



Great Lakes
Hops & Barley Conference
March 7, 2020

Hi, I'm Jesse.



From bovines to beer

- Executive Director of the Craft Maltsters Guild
 - Started December 2019
- Based in Bozeman, MT
- A decade of writing and marketing/PR consulting
 - Agriculture businesses, ranches, conservation orgs
- Fermentana - events management
 - Bozeman Craft Beer Week
 - Beer education
- Pink Boots Society - Montana Chapter
- Homebrewing - Bridger Brew Crew
- Personal interests
 - Fly fishing, hiking, Budro



No boys allowed: women-only craft beer series kicks off Jan. 23

BOZEMAN
Bozemanans, a beer-focused event company owned by Bozeman home brewers, Lisa and Liz Maltsters, is kicking off its annual Craft Beer Week with Beer Mamas, a series of female-only beer events that begins on Tuesday, Jan. 23, with the "Brews of Beer." From 6 to 8 p.m. at Bozeman Brewing Company, attendees will enjoy a "memory and toasting" led by Maltsters, a certified beer judge, while tasting a variety of beer styles. The evening will also include a tour of the brewing facility, light snacks and time for mingling and discussion.



Maltsters and Bozeman decided to launch the Beer Mamas series to open a spotlight on a rapidly growing demographic of Montana's beer-loving population—women. According to the national Brewers Association, women currently represent slightly more than half of all beer drinkers, 50 that number, approximately 25 million women nationwide.



About the Craft Maltsters Guild

- Officially, the North American Craft Maltsters Guild
- Founded in 2013 by 8 craft malthouses
- THE GUILD'S MISSION is to promote and sustain the tradition of craft malting in North America (*and beyond*), provide services and resources to the Association's members, and uphold the highest quality and safety standards for Craft Maltsters.



Defining craft malt

- Finished malt product, produced from a variety of grains
 - Examples: Barley, wheat, rye, millet, oats, corn, spelt, triticale, and buckwheat
- Made using a majority (greater than 50% by weight) of locally grown grains



What is a craft malthouse?

- **Small:** A Member Malthouse produces between 5 metric tons (5.5 US tons) to 10,000 metric tons (11,000 US tons) per year.
- **Local:** Over 50% of grains are grown within a 500-mile radius of the Member Malthouse.
- **Independent:** Each Member Malthouse must be independently owned by a 76% majority of ownership.



Malting systems

Data from Aaron MacLeod at Hartwick College showed out of the nearly 3400 samples their lab processed for 112 malthouses across North America over the past 5 years:

- o 55% were malts made in Saladin box systems
- o 20% were malted on a drum system
- o 25% were floor malted



Current Membership

- Member Malthouses: 58
- International or Developing Malthouses: 48
- Allied Trade: 58
- International Brewery or Distillery: 55
- Individual: 48



2020 Membership - All Tiers



5 continents:

North America (3 countries)

