



BA

BREWERS  
ASSOCIATION

# STEWARDSHIP REPORT



2019



# Dear Valued Members:

The craft beer community is maturing, with single-digit growth and increasing competition the new normal. But as average growth per brewery slows, our community of now more than 8,000 breweries is stronger than ever, with many continued opportunities for success.

## SUPPORT

### Tools for the Trade

We understand you are busy. We are here when you need us. The Brewers Association remains your steadfast supporter with relevant and timely resources that provide value to members of all sizes and throughout all phases of your business.

In 2019, we overhauled our association website to allow you to quickly find the resources you need to run a successful and safe business. Home to more than 800 videos, articles, and seminars, the online resource hub helps members do their jobs with greater efficiency, safety, and profitability. In addition, our ambassadors—experts in beer quality, safety, sustainability, and diversity—attended 28 state brewers guild meetings and other industry events, disseminating information and promoting available resources.

As any business owner knows, time is money. Through Brewers Publications, we published *Small Brewery Finance*, a comprehensive, results-oriented guide to building a foundation of financial principles to help breweries start and run thriving businesses. Combined with the recently released fourth edition of the *Draught Beer Quality Manual*, these two guides are must-reads for breweries of any size.

We continue to invest in the development of a robust and sustainable supply chain, awarding \$510,000 in competitive grant support to 17 research projects in 2019. Since 2015, the Brewers Association

has provided more than \$2.2 million in funding for 94 research projects addressing barley and hop variety development, disease research, and climate change in the supply chain.

### Welcome All

While there is still much work to be done, we're proud of the steps the association made in 2019 toward furthering our commitment to provide resources that promote and foster a diverse and inclusive craft beer community. The association released a five-part series of best practice guides that establish a foundation for addressing, creating, and managing a diversity and inclusion program. In May, we announced the inaugural class of recipients of our first-ever diversity and inclusion event grants. We also completed our first benchmarking survey of brewery owner and employee diversity in terms of gender, race, and ethnicity; and in December, published a "We Welcome Everyone" inclusivity poster available for member download.

### Collective Voice

We embrace our role as a convener for the industry; our collective voice is strengthened when all business interests are represented. That's why the Brewers Association Board of Directors added a new Taproom Brewery voting member class to establish a voice for this rapidly growing segment of our community. The Taproom Subcommittee was formed mid-year, and the first elected taproom board member began her service in February 2020. A second taproom member will join the board after the 2020 fall election.

## PROTECT

### Advocacy

With the language that recalibrated federal excise taxes (FET) for breweries set to expire on Dec. 31, 2019, the Brewers Association worked with its legislative champions in Congress to support the Craft Beverage Modernization and Tax Reform Act (CBMTRA), with the goal of making the legislation permanent. The bill has overwhelming bipartisan support with 342 co-sponsors in the House and 73 co-sponsors in the Senate (as of Dec. 18, 2019).

Though the CBMTRA was not brought up for a vote, Congress recognized the profound impact the

**Craft Brewer Defined.** An American craft brewer is a small and independent brewer.

**Small.** Annual production of 6 million barrels of beer or less (approximately 3 percent of U.S. annual sales). Beer production is attributed to a brewer according to rules of alternating proprietorships.

**Independent.** Less than 25 percent of the craft brewery is owned or controlled (or equivalent economic interest) by a beverage alcohol industry member that is not itself a craft brewer.

**Brewer.** Has a TTB Brewer's Notice and makes beer.



recalibrated FET has had on independent brewers. A yearlong extension of the current rates was included in legislation passed at the end of 2019, allowing breweries to pay the lower FET rates and transfer beer between bonded facilities through Dec. 31, 2020. The Brewers Association will continue to work with our members, guilds, and congressional champions to pass the CBMTRA and make the current lower federal excise tax rates permanent.

Throughout the year, the Brewers Association also worked with Congress to mitigate the impact of tariffs on the brewing industry. In its first year, the Brewers Association Political Action Committee successfully educated brewery owners, employees, and American Homebrewers Association members about its agenda in order to encourage political participation. The Brewers Association PAC raised \$72,235 in contributions and dispersed \$45,500 to members of Congress, split evenly along party lines.

While the smallest brewers may not see the direct impact of our efforts in D.C., they are aimed to protect and defend the rights of market access for every business model.

In addition to our efforts on the federal level, the Brewers Association continued its support of state guilds through programs and resources. Grants totaling more than \$365,000 were awarded to 20 state guilds through our State Guilds Executive Director Cooperative Funding Grant Program.

## PROMOTE

### Independence

2019 was a big year for independent beer, and the Brewers Association increased its efforts to promote our members by providing the beer lover with numerous ways to get involved: the creation of the

Independent Craft Brewer Supporter Seal and the SupportIndependentBeer.com website; the establishment of two national holidays—National Independent Beer Run Day and Small Brewery Sunday—to celebrate and promote beer sales occasions; and the continued promotion of the Independent Craft Brewer Seal.

### Brewing History Initiative

The craft brewing revolution has had a profound social, cultural, and economic impact on this country. America is a beer nation, and the Brewers Association is honored to support the Smithsonian's American Brewing History Initiative to chronicle and showcase the significant achievements small and independent brewers and homebrewers have made throughout our nation's history.

