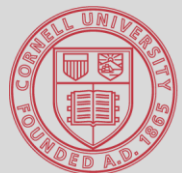


Barley Supply Chain Survey Results



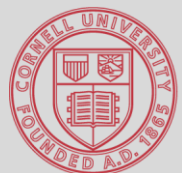
Photo Credit: wisegeek.com



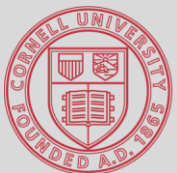
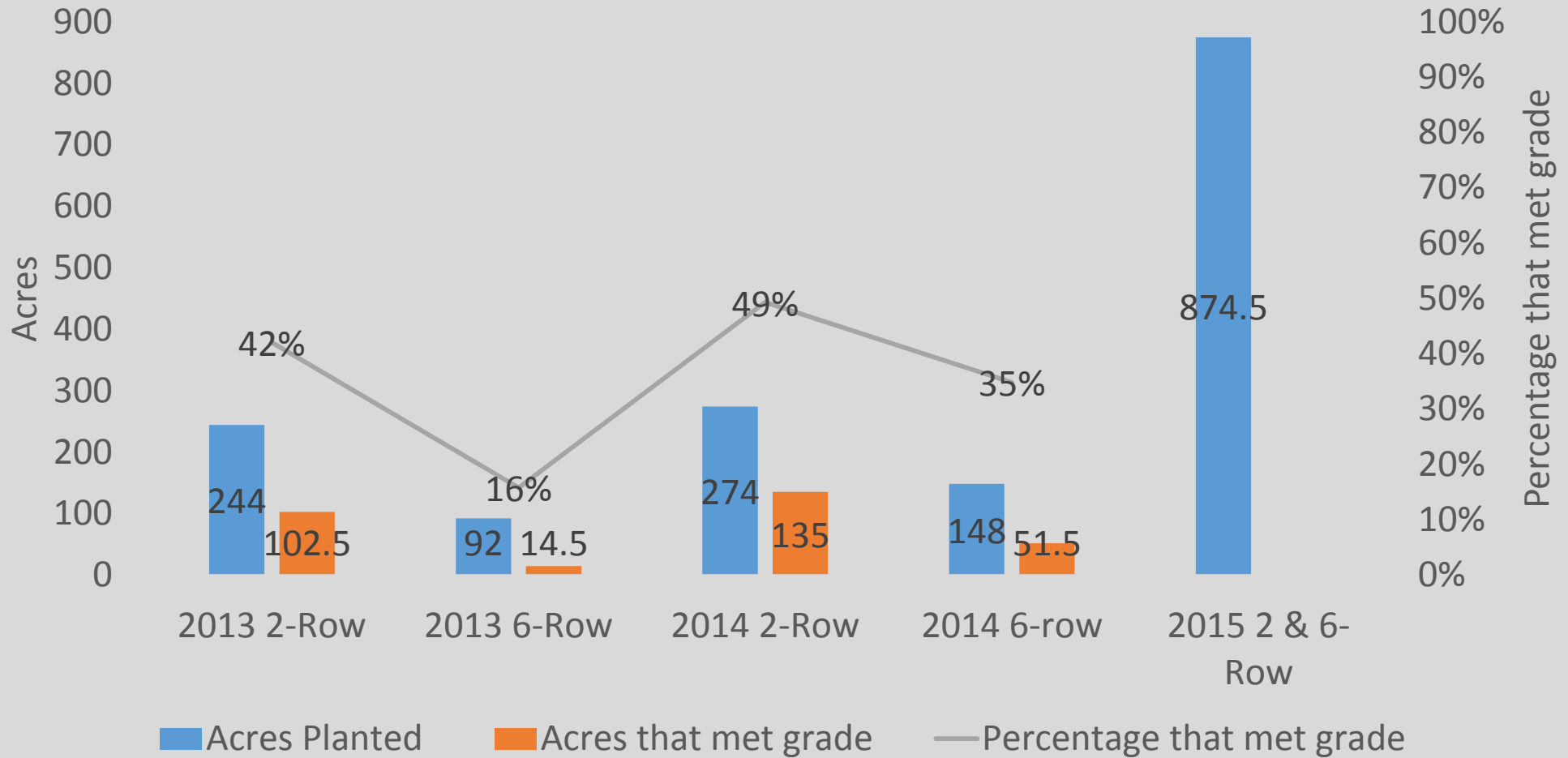
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Survey Administration

