

The Economic Impact and Value Added by U.S. Beer Distributors

February 2020

Prepared for the National Beer Wholesalers Association

by

Applied Business and Economic Research Associates:

Paul Larson, Ph.D.

William Latham, Ph.D.

Kenneth Lewis, Ph.D.

EXECUTIVE SUMMARY

Economic impact analyses of the U.S. Beer industry have been performed at both the national and state levels for several decades. Previous studies quantified the economic impact to each state's economy, while other studies include only single states or regions.

This current report for 2020, produced for the National Beer Wholesalers Association (NBWA), updates the impacts and beer distributors' direct operations, capital investment activities and community involvement activities, and it includes a qualitative description of the value beer distributors (wholesalers) provide across the beer industry's supply chain.

Key findings for the United States include from 2019:

1. Beer distributors directly employ approximately 142,000 full-time equivalent persons paying \$9.9 billion in income through wages, salaries, benefits and profits. In total, the industry helps to create over 387,000 jobs and generates \$23 billion in income.
2. Beer distributors directly impact the economy through \$34.5 billion of production. When including indirect effects on other industries, capital investment spending that is different from other wholesaling operations, and charitable activity, beer distributors help to add \$87 billion to the national total value of production (Gross Domestic Product).
3. Beer distributors directly generate \$12.2 billion in federal, state, and local tax revenue through business and employment taxes.
4. Each full-time job at a beer distributor supports 2.73 jobs, \$165,000 of income, and \$614,000 of production within the national economy.
5. The beer industry's unique features and regulation make beer distribution particularly beneficial from an economic perspective. The direct economic benefits of efficient distribution are supplemented by reductions in resources used to bring product to market while providing greater value, choice and variety for consumers.
6. Beer distributors provide many economic benefits that enhance the overall industry: from protecting and maintaining the quality of the product; to representing the industry in policy and public health matters; to collecting state excise taxes; and promoting industry standards.
7. Beer distributors are good citizens in their communities across the U.S. They support numerous community events, a wide array of charitable activities and many activities promoting local economic development. In addition, they play a vital role in responsibility efforts that help reduce drunk driving, alcohol abuse and underage drinking through alcohol awareness and education initiatives.

METHODOLOGY

For this report, the National Beer Wholesalers Association (NBWA) requested a broader and deeper examination of the role and value of beer distributors in the United States, highlighting the value wholesaling adds to the industry. Our description of the value added by wholesalers is largely qualitative, based on economic theory, examples of similar industries, and existing research.

We also updated our quantitative analysis of the impact of the industry on economies. We input employment and or production data from wholesalers into an economic model of inter-industry trade within and between states. This model estimates the impact on industries that supply products and services in support of beer distribution, such as vehicles or accounting services, plus the impact on industries that support distributors' employees, such as restaurants, medical care, and retail stores. We report production, jobs, income, and taxes resulting directly from beer wholesalers, which then gets "multiplied" to include the indirect impacts on other industries. We report the total impact on each state and interpret the multipliers for policy implications.

This report expands the usual economic impact analysis in five important ways:

- (1) This report recognizes that distributors' impacts extend beyond their own states' borders; quantifies these effects; and adds them to the usual isolated-state economic impacts. Simply adding the usual state-level impacts, which do not recognize the inter-state effects, fails to account for a sizable portion of the economic contributions of beer distributors.
- (2) This report measures the volume of distributors' capital investment activities including structures, vehicles, software, energy-saving technology and other equipment such as the substantial amounts of refrigeration equipment required for a perishable commodity like beer. The study adds the impacts of investments in all these areas to the usual impact of distributor operations;
- (3) This report measures the value distributors add in their local communities from supporting community events and local economic development to contributing to charitable causes and promoting responsible alcohol use. This report adds the impacts of these activities to the usual impacts of distributor operations.

ANALYSIS:

The economic impacts of distribution networks are often overlooked in the general economy with manufacturers and retailers typically getting a greater share of attention from consumers and the media. But in between, America's distribution and wholesale networks help the economy run smoothly and yield *economic surplus* that translates to jobs and income for employees, and satisfaction with consumers' purchases. From large urban markets to small rural markets, a sophisticated logistical support network is necessary to bring products to

retailers around the country. The cost savings resulting from distribution efficiencies mean more variety, more choices, and better prices for consumers.

It is natural, in any industry, for firms to evolve and adopt technologies that increase economic surplus by reducing costs or increasing demand. For a product such as beer, the cost advantages of producing large batches has led to very large breweries over time. However, the continued growth in consumer demand for craft beverages has directly led to a significant increase in the number of small manufacturers.

The alcohol beverage market in the U.S. has become more complex and competitive than ever. Today, more than 600,000 licensed alcohol beverage retailers sell products to more than 100 million legal drinking age consumers. The 2019 Annual Report from the U.S Tax and Trade Bureau (TTB) reported more than 99,000 regulated industry members in the U.S., including more than 26,000 permitted alcohol distributors (wholesalers); 11,500 permitted breweries; 15,000 permitted wineries; 3,700 distilled spirits producers; and more than 13,000 alcohol importers. In FY 2019, TTB received approximately 199,000 label applications and more than 20,000 formula applications for new alcohol beverages in one year alone. One industry source has the total number of alcohol beverage items available in the marketplace estimated at over 400,000.¹

The efficiency of large distribution networks has resulted in the development and evolution of the current beer industry. Economists refer to the efficiencies of being large **as economies of scale**. Simply put, this means that cost per unit fall when more units are produced. There may a point when a business can become *too* large and it experiences rising costs per unit or **diseconomies of scale**. For a distribution network, this only occurs with an exceptionally large volume, if at all.

Figure 1 below represents an open industry where four breweries transport product directly to retailers. In this hypothetical example, each producer delivers to each retailer, and there is significant crossing over of routes. Realistically, trucks would be only partially filled, or trucks would run each route infrequently reducing average freshness at each retailer.

Contrast this with the industry in Figure 2, where wholesalers not only clusters of routes together, but there is also a decrease in routes originating from each brewery and arriving at each retailer. Whereas in the open industry, each producer delivered to each of the seven retailers, the breweries now deliver to each wholesaler. Likewise, retailers accept deliveries from only a single wholesaler rather than each brewery.

The industry with wholesaling includes fewer routes driven, fewer miles traveled, fuller deliveries, and more frequent deliveries. With regards to burdens of acquiring and maintaining agreements between businesses, every brewer and retailer experience is better off. Each

¹ See *Wine and Spirits Daily*, January 29 ,2020.