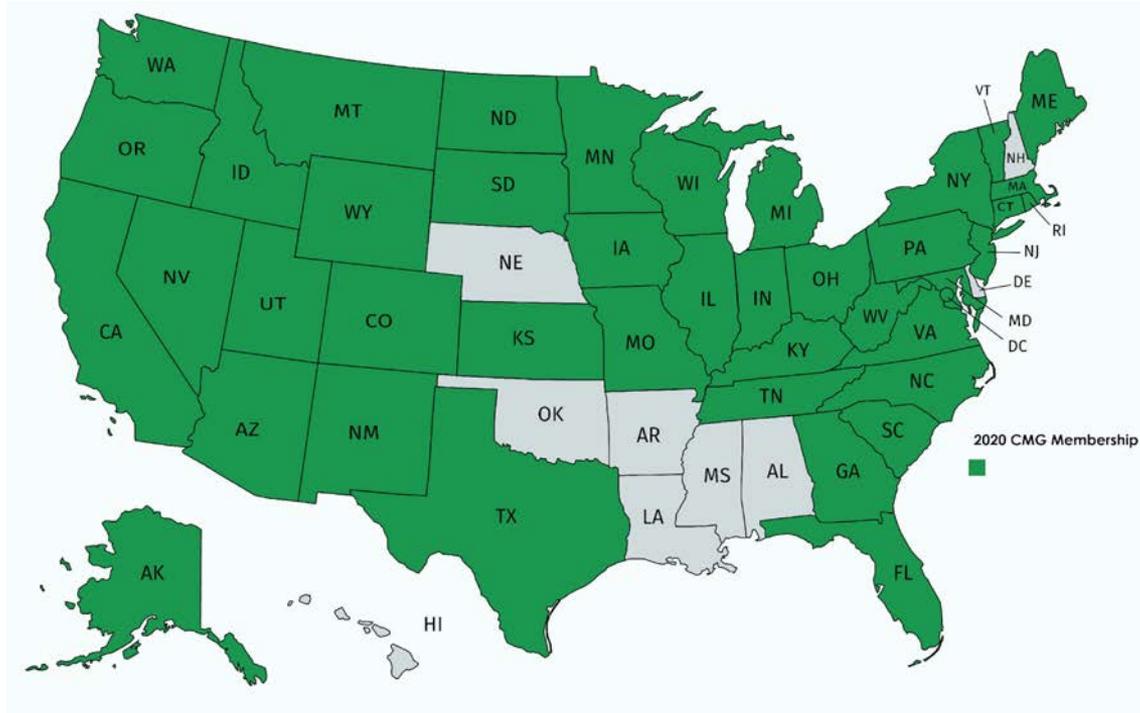
International (13 countries)

North America, South America, Europe, Australia, Asia

USA 42/50 states (270), CAN 8/10 provinces (41), MEX (1)

Australia (10), Germany (5), UK (3), Norway (2), Brazil (1), China (1),
France (1), Italy (1), Japan (1), Netherlands (1), Ireland (1), Scotland (1),
Slovenia (1)

