

KEAGAN J.E. COLLINS^a, CHRISTIAN M. ROGERSON^b, JAYNE M. ROGERSON^c

The Evolution of the Craft Beer Industry in the Global South: The Experience of South Africa

Abstract. The global rise of craft beer production and consumption has generated a growth of literature across a range of disciplines. Neo-localism is one of the major concepts explaining the emergence of craft beer landscapes in the Global North. This paper analyses the case of South Africa as an example from the Global South of the burst of a craft beer culture and the emergence of an economy of craft beer. The aim in this paper is to investigate the historical development, structural features and spatial organisation of the craft beer industry in South Africa as well as its neo-local manifestations.

Keywords: craft beer, South Africa, neo-localism, craft beer tourism

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1. Introduction

Alcoholic beverages enjoy a long history across different cultures and societies (Patterson & Hoalst-Pullen, 2014). One of the most remarkable shifts observed in recent decades has been the global growth of fermented craft beverages including craft beer (Garavaglia & Swinnen, 2017a, 2017b; Cabras et al., 2023). Although the modern-day craft beer movement has its genesis in the USA it is increasingly evidenced in a growing number of countries globally (Reid, 2021; Hasman et al., 2023). Across many countries of the Global North the beer industry has recently experienced a radical makeover in terms of landscapes of production and consumption. Elzinga, Tremblay & Tremblay (2015, p. 248) contend that the stimula-

^a School of Tourism and Hospitality, University of Johannesburg, South Africa, collinsk.j.e@gmail.com

^b School of Tourism and Hospitality, University of Johannesburg, South Africa, chrismr@uj.ac.za, <https://orcid.org/0000-0003-1306-8867>

^c School of Tourism and Hospitality, University of Johannesburg, South Africa, jayner@uj.ac.za, <https://orcid.org/0000-0003-3394-1311>

tion of demand for craft brews (re-) invents beer as a serious consumption good to be paired with food, rather than simply as a liquid that quenches a thirst on a hot day or offers an inexpensive buzz. Chapman (2015, p. 102) pinpoints that the formerly monolithic world of beer has been transformed by a new beer culture, which is distinguished by “variety, diversity, ingenuity, creativity and unbridled excitement”.

Arguably, this international rise in the popularity of craft beer “has caught the attention of researchers from many different academic disciplines” (Withers, 2017, p. 12). An international review conducted by Durán-Sánchez et al. (2022) demonstrates that craft beer is a recent area of study that has seen a worldwide expansion. Further, a systematic review of research on craft beer, conducted by Nave et al. (2022), indicates that a growing number of economics and business science researchers have been studying the beer market, branding and consumer behaviour. In addition, the review highlights a rise in craft beer scholarship since 2015. Research conducted mainly by geographers and tourism scholars addresses themes of space, place and identity, local economic development as well as of the sustainability and environmental issues surrounding the craft beer industry (Schnell, 2013; Mathews & Picton, 2014; McLaughlin, Reid & Moore, 2014; Reid, McLaughlin & Moore, 2014; Fletchall, 2016; Rogerson, 2016 Kline, Slocum & Cavaliere, 2017; Reid & Gatrell, 2017a, 2017b; Argent, 2018; Slocum, Klein & Cavaliere, 2018; Debies-Carl, 2019; Ingram, Slocum & Cavaliere, 2020; Wojtyra, 2020; Pezzi, Faggian & Reid, 2021; Wartell & Vazquez, 2023). According to Reid and Gatrell (2017a, p. 102), “the craft beer industry has leveraged place-based identities, reconfigured tourism geographies, and transformed the beer-scape of a global industry at all scales”. In explanations of the remoulded geographies of beer across various countries in the Global North a core theoretical underpinning is that of ‘neolocalism’ (Flack, 1997; Eberts, 2014; Schnell & Reese, 2003; Patterson & Hoalst-Pullen, 2014; Hasman et al., 2023).

The internationally changing beer-scape is not, however, merely a phenomenon observed in countries of the Global North. For example, Belmartino and Liseras (2020) document the growth of a thriving craft beer market in Argentina. The booming production and activities of craft brewers in Brazil (de Oliveira Dias & Falconi, 2018) and the emergence of a craft beer industry in India have also been examined (Patwardhan, Dabral & Mallya, 2019). The case of South Africa offers a further illustration from the Global South of the burst of a craft beer culture and the emergence of an economy of craft beer (Rogerson & Collins, 2015a, 2015b). The aim in this paper is to investigate the historical development trajectory and spatial organisation of the craft beer industry in South Africa as well as its neolocal manifestations.

The discussion is organised into two major sections of material. The next provides the international context of the expansion of the craft beer industry and the nexus of neo-localism. The following section turns to South Africa and records the historical emergence of the craft beer industry its key drivers, organisation, geography and influence of neo-localism on the country's craft beer-scape. The analysis draws upon a national audit that was undertaken of the growth of micro-breweries in South Africa and supplemented by 53 semi-structured interviews conducted (in 2016 and with follow-ups in 2021) with craft beer entrepreneurs about the organisation and challenges of their businesses. Material on the COVID-19 impacts is drawn from industry documentary sources.

2. International Context

Following the experience of the United States over the past 30 years, other parts of the world have seen an increase in the production and consumption of craft beer, which is part of the new 'beveragescape' involving craft distillers and craft cider producers. Craft breweries are rapidly expanding in the United Kingdom, across much of Europe, Australia, New Zealand, parts of Asia and recently in several countries in the Global South. Among others, Kline & Bulla (2017, p. 3) associate this recent surge of craft beverages in the USA as "an expansion of the local foods movement, which is a rejection of the notion that our food must be sourced from monolithic and industrialized producers". This is linked more broadly to a growth in demand for craft-based products and a movement in which people demand goods and services that have a connection with the 'local'.

