



The World's Best Beer City
A Snapshot of the Beer Industry in the Sheffield City Region

We knew beer was big in Sheffield. But the scene has been moving so quickly we had no idea how big it was – and neither, it seems, does anyone else.



Capital of Beer

This report is the final publication of a three-part series commissioned to highlight Sheffield's huge wealth of creative talent. Sheffield is a city of makers, its creativity reflected in the input from both universities, the range of festivals in the city and its spirit of independence. The reports cover music, art and the beer industry, all of which cross over and link creatively between each distinct sector.

This snapshot of the craft beer industry in Sheffield is part of the University's cultural engagement strategy that has contributions from the City & Cultural Engagement team and academic colleagues. The report looks at ways we can create the conditions and the support required to enable both recognition for this industry and to demonstrate how the Sheffield City Region is at the forefront, both nationally and internationally.

We are indebted to Pete Brown, author of the report and to researcher Jules Gray as well as the many brewers of beer who have contributed to the findings which demonstrate once again, the independent making tradition that is in the DNA of the city and the region.

In the Year of Making 2016 we are sharing these findings and enabling everyone in the city and the region to take pride in their achievements. We wish to demonstrate both to its inhabitants and beyond to explore how, collectively, we as a City and a region with makers in Barnsley, Chesterfield, Rotherham, Doncaster and North Derbyshire, can continue to inspire and support growth, provide routes to market for our makers and add economic vibrancy. This our final report truly demonstrates that we are a City of Makers.

Make yourself part of it.

Professor Vanessa Toulmin, Director of City and Cultural Engagement, University of Sheffield.

Part of:



Our Approach

The report is based on a mix of quantitative data and one-on-one in-depth interviews.

We began by compiling a list of brewers in the Sheffield City Region using CAMRA's Good Beer Guide as our initial source, then supplementing this with local knowledge, internet searches and conversations with people on the Sheffield beer scene (The Sheffield branch of CAMRA were very helpful in this.)

While focusing mainly on the City of Sheffield itself, our scope was the Sheffield City Region, which comprises Barnsley, Bassetlaw, Chesterfield, the Derbyshire Dales, Doncaster, North East Derbyshire, and Rotherham as well as Sheffield.

This list yielded a total of 57 active brewers in the Sheffield City Region. We sent each of these brewers a questionnaire and followed this up with phone calls, emails and tweets, which resulted in a response rate of just under 50 per cent.

The author then conducted a series of in-depth interviews with brewers, publicans, retailers and others close to the beer scene in Sheffield.

The author is an internationally recognised beer writer now based in London, but born and raised in Barnsley, so also brings a degree of personal knowledge and expertise to the project.



Sheffield has a huge number of brewers

As of March 2016, we were able to identify 57 breweries across the Sheffield City Region.

Five of these are beginning production or have just begun production in 2016.

23 of them (or 40%) are within the City of Sheffield itself, making Sheffield a significant brewing city by any measure.

31 of them (or 54%) began brewing within the last five years – proof of a current boom in a city that's long had a great reputation for beer and brewing.

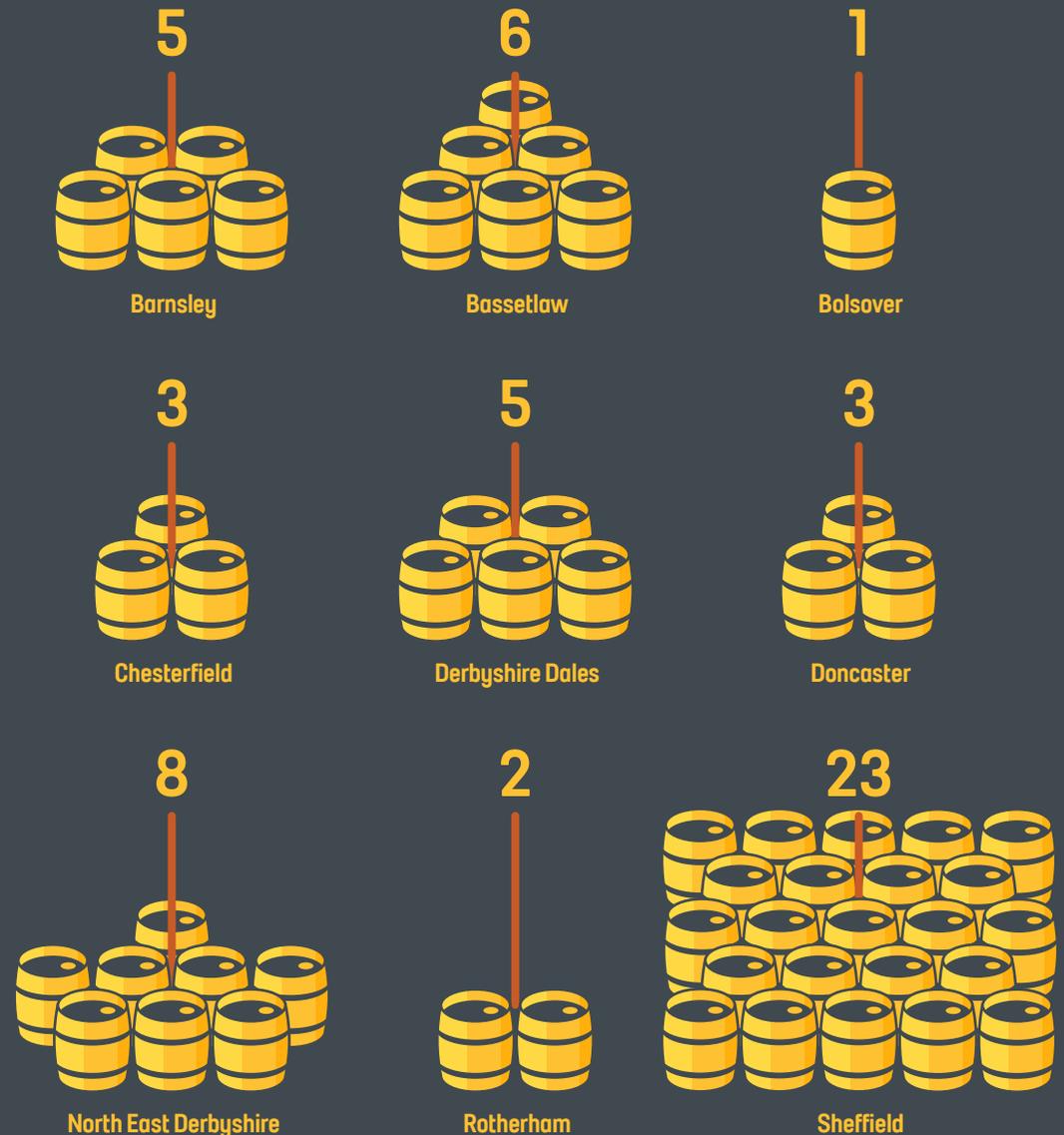
Does this make Sheffield the UK's brewing capital? Anecdotally, more people around the national beer scene would argue that this title goes to London. The capital currently has 76 active brewers, an astonishing rise from a mere two or three a decade ago. But the number of breweries opening in London has slowed and possibly peaked, while the number of brewers opening their doors in Sheffield is accelerating.