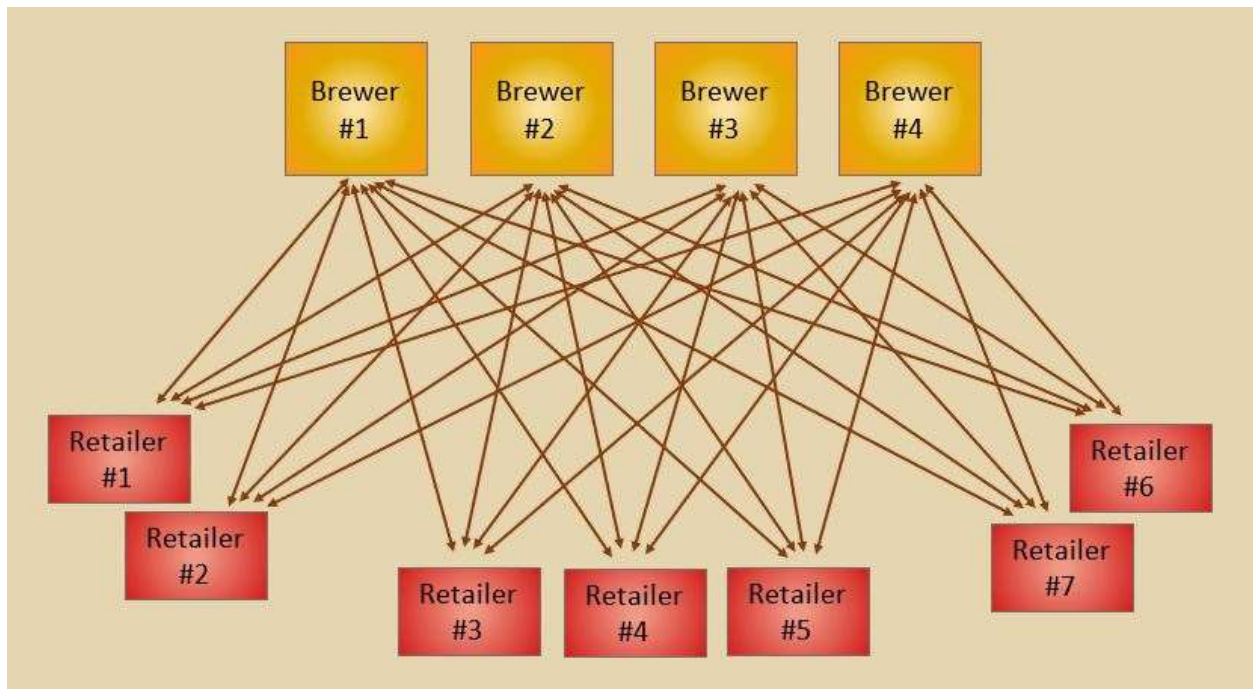


Figure 1 – Inefficient Distribution from Producers Directly to Retailers

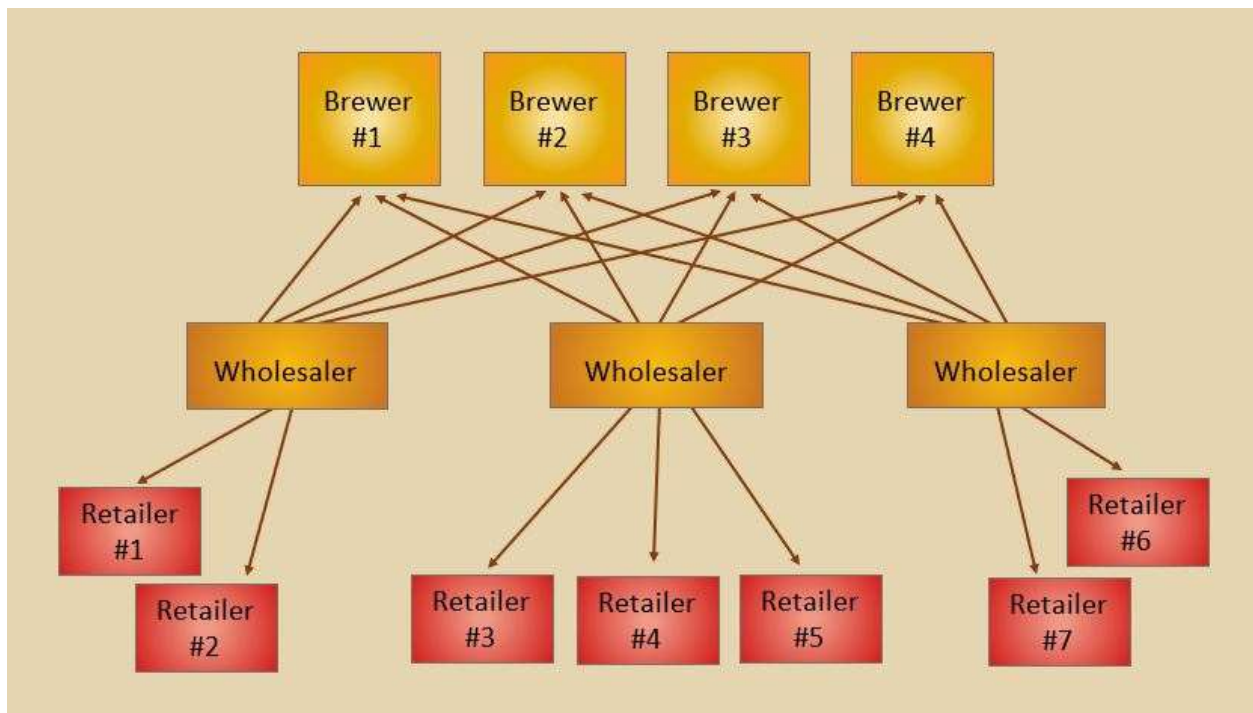


Figure 2 – Cost Effective Distribution from Producer to Retailer through a System of Wholesalers

brewer inevitably works with fewer recipients in the case of wholesaling versus retailers, and each retailer works fewer wholesaler despite receiving products from many brewers.

Large companies could internalize most of the benefits of a large distribution network. Thus, reduction in distribution costs from wholesaling are mostly felt by small companies. A 2014 study estimated the cost of beer delivery and sales would increase 14% for major domestic breweries, but triple for craft breweries, without an open network of wholesalers.²

PRODUCTION, JOBS, AND INCOME ACROSS THE NATION

The value added throughout the industry by wholesalers is difficult to quantify; the effects are intertwined, and some individual aspects might be slightly harmful to a few individuals while benefiting the rest. However, the production, job creation, and income generating by wholesalers can be measured using established techniques.

These are referred to as the ***economic impact*** of an industry. The direct impact of an industry measures the jobs, payroll and output created directly by the distributors in their own operations. ***Indirect effects*** are the additional jobs, payroll and output created when the beer distributors purchase goods, equipment and services from the many diverse businesses that support them. These businesses include providers of office supplies, fuel for trucks, utilities, insurance and many other business services. It is important to note that these providers *do not* include the suppliers of the beer and other products that are handled by the distributors. Additional rounds of indirect effects occur as providers make purchases from their own input providers. ***Induced effects*** measure the additional jobs, payroll and output created throughout the economy when the employees of the distributors or of the indirect providers, in any of the rounds, make purchases of consumer goods, other property and services or pay taxes using their wages and salaries. The ***total effect***, or total impact, is simply the sum of direct, indirect and induced effects.

The indirect and induced effects are sometimes lumped together as ***multiplier effects***. This term is used to describe a simple interpretation of calculated results. For example, \$200 million of direct production that supports an additional \$100 million of additional production for a total impact of \$300 million. We say that the production ***multiplier*** is $(\text{Total}) / (\text{Direct}) = \$300 / \$200 = 1.5$, and we interpret that to mean that each \$1.00 of direct activity results in a total impact of \$1.50 within the region. Similar calculations and interpretations are used for ***jobs multipliers*** and ***income multipliers***.

Simple calculations of multiplier effects would measure the multiplier effects of, for example, an employee at a Delaware wholesaler spending wages at a grocery store in Delaware, but they miss any spending in Delaware by an employee who lives and works just across the border in

² See Exhibit 2 from Houghton, Neil and Gjaja, Marin, "For Small and Large Brewers, the U.S. Market Is Open." Boston Consulting Group. June 19, 2014. <https://www.bcg.com>.

Maryland. Our analysis, as has been true in previous versions of our reports, includes estimates of these interstate impacts.

For the wholesale beer industry, estimates of economic impacts are summarized as follows:

	Production	Employment	Income
Direct Impact	\$ 34,543,495,620	142,095	\$ 9,880,866,000
Multiplier Effects	\$ 47,717,795,729	219,284	\$ 11,995,435,361
Additional Impacts*	\$ 5,013,957,368	26,294	\$ 1,562,467,815
Total Economic Impact	\$ 87,275,248,717	387,674	\$ 23,438,769,176
<i>Multipliers</i>	<i>2.53</i>	<i>2.73</i>	<i>2.37</i>
<i>Range of Multipliers for Individual States</i>	<i>1.67 - 2.88</i>	<i>1.51 - 3.12</i>	<i>1.60 - 2.63</i>

** Additional impacts include direct and multiplier effects of charitable activities and capital investment.*

An estimated \$34.5 billion of production at beer distributors generates \$49.5 billion in additional purchases by the distributors and their employees. This additional production supports over 226,000 jobs and nearly \$12 billion in income. A per-unit interpretation is that each dollar of production at a beer distributor supports a total of \$2.53 of production within the national economy. Similarly, each full-time job at a beer distributor supports a total of 2.78 jobs nationally, with the additional 1.78 jobs earning, on average, \$53,000 per year.

Not reported in the above table is a total impact of \$12.2 billion of national, state, and local tax revenue.

APPENDIX 1
Impacts Summarized by Impact Type

Summary Totals	Total Output	Total Employment	Total Income	Total Taxes
Alabama	\$ 1,296,752,182	6,498	\$ 333,591,190	\$ 185,787,885
Alaska	\$ 203,287,085	861	\$ 51,728,124	\$ 43,607,413
Arizona	\$ 1,802,801,249	8,391	\$ 474,330,133	\$ 242,640,325
Arkansas	\$ 644,165,980	3,058	\$ 162,406,747	\$ 100,299,163
California	\$ 9,262,593,723	38,179	\$ 2,547,968,674	\$ 1,464,712,367
Colorado	\$ 1,554,713,125	6,588	\$ 400,396,703	\$ 182,988,361
Connecticut	\$ 899,182,992	3,185	\$ 229,376,258	\$ 129,179,731
Delaware	\$ 341,807,735	1,193	\$ 69,582,734	\$ 46,271,817
District of Columbia	\$ 228,514,821	737	\$ 60,461,646	\$ 35,687,014
Florida	\$ 6,116,381,993	28,123	\$ 1,559,331,481	\$ 821,923,556
Georgia	\$ 2,342,346,204	10,497	\$ 619,320,259	\$ 296,706,181
Hawaii	\$ 376,907,167	1,969	\$ 108,929,831	\$ 55,209,058
Idaho	\$ 662,454,278	3,388	\$ 156,588,725	\$ 90,169,104
Illinois	\$ 3,504,281,344	13,952	\$ 906,606,223	\$ 455,997,754
Indiana	\$ 1,107,737,831	5,339	\$ 282,513,595	\$ 143,831,834
Iowa	\$ 782,962,665	3,782	\$ 199,266,271	\$ 106,520,692
Kansas	\$ 701,494,688	3,224	\$ 179,868,040	\$ 90,311,738
Kentucky	\$ 870,990,860	4,201	\$ 220,592,061	\$ 132,065,582
Louisiana	\$ 1,623,831,309	8,219	\$ 477,349,386	\$ 240,656,507
Maine	\$ 647,654,030	3,311	\$ 175,283,824	\$ 98,776,045
Maryland	\$ 1,152,742,488	5,026	\$ 332,709,693	\$ 182,406,549
Massachusetts	\$ 1,530,110,476	6,381	\$ 487,351,952	\$ 207,735,951
Michigan	\$ 2,964,880,577	13,741	\$ 798,432,522	\$ 384,542,974
Minnesota	\$ 1,705,294,415	7,276	\$ 452,400,293	\$ 214,425,966
Mississippi	\$ 582,071,591	2,919	\$ 139,294,823	\$ 96,929,144
Missouri	\$ 1,749,359,506	8,513	\$ 488,178,200	\$ 205,753,941
Montana	\$ 554,708,250	2,630	\$ 117,115,214	\$ 83,284,061
Nebraska	\$ 432,695,388	2,206	\$ 125,048,480	\$ 55,417,847
Nevada	\$ 662,579,497	3,121	\$ 175,426,888	\$ 99,103,452
New Hampshire	\$ 470,467,654	1,997	\$ 120,371,281	\$ 59,630,966
New Jersey	\$ 1,410,646,230	9,012	\$ 655,945,669	\$ 218,034,469
New Mexico	\$ 393,655,786	2,099	\$ 99,809,636	\$ 63,445,769
New York	\$ 5,113,576,878	19,837	\$ 1,497,438,116	\$ 852,495,103
North Carolina	\$ 2,270,763,598	10,968	\$ 607,619,549	\$ 294,955,406
North Dakota	\$ 261,285,075	1,067	\$ 59,590,789	\$ 42,787,407

