

Brewers Guild Craft Market Size Survey Report - *Fourth Update*

Prepared for Brewers Guild
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Market
Knowledge

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Approach

- Brewers were approached and asked to participate (confidentially) in a market sizing survey. This is the fourth study undertaken covering the period from Jan 2008 to Dec 2011.
- Volume figures were obtained for 6 monthly periods.
- A number of other questions were also asked at the same time.

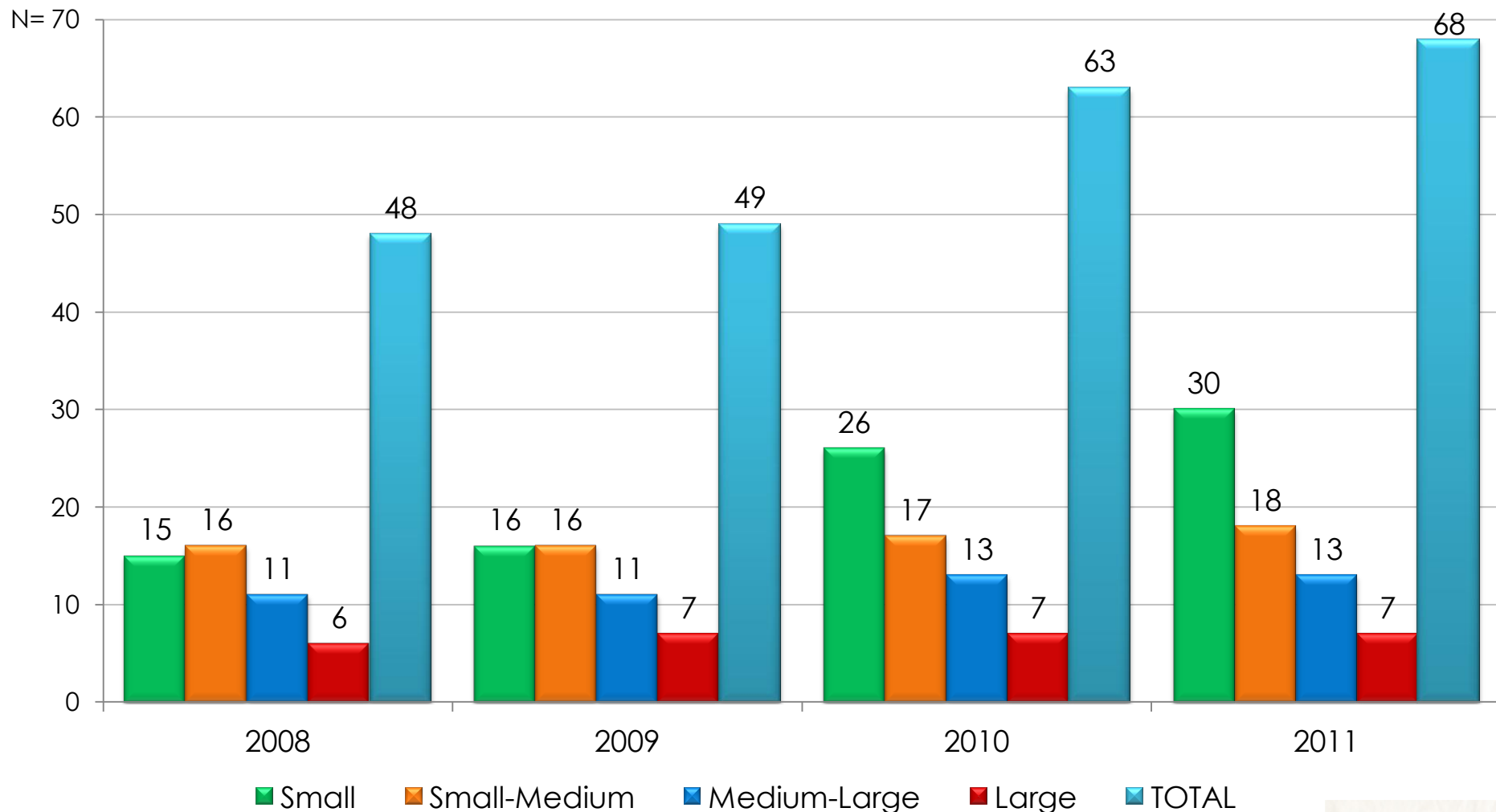
VOLUME SPLIT BY PRODUCTION SIZE/VOLUME



Definition

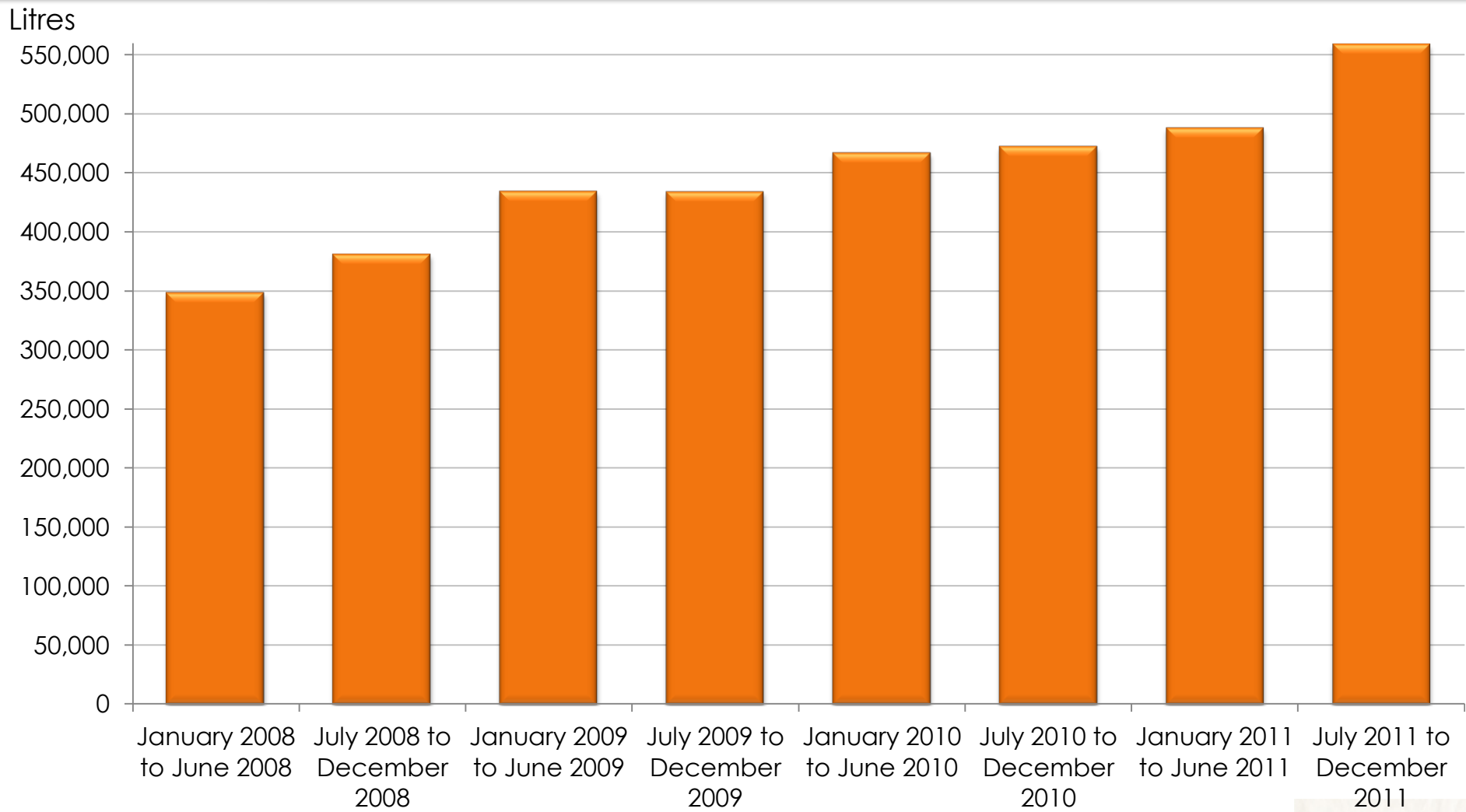
- The following charts split the Craft market by production volumes (as measured in July-Dec 2011 time period) into four groups:
 - Small:
 - Those brewers who produced under 20,000 litres in the last 6 month period (*annual volume 40,000l*)
 - Small to Medium:
 - Those brewers who produced between 20,001 to 50,000 litres in the last 6 month period (*annual volume 40,001 to 100,000l*)
 - Medium to Large:
 - Those brewers who produced between 50,001 to 250,000 litres in the last 6 month period (*annual volume 100,001 to 500,000l*)
 - Large:
 - Those brewers who produced over 250,001 litres in the last 6 month period (*annual volume 500,000+ l*)

