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Article

Market study on craft beer consumption in southern Tamaulipas

Estudio de mercado sobre el consumo de cerveza artesanal en el sur de Tamaulipas

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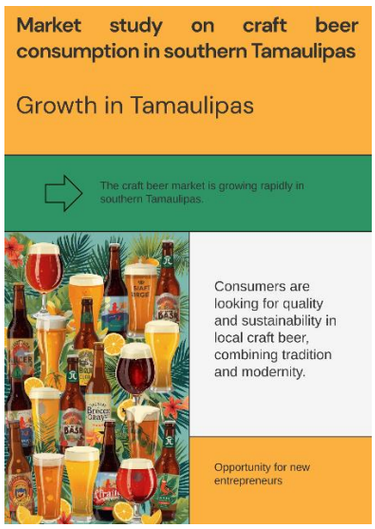
Abstract

The craft beer market in southern Tamaulipas shows significant growth potential, driven by middle- and high-income consumers with higher education and a preference for premium products. This study analyzes supply and demand conditions, identifying opportunities and challenges for the positioning of a new craft brewery project. Data was collected through surveys and direct observation in supermarkets and local breweries. Results reveal that consumers value flavor, quality, and sustainability, with willingness to pay between 2.5-3.6 USD per bottle. The findings provide strategic insights into business planning and market entry.



Craft beer, Strategic insights, Business plan

Resumen

El mercado de la cerveza artesanal en el sur de Tamaulipas presenta un crecimiento significativo, impulsado por consumidores de ingresos medios y altos, con educación superior y preferencia por productos premium. Este estudio analiza las condiciones de oferta y demanda, identificando oportunidades y desafíos para el posicionamiento de un nuevo proyecto cervecero. Los datos se obtuvieron mediante encuestas y observación directa en supermercados y cervecerías locales. Los resultados muestran que los consumidores valoran el sabor, la calidad y la sostenibilidad, con disposición a pagar entre 45-65 MXN por botella. Los hallazgos ofrecen información estratégica para la planeación de negocios y la entrada al mercado.

Cerveza artesanal, Información estratégica, Plan de negocios

Area: Strengthening the scientific community

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Introduction

The objective of this study is to comprehensively analyze the profile, consumption habits, preferences, and attitudes of craft beer consumers in southern Tamaulipas, to generate strategic information that supports decision-making in brewing projects in the region. This study is based on the application of a structured questionnaire designed to provide a comprehensive view of the craft beer market in southern Tamaulipas and it was administered via social media.

The first section presents the relevance of Mexico's brewing industry within the global context, highlighting its role as the fourth largest producer and the leading exporter worldwide. It explains its economic impact on GDP and employment, as well as the concentration of production in certain states and leading companies. Finally, it points out the emerging growth of the craft beer segment, which, although still marginal, contributes to innovation and regional development opportunities.

The following section describes the features of the research methodology and design, including the structure of the questionnaire applied. The instrument was divided into five sections: Demographic Data, Consumption Habits, Product Preferences, Behaviors and Attitudes, and Final Comments, allowing for a comprehensive analysis of consumer behavior.

The results section shows the demographic characteristics of the respondents and the findings for the questions asked.

1. Background

The brewing industry is one of the most dynamic sectors worldwide and in Mexico, with significant economic impact and influence on consumption patterns. In 2022, global beer production reached 1,890 million hectoliters, with nearly half concentrated in five countries: China, the United States, Brazil, Mexico, and Germany (Martínez, 2023).

Global beer consumption increased by 2.9% compared to the previous year, equivalent to more than 303 billion bottles of 633 ml, driven by post-COVID-19 recovery (Kirin Brewery Company, 2023).

China remained the largest consumer, while Mexico ranked fourth in production and first in exports, with USD 5.95 billion in sales abroad, mainly to the United States, which absorbs 78.6% of Mexican beer imports (OEC, n.d.).

