

**Brewers Association 2020
Malt Barley & Brewing
Industry Update**



“If you think you are too small to
make a difference, try sleeping
with a mosquito.”

– Dalai Lama



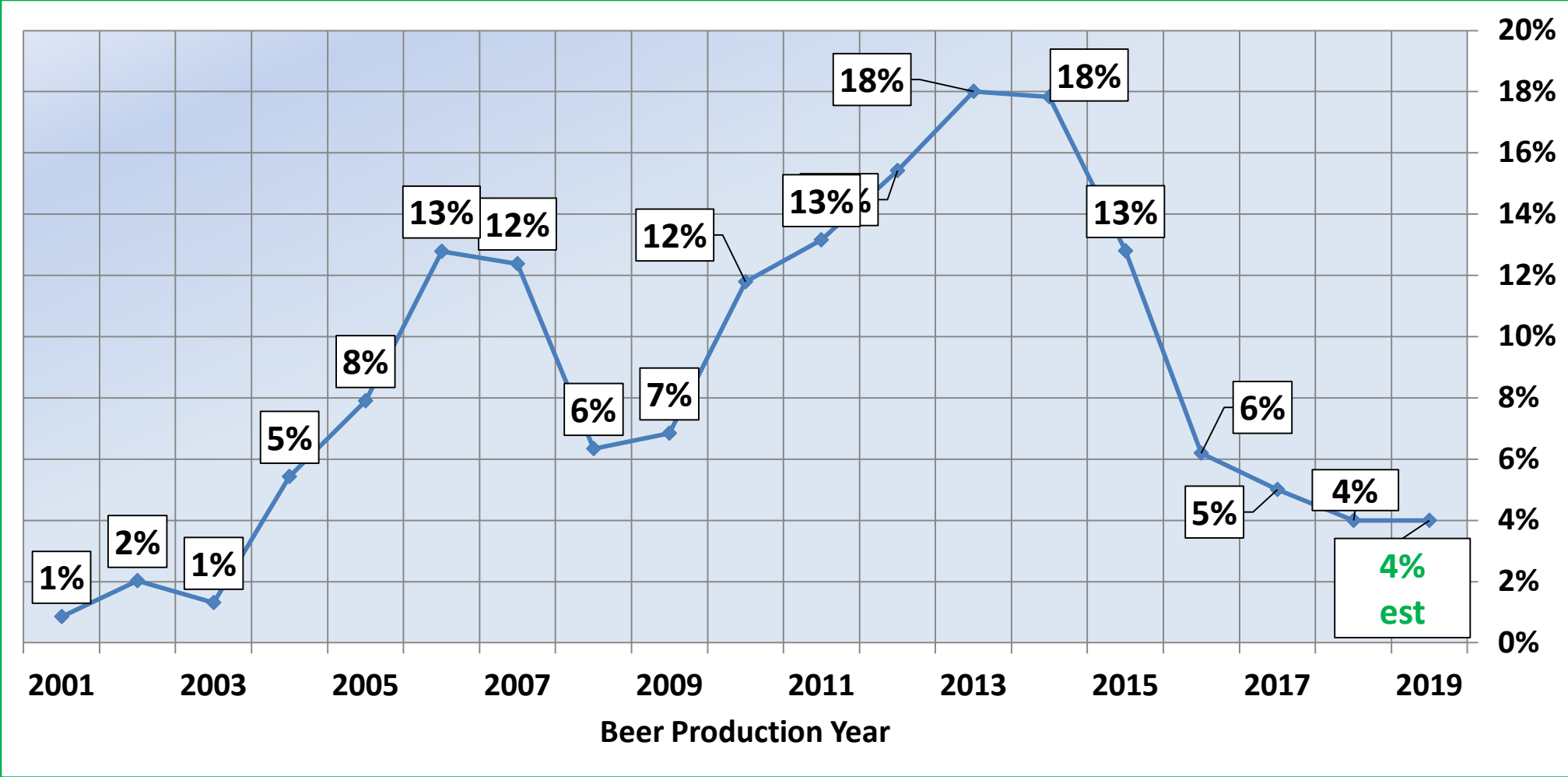
Objectives

- **Brewing Industry Update**
- **BA Barley Industry Funding and Support**
- **Malt Industry Best Practices –**
 - **Health Canada & FDA Rulemaking**
 - **GMPs**
- **Excise Tax**