On a per capita basis, the comparison between Sheffield and London using these numbers is dramatic:

- **The Sheffield City Region has one brewery for every 32,142 people**
- **The City of Sheffield has one brewery for every 23,991 people**
- **Greater London has one brewery for every 112,355 people**

Whichever comparison you prefer, on a per capita basis the Sheffield City Region has 3.5 times more brewers per capita than Greater London, while the City of Sheffield has 4.7 times as many breweries per capita as Greater London.

Breweries in the Sheffield City Region



Those brewers make a lot of different beers

Between them, these brewers create an astonishingly wide array of beers. The average Sheffield brewer brews five beers on a permanent basis and around eleven seasonal, occasional or one-off beers every year.

This gives us a rough estimate of 300 permanent beers and 700 seasonal beers, totalling 1000 different beers produced by Sheffield's brewers each year.

Within Sheffield, around **400** different, unique beers are available in the city's pubs on a typical day.



Sheffield's brewers are small scale, but growing

86% of Sheffield's brewers could be described as 'microbreweries,' brewing less than the 5000 hectolitre threshold for progressive Beer Duty (PBD).

However, two thirds of breweries say they plan to expand and grow in the next twelve months. Of those that don't have any plans to expand, almost half have only just opened, or only just completed expansion.

So not only is the number of brewers in Sheffield growing, we can expect to see the average size and scale of brewers growing too.

The brewers we surveyed are planning on investing a total of £3.2 million in expansion over the coming year.



How much beer did you brew in 2015 (hectolitres)?

- 10,000+
- 7,500-10,000
- 3,000-4,000
- 2,000-3,000
- 1,000-2,000
- 0-1,000



Do you have any significant expansion planned over the next twelve months?

- No
- No (recently opened / expanded in 2015/16)
- Yes

Source: Survey of Sheffield City Region Brewers, March 2016 / Base: 25 brewers



Sheffield is the best-kept secret in the beer world!

With such a dynamic brewing sector, in the middle of a global boom in interest in well-made, flavourful beer, we should expect Sheffield to have a national or even international reputation as a premier beer city.

And yet it doesn't.

Google any version of 'world's best beer cities,' and Sheffield isn't mentioned anywhere. Cities with far fewer breweries, with less of a historic reputation for brewing, with far less diversity of beers available and fewer famous beer pubs feature where Sheffield doesn't.

Even nationally, other cities such as London, Manchester and Leeds have a more current reputation as exciting beer destinations.

Even focusing on Sheffield's core strength of cask ale brewing, in recent years Norwich has staked a claim to be the UK's premier cask ale destination, and has gone pretty much unchallenged. Within the north, Derby and Nottingham are seen as close rivals to Sheffield.

Outside cities themselves, in terms of national reputation, Cornwall and London enjoy a reputation as 'the place good beer comes from' that Yorkshire once enjoyed exclusively.

Why?

Sheffield keeps itself to itself. When we asked brewers where they sell their beer, they replied that nearly three quarters of it was sold within the Sheffield City Region.

Sheffield's brewers focus mainly on their core territory. This helps make Sheffield's beer scene special – there are beers here that are difficult to find anywhere else, helping make Sheffield a destination for beer lovers.

The problem is, Sheffield doesn't then shout about what a great destination it is. This is partly in the city's nature – Sheffield people don't brag. But even taking that into account, it's curious – if not downright bizarre – how little attention the city of Sheffield draws to its brewing prowess. Details of the city's pubs and brewing scene are buried very deep in tourism websites, unmentioned on landing pages listing key points of attraction, and are incomplete and often out of date when you do find them.

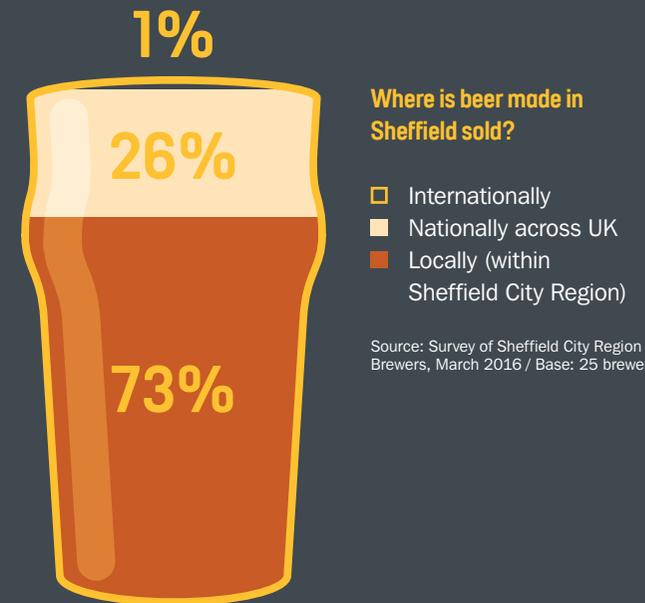
Although things are starting to improve, there's very little sense either of collective action among Sheffield's pubs and brewers to promote themselves, or of other bodies such as Sheffield City Council or tourism offices recognising the important role they play in the city's economic and cultural life.

This means that Sheffield – having pioneered the beer revolution now taking place across Britain – is in danger of being eclipsed by other cities.

Closing the Gap

We believe there is a significant gap between the reality of how strong and vibrant the beer scene is in Sheffield, and the perception and promotion of it.

The remainder of this report will explore in detail the past, present and future of brewing in Sheffield, draw some conclusions and give recommendations on what should be done to close this gap, helping Sheffield's brewers thrive and helping the city realise the full benefit of what they do.



"Much as I dislike hype around beers/breweries, to keep up unfortunately we need some! And currently there isn't. There's local hype when a new 'out there' beer comes out... but nationally there's no particular clamour or even awareness."

Dave Szwejkowski, brewer

Sheffield: A City Of Makers

People in Sheffield make things. They always have. And they've always done it on a small, independent scale.

The city was once the world capital of steel, cutlery and tool making, and much of the work was done by highly trained master craftsmen working alone or with just one or two other people. These artisans were known as the 'Little Mesters', with 'Mester' being Sheffield dialect for 'master', and the title probably meaning something along the lines of 'master craftsmen working on a small scale.' The Little Mesters worked throughout the city, independently but cooperatively, and acquired a reputation for stubborn bloody-mindedness which manifested itself in the excellence of their work.