The importance of the Mexican brewing industry is reflected in its 1.5% contribution to national GDP and the generation of approximately 700,000 direct and indirect jobs (INEGI, 2017). Its value chain involves farmers, packaging manufacturers, brewmasters, and distributors, strengthening key sectors such as agriculture and logistics. Production is concentrated in Zacatecas, Coahuila, and Nuevo León, which together account for more than half of national output.

The market is dominated by Grupo Modelo and Heineken Mexico, with production capacities exceeding 120 million hectoliters annually (El Financiero, 2023; Alfa Editores, 2018). Domestic consumption has shown steady growth, with an average annual expenditure of USD$182.87 per person in 2021 and per capita consumption rising from 56 to 68 liters between 2010 and 2019 (Storecheck, n.d.).

Within this panorama, Mexican craft beer represents an emerging yet marginal segment, accounting for only 0.84% of total beer sales in the country. According to the Brewers Association (n.d.), craft beer must meet three criteria: production below seven million hectoliters, independent ownership, and exclusive malt-based brewing. In Mexico, there are approximately 1,500 independent breweries, averaging 7.2 employees, of whom 33% are women and 16% are single mothers (Amarilio-Castillo, 2021).

Craft beer production reached 303,337 hl in 2021, with Jalisco, Baja California, and Nuevo León leading. The most produced styles include Bitters, IPAs, and Double IPAs (19.35%), followed by light ales, pale ales, lagers, and amber beers (Amarilio-Castillo, 2021). The market reached USD 125 million in 2023 and is projected to grow at 7.1% annually until 2032, reaching USD 232.86 million (Informes Expertos, n.d.).

In the northeastern region of Mexico, several local producers stand out for their contribution to the diversity and quality of the craft beer market:

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- Nuevo León hosts well-known breweries such as *Albur, Propaganda Brewing, Ocho Reales, Cervecería Duarte,* and *Boca Negra,* among others (Girón, 2023).

- Tamaulipas is home to breweries including *Robleoro Brewing Co, Caserío, El Milagro de los OVNIs, Cerveza Cuarto de Milla,* and *Heroica* (González, 2022).

- Coahuila has a strong presence with breweries such as *Aeon, Barbaroja, Clásica, Huérfana,* and *Primitivo,* among others (IBUS, 2019).

These breweries significantly enrich the regional beer landscape, offering variety, innovation, and distinctive flavors that strengthen the identity of northeastern Mexico's craft beer industry. Specifically, Southern Tamaulipas—comprising Tampico, Ciudad Madero, and Altamira—provides a unique environment for the development of craft beer. With a metropolitan population of over 773,285 inhabitants (Data México, 2020), the region combines urban density with strong cultural traditions of social gatherings and gastronomy. Its humid subtropical climate, characterized by high temperatures and humidity for most of the year, influences consumption patterns, favoring refreshing beer styles and lighter presentations. The presence of a port economy and industrial activity also contributes to a diverse consumer base with medium- to high-income segments, creating opportunities for premium products such as craft beer (POSTA).

To complement this context, a field visit was conducted to two recognized establishments in Tampico. The fieldwork identified a wide variety of brands and styles of beer available, both national and international, reflecting the diversity of consumer preferences and the positioning of craft beer alongside imported premium options. The variants are shown in Table 1, which summarizes the assortment found in Walmart and HEB supermarkets.

This context highlights the duality of the Mexican brewing industry: on one hand, a consolidated and globally competitive sector; on the other, an expanding craft segment that, although minor, contributes diversity, innovation, and regional development opportunities.