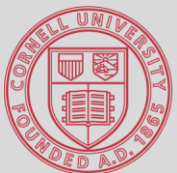
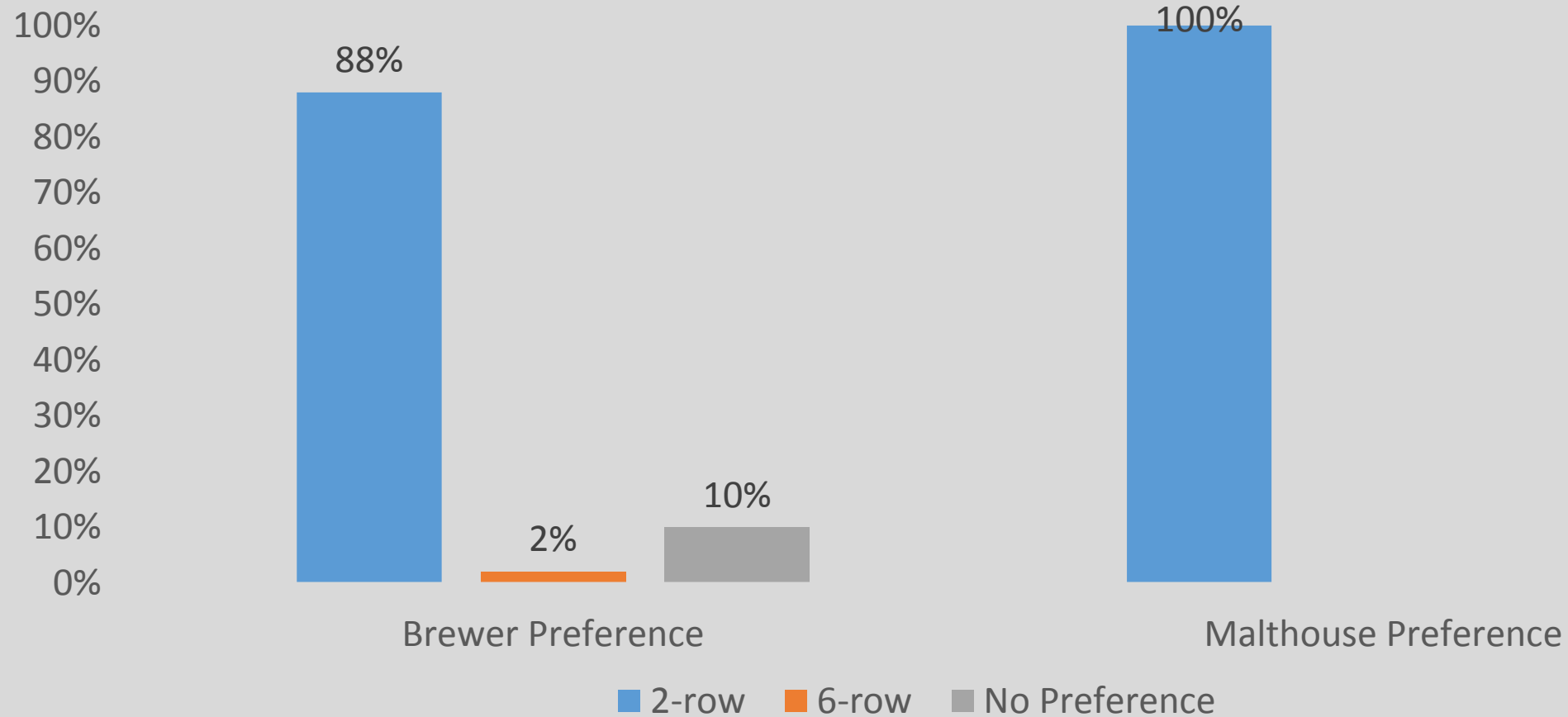
- Issued in Spring 2015
- Emailed:
 - 32 malting barley farmers
 - 8 malt houses
 - 250 breweries
- Response rate:
 - 28 malting barley farmers (88%) – fully responded
 - 8 malt houses (100%) – fully responded
 - 80 breweries (31%) – some fully and some partially responded