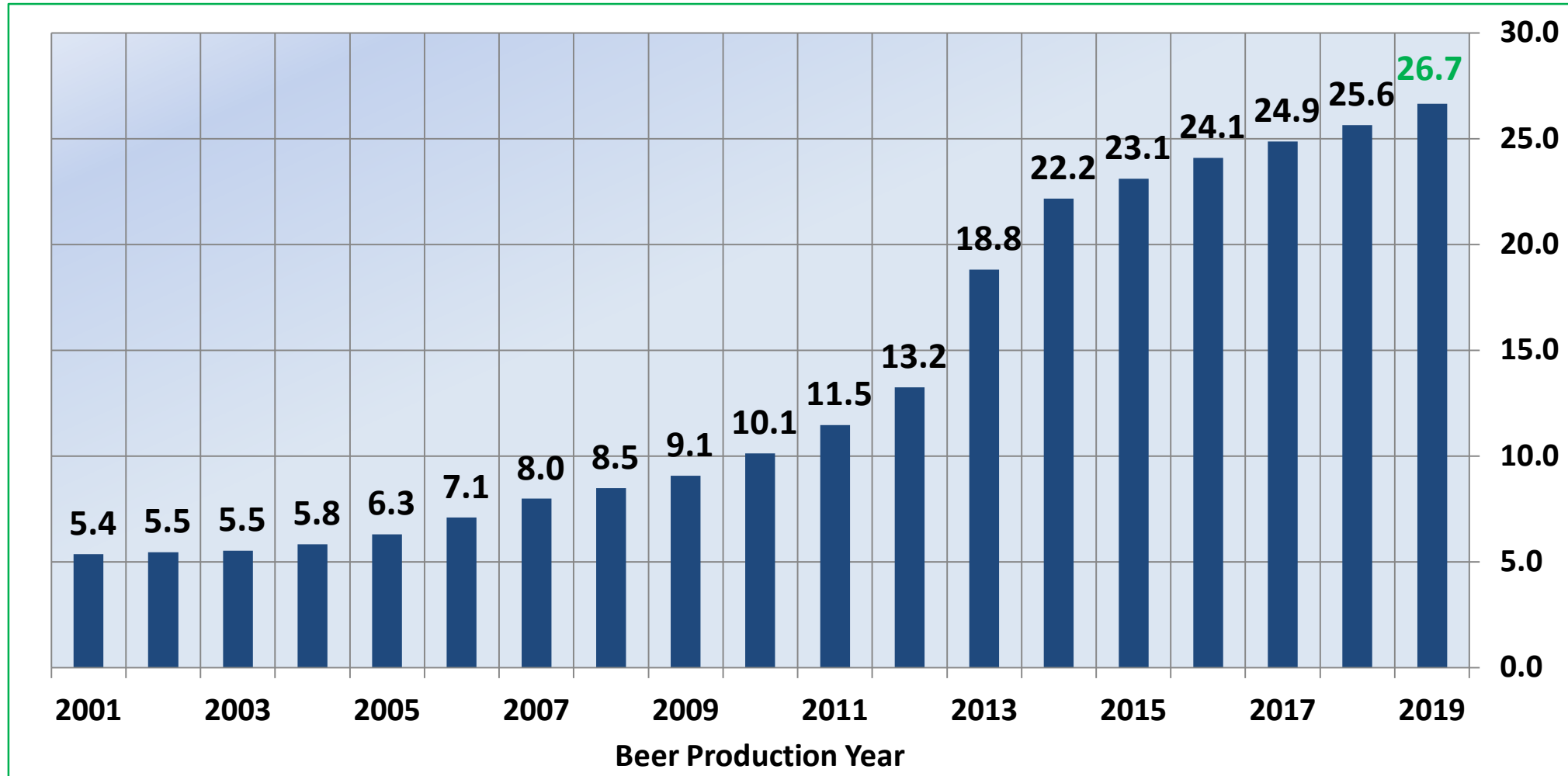
2019 Brewing Industry Update

- Total U.S. beer volume down **~0.8%**
- Total number of U.S. breweries tops **8,100** for first time ever (~7,000 one year ago; ~6,000 two years ago)