Box 1

Table 1
Variety of beer in supermarkets

Walmart Brand	Price (USD)	HEB Brand	Price (USD)
Minerva	2.22	Goblin	5.66
Tropper	3.00	Erdinger	5.11
BelHaven Black	3.33	Bombardier	5.66
Grolsch	3.28	HB	6.05
Delirium	6.77	Youngs	5.66
Tsingtao	3.39	Eagle Banana	5.66
Lefmans	4.89	San Peters	5.66
Sapporo Light	3.83	Duff	2.39
Brewdog	4.55	Tropper	5.83
Samuel Adams	3.61	Tsingtao	3.28
Calavera	3.16	Sapporo	4.66
Finisima	3.28	Asahi	3.5
Ticus	2.78	Perro del mar	3.28
Paulaner	5.77	Baja Brewing	4.66
Erdinger	5.11	Minerva	3.5
Jabali	2.11	Lagerita	3.28
HB	3.66	Rrey	3.11
Flensburger	4.66	Nacional	2.28
Tempus	2.22	Finisima	2.89
Allende	3.33	Allende	2.5
Baja brewing	3.00	Colimita	2.22
		Principia	3
		Regio	2.33

Source: Owned

2. Methodology

This research is non-experimental in design, following a cross-sectional and descriptive approach, according to Hernández Sampieri & Mendoza Torres (2018). A transversal perspective was adopted, since cross-sectional designs collect data at a single point in time, with the purpose of describing variables and analyzing their incidence and interrelation at a given moment.

In accordance with market research standards, research was conducted on the current status of the availability and sale of craft beer through secondary sources (Coursera, 2023). A questionnaire (UNADM) was designed as a tool to collect information from primary sources through fieldwork with a non-probabilistic sample (Morales Pérez, De la Torre Romero, & Aguerrebere Salido, 2003).

The study population consisted of residents of Tampico, Ciudad Madero, and Altamira, all part of the metropolitan area of Southern Tamaulipas. People aged 20 years and older were included as the units of analysis. The distribution of the population aged 20 years or older is presented in Table 2 (Data México, 2020).

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Box 2

Table 2
Population aged 20 years or older in Tampico metropolitan area

City	Men	Women
Tampico	99,867	115,233
Madero	69,677	79,969
Altamira	85,362	89,826

Source: Owned based on (Data México, 2020)

Surveys were conducted online due to their efficiency, low cost, accuracy, and ease of participation, which also facilitated data processing and analysis (QuestionPro, n.d.). To ensure clarity and reliability of the instrument, a pilot test was administered to 10 randomly selected individuals meeting the inclusion criteria. Feedback from this stage was used to refine the questionnaire, eliminating ambiguities and improving the structure. The final questionnaire consisted of 15 items, divided into four main sections, as shown in Table 3.

Box 3

Table 3
Questionnaire composition

Dimension	Items	Characteristics
1. Demographic	1, 2, 3, 4, 5, 6	All multiple choice
2. Consumption Habits	7, 8, 9, 10, 11, 12	All multiple choice
3. Behaviors and Attitudes	13, 14	All multiple choice
4. Final Comments	15	Open question

Source: Owned

Each dimension in Table 3 corresponds to:

1. Demographic Data. Basic information such as age, gender, and income level, allowing segmentation of responses by socio-demographic groups.

2. Consumption Habits. Frequency of craft beer consumption and common purchase locations, providing insights into consumer behavior.

3. Behaviors and Attitudes. Motivations, openness to trying new beers, influence of recommendations, and participation in beer-related events.

4. Final Comments. Open-ended question for respondents to share opinions, suggestions, and additional insights.

Data collection was carried out between October 2024 and February 2025 using online survey tools. Responses from 101 people were retrieved. The results were processed with Excel for statistical analysis, while qualitative responses were examined through word cloud visualization to identify recurring themes and perceptions.

3. Results

The findings are presented here according to the dimensions of the questionnaire.

3.1 Demographic data of the sample

The market study reflects a diverse consumer profile in terms of age, gender, income level, education, and occupation. Regarding age, many consumers are between 25 and 44 years old with 47.6%, followed by the group aged 20 to 24 with 35.2%. This young-adult population represents the most relevant segment for craft beer consumption, as illustrated in Figure 1.