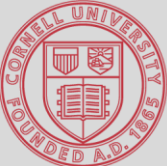
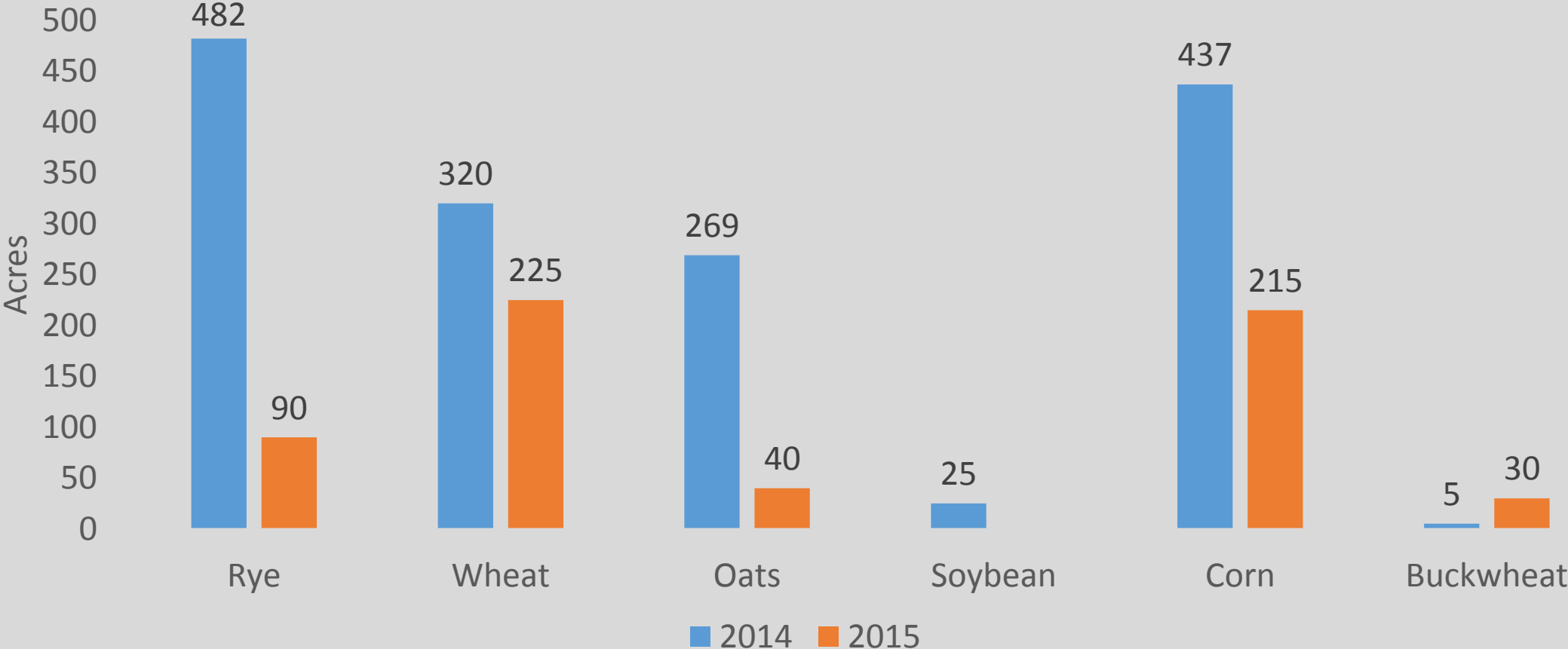
Malting Barley Acreage Across NY