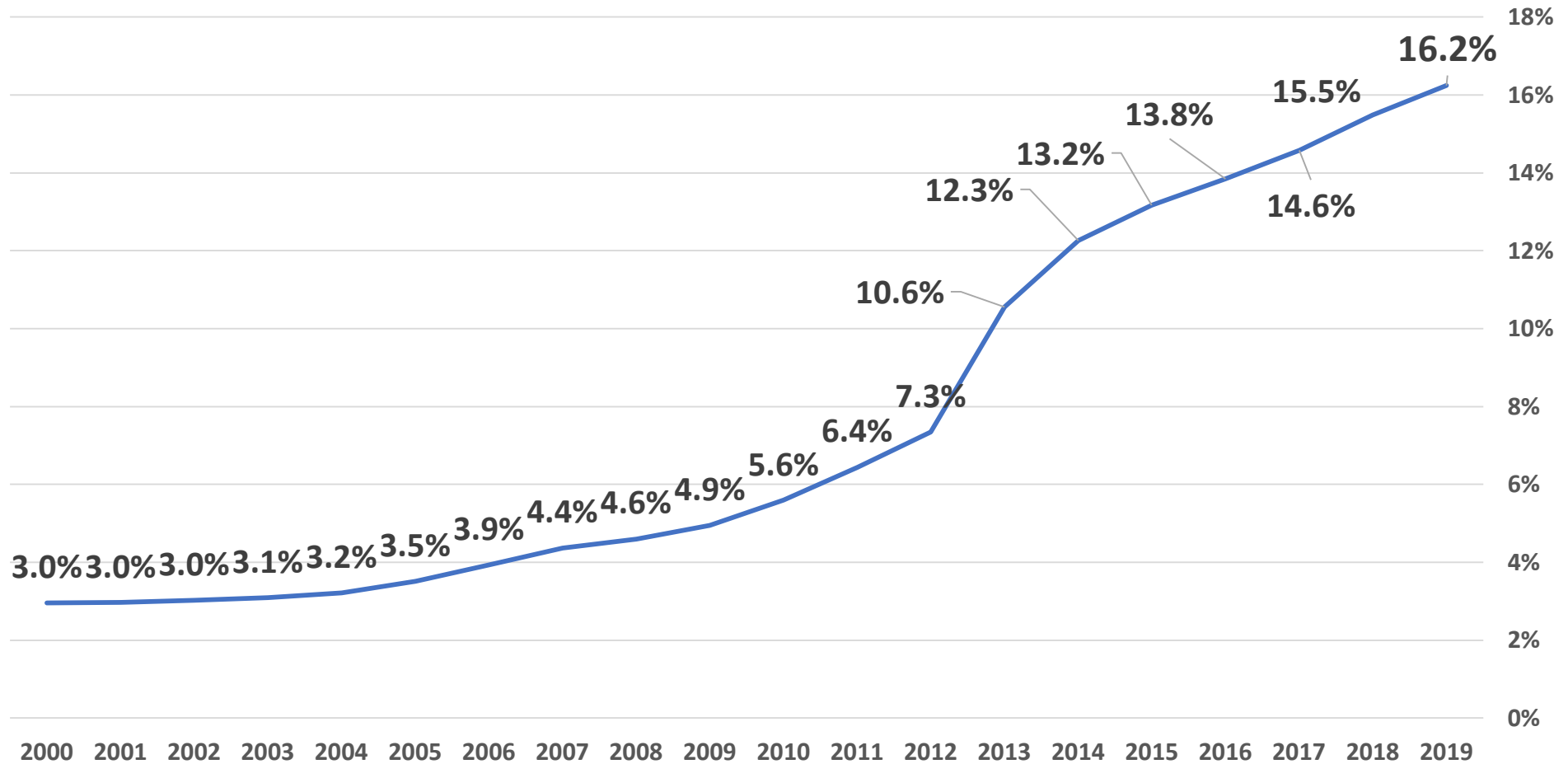
US Craft Beer Volume % Change YOY