The term neo-localism is now widely applied to describe the phenomenon of a craving for a sense of belonging to or affiliation with a local community (Schnell & Reese, 2003; Graefe, Mowen & Graefe, 2018; Ingram, Slocum & Cavaliere, 2020). Shortridge (1996, p. 10) first introduced the term neolocalism and described it as the "the deliberate seeking out of regional lore and local attachment by residents within a community". The resurgence of local identity as a concept can also be attributed to studies conducted by several cultural geographers (Flack, 1997; Schnell, 2011, 2013; Schnell & Reese, 2003). Brain (2011, p. 9) maintains that the concept of neo-localism "represents a lens for discussing the ways in which individuals experience the impacts of globalization". Conventionally, neo-localism is viewed as an opposition to globalisation as both consumers and tourists seek to immerse themselves in the 'distinctively local' in an effort to have an 'authentic' experience (Ingram, Slocum & Cavaliere, 2020).

Travellers search for authentic, local and place-based experiences, which offer holistic connections to the places they visit. According to Schnell and Reese (2003) neo-localism is evidenced in the active, conscious attachment to place. Eades, Arbogast & Kozlowski (2017, p. 60) reflect that scholars of neo-localism “largely define it and the identities that constitute neo-localism as formed and replenished by a particular local space”. Schnell (2013) forwards that the foundations of neo-localism can be associated with different ways in which the term ‘local’ is perceived as well as understood by participants through several interconnected neo-local movements. Indeed, Schnell (2013) describes the trend towards individuals and communities becoming more engaged with this so-called counter-movement as predominantly because the term ‘local’ is essentially perceived “as a primary form of identity, and the promotion of people thinking of themselves not only in the sense of abstract symbols, but also in terms of what they buy, what they eat, whom they interact with, and identifying not only with their own places, but with the idea of place itself” (Schnell, 2013, p. 82). It is argued that neo-localism, has the potential to support ecologically and culturally appropriate development which is grounded in place attachment (Ingram, Slocum & Cavaliere, 2020).

Arguably, therefore, neo-localism is a concept widely invoked to account for the international growth of the craft beer industry. As discussed by Myles and Breen (2018, p. 166) craft breweries “produce an identity-laden product that boosts local and regional economies”. At the broadest level of analysis therefore the international growth of craft beer must be interpreted as another facet of the emergence and strengthening of a counter-movement to globalization which emphasizes the importance and vitality of artisanal production and local connections. Reid & Gatrell (2017a, 2017b) identify three core factors that can explain the popularity of craft beer, namely the renewed interest in supporting local economies through purchasing local products, the rise of place-based local economic development and the observed importance of millennial consumers in beer markets as a driver of demand for craft beer. Buratti (2019) notes that for a younger generation of beer consumers the origin of production is a major factor in their purchasing preferences.

Place-based local economic development has expanded around craft beer as cities and local governments acknowledge the potentially significant contribution that craft breweries can make to local development prospects, neighbourhood change and urban redevelopment. O’Brien (2020, p. 23) observes that the “craft beer industry has effectively leveraged the consumption trend of localism as an expedient and pragmatic competitive position against established and once nearly omnipotent national and international big beer brands”. Holtkamp et al. (2016, p. 66) interpret neo-localism as “a conscious effort by businesses to foster a sense of place based on attributes of their community”. This reconnection occurs because

craft breweries use local elements in the naming and labelling of their beers to create a sense of place and strengthen ties with local communities (McLaughlin, Reid & Moore, 2014, p. 137). Nevertheless, Eberts (2014, p. 176) observes that because brewers usually have to obtain their key ingredients, such as barley and especially hops, from a variety of non-local sources, they evoke localness primarily through “the art of brewing itself and the narratives of place they employ in their marketing”. This observation is supported by Buratti (2019), who notes that small independent craft beer breweries — flagships of neo-localism — use core ingredients — hops and barley — that are often not sourced locally. Most craft beer is therefore locally produced but not from locally sourced ingredients. Buratti (2019, p. 5) goes on to say that “microbrewers and brewpubs must foster a local identity in other ways, including product and company naming, employing local imagery, storytelling, and sustainability and community involvement”.

The mushrooming of craft breweries is linked to a business model involving their attempts to differentiate themselves from macro-brewers (Garavaglia & Swinnen, 2017a). The model emphasizes the ‘authenticity’ of craft beer products and a propensity for constant innovation, the development of new beer styles and an effort to connect with customers through distinctive and individualistic business approaches. In the USA the adoption of ‘sustainable’ business practices has been part of the craft brewing culture as a whole and the way micro-brewers distinguish themselves from larger macro-beer producers (Withers, 2017). Craft breweries exemplify one of many ways that communities reaffirm local identities in the wake of the impacts of globalisation on homogenising tastes and products (Flack, 1997; Schnell & Reese, 2003). Cappellano et al. (2023) explain how craft micro-brewers in several countries seek to promote territorial branding strategies and link to a ‘sense of place’ According to O’Brien (2020), beer product branding often draws inspiration from local cultures and utilizes ideas from stories, ingredients, history to produce a distinctive beer label design. Craft microbreweries utilise neo-localism to market their products by using local place names, people, events, landscape features and icons on their labels and in the names of their beers to establish associations with the local environment and culture (Fletcher, 2016). According to Graefe, Mowen & Graefe (2018, p. 28), in addition to using local names, images and history to market their products, craft breweries are often also “active partners in local and environmental causes and organizations”.

