



DID YOU KNOW?

CRAFT BREWERIES

Commodity Description

Craft breweries are small, independent beer makers that produce beer using products such as barley, wheat, hops, rye, oats and sometimes incorporating fruits, herbs, spices or honey. They often utilize locally sourced ingredients. Breweries and farm breweries have become an increasingly popular tourist attraction. To qualify as independent, a craft brewery must have less than 25% ownership or control by a beverage alcohol company that is not a craft brewer. A brewer is defined as a business that holds a Brewer's Notice from the Alcohol and Tobacco Tax and Trade Bureau (TTB), or owns the rights to one or more beer brands that are brewed in the United States and sold as its primary business. The requirements to be considered small is an annual production of 6 million barrels of beer or less (approximately 3 percent of U.S. annual sales). Beer production is attributed to a brewer according to rules of alternating proprietorships.

Why this commodity?

- VA – 344 craft breweries, rank 16th in the U.S. Produce 342,075 barrels per year. Economic impact of \$1,410M.
 - Of the registered craft brewers in Virginia, 51% are located in Loudoun, Fairfax and Prince William counties.
- MD- 132 craft breweries, rank 23rd in the U.S. Produce 176,644 barrels per year. Economic impact of \$955M.
 - Almost half of the barrels produced in MD are produced in Baltimore County. Nearly 10% of beer brewed in Maryland is consumed on site in taprooms and beer gardens.
- WV – 37 craft breweries, rank 37th in the U.S. Produce 21,562 barrels per year. Economic impact of \$260M.
 - Craft beer is now the second-fastest growing manufacturing sector in West Virginia.
- Small and independent American craft brewers continue to have a large impact on state and local economies, with craft breweries contributing \$71.8 billion to the U.S. economy in 2025. The figure is derived from the total impact of beer brewed by craft brewers as it moves through the three-tier system (breweries, wholesalers and retailers), as well as all non-beer products like food and merchandise that brewpub restaurants and brewery taprooms sell.
- The industry provided over 415,000 total jobs, with over 189,000 jobs directly at breweries and brewpubs, including serving staff at brewpubs.

What are legal considerations or laws that are relevant to the industry?

- Producer License Types & Privileges
- Direct to Consumer Shipping Rights
- Wholesale Protection Laws

What is the current pricing and market trends?

- Overall U.S. beer production and imports were down 5.7% in 2025, while craft brewer volume sales declined by 4%, slightly increasing small and independent brewers' share of the U.S. beer market by volume to 13.4%.
- Retail dollar sales of craft decreased 2.8%, to \$28.0 billion, and now account for 24.8% of the \$113 billion U.S. beer market. The primary reasons for dollar sales declines below volume declines were price increases and slightly stronger onsite sales growth versus distribution.
- 68% of craft beer consumers are millennials (25-44).
- 72% of craft beer is purchased at retail (grocery, convenience stores), 28% on-premise (bars, restaurants).

What are best practices for quality craft beer?

- Beer quality
 - Beer quality is measured by a complex set of sensory characteristics that include appearance, aroma, taste and texture.
- Stability
 - Product stability can generally be broken down into three categories.
- Perception
 - A number of factors, such as beer color and clarity, affect perception and the overall reception of beer.
- Beer ages or deteriorates with time
 - Beer flavor is not static; it is in a constant state of change.
- Know if beer is stale
 - "Stale" is not a specific, consistent off-flavor. It has different characteristics depending on beer style.
- Beer distribution
 - It is important to keep the integrity of the beer through every step of the distribution process.
- Delivery and dispense
 - It is important to keep the integrity of the beer through every step of the delivery and dispense process.

Sources: brewersassociation.org
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