The Little Mesters made things to a very high standard of detailed craftsmanship, something not easily replicable by machine. But eventually, the cheaper cost of standardised, imported, machine-produced goods tempted people to shop on price rather than quality, and the Little Mesters have effectively disappeared.

But they set a template for how things are done in Sheffield that has endured and thrives today. **"We're the awkward squad, but we get things done,"** says Nick Simmonite, whose family have a long history of running pubs and bars in the city.

"Sheffield still has more independent makers than anywhere else," says John Hamshere, Chief Executive of Sheffield Industrial Museums Trust. **"They're still independent and bloody-minded, and they work all across the creative industries."**

A typical example of how the spirit of the Little Mesters lives on is the Peddler's Market. On the first Friday and Saturday of each month, a former industrial warehouse in Kelham Island hosts a gathering of small, independent vendors of street food, cocktails and craft beer, alongside live music and local artists and makers exhibiting their work.

Our survey data suggests that over 70 per cent of Sheffield's brewers employ fewer than five people. They're small scale makers in the Little Mester tradition.

As such, they contribute to the city not only economically, but culturally – both by collaborating with each other and with similar small-scale craftspeople in other disciplines, and by simply being who they are.

It's easy to imagine that such spiky independence might produce an insular, unwelcoming beer scene. In fact the opposite is true. Everyone we spoke to talked about how friendly and welcoming Sheffield is in general, and the beer scene in particular. Many of the key people we identified in the local brewing scene came here having grown up elsewhere, and loved the city so much they ended up staying here and contributing to it.

We'll come back to this point in more detail after providing some context of how brewing in Sheffield has developed.

"As a new brewer, everybody – shops, breweries and customers – has been really accommodating and welcoming of me and Emmanuales since starting. Sheffield really is amazing!" Nick Law, Emmanuales



A Short History of Brewing in Sheffield

Industrial Revolution

Like most industrial cities, Sheffield was once home to scores of breweries. The Industrial Revolution spurred the growth of commercial breweries with new technologies and economies of scale, and also created a mass market for beer by throwing large numbers of men together in factories, forges and furnaces, who needed large quantities of beer as a safe source of drinking water, as energy, and as rehydration. As industry and cities grew, so did the number of commercial breweries and pubs that served them.

Sheffield was a perfect example. The first recorded brewer in the city was Rawson's in Pond Street, founded in 1758. A century later, it was one of around thirty in the city. According to local industrial historian John Hamshere, Sheffield was once the UK's largest brewing city (only the town of Burton on Trent brewed more).

Beer consumption peaked in the 1870s and went into a slow, steady decline. Brewers 'tied' pubs by offering them loans in return for exclusivity over the beers they sold. As the industry consolidated, brewers acquired each other not for the unneeded brewing capacity, but for the pub estates.

By the First World War there were around sixteen breweries left in operation in Sheffield, and this number continued to decline. But one small Sheffield brewery was to prove the cradle from which the modern British brewing industry sprung.

Merger, Acquisition and Decline

In the 1950s, the Hope & Anchor brewery in Mowbray Street entered into a transatlantic distribution deal with Canadian entrepreneur E P Taylor. Taylor would distribute the Sheffield brewery's stout in North America while the Hope & Anchor would sell Taylor's Carling Black Label lager here. The arrangement didn't work. On this side, the tied house system meant Carling could only be sold in the Hope & Anchor's own pubs. So Taylor bought the brewery and began expanding it to gain distribution. He bought brewers in Bradford and Scotland to create Northern Breweries, which grew and expanded to become United Breweries, owning 2800 pubs by 1961.

This kick-started a dizzyingly rapid process of consolidation that saw any brewery wishing to stay outside Taylor's clutches mimic his merger and acquisition activities. By the early 1970s, what had been Sheffield's Hope & Anchor was now a tiny part of Bass Charrington & Co, which was itself one of six giant national brewing concerns that dominated British brewing and owned most of the country's pubs.

Each of the Big Six owned far more breweries than they needed, and all were looking to build national brands with centralised, modern production and efficient distribution. Across the country, hundreds of old Victorian breweries in towns and cities were closed down and replaced by modern factories near motorways. Famous Sheffield names like Ward's and Stones were acquired by national concerns Whitbread and Bass, and production was transferred out of the city.

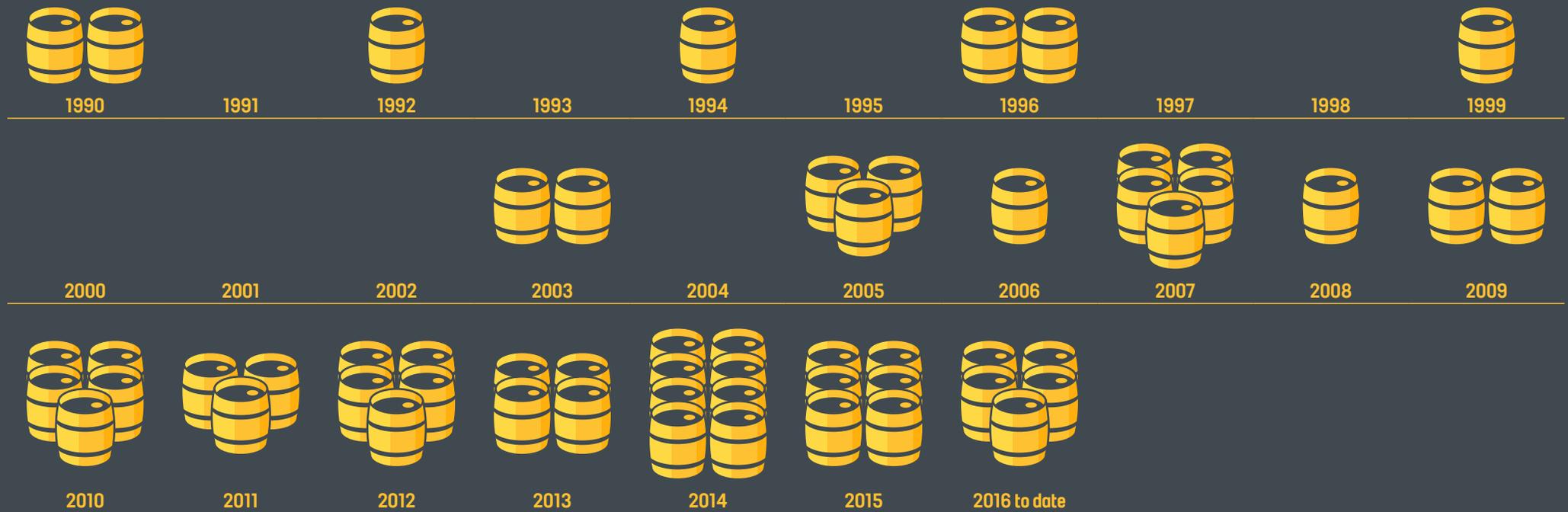
Stones was originally brewed by William Stones in 1868, and the beer quickly became synonymous with Sheffield. The brewery in Cannon Street in the Neepsend district was its heart. Bass acquired the brewery in 1968 and initially gave it a great deal of support. By 1992 Stones was the bestselling bitter in the UK. But Bass' main priority was Eddie Taylor's Carling lager, and ale volumes across the country went into what looked like a terminal decline.