As the neo-localism movement has strengthened, so does the potential interest in consuming local beers during visits to local microbreweries. Reid (2021, p. 317) points out that a defining feature of craft beer consumers is a desire to drink craft beer at the point of production, “which ensures that beer is enjoyed in its freshest state”. This is one of the underpinnings of craft beer tourism. Local

development policies and initiatives to leverage beer tourism for local development have given rise to the proliferation of beer trails and beer-themed festivals (Bujdoso & Szucs, 2012; Slocum, 2016; Alonso, Sakellarios & Bressan, 2017; Eades, Arbogast & Kozlowski, 2017; Myles & Breen, 2018; Williams & Shapiro, 2023). As was earlier the case with wine tourism, the global craft beer revolution has triggered the emergence of craft beer tourism, which is another dimension of change in tourism (Saarinen & Rogerson, 2021). There is a growing international research interest in craft beverages and specifically in the role of craft beer tourism in urban regeneration, neighbourhood change as well as rural development (Wartell & Vazquez, 2023). This development has created opportunities for tourism growth in peripheral regions and small town areas, which can benefit from neo-localism and beer tourism offerings (Pezzi, Faggian & Reid, 2021). Craft beer development and tourism are interpreted as creative local responses to peripherality, with beer entrepreneurs becoming local actors/agents of change establishing such businesses (Pezzi, Faggian & Reid, 2021).

3. The Craft Beer Industry of South Africa

The following analysis of the craft beer industry of South Africa is organised into three sub-sections, namely (1) an historical overview of the evolution of the industry, (2) structural drivers, organisation and geography, and (3) the influence of neo-localism in shaping the industry.

3.1. Historical Evolution of the Industry

Beer brewing in South Africa has a long tradition (Corne & Reyneke, 2013), with a distinctive history of the production of traditional African sorghum beer as documented by Rogerson (2019). The modern evolution of brewing beer in South Africa, specifically as an industrial activity, is largely associated with the operation of three enterprises, namely Ohlssons Cape Brewing Limited (established in 1882), Chandlers brewing (established in 1884) and, most importantly, South African Breweries Limited (established in 1889) (Tucker, 1985). A significant historical milestone in the South African brewing industry was the amalgamation of these three dominant brewing enterprises in 1956 into South African Breweries Limited (SAB) (Tucker, 1985). Another critical moment was the merger in 2002 between SAB and the US Miller Brewing to form SABMiller (Mager, 2010). Following the merger, this enterprise became a global player in the production and marketing of a range

of beers and one of the largest multinational brewing companies. In October 2016, however, SABMiller was acquired by Anheuser-Busch InBev.

Within the South African market, SABMiller was the leading producer of (malt) beer in the country, with an estimated 95% local market share and owning over 150 beer brands (Mager, 2010). In common with trends observed in USA, UK and Australia, South Africa has witnessed the appearance and growth of a craft beer sector of microbreweries (Rogerson, 2016). It can be argued that following global trends and the consolidation of SABMiller, which led to the production of increasingly standardized lager and light beers, there emerged a countermovement in South Africa's beer industry, which has existed over the past 30 years and closely resembles the trends observed in several countries in the Global North. This movement was sparked by the growing interest of South African consumers in 'older' beer styles, such as pale ales, porter, brown cask ales, stout and bitters (Corne & Reyneke, 2013). In this respect the development and growth of the South African microbrewing and craft beer industry is not dissimilar to that experienced in countries of the Global North during the early 1970s and 1980s. One difference is that initially this development happened on a smaller scale than in the USA or UK and that until recently the rate of microbrewery formation in South Africa was relatively slow (Rogerson & Collins, 2015a).

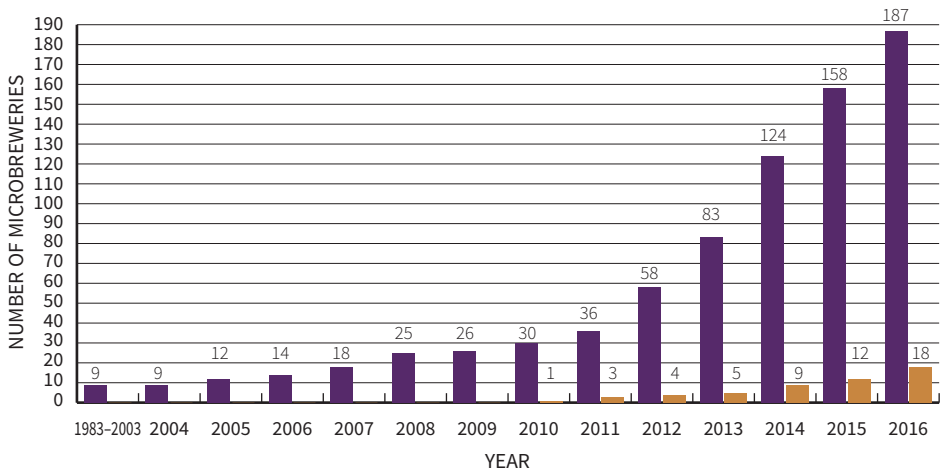


Figure 1. The number of craft breweries in South Africa, 1983–2016
 Note: Purple bars denote breweries operating in a given year while orange ones represent brewery closures recorded in that year. Source: Authors

The year 1983 marks the beginning of microbrewing in South Africa with the establishment of Mitchell's Brewery in Knysna. Since 1983 structural changes and a new geography of craft beer production has emerged. Craft beer produc-

tion spread to different regions as many local beer consumers switched to the more artisanal, locally produced crafted beer products, which constituted an attractive alternative to conventional mass-produced beer products offered by multi-national brewers such as SABMiller. Figure 1 shows the growing number of craft microbreweries in South Africa, which rose from 9 in 1983 to as many as 187 by 2016.

As can be seen, the first two decades, including the end of apartheid and the democratic transition in 1994, were marked by only a small growth in numbers of breweries. In 2003 there were only nine microbreweries, mostly located in and around Cape Town and in Kwa-Zulu-Natal rather than in Gauteng, South Africa's economic heart and major market. From 2004 the growth gains momentum with new brewery establishments, mainly in Cape Town and elsewhere in the Western Cape. By 2008 the number of breweries had more than doubled to 25 microbreweries. The rate of expansion continued to increase between 2008 and 2013, when an additional 58 licensed microbreweries were established with an even higher growth rate of 70 percent. The peak period of growth was recorded between 2013 and 2016, as evidenced by the highest number of craft breweries in operation and the highest number of brewery closures (9.6% of the total). Most closures recorded between 2010–2016 were due either to an increasingly competitive environment or poor quality of beer products.