Number of Craft Brewers By volume splits

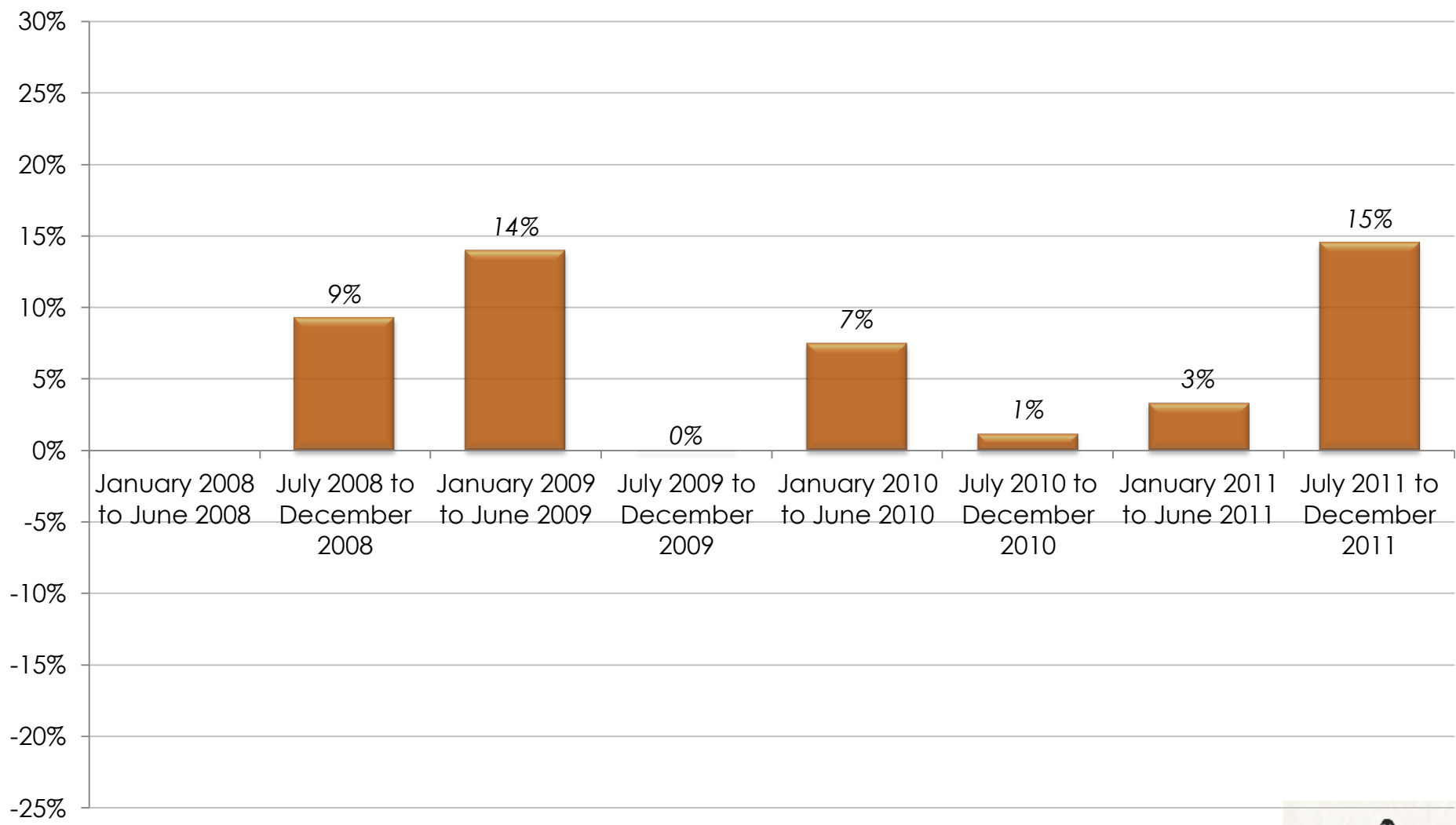


Volume – Small-Medium producers

Volume – 6 month periods

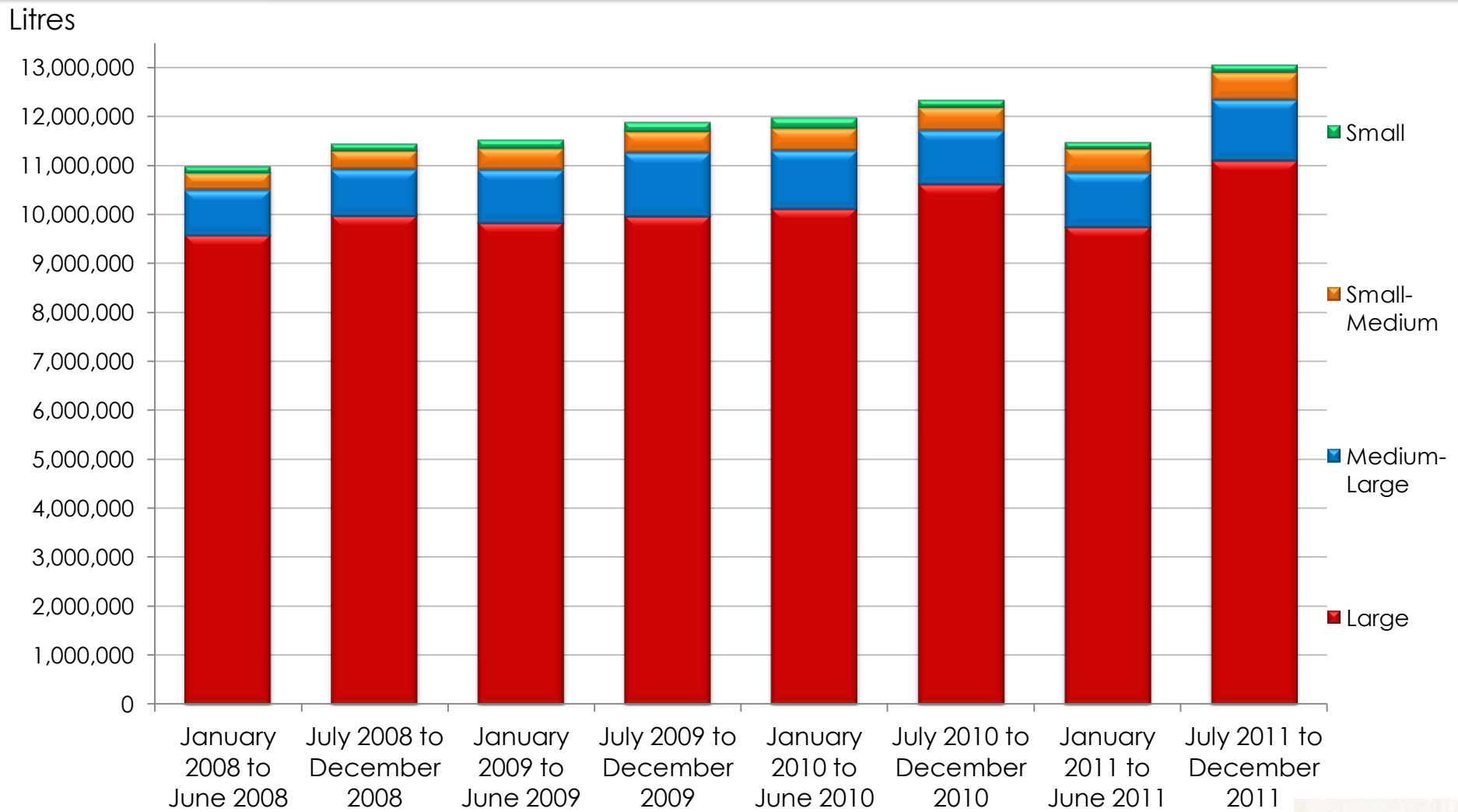


Change in volume – Small-Medium producers *6 month periods*