The introduction of smoothflow by John Smiths and then Tetley's in the mid-1990s commoditised mainstream ale and mopped up dwindling demand. The Stones brewery was closed in 1998. Sheffield's other great brewing icon, Wards, closed its doors a year later, again after being acquitted by a bigger concern.

Alex Barlow, owner of Sheffield's newest brewery, Sentinel, was working for Bass and based in Sheffield at the time. For him, the demise of Stones was the start of his disillusionment with big-scale brewing. "Ale always had a heart and a heartland," he says. "Big brewers don't give a shit about heart, it's all head and numbers."

The revival of brewing in Sheffield pre-dated the current craft beer boom – in many ways Sheffield was the pre-cursor to a national trend.

Brewery Openings in Sheffield 1990–2016



Resurrection

By the time Wards and Stones were shut down, the fight-back against the dominance of big brewers had already begun. In 1980 Dave Wickett – a business studies lecturer at what is now Sheffield Hallamshire University – opened a pub in the Kelham Island district of the city.

People told Wickett he was insane. Not only was Kelham Island a largely derelict and deserted post-industrial area that had become Sheffield's red light district, Wickett's plan was to focus his offering around real ale at a time when most of Britain's drinkers were switching their preference to lager.

On the night Wickett's pub, the Fat Cat opened, there were queues down the street.

Wickett never looked back. Ten years later he opened the Kelham Island Brewery in an old pub outbuilding. In 2004, Kelham's Pale Rider was named Champion Beer of Britain.

Wickett's influence on Sheffield's beer scene is impossible to overstate. He inspired others to follow his lead, in more ways than one. Even Wickett's greatest fans concede he wasn't always easy to work with. His relationships with his brewers were sometimes fraught, and people would come and go from Kelham Island, sometimes leaving amicably, other times not. But remarkably, even if people left under a cloud, they were so inspired by what they had learned working for Wickett that they'd often go and set up a brewery of their own, and soon Kelham Island and its neighbouring districts had a cluster of small breweries.

In 2002, the introduction of Progressive Beer Duty by Chancellor Gordon Brown spurred an explosion in the number of small breweries across the UK, with the total number eventually trebling between the millennium and 2015.

We noted the opening dates of all the brewers currently operating in the Sheffield City Region. Graphing these dates reveals two important facts.

Firstly, we can see that, largely because of Dave Wickett's influence, the revival of small scale brewing in Sheffield pre-dates the national trend. By the time Progressive Beer Duty was introduced in 2002, there were already seven breweries in Sheffield. (By comparison, there were approximately four in London at this time, only one of which was a recent opening.)

Secondly, we can see quite clearly that the pace of brewery openings in Sheffield is accelerating. At the time when Sheffield had seven small breweries (two within the city itself, not counting others that are now closed) that statistic was impressive. Now it has 57 (23 of those in the city itself) and over half began brewing in the last five years.

Sheffield has had ups and downs as a brewing city. It's now definitely on the up. If the current pace of openings continues, the number of breweries in the City of Sheffield itself will soon surpass its nineteenth century peak.

Sheffield: The Real Ale Capital of the World

Cask ale, more commonly known as real ale, is not quite unique to Britain, but Britain is the only country in which it is a significant beer tradition.

Unlike other beer styles, cask ale contains live yeast and is undergoing a conditioning process in the pub cellar where it is stored, giving the beer a natural carbonation and subtle, complex flavour.

Cask ale is trickier to keep and serve well than beer where conditioning is completed in the brewery before packaging, and was almost certainly headed for extinction before the foundation of the Campaign for Real Ale in 1971. CAMRA's campaigns persuaded brewers to continue to brew cask ale, and pubs to continue to sell it. Cask ale instils a fierce passion in its fans, and many who brew and sell it are fans themselves.

Beer Census

Every year, the Sheffield branch of CAMRA cooperates with other local branches to conduct a Beer Census. For years, the branches in Derby and Sheffield have enjoyed a good-natured rivalry over which is the UK's premier real ale city. They decided to settle this by coordinating teams to conduct citywide surveys to calculate the number of different, unique ales available on the bar in a given day.

On the day of the 2015 survey, Sheffield CAMRA visited 145 pubs. An average of five had pumps per pub, which boasted a total of 730 hand pumps over such a large number of pubs is impressive in itself, even if these pubs were chosen by CAMRA for their commitment to real ale.

Between them, these 730 hand pumps were selling 385 different cask ales. This made Sheffield the clear winner over the growing number of other cities that now take part in the Census:

- Nottingham – 334 different beers
- Norwich – 254 different beers
- York – 281 different beers
- Derby – 200 different beers
- Leeds (City Centre) – 189 different beers

The total for each city is impressive enough, demonstrating the vitality of cask ale, but Sheffield's usually wins.

We can only speculate how well larger cities such as Manchester or London would compare. Undoubtedly the total number of pubs and real ale hand pumps would be greater. But both cities are home to larger, traditional brewers who own significant chunks of pub estate selling their own beers – a scenario not shared by Sheffield.

Another statistic revealed by the Sheffield Beer Census is the strong loyalty to local breweries. We would expect to see big national ale brands dominating the bar, especially as most pubs in the city belong to the large national pub companies that have replaced the old Big Six breweries. Punch Taverns, Enterprise Inns and Mitchell's & Butler's are by far the biggest landlords in the city, and each tends to focus on large deals with the country's biggest regional brewers.

And yet in Sheffield, four out of the top six most widely stocked breweries are local. Greene King and Sharp's – the UK's largest and second-largest real ale breweries – are heavily outnumbered in their presence by local heroes Abbeydale, Bradfield, Kelham Island and Thornbridge.

But the secret of Sheffield's beery diversity is the stocking pattern within those brewery portfolios. Sharp's is essentially synonymous with Doom Bar, while Greene King IPA is that brewery's flagship brand. Abbeydale may be the most widely stocked Brewery in Sheffield, but its flagship brand, Moonshine, was only stocked in 32 of the 145 pubs surveyed, just one pub behind Bradfield's Farmer's Blonde.