(continued on next page)

Summary Totals (cont.)	Total Output	Total Employment	Total Income	Total Taxes
Ohio	\$ 3,201,664,175	14,636	\$ 834,905,361	\$ 399,792,316
Oklahoma	\$ 827,382,765	3,831	\$ 200,690,327	\$ 116,156,958
Oregon	\$ 1,503,842,575	7,346	\$ 420,772,330	\$ 177,127,229
Pennsylvania	\$ 3,788,974,497	16,404	\$ 1,054,945,873	\$ 526,839,772
Rhode Island	\$ 120,032,136	516	\$ 31,882,026	\$ 19,702,958
South Carolina	\$ 1,353,792,940	6,551	\$ 330,922,012	\$ 212,685,259
South Dakota	\$ 241,596,829	1,143	\$ 57,547,975	\$ 33,429,363
Tennessee	\$ 1,802,404,254	8,681	\$ 509,178,687	\$ 244,954,990
Texas	\$ 10,028,874,256	41,018	\$ 2,518,569,153	\$ 1,214,863,264
Utah	\$ 475,210,361	2,345	\$ 127,485,809	\$ 59,239,826
Vermont	\$ 352,583,262	1,680	\$ 83,488,633	\$ 57,588,588
Virginia	\$ 2,231,985,187	9,849	\$ 626,485,453	\$ 315,939,246
Washington	\$ 2,460,041,251	9,402	\$ 572,075,197	\$ 390,054,870
West Virginia	\$ 415,115,425	2,036	\$ 99,701,434	\$ 71,392,927
Wisconsin	\$ 2,012,131,152	9,653	\$ 536,764,826	\$ 265,233,871
Wyoming	\$ 233,918,984	1,094	\$ 61,129,067	\$ 44,539,829
U.S. Total	\$ 87,275,248,717	387,674	\$ 23,438,769,176	\$ 12,173,832,396

Impacts on Production and Output	Direct Output By Beer Wholesalers	Indirect Spending By Other Firms	Output Induced by Spending of Wages	Total Output From Operations	Additional Output: Charitable Activities	Additional Output: Capital Investments	Total Economic Impact on Output
Alabama	\$575,269,967	\$291,681,295	\$382,181,808	\$1,249,133,070	\$2,627,742	\$44,991,370	\$1,296,752,182
Alaska	\$104,417,545	\$46,702,641	\$45,858,895	\$196,979,082	\$333,254	\$5,974,749	\$203,287,085
Arizona	\$662,357,067	\$428,138,078	\$644,088,478	\$1,734,583,623	\$4,057,389	\$64,160,237	\$1,802,801,249
Arkansas	\$309,000,494	\$135,642,727	\$176,733,545	\$621,376,766	\$1,215,822	\$21,573,391	\$644,165,980
California	\$3,403,259,724	\$2,262,520,940	\$3,204,330,058	\$8,870,110,721	\$22,088,509	\$370,394,493	\$9,262,593,723
Colorado	\$540,180,878	\$380,145,795	\$567,679,612	\$1,488,006,285	\$3,757,630	\$62,949,210	\$1,554,713,125
Connecticut	\$387,057,252	\$191,109,906	\$294,803,854	\$872,971,012	\$1,436,749	\$24,775,232	\$899,182,992
Delaware	\$148,808,925	\$73,287,549	\$110,174,002	\$332,270,477	\$494,924	\$9,042,333	\$341,807,735
Dist. of Columbia	\$136,510,490	\$51,384,913	\$36,595,827	\$224,491,230	\$203,095	\$3,820,496	\$228,514,821
Florida	\$2,218,256,633	\$1,528,569,958	\$2,148,719,531	\$5,895,546,123	\$12,883,136	\$207,952,734	\$6,116,381,993
Georgia	\$881,568,346	\$540,453,612	\$822,100,185	\$2,244,122,143	\$9,416,772	\$88,807,288	\$2,342,346,204
Hawaii	\$166,839,763	\$100,628,820	\$97,200,340	\$364,668,923	\$751,489	\$11,486,756	\$376,907,167
Idaho	\$296,753,381	\$157,707,729	\$193,928,730	\$648,389,841	\$788,381	\$13,276,057	\$662,454,278
Illinois	\$1,303,263,043	\$787,614,374	\$1,281,051,281	\$3,371,928,697	\$7,459,531	\$124,893,115	\$3,504,281,344
Indiana	\$465,549,080	\$233,309,880	\$354,934,870	\$1,053,793,829	\$2,872,963	\$51,071,039	\$1,107,737,831
Iowa	\$350,815,656	\$173,616,712	\$227,322,429	\$751,754,797	\$1,652,431	\$29,555,437	\$782,962,665
Kansas	\$304,560,646	\$156,612,457	\$215,385,489	\$676,558,592	\$1,380,154	\$23,555,942	\$701,494,688
Kentucky	\$395,495,204	\$190,327,071	\$250,146,921	\$835,969,196	\$1,889,467	\$33,132,197	\$870,990,860
Louisiana	\$720,099,123	\$365,827,541	\$494,829,064	\$1,580,755,728	\$2,402,459	\$40,673,122	\$1,623,831,309
Maine	\$265,799,495	\$153,684,789	\$211,097,657	\$630,581,941	\$940,392	\$16,131,697	\$647,654,030
Maryland	\$480,423,374	\$266,815,742	\$364,007,047	\$1,111,246,163	\$2,372,365	\$39,123,960	\$1,152,742,488
Massachusetts	\$584,773,803	\$343,836,080	\$540,143,795	\$1,468,753,678	\$3,430,842	\$57,925,956	\$1,530,110,476
Michigan	\$1,199,580,881	\$652,035,718	\$1,023,771,402	\$2,875,388,000	\$4,967,057	\$84,525,520	\$2,964,880,577
Minnesota	\$617,649,937	\$378,836,879	\$647,103,521	\$1,643,590,337	\$3,464,170	\$58,239,908	\$1,705,294,415
Mississippi	\$277,520,715	\$126,954,098	\$151,398,365	\$555,873,178	\$1,453,764	\$24,744,649	\$582,071,591

(continued on next page)