Members in 42/50 states

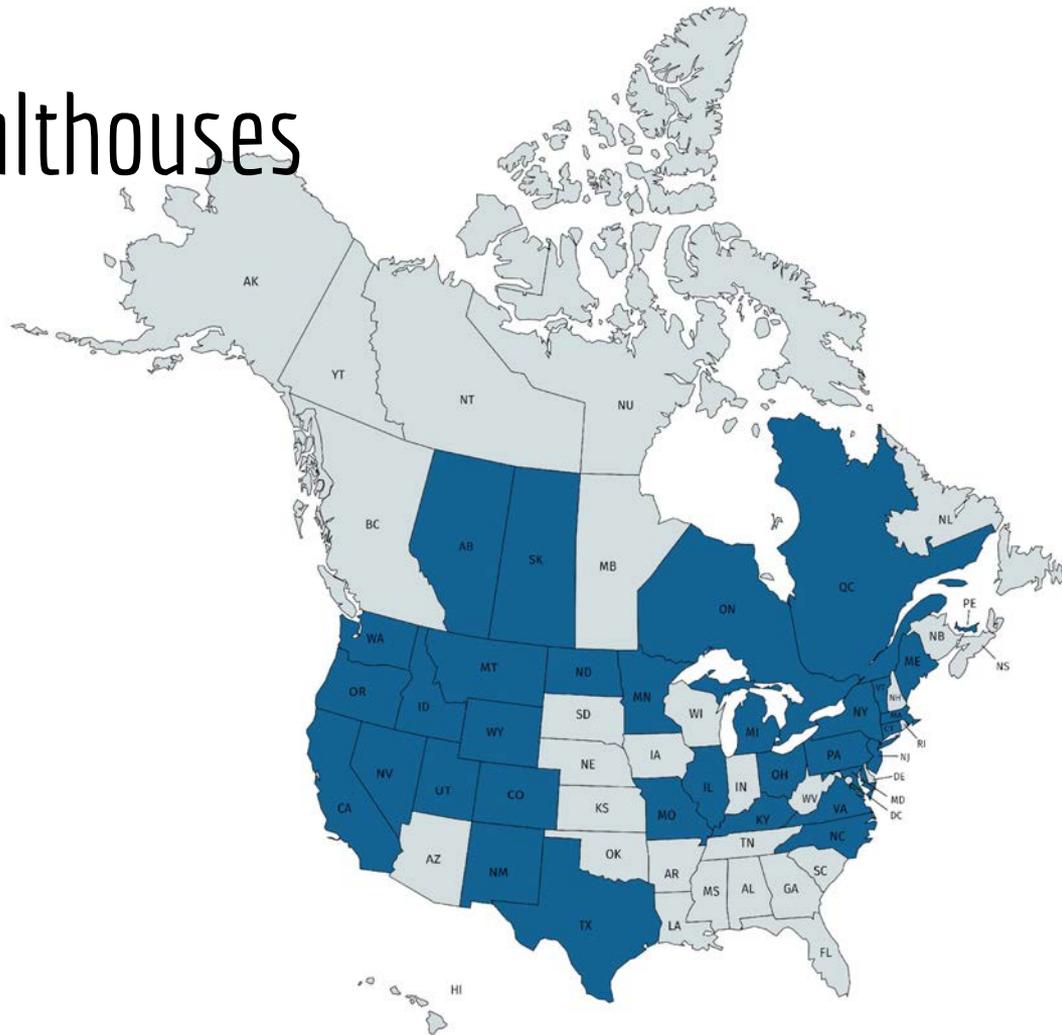


9 European countries



Operating Member Malthouses

- USA - 28/50 states
- Canada - 5/10 provinces





Promoting Craft Malt

2020 Craft Malt Conference, Feb. 7-8, 2020

- Approx. 200 people from across the globe attended
 - 29 states and 7 Canadian provinces represented
 - International attendees from Mexico, Japan, Germany, Australia, Italy, United Kingdom, France and Norway
- Tours and networking
 - Pre-conference malt house tours of 3 local craft malthouses
 - Opening reception @ New Belgium Brewing w/ MBAA Rocky Mountain District chapter
- Variety of topics covered
 - Malting techniques, business planning and fundraising, malt quality, value adding on the farm, flavor research, marketing strategies, insights into current beer industry trends, brewing with craft malt, single malt distilling



2nd Annual Malt Cup

- Added a new category (Light Munich) in 2020
- Increased entries by $\frac{1}{3}$ from 1st to 2nd year
- Results
 - Light Munich winners
 - 1st Place: Blacklands Malt (TX)
 - 2nd Place: Briess Malt & Ingredients (WI)
 - 3rd Place: Root Shoot Malting (CO)
 - Pale Malt winners
 - 1st Place 1886 Malt House (NY)
 - 2nd Place: LINC Malt (WA)
 - 3rd Place: Admiral Maltings (CA)
 - Overall Best of Show: 1886 Malt House



2020 Soles of Malt Award Recipient



Congratulations, Ryan Hamilton!

2019 Benchmarking Survey

- First (ever) craft malt industry benchmark study
 - Study supported by Brewers Association
- Research conducted by New Growth Associates (Megan Philip Goldenberg)
- Data was collected from 45 commercial craft malthouses from across the U.S.
- Survey goals
 - Set industry benchmarks
 - Measure craft malt's economic impact



The “average” U.S. Craft Malthouse

- 6 years old, started in 2014
- Incorporated as a LLC
- Purchases raw, conventionally grown grains directly from farmers w/o a contract
- Tests all incoming raw grains & outgoing malts for some quality parameters with a 3rd party
- Experiences a 20% in-house shrink rate
- Uses 4 ton system
- Uses 2R barley
- Sells mostly directly to commercial breweries in their own state
- Annual revenues of \$350,000 & profitable
- Annual salary of \$49,000 + Federal benefits per FTE