A major wave of craft breweries closures happened as a result of the COVID-19 pandemic. During 2020–2021 South Africa was subject to one of the world's most stringent lockdowns including curfews, stay-at-home orders and bans on sales of cigarettes and alcohol (Rogerson & Rogerson, 2020). At the start of the pandemic the government imposed a total ban on alcohol sales, which lasted from 27 March to 1 June 2020. With new COVID outbreaks, the ban was reinstated on 12 July and lifted on 17 August 2020. A third ban was introduced in December 2020 and lifted only February 2021; a fourth ban occurred between 28 June and 12 September 2021. The four alcohol bans lasted 160 days altogether, with devastating implications for craft beer producers.

Arguably, whereas South Africa's largest brewing enterprises had the strength to ride out the lockdowns imposed with COVID-19 the less well-capitalised and resourced smaller breweries faced serious challenges to their survival as small businesses. With no direct government relief to support these micro-brewers an estimated 30 percent of craft breweries (nearly 60) had to close down permanently in the period 2020–2021 (Corne, 2020; Zali, 2021). Because of the alcohol bans imposed in the period 2020–2021, the experience of the South African craft beer industry is markedly different from those observed in other parts of the world, particularly in countries in the Global North. As noted in one recent reflection on

South Africa's response to the pandemic, the alcohol bans "had spurious foundations" and resulted in considerable negative industry impacts which "on balance did more harm than good" (Parker, 2023, p. 49).

3.2. Structure and Spatial Distribution

Historically, the development of the craft beer industry in South Africa has been driven by the presence of a long existing and fairly large homebrewing community and of a small number of homebrewing clubs, most of which operate in the country's major cities. The most notable are the Wort Hog Brewers in Gauteng, South Yeasters in Cape Town and East Coast Brewers in Kwa-Zulu Natal and later arrivals such as Port Elizabeth Homebrewers Association, Sedibeng Home Brewers in Gauteng, Durban Homebrewers in Kwa-Zulu-Natal and Bloemfontein Home Brewing Club (Corne & Reyneke, 2013). Activities of these different homebrewing clubs have been described as the foundation for the incubation of several of the country's more recently established craft microbreweries. The reasons for entrepreneurs establishing breweries have been examined by Rogerson & Collins (2019). The role of homebrewing clubs and the transition from a hobby to a small micro-brewery business enterprise was a common trajectory mentioned by the interviewees. It is a trend which resembles the development pathway of craft beer in the Global North.

It was a transition from a hobby — yeah, I homebrewed for four years before I decided to start the Microbrewery... (Triggerfish Brewery).

It was first hobby that turned into an obsession and now it's a business... (Sir Thomas Brewery).

A hobby, completely — and I just decided to create a business out of a home brewing obsession which was about 5 years in the making (Mogravity Brewery).

Arguably, the craft beer economy of South Africa was created by numerous entrepreneurs with a passion for the product, for the industry and eagerness to tap into a niche market. The establishment of craft breweries in several township areas has resulted in a change in the racial complexion of craft brewery entrepreneurs with the former exclusive domination by White entrepreneurs now shifting with the beginnings of the entry of Black South African entrepreneurs into the craft beer industry. Above all, what emerges is that the craft beer section of South Africa is dominated by passionate entrepreneurs and many of those running micro-brewer-

ies out of lifestyle considerations. The following extracts include typical responses recorded during the interviews:

To brew good beer it MUST be a passion! I am very passionate about brewing, it changed my whole life and I love every minute of it!! (Brauhaus am Damm).

Lifestyle choice!!! I wouldn't change it for anything (Odyssey Craft Brewery).

The Dog and Fig Brewery was established by a group of friends in 2008, as an expression of their passion for good company, good food and of course, great beer. The vision to establish a microbrewery with a difference started brewing as early as 2007 already then we realised the need to develop an exclusive market for unique beers which, like wine, can be savoured rather than quaffed. The target is to create custom-brewed couture beers and avoid the uniform taste of mass-produced products, hence the concept of extreme brewing. These beers are unfiltered, unpasteurised and made only with malted barley, hops and water. We also seek to educate people in the wide-ranging styles of beer, and therefore complement the brewing activities with structured beer-tasting evenings and attendance at various festivals (Dog and Fig Brewery).

Several different segments of enterprises can be differentiated within the South African craft beer industry. The first group includes informal homebrewers who generally brew experimental craft beers for personal satisfaction and often operate from home premises, which are known as 'garage breweries'. Homebrewing is essentially treated as a lifestyle choice or a hobbyist pursuit by this group; however, many homebrewers in South Africa strive to eventually establish a recognized microbrewery. In fact, many of the country's already well-established microbrewers evolved from homebrewing clubs. A typical South African example is the owner of 'The Cockpit Brewhouse' in Cullinan, who said: "Without the Wort Hogs I wouldn't have reached the point of brewing decent beer as quickly as I did" (Corne & Reyneke, 2013, p. 160). Under government regulations in South Africa individuals are allowed to produce home brewed beers in unlimited quantities for personal use without any permits or licenses. Such homebrews may only be given to family and friends as gifts because, according to national legislation, the brewing of beer or the making of wine and producing distilled spirits at home is only permitted 'for own use' and not for sale.