Impacts on Production and Output (cont.)	Direct Output By Beer Wholesalers	Indirect Spending By Other Firms	Output Induced by Spending of Wages	Total Output From Operations	Additional Output: Charitable Activities	Additional Output: Capital Investments	Total Economic Impact on Output
Missouri	\$671,176,258	\$413,771,270	\$601,061,831	\$1,686,009,358	\$3,398,125	\$59,952,023	\$1,749,359,506
Montana	\$251,655,243	\$127,484,207	\$160,983,681	\$540,123,131	\$805,139	\$13,779,980	\$554,708,250
Nebraska	\$180,517,408	\$102,493,723	\$129,476,287	\$412,487,418	\$1,103,923	\$19,104,047	\$432,695,388
Nevada	\$268,108,989	\$162,716,998	\$198,715,561	\$629,541,548	\$1,927,152	\$31,110,797	\$662,579,497
New Hampshire	\$182,909,943	\$101,299,562	\$165,594,033	\$449,803,538	\$1,121,867	\$19,542,249	\$470,467,654
New Jersey	\$561,504,804	\$308,055,254	\$472,601,163	\$1,342,161,221	\$3,855,203	\$64,629,806	\$1,410,646,230
New Mexico	\$181,808,855	\$93,810,299	\$101,089,959	\$376,709,113	\$977,473	\$15,969,200	\$393,655,786
New York	\$2,145,369,765	\$1,200,921,000	\$1,620,421,116	\$4,966,711,881	\$8,550,098	\$138,314,899	\$5,113,576,878
North Carolina	\$878,793,547	\$529,754,322	\$764,586,799	\$2,173,134,668	\$5,417,089	\$92,211,841	\$2,270,763,598
North Dakota	\$130,502,548	\$54,960,017	\$67,201,966	\$252,664,530	\$469,440	\$8,151,105	\$261,285,075
Ohio	\$1,198,663,068	\$750,847,618	\$1,128,694,961	\$3,078,205,647	\$6,580,038	\$116,878,490	\$3,201,664,175
Oklahoma	\$351,974,742	\$200,631,413	\$240,794,756	\$793,400,911	\$1,799,964	\$32,181,890	\$827,382,765
Oregon	\$590,093,558	\$367,981,874	\$498,535,132	\$1,456,610,564	\$2,471,875	\$44,760,136	\$1,503,842,575
Pennsylvania	\$1,454,831,658	\$839,118,651	\$1,356,988,979	\$3,650,939,287	\$7,241,969	\$130,793,241	\$3,788,974,497
Rhode Island	\$46,970,525	\$25,763,289	\$39,294,635	\$112,028,449	\$474,456	\$7,529,231	\$120,032,136
South Carolina	\$590,864,502	\$309,148,110	\$402,249,842	\$1,302,262,453	\$2,913,545	\$48,616,941	\$1,353,792,940
South Dakota	\$110,968,721	\$53,697,758	\$66,761,490	\$231,427,969	\$556,152	\$9,612,708	\$241,596,829
Tennessee	\$724,578,309	\$414,007,158	\$601,168,645	\$1,739,754,112	\$3,432,548	\$59,217,593	\$1,802,404,254
Texas	\$3,851,322,957	\$2,253,421,162	\$3,577,741,035	\$9,682,485,154	\$19,647,288	\$326,741,814	\$10,028,874,256
Utah	\$173,139,349	\$117,758,251	\$163,147,901	\$454,045,501	\$1,152,599	\$20,012,261	\$475,210,361
Vermont	\$157,659,720	\$82,251,794	\$105,440,565	\$345,352,079	\$404,618	\$6,826,565	\$352,583,262
Virginia	\$909,170,968	\$538,304,202	\$713,224,183	\$2,160,699,353	\$4,011,814	\$67,274,020	\$2,231,985,187
Washington	\$1,009,458,358	\$575,226,207	\$808,509,056	\$2,393,193,622	\$3,728,451	\$63,119,178	\$2,460,041,251
West Virginia	\$204,480,776	\$86,001,190	\$109,914,250	\$400,396,215	\$810,858	\$13,908,352	\$415,115,425
Wisconsin	\$794,184,514	\$468,993,852	\$676,991,190	\$1,940,169,556	\$3,837,099	\$68,124,498	\$2,012,131,152
Wyoming	\$126,975,114	\$49,681,733	\$52,344,499	\$229,001,347	\$265,740	\$4,651,898	\$233,918,984
U.S. Total	\$34,543,495,620	\$20,245,546,221	\$29,309,120,219	\$84,098,162,060	\$181,295,007	\$2,995,791,650	\$87,275,248,717

Impacts on Employment	Direct Employment at Beer Wholesalers	Indirect Employment at Other Firms	Employment Induced by Spending of Wages	Total Employment Impact from Operations	Additional Jobs: Charitable Activities	Additional Jobs: Capital Investment	Total Employment Impact
Alabama	2,575	1,560	2,052	6,186	26	286	6,498
Alaska	421	189	214	824	3	35	861
Arizona	2,827	2,033	3,121	7,982	34	375	8,391
Arkansas	1,193	723	992	2,908	12	138	3,058
California	13,302	8,886	13,894	36,082	169	1,928	38,179
Colorado	2,275	1,474	2,447	6,196	30	362	6,588
Connecticut	1,318	589	1,129	3,036	11	138	3,185
Delaware	567	201	366	1,134	4	54	1,193
Dist. of Columbia	487	123	104	714	2	21	737
Florida	9,015	7,156	10,592	26,762	107	1,253	28,123
Georgia	3,452	2,402	4,033	9,887	71	539	10,497
Hawaii	844	513	544	1,901	6	62	1,969
Idaho	1,431	806	1,051	3,288	8	93	3,388
Illinois	4,994	2,882	5,324	13,200	60	693	13,952
Indiana	2,111	1,126	1,752	4,988	26	325	5,339
Iowa	1,562	814	1,193	3,570	16	195	3,782
Kansas	1,281	715	1,071	3,066	13	145	3,224
Kentucky	1,630	992	1,342	3,963	18	220	4,201
Louisiana	3,019	1,996	2,933	7,948	23	248	8,219
Maine	1,201	799	1,193	3,194	9	109	3,311
Maryland	1,938	1,106	1,734	4,778	19	228	5,026
Massachusetts	2,253	1,290	2,480	6,023	26	332	6,381
Michigan	4,871	3,034	5,272	13,177	43	520	13,741
Minnesota	2,520	1,496	2,888	6,904	28	344	7,276
Mississippi	1,256	679	808	2,743	15	160	2,919

(continued on next page)

Impacts on Employment (cont.)	Direct Employment at Beer Wholesalers	Indirect Employment at Other Firms	Employment Induced by Spending of Wages	Total Employment Impact from Operations	Additional Jobs From Charitable Activities	Additional Jobs From Capital Investment Activities	Total Employment Impact
Missouri	2,967	1,972	3,157	8,096	30	386	8,513
Montana	1,165	586	776	2,528	8	95	2,630
Nebraska	810	520	741	2,071	11	124	2,206
Nevada	1,188	765	965	2,919	17	186	3,121
New Hampshire	767	382	713	1,862	10	126	1,997
New Jersey	3,392	1,910	3,330	8,632	30	351	9,012
New Mexico	913	494	583	1,990	9	100	2,099
New York	8,028	4,215	6,805	19,048	62	727	19,837
North Carolina	3,892	2,547	3,892	10,330	48	590	10,968
North Dakota	512	206	295	1,013	5	49	1,067
Ohio	5,165	3,243	5,453	13,861	56	719	14,636
Oklahoma	1,537	909	1,171	3,617	17	198	3,831
Oregon	2,689	1,717	2,626	7,032	22	292	7,346
Pennsylvania	5,872	3,372	6,311	15,555	59	790	16,404
Rhode Island	194	100	174	467	4	45	516
South Carolina	2,545	1,571	2,090	6,206	28	317	6,551
South Dakota	489	246	338	1,074	5	64	1,143
Tennessee	3,087	2,044	3,152	8,283	30	367	8,681
Texas	14,576	9,113	15,365	39,054	162	1,802	41,018
Utah	784	579	850	2,212	10	123	2,345
Vermont	742	364	525	1,631	4	46	1,680
Virginia	3,793	2,192	3,432	9,417	34	399	9,849
Washington	3,987	1,936	3,107	9,030	30	342	9,402
West Virginia	932	431	574	1,937	8	91	2,036
Wisconsin	3,598	2,142	3,432	9,172	34	446	9,653
Wyoming	521	255	287	1,063	3	28	1,094
U.S. Total	142,095	87,396	138,670	368,162	1,512	24,782	387,674