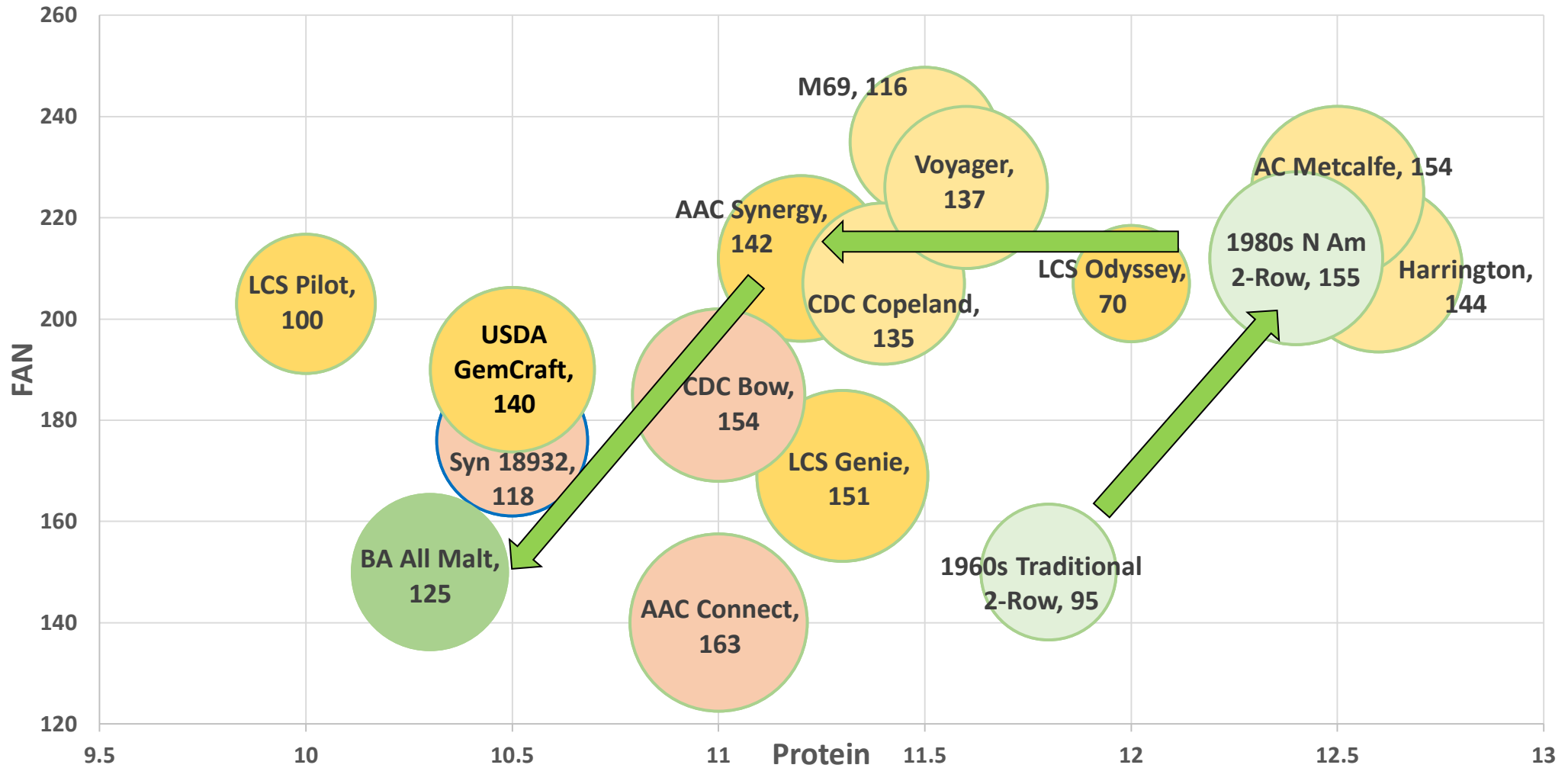
US Craft Beer Production Volume (MM US BBL)