The second segment of the craft beer economy includes unlicensed microbreweries, which are in the process of obtaining their liquor licences and are on the verge of opening in the near distant future. This segment markets their craft-beer products at local craft beer festivals. The third main segment includes currently

licensed and well-established microbreweries; many of them have been in existence for some time, while others have only recently entered the market. In the study by Collins (2018), in which he interviewed representatives of microbreweries, 75 percent of them were associated with amenities such as restaurants, brewpubs, tasting rooms or conference facilities. In addition to the craft beers they produce, these amenities provide microbrewers with an alternative way to differentiate themselves on the market. By selling beer from own premises they gain an important advantage by not having to invest a great deal in distribution networks. This situation allows them to spend more money on overhead costs and brewing itself. These amenities also enable microbrewers to create an environment where consumers develop a connection with the craft brewery and can 'put a face on the product'.

Contract brewing is a sub-segment of the licensed industry (18 breweries in 2016). This type of craft brewing refers to an arrangement whereby a microbrewery produces its beer using another brewery's equipment. Under this arrangement the producer can either hire the services of the contract brewery's in-house brew master or brew beer on their own. This type of agreement is usually chosen when a newly created microbrewery is incapable of meeting the current demand or wants to launch a new brand of beer but does not have sufficient production capacity or space. A contract brewing company usually handles marketing, sales, and distribution of the producer's beer, while generally leaving the brewing and packaging to the producer (Collins, 2018).

The segmentation, organisation and development of South Africa's craft beer sector has been influenced substantially by government legislation. In April 2004 the Government Gazette promulgated the core legislation pertaining to the South African liquor industry, which refers to the Liquor Act, 2003 Act No 59. Applications for a licence enabling the micro-manufacture and sale of liquor for consumption both on and off the premises must be made at a Provincial Liquor Board. Such licences have to be obtained by microbrewers or other manufacturers of alcohol. The responsibility for regulating the liquor industry rests jointly with national and provincial governments. The requirements and types of licenses can differ from province to province. Other important factors are legislated, most importantly relating to property zoning. This usually requires the local municipality's planning department or land use department to conduct an inspection and determine the suitability of the brewer's premises. In Gauteng zoning restrictions stipulate that licensed premises must not be within a 500-metre radius of places of worship or educational institutions.

Another important regulation is that all liquor licences must be renewed every twelve months. Should a liquor license holder fail to renew, the liquor license expires after a specified period. Once a liquor license has expired, a new liquor license

application must be submitted. The growth of the craft beer industry in South Africa has been supported by the establishment of industry associations. “Craft Beer South Africa” is one such association which lobbies on behalf of the industry. As defined by the National Liquor Act of 2003, craft breweries in South Africa are small businesses since micro-manufacture licenses are only granted to enterprises producing up to 100 million litres of beer per year (Liquor Act, No 59 of 2003, 2004). The majority of South Africa’s craft brewers fall considerably below this threshold and occupy a space near the low end of micro-manufacturing (Steenkamp, 2016).

Turning to the spatial organisation of the industry Figure 2 provides an historical snapshot of the geography of craft beer production in South Africa in 2016, a baseline picture prior to the impact of the COVID-19 pandemic on the industry. While craft beer breweries at that time existed all over the country, most of the production was located in the Western Cape, Gauteng and KwaZulu-Natal provinces.

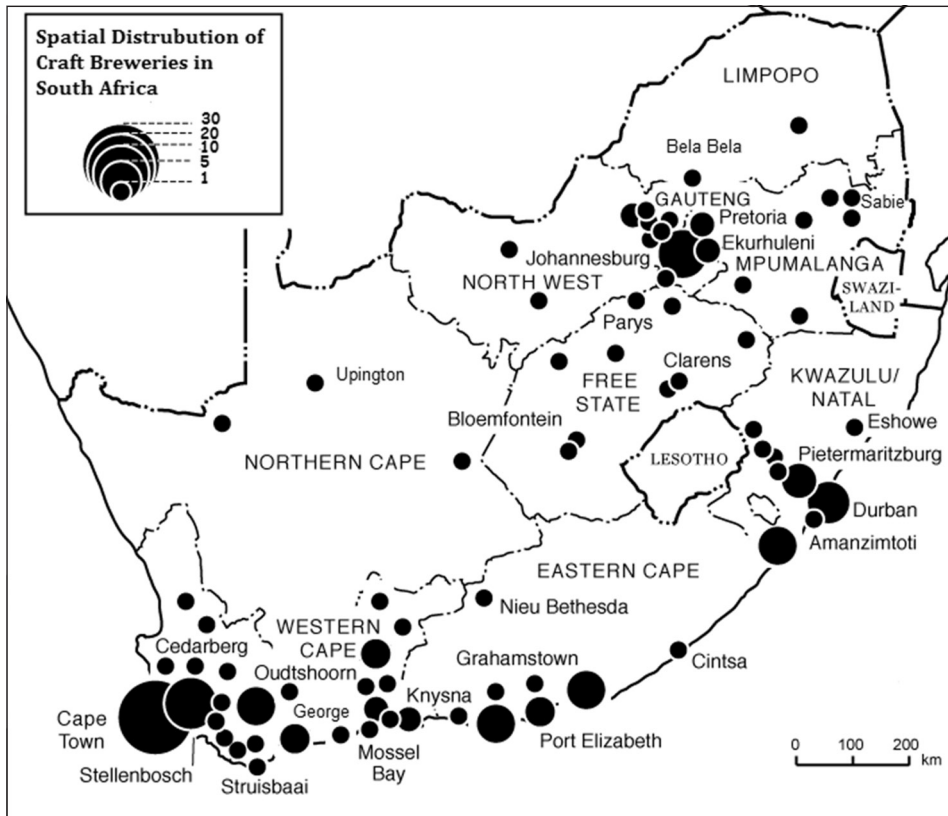


Figure 2. The location of craft breweries in South Africa, 2016.
 Note: In 2018 the Kingdom of Swaziland was renamed as Eswatini and in 2021 the city of Port Elizabeth was renamed Gqeberha. Source: Authors