Total number of real ale hand pumps in Sheffield pubs



■ Local Sheffield brewery ■ National brewery

Source: Sheffield CAMRA Beer Census Sept 2015 / Base: 145 Sheffield pubs

The most widely stocked beers are only available in around one in five pubs surveyed.

Abbeydale and Bradfield top the survey because collectively their ranges are stocked more widely than big brands such as Doom Bar and Greene King IPA. Thornbridge is by far the largest brewery in the Sheffield City Region, but it produces twenty different permanently available beers. In brand terms at least, the range of beers available in Sheffield is astonishingly diverse.

For such a compact city, such a championing of cask ale leads us to assert that Sheffield is the real ale capital of the UK, and therefore, the world.

Beer Festivals

Sheffield boasts a number of regular beer festivals and events that underscore its reputation as a beer capital.

Sunfest

Held every July at the Abbeydale Brewery's Rising Sun, featuring over 100 real ales and ciders and attracting people from across the UK.

SIBA BeerX

For the past four years the Society of Independent Brewers (SIBA) has combined its AGM, trade show, Festival of Beer and National Beer Awards into one event which forms the annual highlight in the small-scale, independent brewer's calendar. This combined event has only ever been held in Sheffield, making the city the focus of the national craft beer and independent brewing movement. In March 2016, over 1600 delegates attended – a 40% increase on the previous year. Obviously, apart from putting Sheffield in the centre of the national beer map, this creates a significant contribution to the city's hotel, restaurant, and especially pub trade.

Sheffield Beer Week

The brainchild of local beer writer and bottle shop owner Jules Gray, Sheffield Beer Week ties in with and amplifies BeerX and also follows a template laid down by other cities such as Portland and Philadelphia in the US, where the concept was pioneered in 2008, and Norwich and London in the UK. The idea is to coordinate events such as Meet the Brewer evenings, Tap Takeovers, brewery tours and beer dinners to create an ongoing festival of beer and brewing. 2016 was only the second year when this independent, not-for-profit initiative ran, and it managed an impressive scope of 66 different events over ten days in 38 participating venues, including pubs, breweries and brewpubs, specialist beer shops and farm shops. Two famous American breweries – Brooklyn and Founders – took part, and twelve Sheffield City Region breweries were involved.



A Sheffield Beer Map, featuring over 40 beer-focused venues, was published and distributed. The map and more details of Sheffield's beer scene and Beer Week are available at sheffieldbeerweek.co.uk.

Sheffield Food Festival

Held this year in May, bringing the best of the region's food and drink to the heart of the city. Under the banner of the 'Sheffield Breweries Cooperative', the city's best brewers band together to offer a beer tent full of the city's favourite beers.

Three Valleys Beer Festival

Held in early June, this festival stretches across 18 different venues around Dronfield and the surrounding area, all linked by a free festival bus service.

Thornbridge Peakender

Held in early July in the heart of the Peak District, featuring camping, live music and craft beers from around the world

CAMRA Steel City Beer & Cider Festival

A four-day long festival held at Kelham Island Industrial Museum in October, now in its 41st year featuring over 200 beers and ciders.



Each of these events brings people to Sheffield to celebrate its beer. But as well as these annual events, Sheffield's pubs showcase the local brewing scene all year round – as well as adding far more to the fabric of the city.



SHEFFIELD
TAP

Sheffield's Pubs: the Night-Time Economy and Cultural Glue

A beer scene is nothing without the pubs that sell it. And Sheffield boasts some of the best pubs in the country.

Real Ale Pubs

The UK is experiencing a real ale revival, but in Sheffield it felt like Britain's national drink never really went away.

In 1980 the Fat Cat in Kelham Island introduced a wide range of constantly rotating cask ales. The idea proved so popular that other pubs took note and imitated it. Starting with the Fat Cat, Kelham Island steadily became a real ale mecca.

Just around the corner from the Fat Cat is the Kelham Island Tavern, reopened in its current form in 2002. It's the only pub ever to win CAMRA's Pub of the Year Award in two consecutive years. It was short-listed for the same award in 2016, and was also named Yorkshire Pub of the Year in 2004, 2007, 2008, 2009 and 2015, and Sheffield Pub of the Year every year from 2004 to 2011, and in 2014 and 2015.

"There are nine different good real ale pubs in Kelham, each an expression of the personality of the landlord," says John Hamshere, real ale fan and director of the Kelham Island Museum. **"Across those nine pubs you can drink sixty different beers. It's no exaggeration to say beer and pubs have regenerated the area."**

Kelham is certainly at the heart of Sheffield's real ale pub scene, but it's by no means confined to there. Great pubs feature all across the city. In trying to discover why Sheffield's pubs are so individual, we explored their ownership structure. The majority of pub across the UK are owned by large pub groups such as Punch, Enterprise, Mitchell's & Butler and Greene King. Historically, is Sheffield somehow different, with more independently owned pubs? Not at all.

Our research showed that the pattern of pub ownership in Sheffield is similar to any other city in the UK. Sure, there are some independently owned pubs and some belonging to local breweries, but the pub companies are as strong here as anywhere. Sheffield's independent spirit and bloody-mindedness are the reasons for the pubs and their beer offering being so different.

"There's no typical, generic, Sheffield pub," says John Hamshere. **"When we were designing a historic pub for the museum, we had nothing to work from. Every one is different."**

Beer Tourism

Sheffield's unique and extensive beer range makes it a tourist destination for beer fans, despite there being little or no official promotion of Sheffield as a beer destination. The local CAMRA branch have encountered people who have travelled from as far away as the United States to attend the city's beer festivals. And on a weekly basis, people come here to drink beers they can't find anywhere else.

One small but significant subculture of travelling drinkers are the 'tickers', people who collect as many different real ales as they can. They know Sheffield has the widest range of beers in the country, and will travel up to 200 miles on a regular basis to come and discover beers they haven't had before.

Beer Trails

The sheer number of great beer pubs means their fans have created real ale trails across the city. The Kelham trail is probably the most famous and popular, but the Sheffield Beer Week website also lists a City Centre trail and one further out into the suburbs. An alternative route is to follow the tram through the city centre and Upper Don Valley.

Whatever you choose, it's impossible to do all the different real ale trails in one day. So people who come to Sheffield to explore its beer are likely to stay over and take advantage of hotels and restaurants too.

The Cultural Glue of the City

This report is the last of three that celebrates the vibrant culture of Sheffield, the other two focusing on art and music. Creativity in the city thrives across all areas, but beer and pubs are the glue that holds the whole thing together. Pubs act as venues for both gigs and exhibitions, and brewers are keen to collaborate with and support creative people in all fields.