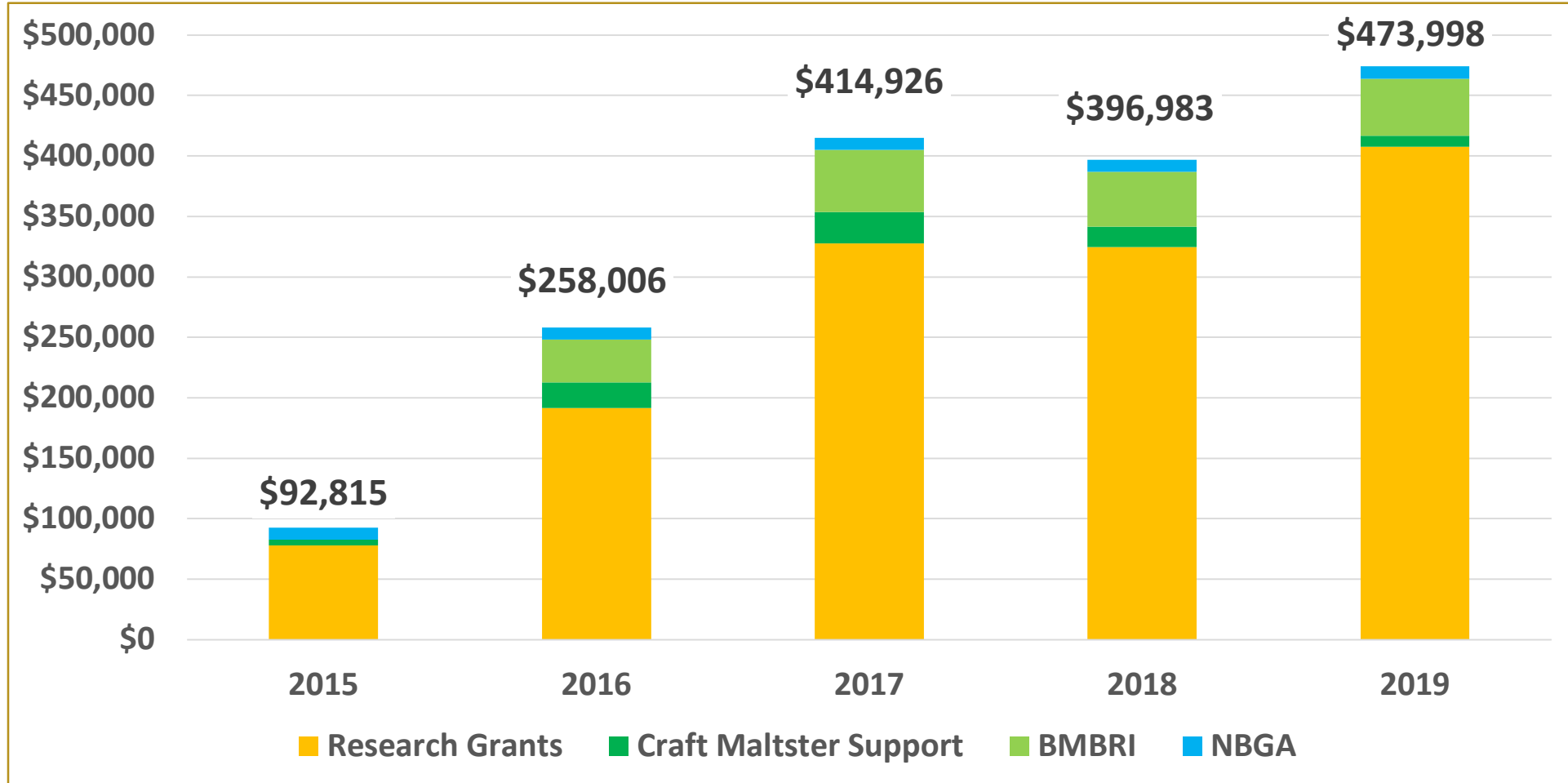
Craft Volume Share of US Beer Production