The largest clusters of microbreweries were situated in the metropolitan areas and major market centres of Cape Town, Johannesburg, Pretoria, Durban and Port Elizabeth. These five centres together were home to 66 microbreweries or 35 percent of the total in 2016. Within Johannesburg and Cape Town a trend was observed for the location of microbreweries in inner-city areas which are experiencing economic regeneration. The best examples are the areas of Woodstock and Salt River in Cape Town and in the inner-city of Johannesburg, most notably at the Maboneng Precinct. The entrepreneur who established the Smack! Republic Brewery in Maboneng said: “We were attracted to the urban rejuvenation taking place in the CBD (Maboneng), which seemed like a fitting backdrop to start Joburg’s only microbrewery in the {inner} city”. One notable change observed in the post-2016 period is the appearance of several craft breweries operating in the economically marginalised township spaces of South Africa’s metropolitan areas, most notably in Soweto, which is part of metropolitan Johannesburg.

Beyond the major markets in the leading cities, microbreweries exist in significant leisure tourism destinations such as Stellenbosch, Knysna, Hermanus, and Mossel Bay (Steenkamp, 2016; Rogerson & Rogerson, 2020, 2021). In recent years craft breweries have gained recognition as a sub-set of small and medium-sized businesses which contribute to local economic development in South Africa (Rogerson, 2014). Indeed, in certain localities, most notably at Stellenbosch and Hermanus, craft beer is part of wider local offerings of gastronomic tourism (Rogerson & Rogerson, 2021).

3.3. Neo-localism

As mentioned earlier, the South African craft beer industry emerged as a supplier of products that constituted an alternative to mass-produced and popular beer types offered by large brewing enterprises and to the segment of sorghum-based beers. This countermovement has brought a diverse range of new and niche beer products to South African consumers.

Commenting on the growth of microbreweries in the USA, Flack (1997, p. 49) noted that much of the appeal of craft beer comes from the fact it is viewed as a rejection of the national culture “in favour of something more local”. The long list of different styles of beer made by South African microbrewery producers includes, *inter alia*, English Bitter, Stout, American Blonde Ale, premium German style beer, Pumpkin Ale, Weissbier, American Red Ale, Golden Ale, Indian Pale Ale, Belgium Dubbel, Saison, Witbier, Light Lagers and what one interviewee described as a “Pilsner and a Porter all with a South African twist” (Nottingham Road Brewery). One craft beer entrepreneur described his beer style as “Left field, experimental and

artisanal” (Three Skulls Brew Works). Respondents from 53 microbrewers were asked to indicate how many different craft beer styles they currently produce. This information is shown in Figure 3.

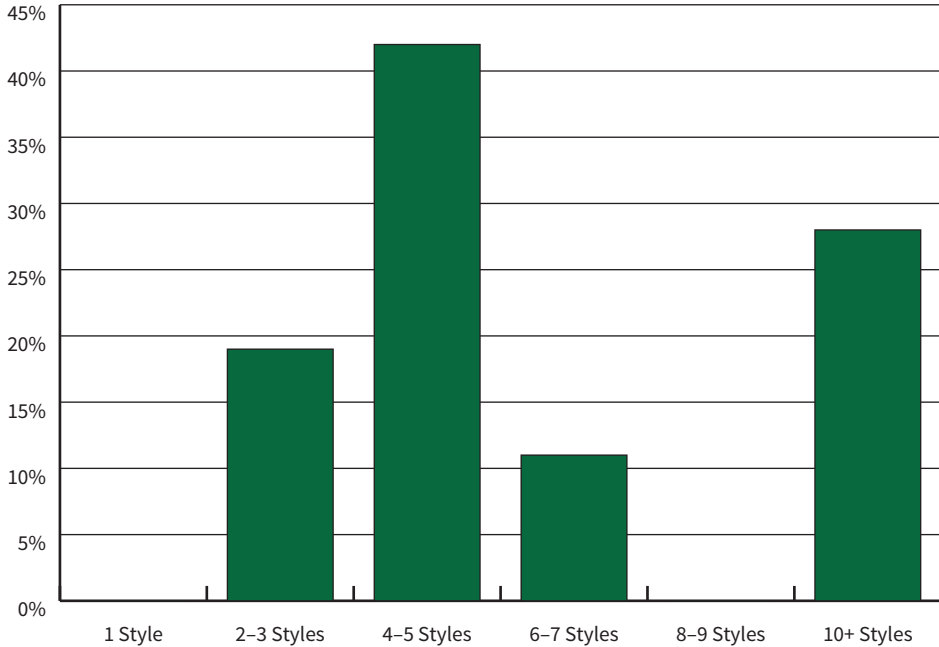


Figure 3. Different craft beer styles produced by microbreweries included in the sample
Source: Author interviews

The connections of microbreweries to local areas can be examined in a number of different ways. The first and most obvious is the brewery’s location. Several interviewees said their microbreweries were located in places they regarded as home. This connection was most apparent in the case of microbreweries situated in small towns or on farms in rural areas. There were also a number of examples of entrepreneurs who chose to establish their brewery where they were living or had been born. This was the motivation for the location of the Darling Brewery, whose founder lives in Darling. Similarly, the place for establishing the Clarens brewery “was seen as best tourist village in South Africa and was born in the neighbouring village” (Clarens Brewery). Another example of a similar motivation was Dieks’ Bru (De Rust, Western Cape), which the interviewee explained as follows: “Because my daughter lives here and I had planned a long time ago to establish a brewery on Route 62” (Dieks’ Bru). In a few cases microbreweries were established in an already existing business location.

Well the farm initially had a winery — so the craft brewery simply became an extension... (Wild Clover Microbrewery).