Box 4

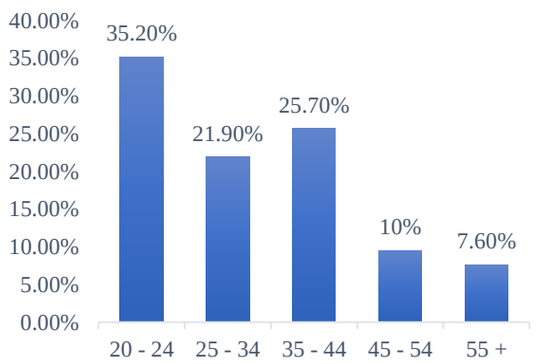

Figure 1
Sample age range

Source: Owned

In terms of gender, both men and women participate in the market, with a balanced distribution across respondents. With respect to income levels, middle- and high-income segments account for the largest proportion of consumers, based on their monthly income. Figure 2 indicates the purchasing power levels.

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Almost a third of those surveyed preferred not to declare their income. Each end of the income range represents one-fifth of the respondents.

Box 5

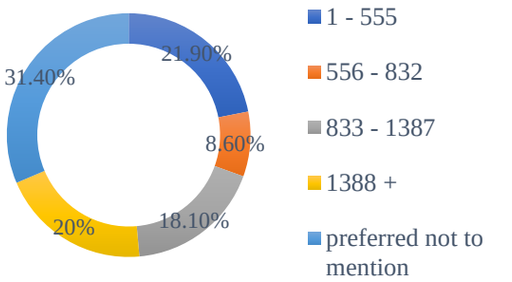

Figure 2
Monthly income levels (USD) of the sample
Source: Owned

In terms of education, most respondents reported having completed higher education or postgraduate studies (97.1%). This suggests a public with a high level of knowledge and demanding expectations regarding product quality. This characteristic is consistent with the occupational profile, where employees constitute the predominant group, reflecting economic stability and the capacity for frequent purchases.

Finally, in relation to geographical location, many consumers reside in Tampico (58%), followed by Ciudad Madero (26%), and to a lesser extent, Altamira (16%). Altamira is underrepresented in this sample, although the characteristics of its population are very different from those of the other municipalities in the metropolitan area.

3.2 Consumption habits of craft beer

The survey results reveal that craft beer consumption is generally occasional rather than habitual. 31.4% of the responses say that they never consume craft beer.

Most respondents reported consuming craft beer either *sometimes* or monthly (64.7%), indicating that it is perceived more as a special experience than as regular practice. As shown in Figure 3.

Box 6

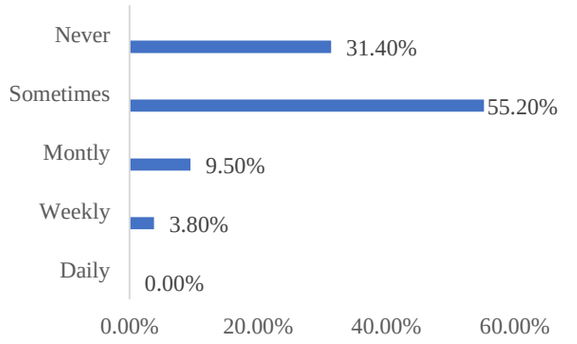

Figure 3
Craft beer intake frequency
Source: Owned

Regarding purchase locations, supermarkets and restaurants/bars were identified as the most common points of sale. However, specialized stores and online platforms also emerged as relevant alternatives, reflecting consumer interest in exploring diverse distribution channels as you can see in Figure 4.