Impacts on Wages, Salaries, and Proprietary Profits	Direct Income from Beer Wholesalers	Indirect Income at Other Firms	Income Induced by Spending of Wages	Total Income Impact from Operations	Additional Income: Charitable Activities	Additional Income: Capital Investment	Total Income Impact
Alabama	\$156,930,941	\$74,370,825	\$87,148,768	\$318,450,535	\$928,933	\$14,211,723	\$333,591,190
Alaska	\$24,460,787	\$13,206,011	\$11,664,105	\$49,330,904	\$135,310	\$2,261,911	\$51,728,124
Arizona	\$189,345,760	\$110,458,242	\$151,906,059	\$451,710,061	\$1,494,021	\$21,126,050	\$474,330,133
Arkansas	\$79,299,129	\$35,388,332	\$40,544,033	\$155,231,494	\$421,548	\$6,753,705	\$162,406,747
California	\$969,877,581	\$638,677,484	\$803,247,035	\$2,411,802,100	\$8,562,442	\$127,604,132	\$2,547,968,674
Colorado	\$157,697,420	\$94,890,911	\$124,701,075	\$377,289,406	\$1,399,867	\$21,707,430	\$400,396,703
Connecticut	\$103,357,436	\$46,782,834	\$69,238,481	\$219,378,750	\$586,712	\$9,410,796	\$229,376,258
Delaware	\$33,054,038	\$14,509,571	\$18,721,138	\$66,284,746	\$201,808	\$3,096,180	\$69,582,734
Dist. of Columbia	\$37,698,698	\$13,758,445	\$7,435,994	\$58,893,137	\$101,482	\$1,467,026	\$60,461,646
Florida	\$599,528,168	\$389,102,929	\$498,170,812	\$1,486,801,909	\$4,723,346	\$67,806,225	\$1,559,331,481
Georgia	\$250,558,783	\$143,983,289	\$191,894,419	\$586,436,491	\$3,394,040	\$29,489,728	\$619,320,259
Hawaii	\$48,593,260	\$29,855,101	\$26,483,166	\$104,931,527	\$289,269	\$3,709,034	\$108,929,831
Idaho	\$75,012,146	\$35,088,608	\$41,898,178	\$151,998,932	\$284,329	\$4,305,464	\$156,588,725
Illinois	\$367,883,307	\$203,822,083	\$288,844,085	\$860,549,474	\$2,872,410	\$43,184,339	\$906,606,223
Indiana	\$127,986,688	\$57,858,053	\$78,506,708	\$264,351,449	\$1,058,539	\$17,103,607	\$282,513,595
Iowa	\$96,407,612	\$42,721,476	\$49,572,666	\$188,701,754	\$578,245	\$9,986,272	\$199,266,271
Kansas	\$82,909,477	\$40,655,131	\$48,187,072	\$171,751,679	\$488,539	\$7,627,822	\$179,868,040
Kentucky	\$98,929,252	\$50,978,820	\$58,992,921	\$208,900,993	\$690,723	\$11,000,346	\$220,592,061
Louisiana	\$223,903,674	\$107,758,169	\$131,314,998	\$462,976,841	\$876,092	\$13,496,452	\$477,349,386
Maine	\$74,740,372	\$41,401,291	\$53,423,393	\$169,565,056	\$343,703	\$5,375,065	\$175,283,824
Maryland	\$147,426,744	\$76,586,061	\$93,410,203	\$317,423,008	\$937,845	\$14,348,840	\$332,709,693
Massachusetts	\$206,576,048	\$102,998,771	\$153,661,552	\$463,236,370	\$1,444,461	\$22,671,120	\$487,351,952
Michigan	\$351,698,898	\$176,417,777	\$240,612,219	\$768,728,894	\$1,778,711	\$27,924,917	\$798,432,522
Minnesota	\$186,722,191	\$98,074,696	\$146,412,099	\$431,208,986	\$1,286,095	\$19,905,212	\$452,400,293
Mississippi	\$67,970,942	\$30,525,114	\$32,646,417	\$131,142,473	\$504,879	\$7,647,471	\$139,294,823

(continued on next page)

Impacts on Wages, Salaries, and Proprietary Profits (cont.)	Direct Income from Beer Wholesalers	Indirect Income at Other Firms	Income Induced by Spending of Wages	Total Income Impact from Operations	Additional Income: Charitable Activities	Additional Income: Capital Investment	Total Income Impact
Missouri	\$200,676,981	\$117,996,436	\$147,626,900	\$466,300,317	\$1,253,376	\$20,624,507	\$488,178,200
Montana	\$56,109,060	\$25,199,631	\$31,123,989	\$112,432,681	\$277,170	\$4,405,363	\$117,115,214
Nebraska	\$55,659,416	\$29,218,559	\$33,260,817	\$118,138,792	\$400,020	\$6,509,668	\$125,048,480
Nevada	\$76,552,590	\$41,992,145	\$45,476,559	\$164,021,294	\$691,204	\$10,714,390	\$175,426,888
New Hampshire	\$52,260,305	\$23,899,700	\$36,478,080	\$112,638,084	\$430,320	\$7,302,877	\$120,371,281
New Jersey	\$282,967,731	\$146,818,646	\$200,270,248	\$630,056,625	\$1,559,369	\$24,329,676	\$655,945,669
New Mexico	\$47,364,603	\$23,161,368	\$24,039,033	\$94,565,003	\$344,124	\$4,900,509	\$99,809,636
New York	\$646,706,144	\$365,325,190	\$430,099,917	\$1,442,131,252	\$3,633,674	\$51,673,190	\$1,497,438,116
North Carolina	\$256,057,287	\$140,300,229	\$178,417,224	\$574,774,740	\$1,962,475	\$30,882,335	\$607,619,549
North Dakota	\$31,846,814	\$11,473,658	\$13,330,639	\$56,651,110	\$165,721	\$2,773,958	\$59,590,789
Ohio	\$338,737,182	\$195,426,114	\$259,232,665	\$793,395,961	\$2,399,134	\$39,110,266	\$834,905,361
Oklahoma	\$87,661,337	\$48,164,654	\$53,586,528	\$189,412,519	\$637,467	\$10,640,341	\$200,690,327
Oregon	\$179,983,605	\$100,198,204	\$123,419,235	\$403,601,044	\$929,454	\$16,241,832	\$420,772,330
Pennsylvania	\$429,606,770	\$240,777,286	\$334,323,373	\$1,004,707,428	\$2,809,644	\$47,428,801	\$1,054,945,873
Rhode Island	\$13,113,581	\$6,690,110	\$9,236,755	\$29,040,446	\$185,597	\$2,655,984	\$31,882,026
South Carolina	\$148,797,170	\$77,024,702	\$88,270,634	\$314,092,506	\$1,041,871	\$15,787,634	\$330,922,012
South Dakota	\$27,892,315	\$12,419,374	\$13,991,488	\$54,303,177	\$190,732	\$3,054,066	\$57,547,975
Tennessee	\$206,742,096	\$118,364,128	\$162,043,324	\$487,149,548	\$1,332,040	\$20,697,100	\$509,178,687
Texas	\$1,062,728,433	\$553,367,872	\$785,575,098	\$2,401,671,403	\$7,236,596	\$109,661,154	\$2,518,569,153
Utah	\$52,308,238	\$30,713,317	\$37,439,063	\$120,460,617	\$403,134	\$6,622,057	\$127,485,809
Vermont	\$39,073,436	\$18,524,101	\$23,457,681	\$81,055,218	\$149,469	\$2,283,946	\$83,488,633
Virginia	\$277,799,777	\$150,714,589	\$173,001,865	\$601,516,230	\$1,527,013	\$23,442,210	\$626,485,453
Washington	\$251,295,572	\$131,487,951	\$166,761,623	\$549,545,145	\$1,395,094	\$21,134,959	\$572,075,197
West Virginia	\$48,609,128	\$21,792,610	\$24,324,749	\$94,726,486	\$296,205	\$4,678,743	\$99,701,434
Wisconsin	\$231,811,322	\$121,240,744	\$158,927,852	\$511,979,918	\$1,403,325	\$23,381,583	\$536,764,826
Wyoming	\$35,537,699	\$12,095,502	\$11,883,589	\$59,516,790	\$91,349	\$1,520,927	\$61,129,067
U.S. Total	\$9,880,866,000	\$5,434,256,844	\$7,014,236,520	\$22,329,359,364	\$68,128,926	\$1,494,338,889	\$23,438,769,176

APPENDIX 2
Impacts Summarized by State

Alabama

Impacts from operations of wholesalers:

	Production	Employment	Income	Taxes
Direct	\$575,269,967	2,575	\$156,930,941	
Indirect	\$291,681,295	1,560	\$74,370,825	
Induced	\$382,181,808	2,052	\$87,148,768	
Total	\$1,249,133,070	6,186	\$318,450,535	

Total Impacts for Charitable Activities:

Total	\$2,627,742	26	\$928,933	
--------------	--------------------	-----------	------------------	--

Total Impacts from Capital Investment Activities:

Total	\$44,991,370	286	\$14,211,723	
--------------	---------------------	------------	---------------------	--

Total Economic Impact of Beer Distributors in Alabama:

Total	\$1,296,752,182	6,498	\$333,591,190	\$185,787,885
--------------	------------------------	--------------	----------------------	----------------------

Alaska

Impacts from operations of wholesalers:

	Production	Employment	Income	Taxes
Direct	\$104,417,545	421	\$24,460,787	
Indirect	\$46,702,641	189	\$13,206,011	
Induced	\$45,858,895	214	\$11,664,105	
Total	\$196,979,082	824	\$49,330,904	

Total Impacts for Charitable Activities:

Total	\$333,254	3	\$135,310	
--------------	------------------	----------	------------------	--

Total Impacts from Capital Investment Activities:

Total	\$5,974,749	35	\$2,261,911	
--------------	--------------------	-----------	--------------------	--

Total Economic Impact of Beer Distributors in Alaska:

Total	\$203,287,085	861	\$51,728,124	\$43,607,413
--------------	----------------------	------------	---------------------	---------------------

Arizona

Impacts from operations of wholesalers:

	Production	Employment	Income	Taxes
Direct	\$662,357,067	2,827	\$189,345,760	
Indirect	\$428,138,078	2,033	\$110,458,242	
Induced	\$644,088,478	3,121	\$151,906,059	
Total	\$1,734,583,623	7,982	\$451,710,061	

Total Impacts for Charitable Activities:

Total	\$4,057,389	34	\$1,494,021	
--------------	--------------------	-----------	--------------------	--

Total Impacts from Capital Investment Activities:

Total	\$64,160,237	375	\$21,126,050	
--------------	---------------------	------------	---------------------	--

Total Economic Impact of Beer Distributors in Arizona:

Total	\$1,802,801,249	8,391	\$474,330,133	\$100,299,163
--------------	------------------------	--------------	----------------------	----------------------

Arkansas**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$309,000,494	1,193	\$79,299,129	
Indirect	\$135,642,727	723	\$35,388,332	
Induced	\$176,733,545	992	\$40,544,033	
Total	\$621,376,766	2,908	\$155,231,494	