Yeah well it's a family farm [Winery] and we built a new cellar which was standing empty and we were looking for something to do there. And my brother worked for SAB for about three or four years and was part of the launch for Carlsberg and Corona and when he returned to the farm he started experimenting with beer brewing and then decided to turn that cellar into a microbrewery — so it was sort of an existing building that worked... (Wild Beast Brewery).

There are also examples of microbreweries located in large urban areas because their founders were emotionally attached to these places. One of them is the Odyssey Craft Brewery. During the interview, its owner said: "I have lived in Durban for most of my life so I call it home and by default it seemed a good choice to start up for this reason. I also looked around... There are no craft breweries in Durban itself. Sure, there are a few in Shongweni and Hillcrest but nothing actually in Durban. I thought this was a good business opportunity" (Odyssey Craft Brewery). Another example is the Devils Peak Brewery in Cape Town: "We started out in Somerset West but it became a logistical hurdle that we had to overcome, but the idea was always to be centred in Cape Town and therefore being close to 'Devils Peak' now — we have these whole *genus loci* that we follow and it creates a sense of place and hence all our beer labels are relevant to 'Devils Peak'..." (Devils Peak Brewery).

Local embeddedness of microbreweries can also manifest itself by the extent to which they depend on local markets to sell their products, which in this analysis were defined as being within 50 km from the location of the microbrewery. For all the 53 microbreweries, sales within the local area accounted for at least 75% of total sales. For half of the sampled entities, this proportion was at least 80%. In tourist areas of South Africa, the share of local sales was boosted by purchases made by tourists who were looking for 'local' flavours. While these findings are not surprising, it can be argued that they are not necessarily evidence of the importance of the 'local' to craft beer producers. More insights into the relative or absolute importance of local markets were obtained from several interviews. In the owner of Diek's Bru situated in De Rust, said that "most of my beers are sold within 50 km". The owner of the Darling Brewery, one of the country's more established microbreweries, also recognised the relative importance of the local market saying that "it is not big but crucial as it was started here" (Darling Brew).

Another dimension of 'being local' has to do with the origin of ingredients used in beer production. According to the interviewees, a large part of the ingredients required to make craft beer, such as base and speciality malts, hops and barley, are sourced through SABMiller. As regards other ingredients, most breweries obtain speciality products from foreign suppliers. As is the case with craft beer production in other parts of the world, it was found that only a small proportion of inputs were actually sourced locally, most importantly water, which was obtained from boreholes, streams or local lakes. The limited use of distinctive local ingredients by the South African craft beer industry can perhaps be explained by the fact it is relatively young in comparison with its counterpart in the USA. Local connections and embeddedness of many microbreweries were also evidenced by their relationships with the wider community. In a number of cases microbreweries were sponsors of not only local beer festivals but also other local events, such as trail runs or local art shows.

In the USA, among the strongest manifestations of neo-localism were efforts made by craft beer producers to link their products to the local area through naming, branding and imaging. Schnell and Rees (2003) and Fletchall (2016) both highlight the importance of imagery as a means to promote local ties. In their studies they examine images on labels, beer names and promotional materials and the extent to which they reflect the principles of neo-localism. Schnell (2013) stresses that a major attraction of breweries is the exclusive nature of their products, which are marketed as beers that cannot be found elsewhere and are tied to a unique place. These breweries are often proudly and self-consciously local. According to Schnell (2013), they actively promote their craft beers by using idiosyncratic beer names and imagery. Schnell argues that in many respects microbreweries market "place" as much as they market beer and that they "actively seek out distinctly local imagery, local landscapes and local stories to position themselves as intrinsically rooted in place" (Schnell, 2013, p. 57).

The role of naming, branding and imaging was also explored during the interviews. The entrepreneurs were asked to explain the reasons for choosing particular names of their microbreweries and their craft beers and whether these names were in any way connected with the area where the brewery is located. The findings revealed almost an equal split between breweries where names and imagery were not linked to the local area and those which employed them as a deliberate strategy to sell the "local" connection. Typical of microbreweries that did not rely on place attachment when choosing their own names and those of their brands was the Odyssey Craft Brewery. As its owner explained: "The brewery is called Odyssey Craft Brewery, and chose it because what is an odyssey? It is a journey, an adventure, an experience... We want to take people on a journey through beer".

The Cockpit Brewhouse, situated at Cullinan, was named to reflect its owner's passion for aviation.

At least one-third of entrepreneurs chose to name their breweries and their craft beers to convey the sense of place attachment. The Chameleon Brewhouse at Hartbeespoort in North West Province as well as its brews are named after the local craft market. In a similar fashion the microbrewery in the Eastern Cape small town of Nieu Bethesda — the Sneeuberg microbrewery — is named after the nearby mountain range. Another example of place attachment in the naming is the Clarens Brewery situated in the Clarens village square and producing Clarens Blonde ale, which is a variation of the American blonde ale type of beer. The Nottingham Road Brewery, situated in the KwaZulu-Natal Midlands, was also named after the place where it is located. In the case of Karusa Premium Wines & Craft Brewery, situated just outside of Oudtshoorn in the Western Cape, the origin of the name was explained as follows: “Karusa is the original word that the Karoo was named by according to the Khoi San meaning “land with little water” or “thirstland”. Figure 4 shows one more example of choosing a name with a local relevance.



Figure 4: Devils Peak Brewery. “The brewery’s name was chosen because Devils Peak is an iconic landmark in Cape Town number one and number two it has that mythical element to it, the intriguing devil character — so a little bit on the naughty side”, so all our names are very entrenched in Cape Town and Devils Peak. Our Beer Names & Labels: ‘The Kings Blockhouse — which is a historical fort on ‘Devils Peak’ and is observable from our location” (Devils Peak Brewery).

