RYAN HANSEN CONSULTING

The Brewery Business Plan Blueprint

A section-by-section working template for breweries and taprooms — what investors and banks actually need to see, built from the same framework used with real consulting clients.

BEFORE YOU START

How to use this template

This is a working document, not a form to fill in once. Expect to revise it as you learn more — the plan you write in month one will not be the plan you finish with.

FOUR RULES FOR USING THIS WELL

- Replace every bracketed prompt with your own words. Nothing here is meant to survive into your final plan as-is.
- Every brewery is different — a taproom-only concept, a production-focused brewery with no taproom, and a brewpub with a kitchen need very different answers in Market Analysis and Funding Request. Adapt each section to your actual model instead of forcing your idea into a generic shape.
- The example text throughout is illustrative and intentionally generic. Do not copy it — a plan that reads like a template is a plan investors have seen a hundred times.
- This is consulting guidance, not legal or financial advice. Licensing requirements, fees, and processing times change — verify current details with the relevant agency or a licensed attorney/accountant before you rely on them for a real launch decision.

> **WORTH REMEMBERING**
>
> Brewing good beer gets you into the game. Running the business well is what determines whether you're still playing in three years. This document is entirely about the second half.

SECTION 1

01 / Executive Summary

The only section some investors will read closely before deciding whether to keep going. Write it last, even though it appears first.

WHAT IT NEEDS TO COVER

- A one-paragraph description of the concept: what you're brewing, where, and for whom.
- Your target market and what makes you different from the brewery down the road.
- The headline financial ask — how much you need, and the top-line result you're projecting.

ILLUSTRATIVE EXAMPLE — DO NOT COPY

"[Brewery Name] is a [taproom / production brewery / brewpub] opening in [city], built around [what makes the beer or the space distinctive]. We're seeking $[amount] to [primary use of funds], and project [key metric — e.g., breakeven by month X, investor repayment within Y years]."

YOUR DRAFT

SECTION 2

02 / Business Description

The concrete facts: name, location, legal structure, and what you actually brew and serve.

- Legal name and structure (LLC, S-corp, partnership) and why you chose it.
- Location and why it fits your concept — foot traffic, zoning, proximity to your target customer.
- What you brew: core beer styles, and any cider, seltzer, non-alc, or other beverages on the menu.
- Whether you're taproom-only, self-distributing, or planning wholesale distribution — this decision drives almost every other section.

"A brewery is a money printer — in an ideal batch, you're turning about $800 of ingredients into $2,000 of sales. Everything in this plan exists to make that math work reliably, at scale, without you running out of cash first."

YOUR DRAFT

SECTION 3

03 / Market Analysis

This is where most first-time plans go generic. Specificity here is what separates a fundable plan from a hobby project on paper.

- Local craft beverage trends: is your market growing, saturated, or shifting toward a specific style or format (cans vs. draft, non-alc, low-ABV)?
- Who exactly is your customer — age, income, what they currently drink, how often they'd visit.
- Name your real competitors. Not "the craft beer industry" — the actual breweries and taprooms within a 15-30 minute drive.

COMPETITOR WORKSHEET

COMPETITOR	DISTANCE	THEIR STRENGTH	THEIR WEAKNESS	YOUR EDGE

TACTIC

Visit each competitor in person before you write this section. Order their flagship beer, sit for twenty minutes, and note who's in the room and what they're paying for. That observation is worth more than any industry report.

SECTION 4

04 / Organization & Management

Investors fund people as much as concepts. This section is where you prove the team can actually execute the plan.

- Org structure: who owns what, who's the brewer, who runs the taproom, who's accountable for the books.
- Founder and key team bios — relevant experience, certifications, and what specifically qualifies each person for their role.
- Key outside relationships: co-packer, ingredient suppliers, distributor, accountant, attorney.

LEADER BIO WORKSHEET — ONE PER KEY PERSON

NAME / ROLE	RELEVANT EXPERIENCE	WHY THEY'RE THE RIGHT PERSON FOR THIS

> **COMMON GAP**
>
> Founders write detailed brewing credentials and a one-line mention of "handles the books." If nobody on the team has real bookkeeping/financial-management experience, name who fills that gap (a fractional CFO, a bookkeeper, a consultant) — investors will ask.

