweries and 10 IGA beers produced in each province (Table 3).

Table 3. No. of breweries that produce IGA beers and No. of IGA beers produced by Piedmontese province (2023).

Province	IGA Breweries	IGA Beers
Turin	5	10
Cuneo	2	4
Alessandria	5	10
Novara	1	1
Asti	3	5
Biella	2	3
Verbano Cusio Ossola	1	1
Vercelli	0	0
Total	**19**	**34**

Source: Authors' elaboration on database microbirrifici.org (accessed on 4 July 2023)

3.2. Consumers' point of view

A total of 336 consumers took part in the study. Table 4 reports the sample profile. The percentage of males (54,76%) within the sample is slightly higher than females (45,24%). More than half of the sample is younger than 30 years old. Anyhow, other age groups are represented as well, 12,80% are between 30 and 37 years old, 23,21% are between 38 and 57, 5,06% are between 58 and 73, and 1,19% are over 73 years old. Regarding the employment, 50% of the respondents are students, 44,04% are currently employed, 1,79% are unemployed, and 4,17% are retired. Almost all consumers come from Piedmont (60% from Turin province), while 19,35% come from other Italian regions. Finally, in terms of frequency of beer consumption, it is possible to observe that 8,93% of respondents do not consume beer, about 23% do not consume it often, 60% consume it weekly, and 7% consume it daily.

Table 4. Sample profile.

Category	Sub-category	No.	%
Gender	Male	184	54.76%
	Female	152	45.24%
Age	<23	79	23.51%
	23-29	115	34.23%
	30-37	43	12.80%
	38-57	78	23.21%
	58-73	17	5.06%
	>73	4	1.19%
Employment	Student	168	50.00%
	Employed	148	44.04%
	Unemployed	6	1.79%
	Retired	14	4.17%
Region	Piedmont	271	80.65%
	Other regions	65	19.35%
Frequency of beer consumption	Do not consume	30	8.93%
	3-4 times a year	33	9.82%
	Once a month	44	13.10%
	Once a week	106	31.55%
	2-3 times a week	100	29.76%
	Daily	23	6.85%

The first results of the study are related to the level of knowledge and frequency of consumption of craft beer and IGA beer (Table 5). Responses of the interviewees that did not consume beer (n=30) were removed, thus the total sample size for this table is 306. Since they do not consume beer, their responses were not of interest for analysing craft and IGA beer consumption. Almost all beer consumers have already heard about craft beers (98,04%), whilst only 27,78% of respondents already know IGA beers. This shows therefore that, while craft beers are well-known among Piedmontese beer consumers, IGA beers are still a niche market known by a few people. The same conclusion could be seen by looking at the frequencies of consumption. Regarding craft beers, 14,71% do not consume them, this percentage represents the actual beer consumers who are not interested in craft beers. About 50% of respondents do not often drink craft beer, while 29% drink it weekly, and 2% drink it daily, showing that at least 30% of consumers are enthusiastic about craft beers. IGA beers, on the other hand, are much less consumed. About 19% of respondents consume them but not often, while interestingly 8% of consumers drink IGA beers at least once a week. These results show that although IGA beer is not yet well known to consumers, some people like it and already consume it very often.

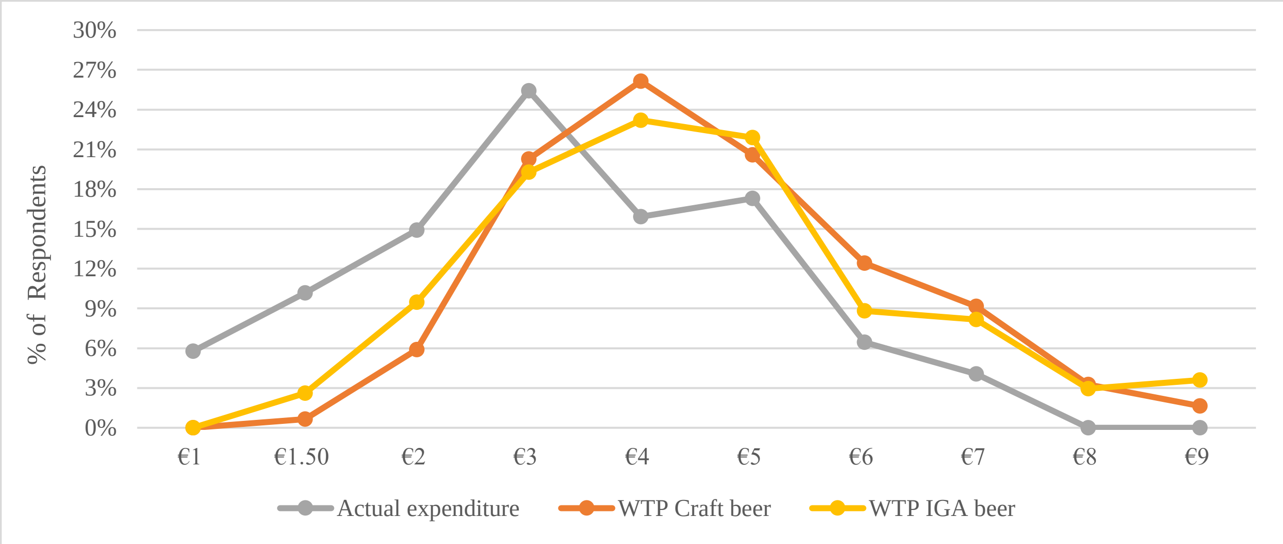
Table 5. Knowledge and frequency of consumption of Craft and IGA beer.