Source: K. Collins

The name of the Red Sky microbrewery at Gordon's Bay "is derived from our Stellenbosch night skies... the Simonsberg turns a deep purple/red in the summer evenings, the best way to observe them... sitting on your veranda with an ice cold beer". The owner of the Copper Lake Breweries explained the origin of the name as follows: "Copper Lake represents the characteristics of the brewery's location and appearance... I have a copper coloured lake on my property". Corne & Reyneke (2013) report the case of craft beer labels featuring local paintings produced by the entrepreneur's daughter, a well-established artist. Another brewery included in the sample, the Saggy Stone brewery, was established by a former geography teacher, who used the name given by his daughter to a landmark situated near Robertson where the brewery is located: "We had built a stone lapa but with very badly built gabions in our kloof. The baboons sat on the walls and they partially collapsed. Our young daughter (12 years) called it Saggy Stone and then when we started building the brewpub out of river boulders she commented that it was just like Saggy Stone lapa!" (Saggy Stone Brewery).

Place attachment is also evident in the name of Darling Brew, which is a small town in the Western Cape, although beers produced by the brewery are named after endangered South African animals including the geometric tortoise (Slow-beer), the loggerhead turtle (Native ale) and the spotted hyena (Bone crusher). At the Honingklip brewery in Western Cape, beer brands include Onrus, a suburb in the nearby town of Hermanus. Steenkamp (2016, p. 24) reports that brewer names from the Stellenbosch area of the Cape Winelands included reference "to the historical route wagons used to take, fetching fresh produce in the Boland in order to refresh the harbour in Cape Town". Finally, Gregory (2016) reported evidence of neo-localism and place attachment in the naming of beers produced by the Smack Republic Brewery (formerly) situated in the Maboneng precinct of the inner city of Johannesburg. This brewery produces a range of different brands of craft beers, all of which reflect a deliberate attempt to make local connections. During the interview its owner said: "We offer three types of craft beer... all of which are idiosyncratic of the famous areas within the inner city of Joburg. One beer is named the 'Maboneng Maverick'...and this is because we are located in the Maboneng building, which is one of the oldest buildings in Johannesburg and has hundreds of years of history attached to it, therefore the urban setting and rich cultural history give us a bold but fresh appeal to our brewery and beers". Other craft beers produced by the Smack Republic Brewing Company were given names connected with stories about the surrounding inner city such as the Braamfontein Brawler and the Bree Street Belle.

As evidenced by the above quotes from the interviews, the development of the craft micro-brewery industry in South Africa includes elements of neo-localism.

Many breweries have based their marketing strategies on neo-localism while others have not sought to capitalize on it. Local connectedness and embeddedness is reflected most strongly in the choice of places where microbreweries are established, in names given to microbreweries and craft beer products as well as images used on labels, all of which emphasize uniqueness and local identity.

4. Conclusion

The growth of craft beer as a global revolution transforming the landscape of production and consumption in the brewing sector is now well-documented (Garavaglia & Swinnen, 2017a, 2017b; Kline et al., 2017; Slocum, Klein & Cavaliere, 2018; Durán-Sánchez et al., 2022; Cabras et al., 2023). The phenomenon of craft beer has been intertwined with wider counter-movements to globalization and with the concept of neo-localism. Most research on craft beer concerns countries of the Global North. This article offers insights into the development of the craft beer industry in the Global South and the role played by neo-localism. Starting from the first decade of the 21st century, a new segment of the beer economy has emerged in South Africa, which is dominated by passionate entrepreneurs engaged in small batch craft beer production. The rise of this new industry has led to the growing popularity of craft beer tourism, an important driver of local economic development especially in small town South Africa (Rogerson, 2016; Rogerson & Rogerson, 2021).

The historical development of the South African craft beer industry is in many respects similar to that observed in countries of the Global North. Similarities include consumer reactions to the dominance of monopoly brewing enterprises and their standard beer products, the home-brewing movement, the appearance of a cohort of passionate craft beer entrepreneurs and the role played by neo-localism in shaping the landscape of the South African craft beer industry. Differences include the delayed rise of the craft beer sector in South Africa, business owners' decisions to set up their microbreweries in the former (exclusively) Black township areas and the resulting (minor) shift in the racial composition of craft beer entrepreneurs. Another distinctive feature of the South African experience is how hard the country's craft beer sector was hit by the government's pandemic measures, particularly the strict bans on the sale of all forms of alcohol.

One important direction of future research for tourism and recreation scholars is to track changes caused by the devastating impacts of the pandemic and to analyse the industry's adaptive strategies, its ability to recover and its degree of re-

silience. Moreover, since the pandemic has strengthened the role of domestic tourism in South Africa, another aspect worth investigating is whether neo-localism continues to be equally important for craft beer entrepreneurs and the changing directions of the South African craft beer industry.

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Ewolucja branży piw rzemieślniczych na globalnym Południu: doświadczenia Republiki Południowej Afryki

Streszczenie. W związku z globalnym wzrostem produkcji i konsumpcji piwa rzemieślniczego pojawiło się wiele badań prowadzonych w wielu dziedzinach. Jedną z głównych koncepcji wyjaśniających rosnącą popularność piwa rzemieślniczego w krajach globalnej Północy jest neolokalizm, czyli powiązanie produktu z lokalną tradycją i miejscem jego wytworzenia. W artykule przeanalizowano przypadek RPA jako kraju globalnego Południa, w którym nastąpił rozkwit kultury piwa rzemieślniczego i pojawienie się gospodarki z nim związanej. Autorzy omawiają rozwój historyczny, cechy strukturalne i organizację przestrzenną branży piwa rzemieślniczego w RPA, a także wskazują, w jaki sposób przejawia się w niej neolokalizm. Analiza ma na celu identyfikację podobieństw i różnic między rozwojem kultury piwa rzemieślniczego na globalnym Południu a jej opisami w istniejącej literaturze, która koncentruje się na krajach globalnej Północy.

Słowa kluczowe: piwo rzemieślnicze, Afryka Południowa, neolokalizm, turystyka związana z piwami rzemieślniczymi



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