SECTION 5

05 / Product Line & Quality Systems

What you make, how you make it consistently, and what happens when something goes wrong in the process.

- Core lineup: styles, flavor profiles, what's distinctive about each.
- Brewing process and ingredient sourcing — where quality and consistency actually get protected or lost.
- Seasonal, specialty, and collaboration plans.

SOPS TO HAVE IN PLACE BEFORE YOU OPEN

- [ ] Recipe/batch record standardization (so every brewer produces the same beer)
- [ ] Sanitation and cleaning schedule for tanks, lines, and packaging equipment
- [ ] Quality control checkpoints (gravity, pH, dissolved oxygen, sensory check) at each stage
- [ ] Packaging and labeling compliance checklist (COLA approval, ABV statement, government warning)
- [ ] Keg/can/bottle tracking and rotation (first in, first out)
- [ ] Incident/deviation log — what happens and who decides when a batch doesn't meet spec

SECTION 6

06 / Marketing & Sales Strategy

How people find out you exist, and how you actually get paid — three separate channels that need three separate plans.

- Brand identity and how you'll build local awareness (social media, events, collaborations, press).
- Taproom sales strategy — what brings people back, not just in the door once.
- Wholesale/distribution plan, if applicable — which accounts, through which distributor or self-distribution.
- Pricing strategy relative to your local competitive set.

CHANNEL WORKSHEET

CHANNEL	% OF REVENUE (TARGET)	HOW YOU'LL GROW IT
Taproom / on-site		
Wholesale / distribution		
Retail / packaged		
Events / off-site		

SECTION 7

07 / Funding Request

The number, exactly what it's for, and the return an investor can expect — stated plainly enough that a banker could repeat it back to you.

USE-OF-FUNDS WORKSHEET

CATEGORY	AMOUNT	WHAT IT COVERS
Brewing equipment	$	
Taproom build-out	$	
Marketing / launch	$	
Working capital	$	
Contingency (10-15%)	$	Almost every launch runs over on at least one line item.
Total	**$**	

SECTION 8

08 / Funding Request — Batch Economics

Before you finalize the number in Section 7, prove the batch math actually works.

WORKED EXAMPLE — TRACKING COGS ON A SINGLE BATCH

Cost of Goods Sold (COGS) is the number that tells you whether a batch made money before you even look at rent or payroll. Model a real batch before you finalize pricing — and notice how much the channel mix (taproom vs. wholesale) moves the outcome:

LINE ITEM	COST
Ingredients (malt, hops, yeast, adjuncts)	$1,800
Packaging (cans, labels)	$1,200
Direct labor (brew day + packaging)	$900
Allocated overhead (utilities, CO2, share of rent)	$600
Total COGS — one 15-bbl batch, ≈ 200 cases of 24x12oz	**$4,500**

SCENARIO	REVENUE	GROSS MARGIN
All 200 cases sold wholesale at $28/case	$5,600	~20%
150 cases wholesale ($28) + 50 taproom-direct ($45/case-equiv.)	$6,450	~30%

WHY THIS MATTERS

Same batch, same COGS — a 10-point margin swing just from selling a quarter of it direct instead of wholesale. That's the lever most new breweries underuse. Rebuild this worksheet with your own real batch size, recipe cost, and price points before you commit to a funding number; a plan built on someone else's numbers will be wrong for your specific market.

SECTION 9

09 / Financial Projections

Three years, minimum. Investors expect to see the assumptions as clearly as the numbers.

- Income statement, balance sheet, and cash flow — Year 1 by month, Years 2-3 by quarter or year.
- State your assumptions explicitly: revenue growth rate, COGS %, labor as a % of revenue, and when you expect to hit breakeven.
- Show a downside case, not just the target case. Investors trust a plan more when it survives being questioned.