Box 7

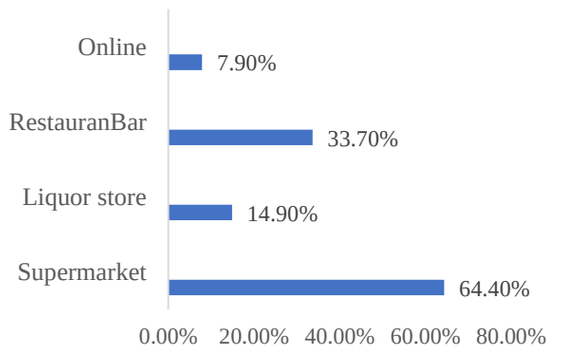

Figure 4
Craft beer purchase locations
Source: Owned

In terms of preferred packaging size, the 355 ml bottle was the most popular option (63.5%), and 33.7% prefer the 500ml one, both considered practical and sufficient for individual consumption. When asked about their favorite beer styles, respondents showed a clear preference for Amber (40.6%), Golden (34.7%), and Dark/Black (33.7%) beers. This highlights a tendency toward more robust and complex flavor profiles. The findings in Figure 5 reveal the attributes most valued in craft beer, flavor and organoleptic quality were identified by 86.4% as the main differentiators, underscoring the importance of sensory experience in consumer choice.

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Box 8

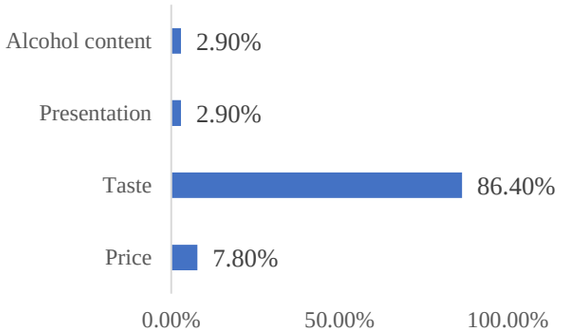

Figure 5
Attributes most valued in craft beer
Source: Owned

Finally, in relation to price sensitivity, most respondents expressed willingness to pay between 2.50 and 3.33 USD per bottle, as you can see in Figure 6. This range exceeds the typical price of commercial beers, reinforcing the perception of craft beer as a premium product.

Box 9

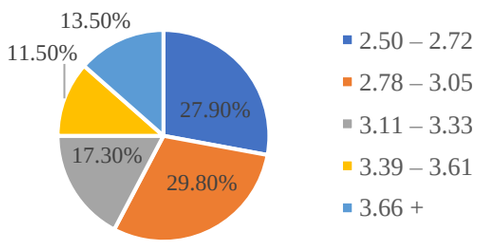

Figure 6
Craft beer price sensitivity (USD)
Source: Owned

3.3 Behavior and Attitudes

When people in the sample were asked about their motivation to try new craft beers, Figure 7 shows that respondents highlighted the importance of direct marketing strategies and personal recommendations.

Those factors play a significant role in influencing consumer decisions to explore new products.

Box 10

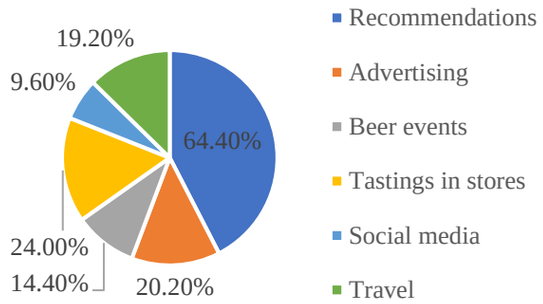

Figure 7
Motivation to try new craft beers
Source: Owned

Regarding participation in craft beer-related events such as festivals or tastings, only 5.7% reported attending several times a year. This finding reveals an area of opportunity for breweries and organizers to promote events more actively and increase consumer engagement.

The data in Figure 8 shows that willingness to pay a higher price for sustainable products, respondents expressed sensitivity toward beers made with local ingredients and sustainable methods.