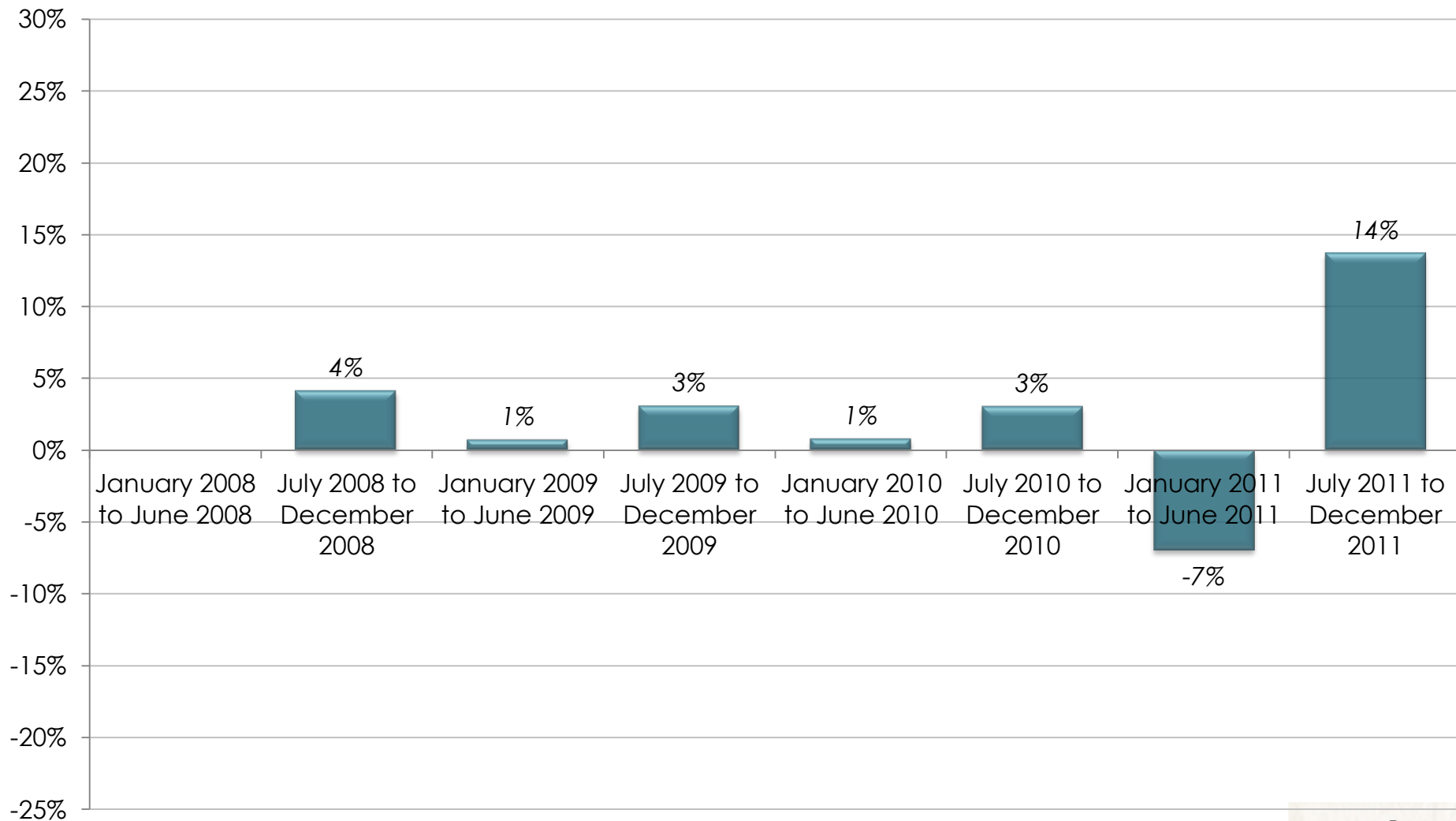
Volume – All producers

Volume – 6 month periods



Change in volume – All producers

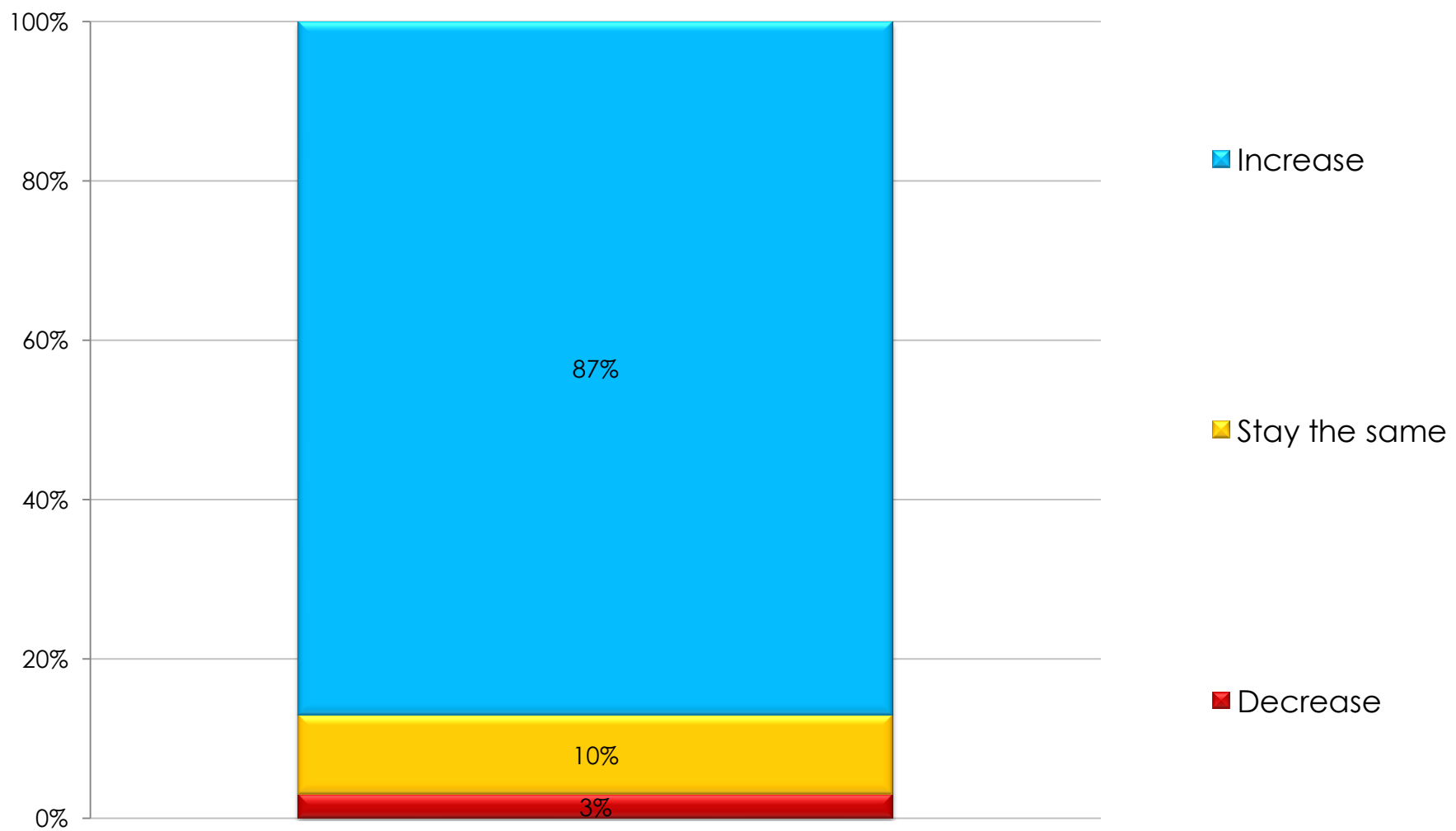
6 month periods



Summary

- The four sub-markets that make up the craft market have experienced quite different levels of expansion/growth.
- The most obvious growth is in the number of small brewers and the increase in volume amongst small-medium brewers.
- Small producers have had mixed results – growth until mid 2010, then fluctuating fortunes.
- All segments have experienced significant growth in the most recent time period (to Dec 2011).

Expectation for beer production in 2012



Export Beer from NZ?