Abbeydale brews a beer specially for the annual Tramlines Festival, and CADS, an art gallery in Shalesmoor, is the venue for Tramlines' 'Blues and Ale' stage. Tramlines is the largest urban music festival in the UK, and as well as the stage and the festival beer, there are mini-beer festivals across the city, with many pubs hosting live music.

Thornbridge owns six pubs within the city of Sheffield, and according to the brewery's Alex Buchanan, "Music, beer, art and community" is the philosophy that drives them. In the past, Thornbridge has had local artists design some of its beer labels, and one of its regular beers is a collaboration with Sheffield band Reverend and the Makers. When Thornbridge took over the Greystones pub, they revived it as a live music venue where beer and legendary musicians go hand in hand.

"A reason beer becomes part of local culture is the amount of things like music gigs, art exhibitions, book launches, special interest lectures, poetry groups etc. that take place in pub function rooms, and local creative types (including brewers) can be inclined to support one another with a bit of civic pride being built on good local things." Andy Cullen, Sheffield CAMRA

Sheffield and the Craft Beer Revolution

Forty years ago, there was a consensus among serious beer drinkers that the only good beer in Britain was real ale.

This is no longer the case (if it ever was.) Real ale is thriving in the UK, but innovation in brewing and packaging techniques, and a shift from focusing simply on local tradition to looking at beer styles from around the world and experimenting with them, has created a broader craft beer culture across all formats and styles of beer. (n.b. for the purposes of this report, and in line with official CAMRA policy, we believe that cask or real ale is craft beer, but that not all craft beer is real ale.)

This is frustrating, because Sheffield was arguably the birthplace of the British craft beer movement. In 2005, Thornbridge began brewing beers that were heavily influenced by North America's heady, hoppy take on India Pale Ale (IPA), and experimenting with barrel ageing Imperial Stouts. They weren't the first British brewer to embrace ingredients like North American hops, but they were the first to create such an impact with them, with flagship beer Jaipur winning hundreds of awards at beer festivals. Initially in cask, Thornbridge also bottled their beers and quickly expanded into keg beers, challenging traditional expectations of a format more suited to foreign beer styles. While many commentators on the British beer scene would point to Scottish punks BrewDog kick-starting the British craft beer revolution in 2007, BrewDog head brewer Martin Dickie was brewing at Thornbridge for two years before he left to start BrewDog.

Craft beer is increasingly a mainstream proposition in cities across the UK. But despite being home to one of the earliest and most successful craft brewers in the country, Sheffield is not regarded as being in the front line.

"Sheffield has a passion for local and unique products, Beer is something we feel we can do very well and are proud of what we produce... The criticism I hear both locally and nationally is that there are a lot of breweries doing the same thing and we don't have two or three breweries really trying different things and embracing the keg/bottle/can markets in a similar way to what's happening presently in Manchester or Bristol. However we make the best cask pale ales in the country, easy!" Sheffield Brewer, answering our survey

Sheffield and the C-word

Good beer never left Sheffield. In other cities, craft beer appeared like an oasis in the desert, but Sheffield was already very happy with what it had.

While there may be a huge number of different beers brewed in Sheffield, many of them are very similar stylistically. Sheffield brews light, blonde pale ales that sell incredibly well in the city's pubs. Many brewers also brew a darker, richer Barnsley Bitter style. Beyond that, and with a few exceptions, there isn't the variety such a large number of brewers would imply.

"We have a good reputation but there are other cities with more progressive and exciting breweries. We have lots of great pubs and bottle shops but there is arguably still a lack [that is absent in the likes of Manchester, Leeds and Liverpool] for successful 'craft' beer bars." Sheffield brewer, responding to our survey

"There's no feeling of any bubble being about to burst in Sheffield (London has more of this potential problem). Progress is balanced and positive without being forced or too rapid." Sean Clarke, independent beer shop owner

Sheffield and the H-word

Craft beer, unfortunately and inaccurately, is often associated with 'hipsters.' The idea that interest in good beer might be an image thing rather than having anything to do with the product itself leads to talk of a craft beer 'bubble' – is this just a fad that will pass once fashionable people move on to the next thing?

As with any such analysis, this is far too simplistic – 23% of the UK population now claim to drink craft beer.

But the image dimension does play a role.

Sheffield as a city is unpretentious and laid back. The hipster subculture simply doesn't fit here the way it does in Manchester, Leeds or London. That may mean it's not as fashionable, but it also means that any developments in the beer scene here are far more likely to be sustainable.

While Sheffield may be the undisputed real ale capital of the world, there's a sense among some of the city's brewers and drinkers that in the wider world of craft beer, it's falling behind.

The Future of Beer and Brewing in Sheffield

We asked the brewers in our survey to rate how they felt Sheffield compared as a beer city to others in the UK. Their response was near unanimous.

Among those who feel Sheffield is good but not the best, the overwhelming response is that it's great at cask ale and has fantastic pubs but needs to broaden its horizons into the wider arena of craft beer, and become more adventurous with the styles it brews.

The good news is that this may be happening.

There's been a dramatic upswing in the number of new brewery openings in Sheffield, and the early signs are that a significant number of new openings will be brewing a broader range of beers.

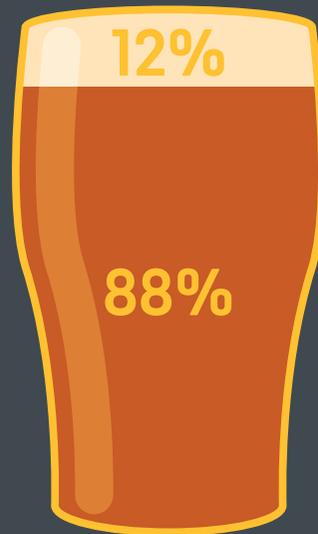
Stancill Brewery is making a big push with its new Sheffield Pilsner. Brewers such as Exit 33 and True North are creating strong hoppy IPAs in the American mould, with the latter also launching a gin distillery. Lost Industry is making experimental beers such as a 6% ABV Mojito Sour and a Sorachi-hopped Chilli IPA across a range of different formats.

Sentinel brewing is a new venture opening in the heart of the city as this report goes to press. Brewer and owner Alex Barlow has worked in the brewing industry all his life and lived in Sheffield for 25 years. His mission is to bring beer to more people, and see beer being drunk in a wider range of different occasions. He's taken over a former carpet warehouse that will feature a working brewery that people will be able to see from the bar and restaurant at the front of the building.