Total Impacts for Charitable Activities:

Total	\$1,215,822	12	\$421,548	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$21,573,391	138	\$6,753,705	
--------------	--------------	-----	-------------	--

Total Economic Impact of Beer Distributors in Arkansas:

Total	\$644,165,980	3,058	\$162,406,747	\$1,464,712,367
--------------	---------------	-------	---------------	-----------------

California**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$3,403,259,724	13,302	\$969,877,581	
Indirect	\$2,262,520,940	8,886	\$638,677,484	
Induced	\$3,204,330,058	13,894	\$803,247,035	
Total	\$8,870,110,721	36,082	\$2,411,802,100	

Total Impacts for Charitable Activities:

Total	\$22,088,509	169	\$8,562,442	
--------------	--------------	-----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$370,394,493	1,928	\$127,604,132	
--------------	---------------	-------	---------------	--

Total Economic Impact of Beer Distributors in California:

Total	\$9,262,593,723	38,179	\$2,547,968,674	\$182,988,361
--------------	-----------------	--------	-----------------	---------------

Colorado**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$540,180,878	2,275	\$157,697,420	
Indirect	\$380,145,795	1,474	\$94,890,911	
Induced	\$567,679,612	2,447	\$124,701,075	
Total	\$1,488,006,285	6,196	\$377,289,406	

Total Impacts for Charitable Activities:

Total	\$3,757,630	30	\$1,399,867	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$62,949,210	362	\$21,707,430	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Colorado:

Total	\$1,554,713,125	6,588	\$400,396,703	\$129,179,731
--------------	-----------------	-------	---------------	---------------

Connecticut**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$387,057,252	1,318	\$103,357,436	
Indirect	\$191,109,906	589	\$46,782,834	
Induced	\$294,803,854	1,129	\$69,238,481	
Total	\$872,971,012	3,036	\$219,378,750	

Total Impacts for Charitable Activities:

Total	\$1,436,749	11	\$586,712	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$24,775,232	138	\$9,410,796	
--------------	--------------	-----	-------------	--

Total Economic Impact of Beer Distributors in Connecticut:

Total	\$899,182,992	3,185	\$229,376,258	\$46,271,817
--------------	---------------	-------	---------------	--------------

Delaware**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$148,808,925	567	\$33,054,038	
Indirect	\$73,287,549	201	\$14,509,571	
Induced	\$110,174,002	366	\$18,721,138	
Total	\$332,270,477	1,134	\$66,284,746	

Total Impacts for Charitable Activities:

Total	\$494,924	4	\$201,808	
--------------	-----------	---	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$9,042,333	54	\$3,096,180	
--------------	-------------	----	-------------	--

Total Economic Impact of Beer Distributors in Delaware:

Total	\$341,807,735	1,193	\$69,582,734	\$35,687,014
--------------	---------------	-------	--------------	--------------

**District of
Columbia****Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$136,510,490	487	\$37,698,698	
Indirect	\$51,384,913	123	\$13,758,445	
Induced	\$36,595,827	104	\$7,435,994	
Total	\$224,491,230	714	\$58,893,137	

Total Impacts for Charitable Activities:

Total	\$203,095	2	\$101,482	
--------------	-----------	---	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$3,820,496	21	\$1,467,026	
--------------	-------------	----	-------------	--

Total Economic Impact of Beer Distributors in Dist. of Columbia:

Total	\$228,514,821	737	\$60,461,646	\$821,923,556
--------------	---------------	-----	--------------	---------------

Florida**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$2,218,256,633	9,015	\$599,528,168	
Indirect	\$1,528,569,958	7,156	\$389,102,929	
Induced	\$2,148,719,531	10,592	\$498,170,812	
Total	\$5,895,546,123	26,762	\$1,486,801,909	

Total Impacts for Charitable Activities:

Total	\$12,883,136	107	\$4,723,346	
--------------	--------------	-----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$207,952,734	1,253	\$67,806,225	
--------------	---------------	-------	--------------	--

Total Economic Impact of Beer Distributors in Florida:

Total	\$6,116,381,993	28,123	\$1,559,331,481	\$296,706,181
--------------	-----------------	--------	-----------------	---------------

Georgia**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$881,568,346	3,452	\$250,558,783	
Indirect	\$540,453,612	2,402	\$143,983,289	
Induced	\$822,100,185	4,033	\$191,894,419	
Total	\$2,244,122,143	9,887	\$586,436,491	

Total Impacts for Charitable Activities:

Total	\$9,416,772	71	\$3,394,040	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$88,807,288	539	\$29,489,728	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Georgia:

Total	\$2,342,346,204	10,497	\$619,320,259	\$55,209,058
--------------	-----------------	--------	---------------	--------------

Hawaii**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$166,839,763	844	\$48,593,260	
Indirect	\$100,628,820	513	\$29,855,101	
Induced	\$97,200,340	544	\$26,483,166	
Total	\$364,668,923	1,901	\$104,931,527	

Total Impacts for Charitable Activities:

Total	\$751,489	6	\$289,269	
--------------	-----------	---	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$11,486,756	62	\$3,709,034	
--------------	--------------	----	-------------	--

Total Economic Impact of Beer Distributors in Hawaii:

Total	\$376,907,167	1,969	\$108,929,831	\$90,169,104
--------------	---------------	-------	---------------	--------------

Idaho**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$296,753,381	1,431	\$75,012,146	
Indirect	\$157,707,729	806	\$35,088,608	
Induced	\$193,928,730	1,051	\$41,898,178	
Total	\$648,389,841	3,288	\$151,998,932	

Total Impacts for Charitable Activities:

Total	\$788,381	8	\$284,329	
--------------	------------------	----------	------------------	--

Total Impacts from Capital Investment Activities:

Total	\$13,276,057	93	\$4,305,464	
--------------	---------------------	-----------	--------------------	--

Total Economic Impact of Beer Distributors in Idaho:

Total	\$662,454,278	3,388	\$156,588,725	\$455,997,754
--------------	----------------------	--------------	----------------------	----------------------

Illinois**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$1,303,263,043	4,994	\$367,883,307	
Indirect	\$787,614,374	2,882	\$203,822,083	
Induced	\$1,281,051,281	5,324	\$288,844,085	
Total	\$3,371,928,697	13,200	\$860,549,474	

Total Impacts for Charitable Activities:

Total	\$7,459,531	60	\$2,872,410	
--------------	--------------------	-----------	--------------------	--

Total Impacts from Capital Investment Activities:

Total	\$124,893,115	693	\$43,184,339	
--------------	----------------------	------------	---------------------	--

Total Economic Impact of Beer Distributors in Illinois:

Total	\$3,504,281,344	13,952	\$906,606,223	\$143,831,834
--------------	------------------------	---------------	----------------------	----------------------

Indiana**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$465,549,080	2,111	\$127,986,688	
Indirect	\$233,309,880	1,126	\$57,858,053	
Induced	\$354,934,870	1,752	\$78,506,708	
Total	\$1,053,793,829	4,988	\$264,351,449	

Total Impacts for Charitable Activities:

Total	\$2,872,963	26	\$1,058,539	
--------------	--------------------	-----------	--------------------	--

Total Impacts from Capital Investment Activities:

Total	\$51,071,039	325	\$17,103,607	
--------------	---------------------	------------	---------------------	--

Total Economic Impact of Beer Distributors in Indiana:

Total	\$1,107,737,831	5,339	\$282,513,595	\$106,520,692
--------------	------------------------	--------------	----------------------	----------------------

Kansas**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$304,560,646	1,281	\$82,909,477	
Indirect	\$156,612,457	715	\$40,655,131	
Induced	\$215,385,489	1,071	\$48,187,072	
Total	\$676,558,592	3,066	\$171,751,679	

Total Impacts for Charitable Activities:

Total	\$1,380,154	13	\$488,539	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$23,555,942	145	\$7,627,822	
--------------	--------------	-----	-------------	--

Total Economic Impact of Beer Distributors in Kansas:

Total	\$701,494,688	3,224	\$179,868,040	\$90,311,738
--------------	---------------	-------	---------------	--------------

Kentucky**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$395,495,204	1,630	\$98,929,252	
Indirect	\$190,327,071	992	\$50,978,820	
Induced	\$250,146,921	1,342	\$58,992,921	
Total	\$835,969,196	3,963	\$208,900,993	

Total Impacts for Charitable Activities:

Total	\$1,889,467	18	\$690,723	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$33,132,197	220	\$11,000,346	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Kentucky:

Total	\$870,990,860	4,201	\$220,592,061	\$132,065,582
--------------	---------------	-------	---------------	---------------

Louisiana**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$720,099,123	3,019	\$223,903,674	
Indirect	\$365,827,541	1,996	\$107,758,169	
Induced	\$494,829,064	2,933	\$131,314,998	
Total	\$1,580,755,728	7,948	\$462,976,841	

Total Impacts for Charitable Activities:

Total	\$2,402,459	23	\$876,092	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$40,673,122	248	\$13,496,452	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Louisiana:

Total	\$1,623,831,309	8,219	\$477,349,386	\$98,776,045
--------------	-----------------	-------	---------------	--------------

Maine**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$265,799,495	1,201	\$74,740,372	
Indirect	\$153,684,789	799	\$41,401,291	
Induced	\$211,097,657	1,193	\$53,423,393	
Total	\$630,581,941	3,194	\$169,565,056	

Total Impacts for Charitable Activities:

Total	\$940,392	9	\$343,703	
--------------	-----------	---	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$16,131,697	109	\$5,375,065	
--------------	--------------	-----	-------------	--

Total Economic Impact of Beer Distributors in Maine:

Total	\$647,654,030	3,311	\$175,283,824	\$182,406,549
--------------	---------------	-------	---------------	---------------

Maryland**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$480,423,374	1,938	\$147,426,744	
Indirect	\$266,815,742	1,106	\$76,586,061	
Induced	\$364,007,047	1,734	\$93,410,203	
Total	\$1,111,246,163	4,778	\$317,423,008	

Total Impacts for Charitable Activities:

Total	\$2,372,365	19	\$937,845	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$39,123,960	228	\$14,348,840	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Maryland:

Total	\$1,152,742,488	5,026	\$332,709,693	\$207,735,951
--------------	-----------------	-------	---------------	---------------

Massachusetts**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$584,773,803	2,253	\$206,576,048	
Indirect	\$343,836,080	1,290	\$102,998,771	
Induced	\$540,143,795	2,480	\$153,661,552	
Total	\$1,468,753,678	6,023	\$463,236,370	

Total Impacts for Charitable Activities:

Total	\$3,430,842	26	\$1,444,461	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$57,925,956	332	\$22,671,120	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Massachusetts:

Total	\$1,530,110,476	6,381	\$487,351,952	\$384,542,974
--------------	-----------------	-------	---------------	---------------

Michigan**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$1,199,580,881	4,871	\$351,698,898	
Indirect	\$652,035,718	3,034	\$176,417,777	
Induced	\$1,023,771,402	5,272	\$240,612,219	
Total	\$2,875,388,000	13,177	\$768,728,894	

Total Impacts for Charitable Activities:

Total	\$4,967,057	43	\$1,778,711	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$84,525,520	520	\$27,924,917	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Michigan:

Total	\$2,964,880,577	13,741	\$798,432,522	\$214,425,966
--------------	-----------------	--------	---------------	---------------

Minnesota**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$617,649,937	2,520	\$186,722,191	
Indirect	\$378,836,879	1,496	\$98,074,696	
Induced	\$647,103,521	2,888	\$146,412,099	
Total	\$1,643,590,337	6,904	\$431,208,986	

Total Impacts for Charitable Activities:

Total	\$3,464,170	28	\$1,286,095	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$58,239,908	344	\$19,905,212	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Minnesota:

Total	\$1,705,294,415	7,276	\$452,400,293	\$96,929,144
--------------	-----------------	-------	---------------	--------------

Mississippi**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$277,520,715	1,256	\$67,970,942	
Indirect	\$126,954,098	679	\$30,525,114	
Induced	\$151,398,365	808	\$32,646,417	
Total	\$555,873,178	2,743	\$131,142,473	

Total Impacts for Charitable Activities:

Total	\$1,453,764	15	\$504,879	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$24,744,649	160	\$7,647,471	
--------------	--------------	-----	-------------	--

Total Economic Impact of Beer Distributors in Mississippi:

Total	\$582,071,591	2,919	\$139,294,823	\$205,753,941
--------------	---------------	-------	---------------	---------------

Missouri**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$671,176,258	2,967	\$200,676,981	
Indirect	\$413,771,270	1,972	\$117,996,436	
Induced	\$601,061,831	3,157	\$147,626,900	
Total	\$1,686,009,358	8,096	\$466,300,317	

Total Impacts for Charitable Activities:

Total	\$3,398,125	30	\$1,253,376	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$59,952,023	386	\$20,624,507	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Missouri:

Total	\$1,749,359,506	8,513	\$488,178,200	\$83,284,061
--------------	-----------------	-------	---------------	--------------

Montana**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$251,655,243	1,165	\$56,109,060	
Indirect	\$127,484,207	586	\$25,199,631	
Induced	\$160,983,681	776	\$31,123,989	
Total	\$540,123,131	2,528	\$112,432,681	

Total Impacts for Charitable Activities:

Total	\$805,139	8	\$277,170	
--------------	-----------	---	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$13,779,980	95	\$4,405,363	
--------------	--------------	----	-------------	--

Total Economic Impact of Beer Distributors in Montana:

Total	\$554,708,250	2,630	\$117,115,214	\$55,417,847
--------------	---------------	-------	---------------	--------------

Nebraska**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$180,517,408	810	\$55,659,416	
Indirect	\$102,493,723	520	\$29,218,559	
Induced	\$129,476,287	741	\$33,260,817	
Total	\$412,487,418	2,071	\$118,138,792	

Total Impacts for Charitable Activities:

Total	\$1,103,923	11	\$400,020	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$19,104,047	124	\$6,509,668	
--------------	--------------	-----	-------------	--

Total Economic Impact of Beer Distributors in Nebraska:

Total	\$432,695,388	2,206	\$125,048,480	\$99,103,452
--------------	---------------	-------	---------------	--------------

Nevada**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$268,108,989	1,188	\$76,552,590	
Indirect	\$162,716,998	765	\$41,992,145	
Induced	\$198,715,561	965	\$45,476,559	
Total	\$629,541,548	2,919	\$164,021,294	

Total Impacts for Charitable Activities:

Total	\$1,927,152	17	\$691,204	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$31,110,797	186	\$10,714,390	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Nevada:

Total	\$662,579,497	3,121	\$175,426,888	\$59,630,966
--------------	---------------	-------	---------------	--------------

New Hampshire**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$182,909,943	767	\$52,260,305	
Indirect	\$101,299,562	382	\$23,899,700	
Induced	\$165,594,033	713	\$36,478,080	
Total	\$449,803,538	1,862	\$112,638,084	

Total Impacts for Charitable Activities:

Total	\$1,121,867	10	\$430,320	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$19,542,249	126	\$7,302,877	
--------------	--------------	-----	-------------	--

Total Economic Impact of Beer Distributors in New Hampshire:

Total	\$470,467,654	1,997	\$120,371,281	\$218,034,469
--------------	---------------	-------	---------------	---------------

New Jersey**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$561,504,804	3,392	\$282,967,731	
Indirect	\$308,055,254	1,910	\$146,818,646	
Induced	\$472,601,163	3,330	\$200,270,248	
Total	\$1,342,161,221	8,632	\$630,056,625	

Total Impacts for Charitable Activities:

Total	\$3,855,203	30	\$1,559,369	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$64,629,806	351	\$24,329,676	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in New Jersey:

Total	\$1,410,646,230	9,012	\$655,945,669	\$63,445,769
--------------	-----------------	-------	---------------	--------------

New York**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$2,145,369,765	8,028	\$646,706,144	
Indirect	\$1,200,921,000	4,215	\$365,325,190	
Induced	\$1,620,421,116	6,805	\$430,099,917	
Total	\$4,966,711,881	19,048	\$1,442,131,252	

Total Impacts for Charitable Activities:

Total	\$8,550,098	62	\$3,633,674	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$138,314,899	727	\$51,673,190	
--------------	---------------	-----	--------------	--

Total Economic Impact of Beer Distributors in New York:

Total	\$5,113,576,878	19,837	\$1,497,438,116	\$852,495,103
--------------	-----------------	--------	-----------------	---------------

North Carolina**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$878,793,547	3,892	\$256,057,287	
Indirect	\$529,754,322	2,547	\$140,300,229	
Induced	\$764,586,799	3,892	\$178,417,224	
Total	\$2,173,134,668	10,330	\$574,774,740	

Total Impacts for Charitable Activities:

Total	\$5,417,089	48	\$1,962,475	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$92,211,841	590	\$30,882,335	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in North Carolina:

Total	\$2,270,763,598	10,968	\$607,619,549	\$294,955,406
--------------	-----------------	--------	---------------	---------------

North Dakota**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$130,502,548	512	\$31,846,814	
Indirect	\$54,960,017	206	\$11,473,658	
Induced	\$67,201,966	295	\$13,330,639	
Total	\$252,664,530	1,013	\$56,651,110	

Total Impacts for Charitable Activities:

Total	\$469,440	5	\$165,721	
--------------	-----------	---	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$8,151,105	49	\$2,773,958	
--------------	-------------	----	-------------	--

Total Economic Impact of Beer Distributors in North Dakota:

Total	\$261,285,075	1,067	\$59,590,789	\$399,792,316
--------------	---------------	-------	--------------	---------------

Ohio**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$1,198,663,068	5,165	\$338,737,182	
Indirect	\$750,847,618	3,243	\$195,426,114	
Induced	\$1,128,694,961	5,453	\$259,232,665	
Total	\$3,078,205,647	13,861	\$793,395,961	

Total Impacts for Charitable Activities:

Total	\$6,580,038	56	\$2,399,134	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$116,878,490	719	\$39,110,266	
--------------	---------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Ohio:

Total	\$3,201,664,175	14,636	\$834,905,361	\$116,156,958
--------------	-----------------	--------	---------------	---------------

Oklahoma**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$351,974,742	1,537	\$87,661,337	
Indirect	\$200,631,413	909	\$48,164,654	
Induced	\$240,794,756	1,171	\$53,586,528	
Total	\$793,400,911	3,617	\$189,412,519	

Total Impacts for Charitable Activities:

Total	\$1,799,964	17	\$637,467	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$32,181,890	198	\$10,640,341	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Oklahoma:

Total	\$827,382,765	3,831	\$200,690,327	\$177,127,229
--------------	---------------	-------	---------------	---------------

Oregon**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$590,093,558	2,689	\$179,983,605	
Indirect	\$367,981,874	1,717	\$100,198,204	
Induced	\$498,535,132	2,626	\$123,419,235	
Total	\$1,456,610,564	7,032	\$403,601,044	

Total Impacts for Charitable Activities:

Total	\$2,471,875	22	\$929,454	
--------------	-------------	----	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$44,760,136	292	\$16,241,832	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Oregon:

Total	\$1,503,842,575	7,346	\$420,772,330	\$526,839,772
--------------	-----------------	-------	---------------	---------------

Pennsylvania**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$1,454,831,658	5,872	\$429,606,770	
Indirect	\$839,118,651	3,372	\$240,777,286	
Induced	\$1,356,988,979	6,311	\$334,323,373	
Total	\$3,650,939,287	15,555	\$1,004,707,428	

Total Impacts for Charitable Activities:

Total	\$7,241,969	59	\$2,809,644	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$130,793,241	790	\$47,428,801	
--------------	---------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Pennsylvania:

Total	\$3,788,974,497	16,404	\$1,054,945,873	\$19,702,958
--------------	-----------------	--------	-----------------	--------------

Rhode Island**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$46,970,525	194	\$13,113,581	
Indirect	\$25,763,289	100	\$6,690,110	
Induced	\$39,294,635	174	\$9,236,755	
Total	\$112,028,449	467	\$29,040,446	

Total Impacts for Charitable Activities:

Total	\$474,456	4	\$185,597	
--------------	-----------	---	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$7,529,231	45	\$2,655,984	
--------------	-------------	----	-------------	--

Total Economic Impact of Beer Distributors in Rhode Island:

Total	\$120,032,136	516	\$31,882,026	\$212,685,259
--------------	---------------	-----	--------------	---------------

South Carolina**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$590,864,502	2,545	\$148,797,170	
Indirect	\$309,148,110	1,571	\$77,024,702	
Induced	\$402,249,842	2,090	\$88,270,634	
Total	\$1,302,262,453	6,206	\$314,092,506	

Total Impacts for Charitable Activities:

Total	\$2,913,545	28	\$1,041,871	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$48,616,941	317	\$15,787,634	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in South Carolina:

Total	\$1,353,792,940	6,551	\$330,922,012	\$33,429,363
--------------	-----------------	-------	---------------	--------------

South Dakota**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$110,968,721	489	\$27,892,315	
Indirect	\$53,697,758	246	\$12,419,374	
Induced	\$66,761,490	338	\$13,991,488	
Total	\$231,427,969	1,074	\$54,303,177	

Total Impacts for Charitable Activities:

Total	\$556,152	5	\$190,732	
--------------	-----------	---	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$9,612,708	64	\$3,054,066	
--------------	-------------	----	-------------	--

Total Economic Impact of Beer Distributors in South Dakota:

Total	\$241,596,829	1,143	\$57,547,975	\$244,954,990
--------------	---------------	-------	--------------	---------------

Tennessee**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$724,578,309	3,087	\$206,742,096	
Indirect	\$414,007,158	2,044	\$118,364,128	
Induced	\$601,168,645	3,152	\$162,043,324	
Total	\$1,739,754,112	8,283	\$487,149,548	

Total Impacts for Charitable Activities:

Total	\$3,432,548	30	\$1,332,040	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$59,217,593	367	\$20,697,100	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Tennessee:

Total	\$1,802,404,254	8,681	\$509,178,687	\$1,214,863,264
--------------	-----------------	-------	---------------	-----------------

Texas**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$3,851,322,957	14,576	\$1,062,728,433	
Indirect	\$2,253,421,162	9,113	\$553,367,872	
Induced	\$3,577,741,035	15,365	\$785,575,098	
Total	\$9,682,485,154	39,054	\$2,401,671,403	

Total Impacts for Charitable Activities:

Total	\$19,647,288	162	\$7,236,596	
--------------	--------------	-----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$326,741,814	1,802	\$109,661,154	
--------------	---------------	-------	---------------	--

Total Economic Impact of Beer Distributors in Texas:

Total	\$10,028,874,256	41,018	\$2,518,569,153	\$59,239,826
--------------	------------------	--------	-----------------	--------------

Utah**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$173,139,349	784	\$52,308,238	
Indirect	\$117,758,251	579	\$30,713,317	
Induced	\$163,147,901	850	\$37,439,063	
Total	\$454,045,501	2,212	\$120,460,617	

Total Impacts for Charitable Activities:

Total	\$1,152,599	10	\$403,134	
--------------	--------------------	-----------	------------------	--

Total Impacts from Capital Investment Activities:

Total	\$20,012,261	123	\$6,622,057	
--------------	---------------------	------------	--------------------	--

Total Economic Impact of Beer Distributors in Utah:

Total	\$475,210,361	2,345	\$127,485,809	\$57,588,588
--------------	----------------------	--------------	----------------------	---------------------

Vermont**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$157,659,720	742	\$39,073,436	
Indirect	\$82,251,794	364	\$18,524,101	
Induced	\$105,440,565	525	\$23,457,681	
Total	\$345,352,079	1,631	\$81,055,218	

Total Impacts for Charitable Activities:

Total	\$404,618	4	\$149,469	
--------------	------------------	----------	------------------	--

Total Impacts from Capital Investment Activities:

Total	\$6,826,565	46	\$2,283,946	
--------------	--------------------	-----------	--------------------	--

Total Economic Impact of Beer Distributors in Vermont:

Total	\$352,583,262	1,680	\$83,488,633	\$315,939,246
--------------	----------------------	--------------	---------------------	----------------------

Virginia**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$909,170,968	3,793	\$277,799,777	
Indirect	\$538,304,202	2,192	\$150,714,589	
Induced	\$713,224,183	3,432	\$173,001,865	
Total	\$2,160,699,353	9,417	\$601,516,230	

Total Impacts for Charitable Activities:

Total	\$4,011,814	34	\$1,527,013	
--------------	--------------------	-----------	--------------------	--

Total Impacts from Capital Investment Activities:

Total	\$67,274,020	399	\$23,442,210	
--------------	---------------------	------------	---------------------	--

Total Economic Impact of Beer Distributors in Virginia:

Total	\$2,231,985,187	9,849	\$626,485,453	\$390,054,870
--------------	------------------------	--------------	----------------------	----------------------

West Virginia**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$204,480,776	932	\$48,609,128	
Indirect	\$86,001,190	431	\$21,792,610	
Induced	\$109,914,250	574	\$24,324,749	
Total	\$400,396,215	1,937	\$94,726,486	

Total Impacts for Charitable Activities:

Total	\$810,858	8	\$296,205	
--------------	-----------	---	-----------	--

Total Impacts from Capital Investment Activities:

Total	\$13,908,352	91	\$4,678,743	
--------------	--------------	----	-------------	--

Total Economic Impact of Beer Distributors in West Virginia:

Total	\$415,115,425	2,036	\$99,701,434	\$71,392,927
--------------	---------------	-------	--------------	--------------

Wisconsin**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$794,184,514	3,598	\$231,811,322	
Indirect	\$468,993,852	2,142	\$121,240,744	
Induced	\$676,991,190	3,432	\$158,927,852	
Total	\$1,940,169,556	9,172	\$511,979,918	

Total Impacts for Charitable Activities:

Total	\$3,837,099	34	\$1,403,325	
--------------	-------------	----	-------------	--

Total Impacts from Capital Investment Activities:

Total	\$68,124,498	446	\$23,381,583	
--------------	--------------	-----	--------------	--

Total Economic Impact of Beer Distributors in Wisconsin:

Total	\$2,012,131,152	9,653	\$536,764,826	\$265,233,871
--------------	-----------------	-------	---------------	---------------

Wyoming**Impacts from operations of wholesalers:**

	Production	Employment	Income	Taxes
Direct	\$126,975,114	521	\$35,537,699	
Indirect	\$49,681,733	255	\$12,095,502	
Induced	\$52,344,499	287	\$11,883,589	
Total	\$229,001,347	1,063	\$59,516,790	

Total Impacts for Charitable Activities:

Total	\$265,740	3	\$91,349	
--------------	-----------	---	----------	--

Total Impacts from Capital Investment Activities:

Total	\$4,651,898	28	\$1,520,927	
--------------	-------------	----	-------------	--

Total Economic Impact of Beer Distributors in Wyoming:

Total	\$233,918,984	1,094	\$61,129,067	\$12,173,832,396
--------------	---------------	-------	--------------	------------------