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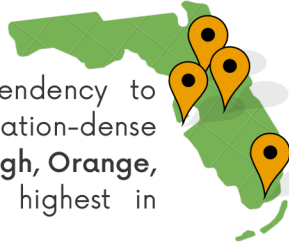
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HOPPING INTO THE FLORIDA'S BREWERY INDUSTRY STATISTICS

AUTHORS: Meri Hambaryan, Jonathan Stephens, Glory Orivri, John Lai, Bachir Kassas, Kevin Athearn, Shinsuke Agehara
(Based off of a survey conducted in 2021 with 42 participating breweries spanning across the State of Florida)

Floridian Brewery Operations Locations

Reported breweries exhibited a tendency to establish operations near population-dense counties, such with **Pinellas, Hillsborough, Orange, Broward, and Alachua** being the highest in operation stationing.



Pacific Northwest Preference

98% of reporting breweries indicated the Pacific Northwest (Idaho, Oregon, Washington) as a major source of domestic hops.



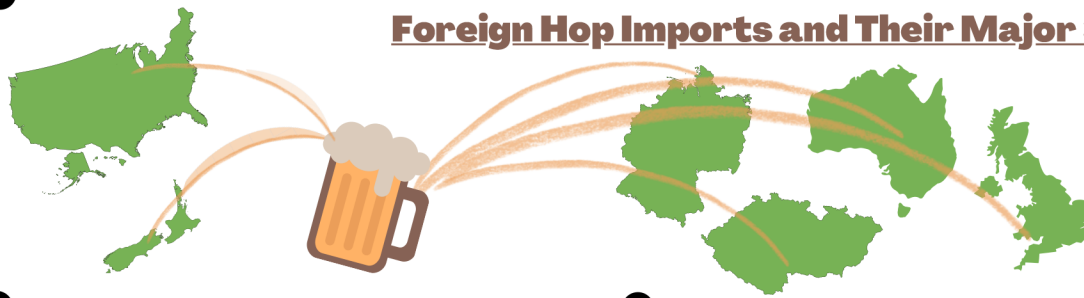
Raw Production Value

The reported group of brewers produced an average over **2,150 barrels** of beer every year.



Foreign Hop Imports and Their Major Sources

A vast majority of Florida brewers import hops, with over **76%** of reporting operations having imported hops primarily from **Germany, Czech Republic, New Zealand, Australia, and the United Kingdom**.



Full Time-Equivalent Employee Values

Reporting operations reported having an average of **10 Full-Time Equivalent (FTE) Employees**.



10+ Years
14.3%

7-9 Years
23.8%



4-6 Years
23.8%

1-3 Years
38.1%

Brewery Operation Age

Reporting operations have been active in Florida for a wide range of durations, spanning 1 to more than 10 years, with many breweries being primarily **1-3 years** old.

Aroma's Impact on General Hop Choice

Herbs, Floral, and specialty fruit (apricot, peach, pear, etc.) scents ranked the highest by reporting breweries when selecting aromatic hops in general, however...



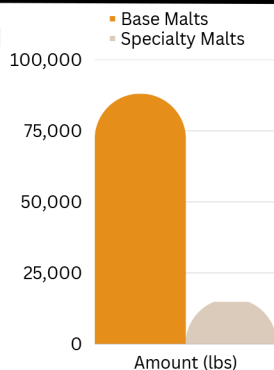
Aroma's Impact on Floridian Hop Choice

Citrus, tropical fruit, and melon/honeydew scents ranked the highest by reporting breweries when selecting hops grown in Florida.



Base vs. Specialty Malts Purchases

In 2021, reporting operations purchased an average of almost **88,000 pounds** of base malts and almost **14,800 pounds** of specialty malts.



Barley

Wheat

Oats

Corn

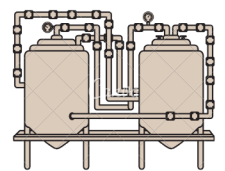
Rye

Rice

Grain Input Preferences

Brewers reported using the following grains in their products:

- 100% use Barley
- 98% use Wheat
- 93% use Oats
- 64% use Corn
- 64% use Rye
- 62% use Rice



Author Information: Meri Hambaryan (m.hambaryan@ufl.edu), is a Ph.D. student in the Department of Food and Resource Economics at the University of Florida. Jonathan Stephens (jchance.stephens@ufl.edu), is an undergraduate student in the College of Agricultural and Life Sciences at the University of Florida. Glory Orivri (g.okpiaifo@ufl.edu), is a Post-Doctoral Associate in the Department of Food and Resource Economics at the University of Florida. John Lai (johnlai@ufl.edu), is an assistant professor in the Department of Food and Resource Economics at the University of Florida. Bachir Kassas (b.kassas@ufl.edu), is an assistant professor in the Department of Food and Resource Economics at the University of Florida. Kevin Athearn (athearn@ufl.edu), is an extension agent in the Department of Food and Resource Economics at the University of Florida. Shinsuke Agehara (sagehara@ufl.edu), is an associate professor in the Department of Horticultural Sciences at the University of Florida.

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