



National Beer Wholesalers Association

NBWA Fact Sheet

November 2012

Number of Breweries -- 2012:

Did you know that the number of breweries continues to grow? According to the federal government's Alcohol Tax and Trade Bureau (TTB) there are now 2,031 breweries in the United States. Some companies have more than one brewery.

Barrels (31 gallons)	Number of Breweries	Percentage of Total
1-1000	1,339	65.9%
1001-7500	464	22.8%
7500-15000	56	2.8%
15001 - 60000	85	4.2%
60001-100000	16	0.8%
100001-1,999,999	50	2.5%
2,000,000 - 6,000,000	5	0.2%
6,000,000+	16	0.8%

Source: TTB 10/25/2012

Number of Breweries – 1991:

Thirty years ago there were 48 breweries. Twenty years ago there were 350 breweries. Ten years ago there were 1,499 breweries.

Source: Brewers Almanac

BREW PUBS:

Brewpub operators who produce less than 5,000 barrels per calendar year who do not package (keg, bottle or can) beer are eligible to file a Brewpub Report of Operation. That means all of the beer that the brewer produces is sold on premise at the tavern.

The numbers from the Brewpub Report of Operation are as follows:

<u>Barrels Produced</u>	<u>Number of Brewers</u>
1-1000	372
1001-5000	44

Brewpub operators who produce less than 5,000 barrels per calendar year who package beer must file a Brewer's Report of Operation. That means some of the beer produced by the brewer is sold on premise and the rest is sold off premise.

The numbers from the Brewer's Report of Operations are as follows:

<u>Barrels Produced</u>	<u>Number of Brewers</u>
1-1000	750
1001-5000	287

Source: TTB 5/24/11

Market Share of Brewers:

Beer has had varied patterns of regional brewers to national brewers and a trend back towards regional breweries is again manifesting itself. Currently there are two large corporations dominating the volume of beer sold in the United States. However, this is a relatively new phenomenon.

2010:

ABInBev	49.3
MillerCoors	30.2
Crown Imports (e.g. Corona)	5.3
Heineken USA	4.0
Pabst	2.7
Diageo-Guinness	1.2
Others	7.3

Source: Adams Beer Handbook 2010

However, it has not always been this way. Thirty years ago, Anheuser Busch was well on its way to growing market share but there were many other strong, regional breweries. The #2 brewery in 2010 has more market share than the top brewery 30 years ago.

1971

ABInBev	29
Schlitz	19
Fallstaff	13
Schaefer	8

Source: Beer Marketer's Insights

Distributors

Number of SKUs per distributor:

1996	190
2003	200
2007	262
2009	470
2011	535.5

Source: NBWA Distributor Productivity Report

Number of Distributors

1980	4,595
1990	3,661
2000	3,180
2010	2,039
2011	3,333

Source: Brewers Almanac and Beer Serves America

Alcohol Beverage of Choice

Although there have been articles about widespread shifts of legal drinkers from beer to spirits or wine the annual Gallup survey has shown remarkable stability in consumer preferences over the past decade.

	Beer	Wine	Spirits
2001	43%	31%	22%
2002	46%	31%	18%
2003	44%	33%	22%
2004	42%	33%	22%
2005	39%	33%	21%
2006	39%	36%	21%
2007	41%	33%	23%
2008	40%	34%	22%
2009	42%	31%	23%
2010	40%	34%	21%
2011	41%	32%	21%

Source: Gallup Poll

<http://www.gallup.com/poll/141656/drinking-rate-edges-slightly-year-high.aspx>

Percentage of People who do not Consume Alcohol

Other than an outlier jump in the 1990 survey, the number of Americans who do not consumer alcohol has remained steady.

1981 - 30%

1990 - 44%

2002 - 34%

2011 - 33%

Source: Gallup Poll

<http://www.gallup.com/poll/141656/drinking-rate-edges-slightly-year-high.aspx>