All items on the menu will be paired with beer. There are also dining rooms and meeting rooms to create a real beer destination in the heart of the city. The bar will feature six beers in keg and two on cask. These will comprise the brewery's own range and guest beers.

The guests will always feature other Sheffield breweries, plus others from Yorkshire and further afield. The tap selection will be supported by an extensive selection of bottled beers.

With Sentinel being just one of five brewery openings already slated for 2016, it's our conclusion that Sheffield is on the cusp of another big wave of brewing expansion that will take it from being the real ale capital of the world to being a modern beer city that rivals Portland, Oregon, Bruges in Belgium or Bamberg in Germany.



How do Sheffield's brewers rate it as a beer location compared to other cities in the UK?

- The best in the UK
- Above average
- No better or worse than elsewhere
- Below average
- Poor

Source: Survey of Sheffield City Region Brewers, March 2016 / Base: 25 brewers



Can Sheffield build on its real ale reputation to stake its place at the forefront of a national (and global) beer boom?



"As a brewery of 13 years the reputation of Sheffield as a beer city has enabled us to grow our business and trade throughout South Yorkshire."

Sheffield brewer answering our survey

Conclusions

1. Sheffield is one of the premier beer cities in the world – it needs to tell people!

Sheffield is the real ale capital of the world, and yet the city does nothing to promote its beer and pub scene, which means it's consequently ignored in any round-up of the world's great beer destinations.

Sheffield needs a firm acknowledgement of its beer scene and the colossal benefits this brings to the city. Sheffield City Council recently conducted a 'Consultation on Citywide Options for Growth' that completely ignored the role of beer and pubs in the city. The report speaks of a desire to make Sheffield the outdoor leisure capital of the UK, but not the beer capital of the world. It says visitors should be able to enjoy a variety of world-class brands but doesn't once mention the incredible number of local breweries. It talks about 'retailers, cafés, museums and art galleries', but doesn't mention the city's amazing pubs at all. Brewers and CAMRA have spoken to the council on the subject of promoting beer and pubs and the benefit this could bring to the city, but no action has been taken.

"Sheffield, if the city wished, could easily take second place to Bruges on the European 'beer holiday' scene. Sheffield has niche pubs, an excellent, diverse beer scene and is light-years away from the corporate extravaganza which the Munich Oktoberfest has become. In years to come, the 'Neepsend brewery trail' could, and should, become a 'must-see' attraction. Beer tourism is something which, in a vision such as this, Sheffield City Council should not ignore. It currently brings vastly more income to the City than the annual two-week, Snooker World Championship and is a potential growth area." Andy Cullen, Sheffield CAMRA

Sheffield's brewers aren't keen on promoting themselves either. Only half the brewers in the Sheffield City Region responded to the survey we conducted for this report. 'Made in Sheffield' is a mark that seeks to promote this 'city of makers' to the wider world, but only three brewers feature among the hundreds of companies signed up to it. Small-scale brewers may be too busy to engage in such marketing exercises. If so, someone needs to help them do it.

2. Sheffield's Beer Scene is testament to a friendly, welcoming city

This is one of the city's key strengths. Beer and pubs attract people to the city and keep them here. Sheffield has a reputation for having one of the highest stay-on rates of students who come here after they graduate, and the night-time economy plays a significant role in that.

But just as impressive is the roll-call of people who were not born in Sheffield but were inspired to stay here and help create the beer scene: Alex Barlow of Sentinel Brewing, Jules Gray, organiser of Sheffield Beer Week, John Hamshere of the Kelham Island Museum, even Dave Wickett who got the whole thing moving with the Fat Cat and the Kelham Island Brewery, all came to Sheffield and were inspired to stay and help build its brewing scene.

This is how Sheffield works. And it translates into significant beer tourism.

3. Sheffield should do more to help its excellent pubs

Sheffield values the importance of buildings with historically significant interiors. The city includes a growing number of pubs whose interiors are rated by CAMRA as assets of Regional or National Importance. These pubs must be supported as any other historically significant building would be – and celebrated as the tourist attractions they undoubtedly are.

"We have traditional & historic pubs, we have punky new kids on the block, we have successful micro-pubs, music pubs, a thriving bottle shop & growler scene, successful beer festivals all year round, an ever expanding number of breweries and a collaborative approach to beer across the city. The city takes beer seriously, but never takes it too seriously, balancing a need for a positive beer scene without the constant or over eager need to be seen as the UK's best." Sean Clarke, independent bottle shop owner

4. Sheffield should facilitate its brewers working together (but not get in the way)

Sheffield is honest, down to earth and laid back, so much so that the last thing it needs is a report saying its down to earth nature is its greatest value, a marketing campaign selling its laid back air, or a fund or prize celebrating its honesty.

Sheffield's brewers neither want nor need interference in how they do their jobs. What would be useful, if any investment were available, would be help with promotion and marketing, helping beers become more widely known. Allow the DIY aesthetic to thrive; let it breathe, let it be organic.

"We could always do more to push and help promote each other, Sheffield Beer Week is a great example but I'd always say closer ties in an ideal world would be better (but brewers are always busy and knackered.)" Sheffield brewer responding to our survey

Recommendations

Promoting Sheffield as The Beer City

Sheffield's brewers and pubs won't shout about themselves – it's not what they do. They need Sheffield more broadly to shout on their behalf. In return, they'll deliver even greater economic and cultural benefit to the city than they already do.

Sheffield needs a dedicated online resource promoting its beer and pubs, linked to from any Sheffield tourism site, and kept up to date. It needs to be tonally right, and needs to focus on all locally produced beer, not just real ale.

Sheffield should then invest in dedicated PR support that helps build awareness outside the city of its beer scene, ensuring it gets onto regular round-ups of great beer cities. (e.g. to date The Guardian has published guides to the Top Ten Craft Beer Pubs in London, Birmingham, Bristol, Cambridge, Leeds, Belfast, York, Oxford, Liverpool, Cardiff, Edinburgh, Glasgow, Brighton, Newcastle, Manchester, but not Sheffield.)

Beer writers and travel writers regularly receive invitations to cover the beer scene in Flanders or the Czech Republic. Why not Sheffield?

Events: Sheffield Beer Week

Sheffield Beer Week is a perfect example of Sheffield's self-starting ethos. After two years it's already become one of the main events in the city's beer calendar, but as a tiny, not-for-profit initiative effectively being run by one person, there are limits on how big it could eventually become. The Norwich City of Ale event is heavily supported by the Business Improvement District. The original and largest Beer Week in Philadelphia has one full time member of staff, a board of directors appointed from local bars and brewers and events all across the city that are tied to coincide with and amplify the main programme. If Sheffield were to support and grow Sheffield Beer Week it could easily become known internationally as the premier beer event in a premier beer city.