N America Malt Barley Basket Evolution 1960s to 2020



BA Barley Industry Support



2019 Research: Sustainability

Improving the Sustainability of Malting Barley Production: Prospects for Perennial and Annual Growth Habit Varieties

Sarah Windes, Daniela Carrijo, Colin Curwen-McAdams, and Patrick Hayes*

ABSTRACT

Malted grains—principally barley (*Hordeum vulgare* L.) —are essential raw materials for brewing. There is an increasing demand for more sustainable crop production practices. At the same time, climate change makes it imperative to identify new production zones, systems, and crops. These demands and imperatives have stimulated interest in converting staple

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Abbreviations: AMBA, American Malting Barley Association; QTL, quantitative trait locus.

BARLEY (*Hordeum vulgare* L. subsp. *vulgare*) is a crop of worldwide importance, ranking fourth amongst the cereals (FAOSTAT,

<https://dl.sciencesocieties.org/publications/cs/abstracts/59/6/2289>

2019 Research: Malt Barley Impact on Beer Flavor

Variation in Sensory Attributes and Volatile Compounds in Beers Brewed from Genetically Distinct Malts: An Integrated Sensory and Non-Targeted Metabolomics Approach

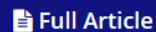
Harmonie M. Bettenhausen , Amanda Benson, Scott Fisk , Dustin Herb, Javier Hernandez , Juyun Lim , Sue H. Queisser , Thomas H. Shellhammer , Veronica Vega , Linxing Yao , Adam L. Heuberger  & Patrick M. Hayes  ...show less

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 <https://doi.org/10.1080/03610470.2019.1706037>

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Abstract

Previous research demonstrates that barley genetics can influence beer flavor. However, the chemical basis for differences in beer flavor attributed to barley is not well defined. Here, the associations between beer volatile compounds and sensory descriptors were investigated in a controlled experiment, whereby barley genotype was the main driver of variation in the system. Beer was brewed from three advanced barley

<https://www.tandfonline.com/doi/full/10.1080/03610470.2019.1706037>

2020 Barley Risk Assessment: Best Practices Gap Analysis

- Smart Barley (ABI)
- Better Barley Better Beer (MC)
- Field to Market Barley Fieldprint (FTM)

2020 Barley Industry Food Safety: MFSAG

- Coalition led by BMBRI (Canada) and AMBA (U.S.)
- Rulemaking (near term) -
 - Health Canada under FSCA
 - FDA rulemaking under FSMA
- Best Practices and GMPs in malthouses (medium term)

Craft Beverage Modernization and Tax Reform Act (CBMTRA)

- Thank you barley industry for your support!
- Originally: a two-year provision of Tax Cuts & Jobs Act of 2017
- Was set to expire Dec 31, 2019 (~2900 new breweries would see a tax increase for the first time ever)
- 1-Year extension: expires December 31, 2020
- 2020 lobbying efforts focusing on “permanence” (instead of “extension”)



CHEERS!