Brewer and Malt house Preference

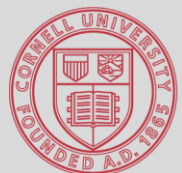


Other Grains Grown for the Brewing and Distilling Market

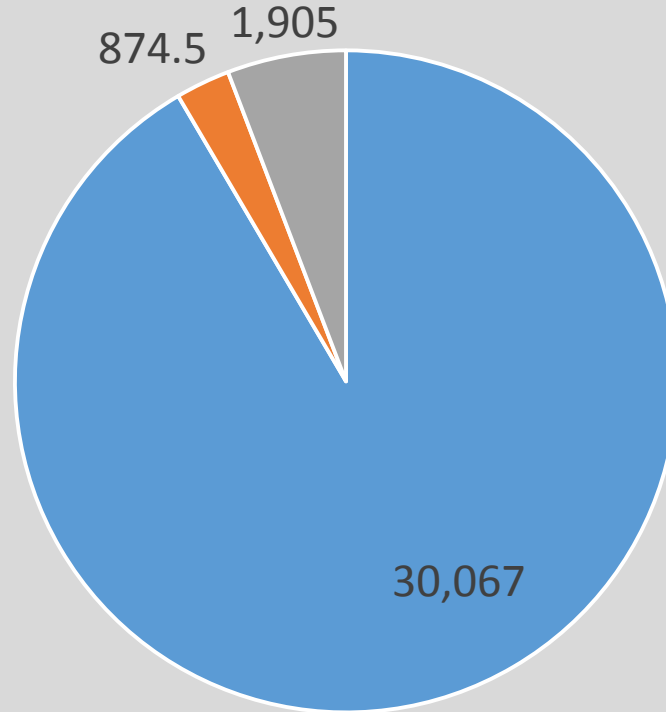


Biggest Barrier/Concern to Market Growth

Rank	Barrier
1	Uncertainty about market demand
2	Uncertainty of your ability to grow a crop that meets quality standards of maltsters and brewers
3	Access to adequate amount of storage
4	Access to seed
5	Transportation and delivery
6	Malting
7	Cleaning and drying
8	Other crops are more profitable
9	Viability of the industry
10	Weak desire by brewers to use local malts
11	Off-farm infrastructure/malting facilities
12	Access to local malt houses



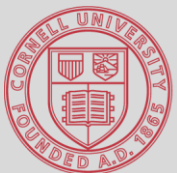
Current and Potential Malting Barley Acreage