KEY ASSUMPTIONS CHECKLIST

- [ ] Revenue growth rate and what drives it (taproom traffic, new accounts, seasonal swings)
- [ ] COGS % and how it improves (or doesn't) with scale
- [ ] Labor cost as brewery staffing ramps from launch to full operation
- [ ] Month you expect to reach positive cash flow
- [ ] Debt service or investor repayment schedule, if applicable

SECTION 10

10 / Licensing & Permits

The least glamorous section and the one that controls your actual launch date. Licensing is typically only 1-3% of total startup cost — but it sets the pace for everything else.

> **ACCURACY NOTE**
>
> License categories, fees, and processing times change and vary by state/county. What follows reflects general California requirements as of 2026 — confirm current specifics with the TTB, your state ABC, and a licensed attorney before relying on any date or number here.

FEDERAL — TTB BREWER'S NOTICE

- Required for every commercial brewery in the U.S. There is no federal application fee.
- You'll need bond coverage in place before you begin brewing for sale.
- File electronically through TTB Permits Online — it's generally faster than paper filing.
- Typical processing runs roughly 45-90 days once TTB considers the application complete — check TTB's published processing-times page for the current figure before you plan around it.

CALIFORNIA — STATE ABC LICENSE

- **Type 23 (Small Beer Manufacturer)** — for breweries producing under 60,000 barrels/year. This license covers production and allows on-site retail sale of your own beer to consumers for off-premises consumption.
- **Type 01 (Beer Manufacturer)** — the license for producers above the 60,000-barrel threshold; not the "on-sale" license some templates conflate it with.
- If your concept includes a taproom serving beer for on-site consumption, or serving other brands' beer/wine, confirm with ABC whether you need an additional on-sale license layered on top of Type 23 for your specific setup — this varies by exactly what you're pouring and how.

SECTION 11

11 / Local Permits, Trademark & Timeline

Naming and timing — the two things people underestimate most about a brewery launch.

LOCAL PERMITS (VARIES BY CITY/COUNTY)

- [ ] Conditional Use Permit (CUP) for the taproom/production site
- [ ] Health Department permit
- [ ] Building and zoning permits
- [ ] Seller's Permit (CA Department of Tax and Fee Administration)
- [ ] Weights and measures certification
- [ ] Environmental permits (wastewater, air quality) if applicable to your scale

TRADEMARK

File with the USPTO after a thorough clearance search. As of mid-2026, USPTO's own published data shows an average of roughly 4-5 months to a first office action and about 9-10 months total to registration or abandonment — plan your can/label design and launch marketing around not having the mark registered on day one.

LAUNCH TIMELINE WORKSHEET

PHASE	WHAT HAPPENS	YOUR TARGET DATES
Months 1-3	File TTB application, start trademark search, begin building-authority conversations	
Months 3-6	TTB approval likely lands in this window; permits and construction move in parallel	
Months 6-9	Construction/equipment install, ABC license finalized, trademark still pending	
Months 9-12+	Test batches, staff hiring/training, soft launch	

SECTION 12

12 / Appendix

Everything that supports the plan but would clutter the main narrative.

- [ ] Market research and any local consumer survey data
- [ ] Supplier agreements or letters of intent
- [ ] Distributor letters of intent, if pursuing wholesale
- [ ] Resumes/full bios for founders and key hires
- [ ] Equipment quotes
- [ ] Your contact information, with a clear invitation for questions

BEFORE YOU SEND THIS TO ANYONE

Take a breath. This process is a sobering exercise by design — it's supposed to surface every gap before an investor or banker finds it for you. If you've filled in even half of this honestly, you already know more about your own brewery than most people do before they open one.

ONE MORE THING

Want a second set of eyes on this?

This template gets you 80% of the way there. The other 20% — the part that's specific to your numbers, your market, and your legal structure — is where a free discovery call tends to save people the most time.

Free 45-minute discovery call

We'll look at where your plan stands and talk through whether working together makes sense — no pitch, no pressure. Typical topics:

- Refining the plan once you've drafted it
- Equipment selection and layout design
- Ownership structure and buy-sell terms — get this right before you need it
- Social media, branding, and go-to-market strategy
- Record-keeping, growth planning, and accountability

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