Category	Sub-category	Craft Beer	IGA Beer
Knowledge	Yes	98.04%	27.78%
	No	1.96%	72.22%
Frequency of beer consumption	Do not consume	14.71%	72.55%
	3-4 times a year	26.47%	13.40%
	Once a month	27.45%	5.56%
	Once a week	22.55%	5.23%
	2-3 times a week	6.86%	1.96%
	Daily	1.96%	1.31%

Subsequently, consumers were asked to state how much they usually spend for a medium beer (66cl) and how much they were willing to pay for a craft beer and IGA beer of the same size (choosing from a range of €1 to €9). Figure 2 shows the distribution of respondents for the stated beer expenditure (for a 66cl beer of their choice) and willingness to pay (WTP) for craft and IGA beer. Once again, only actual beer consumers were considered for the analysis.

It was noted that about 70% of the sample usually spends €4 or less to purchase a common beer. On the other hand, 30% of respondents declare to spend €5 or more, thus indicating that there is a group of consumers already accustomed to paying more for quality beers. About 30% of respondents would not spend more than €3 for IGA and craft beers, thus showing that they do not value these products very highly. It is interesting that 25% of consumers would spend €6 or more. The latter represents a segment of the population highly interested in this product. These consumers recognize its added value as they are willing to pay more for them. In conclusion, it can be seen from these results that most respondents are willing to pay more for craft and IGA beers compared to traditional beers.

Figure 2. Actual beer expenditure and WTP for craft and IGA beer.



Consumers were asked to evaluate their level of interest for a beer locally produced in Piedmont with local ingredients and for a certification attesting to it. The results highlight how 20% of beer consumers are not really interested, while 80% show a high level of interest in developing a local beer supply chain. Similarly, consumers positively evaluated the use of local grapes for the production of IGA beers.

Finally, about 26% of the sample has already taken part in guided tours of craft breweries. This result shows an interest for this type of touristic experience. In general, most of the sample responded positively to the fact that there is a strong link between craft breweries, beers, and enogastronomic tourism. These results thus suggest the potential that the beer sector could have in terms of tourism development.

4. Conclusion

This study constitutes an initial exploratory analysis of the market for IGA beers in Piedmont. The results highlighted the growing trend of IGA beer production in Piedmont. The existence of IGA beers is not yet known to many consumers, while a high percentage of consumers are interested in craft beers. Furthermore, consumers showed an interest in the locality of these products, both in terms of raw materials and in terms of production processes. Many consumers are willing to value the authenticity of beers and could be interested in tourism experiences connected to craft beers.

The results suggest some practical implications for market development. First, since a lot of consumers never heard of IGA beers, Piedmontese microbreweries need to advertise the existence of this new type of beer. Several craft beer enthusiasts emerge from the consumer survey. This group already recognize the added quality of craft beer and could be interested in IGA beers and willing to pay a premium price for them. The quality, locality, and distinctiveness of the production process as well as the traceability of the products need to be better communicated to the consumer. Beer fairs, food events, restaurants, local shops, websites, and social media are all useful channels that could be used to communicate these features to the public. In addition, breweries need to obtain policymakers' support for increasing various tools for the promotion, communication, and definition of quality standards, such as the implementation of quality systems. These instruments will be very useful for increasing consumer trust in the authenticity of the product. On the other hand, tourism initiatives can be a useful tool for the enhancement of the brewery as a tourist destination. Indeed, it should be considered that gastronomic tourism is an important part of the cultural tourism market and craft breweries are a potential tourist attraction capable of reaffirming local cultural identity and a sense of belonging. Such experiences could attract the favour of both locals and international tourists. Finally, IGA beers show some potential synergies with the wine sector which is already well-known and appreciated in the territory. Tourism experiences that link wine and beer could be important opportunities to enhance these niche products.

This study intends to contribute to the enrichment of knowledge in the field of craft beers through the analysis of both supply and demand to return a descriptive framework including the two main stakeholders. Future research will require an in-depth analysis of consumer characteristics to understand what influences their preferences, as well as specific interviews with IGA breweries to identify the main challenges and opportunities of this market. Breweries will need further information to develop effective market strategies, new products, and enogastronomic tourism experiences.

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