■ Total acres farmed

■ Total acres of malting barley

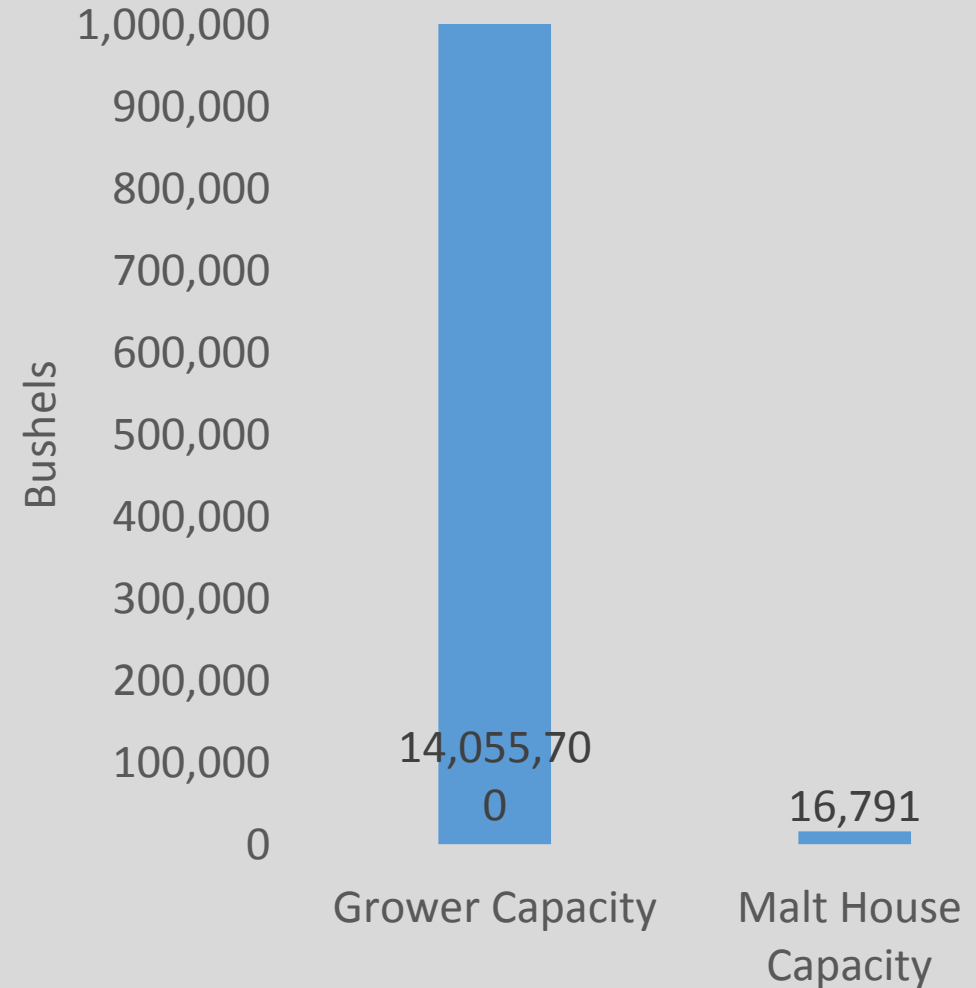
■ Potential acres of malting barley



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Farmer Storage Challenges

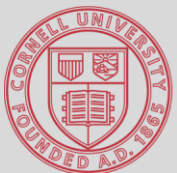
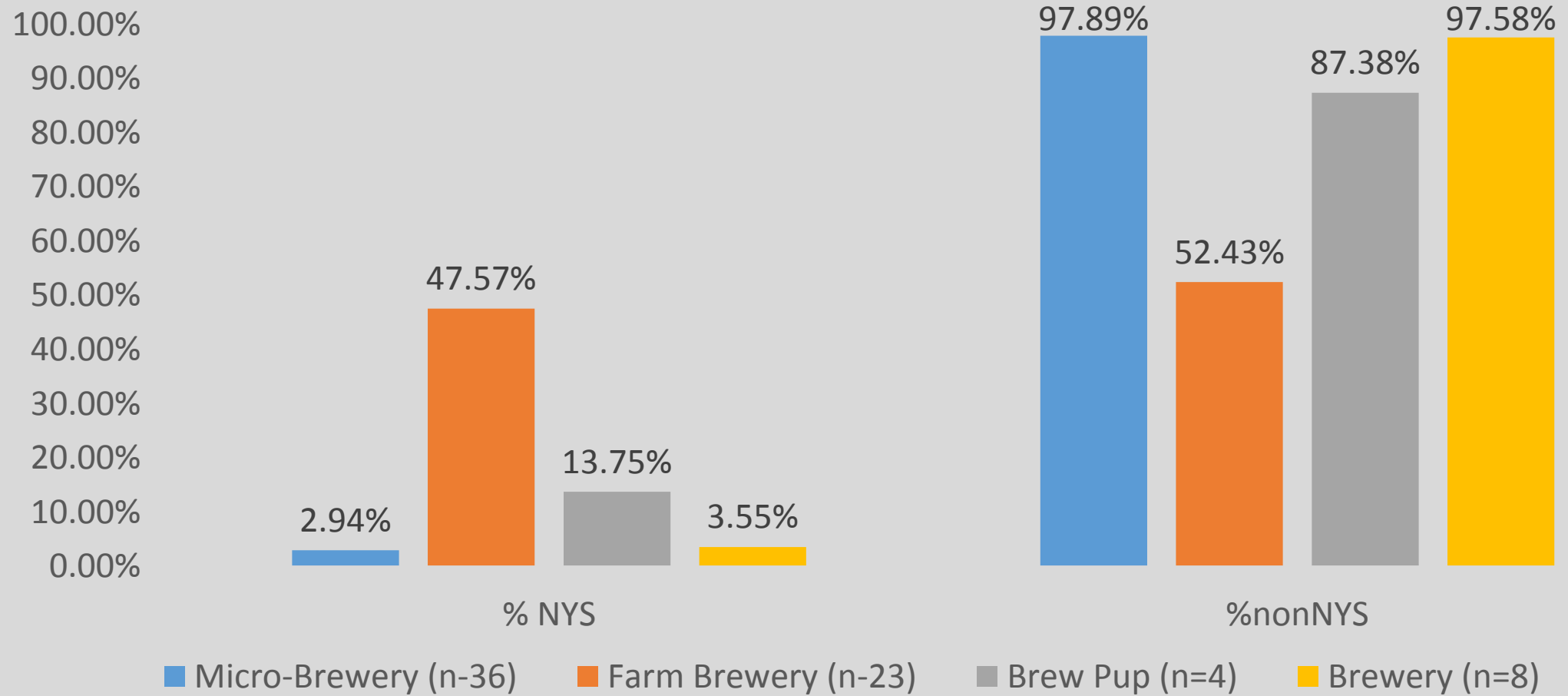
Rank	Barrier
1	Need to hold malting barley for longer periods due to lack of demand
2	Ability to store varieties separately, due to lack of storage
3	Cleaning
4	Molds and mycotoxins
5	Potential damage from moving the grain between different storage vessels
6	Drying
7	Decreased grain viability
8	Insect damage