Canning and/or bottling line

Most of Sheffield's brewers operate on a small scale and are restricted to draught beer, mainly in cask. This severely limits their ability to sell beer to a wider geographic audience, and curtails hopes of getting into the off-trade, which now accounts for half of all British beer sales.

Bottling and canning lines are expensive investments – far too great for most of Sheffield's brewers.

"As yet nobody round here, to my knowledge, is big enough to get their own canning machinery. Cans clearly offer many advantages over bottles, but set-up costs are very high. I had hoped the 'mobile canning' and 'canning to order' concepts might work, but so far in my experience quality has not been good." Dave Szejkowski, brewer

So what about a cooperative joint venture?

South East Bottling (www.sebottling.co.uk) was set up by three brewers: Sambrooks, Gadd's and Westerham in the South East of England. They are all shareholders in a flexible bottling line located in a unit on an industrial estate in Broadstairs, Kent, which can be hired by other local breweries.

Sheffield is a compact city with space available for such a facility, but even as a cooperative the cost of such a line is out of reach of many. If Sheffield City Council or any business development organisation did have funds to invest, Sheffield's brewers tell us this is where that investment could make the most dramatic difference to the city's brewing scene. It would allow brewers finally to sell their beers well beyond the city, in venues other than Sheffield's pubs, and thereby play a key role in building Sheffield's reputation as a beer city.

Education

There are only two university degree courses in the UK that specialise in brewing, the main one being at Heriot Watt in Edinburgh, the other a newly launched course at Nottingham University. There was briefly an MSc course in Microbrewing at the University of Sheffield, but this course no longer seems to run. It would be hugely valuable if revived as part of a broader campaign to showcase Sheffield as The Beer City. The newly opened Sentinel Brewery will be holding educational courses in beer but it would be great to see this spur a broader momentum.

Collaboration

Sheffield's brewers could, of course, do more to help themselves. While everyone is busy in a small-scale business with day-to-day brewing, there's a natural spirit of collaboration in the city and huge potential for brewers to increase their engagement with local artists, designers and musicians, and work together on mentoring new brewers and brewing collaborative beers to create more news and excitement in the city's beer scene.





A Bright Future?

Sheffield is a vibrant beer city with a great brewing heritage.

Within the beer world, it's acknowledged as one of the best places to drink cask ale, and seems to be on the cusp of a new boom that expands this traditional offering and takes Sheffield firmly into the future of craft beer. Beer and pubs undoubtedly contribute a massive amount to the city both culturally and economically, driving tourism and providing the glue that brings together Sheffield's amazing broader artistic and creative communities.

But no one talks about this, and therefore there's a gap between the reality of brewing in Sheffield, and the broader (lack of) perception of it.

Sheffield's brewers and beer fans will continue to thrive whether or not they receive help and recognition. They won't ask for help because they don't need it, and because they're stubborn and don't like to ask. But if help is given, they can make a much bigger contribution to the life of the city.

After reading this report, go and check out the world's greatest beer cities, those that are feted for their beer heritage, where beer is sold as one of the key attractions of the city. Look at Munich, Bruges, Portland, London, and you'll see that Sheffield has at least as much right as any of them to compete for the title of the world's greatest beer city. The benefits of doing so to Sheffield's hotels, B&B's, restaurants, pubs and cafés, not to mention the city's image more generally, would be significant indeed.

Appendix: Breweries in the Sheffield City Region

(As of April 2016)

Brewery Name	District	Year Founded	Brewery Name	District	Year Founded
Wentworth	Barnsley	1999	Pigeon Fishers	NE Derbyshire	2014
Acorn	Barnsley	2003	Hopjacker	NE Derbyshire	2015
Barnsley Beer Company	Barnsley	2010	Drone Valley	NE Derbyshire	2016
Geeves	Barnsley	2011	Chantry	Rotherham	2012
Two Roses	Barnsley	2011	Kelham Island	Sheffield	1990
Springhead	Bassetlaw	1990	Abbeydale Brewery	Sheffield	1996
Idle	Bassetlaw	2007	Bradfield	Sheffield	2005
Double Top	Bassetlaw	2010	Sheffield	Sheffield	2007
Dukeries	Bassetlaw	2012	White Rose	Sheffield	2007
Hale's	Bassetlaw	2013	Exit 33	Sheffield	2008
Idle Valley	Bassetlaw	2014	Steel City	Sheffield	2009
Welbeck Abbey	Bolsover	2011	Blue Bee	Sheffield	2010
Townes	Chesterfield	1994	On the Edge	Sheffield	2012
Brampton	Chesterfield	2007	Dronfield	Sheffield	2013
Raw	Chesterfield	2010	Tapped	Sheffield	2013
Haywood Bad Ram	Derbyshire Dales	2003	Toolmakers	Sheffield	2013
Peak Ales	Derbyshire Dales	2005	Emmanuales	Sheffield	2014
Thornbridge	Derbyshire Dales	2005	Fuggle Bunny	Sheffield	2014
Intrepid Brewing Co	Derbyshire Dales	2014	Stancill	Sheffield	2014
Matlock Wolds Farm	Derbyshire Dales	2014	Lost Industry	Sheffield	2015
Concertina	Doncaster	1992	Neepsend	Sheffield	2015
Glentworth	Doncaster	1996	North Union	Sheffield	2015
Imperial Club & Brewery	Doncaster	2010	Regather	Sheffield	2015
Doncaster	Doncaster	2012	The Brew Foundation	Sheffield	2015
Spire Brewing Co	NE Derbyshire	2006	True North	Sheffield	2016
Ashover	NE Derbyshire	2007	Aardvark	Sheffield	2016
Barlow	NE Derbyshire	2009	Little Critters	Sheffield	2016
Instant Karma	NE Derbyshire	2012	Sentinel	Sheffield	2016
Heath Village	NE Derbyshire	2014			



Acknowledgements

Commissioned by Prof. Vanessa Toulmin, Director of City & Cultural Engagement, on behalf of The University of Sheffield.

Written by Pete Brown, freelance writer, author and consultant
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Research and further assistance from Jules Gray, Director, Sheffield Beer Week, and proprietor of Hop Hideout.
www.hophideout.co.uk

Alex Buchanan from Thornbridge.

Depth interviews and further comment from:
Nick Simmonite, Publican, Frog & Parrot
Bob Phaff, brewer, True North Brewing
Alex Barlow, Sentinel Brewing
Dave Szewjkowski, Steel City Brewing
Sean Clarke, Beer Central Ltd.
John Hamshere, Kelham Island Industrial Museum
Dave Pickersgill and Andy Cullen, Sheffield CAMRA

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Photography: Shaun Bloodworth; Jules Gray
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