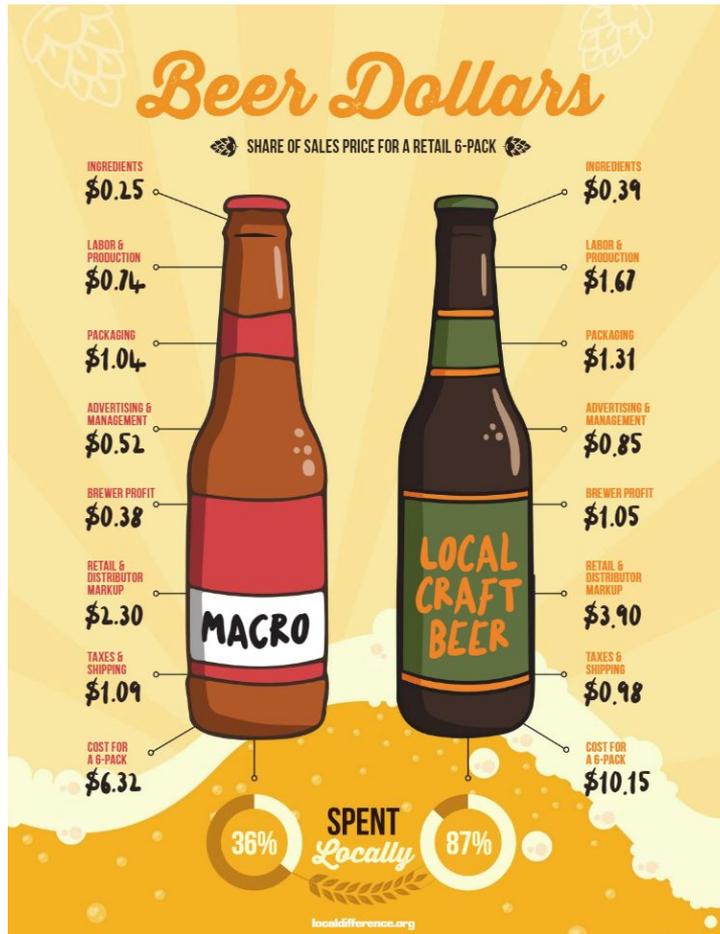


(Source: 2019 CMG benchmarking survey conducted by New Growth Associates; data collected from 45 craft malthouses from across the U.S.)

Malt barley makes farmers more money!

- Feed barley, avg. price - \$2.50/bushel
- Malting barley, avg. price - \$8.16/bushel
- **That's a direct impact on the farm of \$5.66/bushel!**

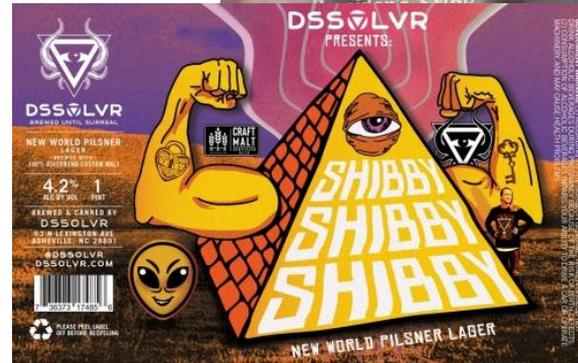




Source: "The Economic Impact of Beer" by Megan Phillips Goldenberg, 2018 Guide to Local Food in Southeast Michigan

Certified Craft Malt Seal

- Launched in September 2019
- Trademarked seal that allows brewers and distillers to communicate their use of and support for distinctive, locally produced raw materials
- Early adopters
 - Currently 36 breweries and distilleries in the program
- Brewers are using the seal on packaged product, taproom signage



Looking ahead

- National Barley Improvement Committee Lobbying Trip, March 8-11
- Craft Brewers Conference, April 19-22
 - Booth 1100 at the BrewExpo America
 - Attend our Ingredients & Supplies Track Seminar “Learning more about craft malt through sensory analysis”
 - Tuesday, April 21 from 10:30am-12pm
 - Room 205



2021 Craft Malt Conference



January 22-23, 2021

Portland, Maine

Have questions? Want to connect?

Jesse Bussard

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Visit www.craftmalting.com to learn more about the Craft Maltsters Guild.