Box 11

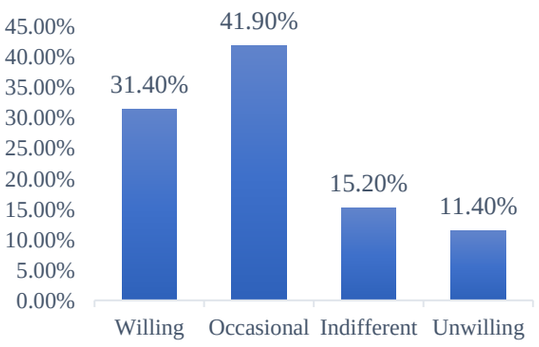

Figure 8
Willingness to Pay a Premium for Craft Beer with Local and Sustainable Attributes
Source: Owned

This suggests that marketing strategies emphasizing ethical and local values could enhance consumer willingness to purchase at premium prices.

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3.4 Final Comments

The open-ended question with number 15 allowed respondents to freely express their preferences and expectations. Several valuable aspects can be identified and visually summarized in Figure 9 with a word cloud that mainly highlights the tasting and quality of the craft beer.

Based on the results of the study presented, the following recommendations are made for the marketing process of craft beer and its differentiating elements.

- Marketing and promotion opportunities. Respondents emphasized the need for greater advertising and in-store demonstrations, suggesting that visibility and direct engagement could enhance consumer interest.
- Perception of authenticity. Craft beer was valued as a product distinct from industrialized options, associated with variety, originality, and richer flavors.
- Accessibility. Easy access was an important factor, indicating that distribution channels remain a key area for improvement.
- Product attributes. Specific preferences were mentioned, such as Pale Ale styles and higher alcohol content, reinforcing the importance of offering diverse options.
- Branding and design. Suggestions included the use of slogans, attractive packaging, and collectible bottles, showing that presentation and identity play a significant role in consumer appeal.
- Symbolic value. Some respondents purchase craft beer as gifts, associating it with premium quality and distinctive design.
- Overall satisfaction: Positive remarks such as *it taste better* reflect strong consumer appreciation and reinforce the perception of craft beer as a superior product.

Box 12

Figure 9
Word cloud regarding preferences and expectations
Source: Owned

4. Conclusions

This study focused on understanding consumer behavior and preferences in the craft beer market of southern Tamaulipas. Surveys revealed that consumption is generally occasional, with most respondents drinking craft beer monthly or sporadically, positioning it as a premium experience rather than a habitual practice.

Regarding consumer preferences, the research identified that Amber, Dark, and Golden styles are the most popular, with the 355 ml bottle being the preferred packaging size. Flavor and overall quality were highlighted as the main differentiators, reinforcing the importance of sensory attributes in product positioning.

In terms of purchasing behavior, supermarkets and restaurants/bars were the most common points of sale, although specialized stores and online platforms also emerged as relevant alternatives. This indicates opportunities for expanding distribution channels and strengthening market presence.

The study also revealed sensitivity toward sustainability and local values. Many consumers expressed willingness to pay a higher price for beers made with local ingredients and sustainable methods, suggesting that marketing strategies emphasizing authenticity and ethical production could increase demand.

Overall, the findings confirm that the craft beer market in southern Tamaulipas is driven by young-adult and middle- to high-income consumers with higher education levels, who value quality, innovation, and identity.

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These insights provide strategic opportunities for breweries to strengthen their positioning, expand consumer engagement, and promote sustainable growth in the region.

Declarations

Conflict of interest

The authors declare that they have no conflict of interest. They have no known competing financial interests or personal relationships that could have appeared to influence the research findings reported in this article on the craft beer market.

Contribution of the authors

Díaz-Flores Jorge: Contributed to the project idea, research on context analysis, writing and editing.

Soto-Hernández, Ana María: Contributed to the research method and technique on context analysis and editing.

Florencia-Castillo, Irma Beatriz: Contributed with data analysis techniques.

Availability of data and materials

The data obtained are not available.

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Abbreviations

GDP	Gross Domestic Product
ml	Milliliters
hl	Hectoliters

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