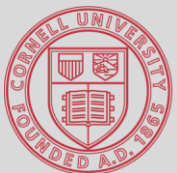
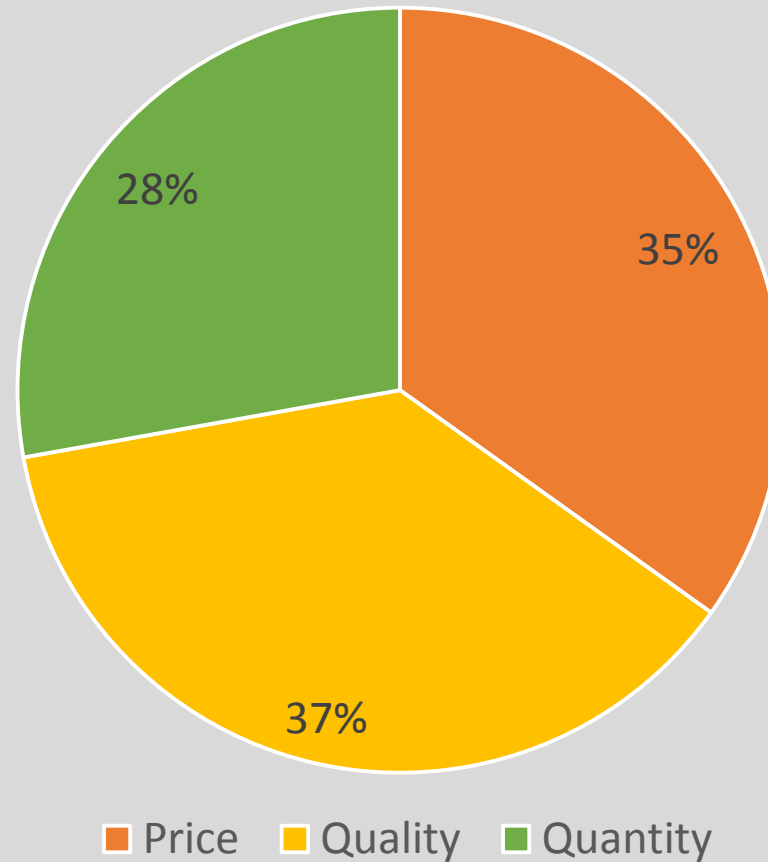
Price of Malting Barley (per pound) by Market

Variable	Average	Std Dev	Minimum	Maximum
Farmer				
NYS Malthouse	0.25	0.06	0.17	0.40
Out of State Malthouse	0.25	0.08	0.17	0.33
Distillery	0.25		0.25	0.25
Animal Feed	0.16	0.05	0.1	0.23
Malthouse				
NYS brewery Price/lb	1.00	0.06	0.9	1.1
Out-of-state brewery Price/lb	1.00	0.00	1	1
Home brewers/shops Price/lb	1.20	0.22	1	1.5
Distillery Price/lb	0.93	0.14	0.75	1.1
Brewery				
Out of State Malt house	0.69	0.23	0.31	1.23
NYS Malt house	1.11	0.31	0.44	2.00

Demand for NY Grown Malt (2015)



Brewers Concerns with Sourcing NY Grown Malting Barley



2014 Acres needed to Meet FBL 20% Requirement

2014 Production Gallons	In Barrels (31 Gallons in a Barrel)	Lbs In malt (68 lbs of malt per barrel of beer)	Malt Lbs at 20% NYS Grown	In Grain (1 lbs barley = .75 lbs malt)	Grain in Bushels (43.5 lbs of grain per bushel)	Acres by Bushel (50 bushels per acre)
740,000	23,871	1,623,226	324,645	405,806	9,329	186.58

Production gallons based on 440,000 taxable gallons. Includes all farm brewers and if they have an additional license where they brew under 60,000 barrels. (7 farm brewer respondents carry another licenses).

Malting Barley Acres Needed to Meet % of NY Grown Input
Requirement for Farm Brewers with Legislatively Mandated Increases

Year	In Barrels	Lbs In malt (68 lbs of malt per barrel of beer)	Malt Lbs NY Grown % Increasing with Legislation	In Grain (1 lbs barley = .75 lbs malt)	Grain in Bushels (43.5 lbs of grain per bushel)	Acres by Bushel (50 bushels per acre)
2018	38,750 (N=23)	2,635,000	527,000	922,250	21,201	424
2020	50,225 (N=20)	3,415,300	2,049,180	3,586,065	82,438	1,649
2024	81,580 (N=20)	5,547,440	4,992,696	8,737,218	200,855	4,017

Any Questions?

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