Housed at the National Museum of American History, "FOOD: Transforming the American Table" is an existing, permanent exhibition that explores the history of food in the United States since 1950. The exhibition's fall update highlights ongoing changes in food itself and how Americans produce, prepare, and consume food and drink. One of four major new sections is "Brewing a Revolution." The Brewers Association began funding the project in 2016 and recently funded an extension of the initiative through 2022.

### #BeersToThat

In a collaborative effort among brewers, distributors, and trade associations to support the overall beer category, the Brewers Association, along with the National Beer Wholesalers Association and the Beer Institute, launched the "Beers To That" consumer campaign in a test market in Austin, Texas in September. The campaign aimed to ensure that Americans continue to see beer as the perfect social complement to many of life's occasions. "Beers To That" promotes the entire beer category and carries a brand-agnostic call to action to celebrate all of life's moments—from the everyday to the extraordinary.

We couldn't realize these successes or provide these resources without the continued engagement of our valuable members. Thank you all for your ongoing support of the Brewers Association.

Cheers,

**Bob Pease**  
President & CEO



# Protecting and Promoting Breweries: Federal Government Affairs

Throughout 2019, the Brewers Association engaged in several federal lobbying efforts to support brewers and educate legislators on the impact of tax policy and tariffs. Additionally, the Brewers Association launched a political action committee, continued working with small brewer caucuses in the House and Senate, and coordinated Hill Climbs to further support the interests of Brewers Association members and the greater craft beer community.



## FEDERAL EXCISE TAXES

With the language that recalibrated federal excise taxes (FET) for breweries set to expire on Dec. 31, 2019, the Brewers Association worked with its legislative champions to reintroduce the Craft Beverage Modernization and Tax Reform Act (CBMTRA), with the goal of making the legislation permanent in 2019. The bill has overwhelming bipartisan support with 342 co-sponsors in the House and 73 co-sponsors in the Senate (as of Feb. 29, 2020).

Though the CBMTRA has not been brought up for a vote, Congress recognized the profound impact the recalibrated FET has had on independent brewers. A yearlong extension of the current rates was included in the 2020 budget, allowing breweries to continue paying the lower FET rates and transfer beer between bonded facilities through Dec. 31, 2020. The Brewers Association will continue to work with our members, guilds and congressional champions to pass the CBMTRA and make the current language permanent.

## TARIFFS

Throughout the year, the Brewers Association worked with Congress to mitigate the impact of tariffs on the brewing industry.

## 232 Tariffs

In June, the tariffs on aluminum and steel were lifted on imported unmanufactured aluminum (10%) and steel (25%) from Mexico and Canada. Even with the tariffs lifted on specific countries, breweries have been seeing higher costs on imported and American-made steel and aluminum products.

## 301 Tariffs

Tariffs have been levied on more than \$400 billion worth of goods imported from China. In September, the U.S. introduced a 15% tariff on items including brewing machinery. Impacted parties can request exclusions.

In late May 2019, the Department of Commerce issued its anti-dumping preliminary determination for kegs imported from Mexico, China, and Germany. Due to the determination, Customs and Border Protection now requires deposits on kegs imported from those countries.

The Brewers Association continued to work with other associations on the APEX Act (H.R. 1406 / S. 1953), which among other items would extend the jurisdiction of the Commodity Futures Trading Commission to include the setting of reference prices for aluminum premiums.

## ALCOHOL AND TOBACCO TAX AND TRADE BUREAU FUNDING

In early 2019, the government shutdown closed the Alcohol and Tobacco Tax and Trade Bureau (TTB) for nearly a month, impacting breweries across the country. Many breweries were unable to secure label and formula approvals for new beers or obtain permits to open new breweries and satellite locations. As a result, the Brewers Association worked with other beverage alcohol trade associations to encourage additional funding for the TTB in the 2020 budget to mitigate future shutdowns, but Congress voted to keep the 2020 fiscal year budget at the same level as the 2019 budget.





2019 Hill Climb

## SMALL BREWERS CAUCUS

The House Small Brewers Caucus ended 2019 with 226 members from 49 states, making it the largest special interest caucus in Congress, while the Senate Bipartisan Small Brewers Caucus ended 2019 with 35 members from 25 states. Throughout the year, the Brewers Association hosted educational events for congressional staffers including a homebrew demonstration, hop sensory training, and a seminar discussing barley's impact on U.S. agriculture.



Sen. Ron Wyden (D-OR) addresses 2019 Hill Climb attendees

## HILL CLIMB

The Brewers Association hosted the 2019 Hill Climb in June. In total, 134 brewery owners and employees traveled to Washington, D.C. to advocate for passage of the CBMTRA; push for increased funding for hops and barley research; and educate Congress about the impacts of tariffs. The event culminated with a congressional reception at the historic Library of Congress.



## BREWERS ASSOCIATION POLITICAL ACTION COMMITTEE

In 2019, the Brewers Association launched a federal political action committee, overseen by association staff, to enhance legislative and grassroots efforts. A political action committee is a transparent, legal, and federally monitored way for trade associations like the Brewers Association to pool campaign contributions from members and donate funds to candidates for federal office. The Brewers Association political action committee supports candidates who champion the interests of small and independent brewers, regardless of party affiliation.

In its first year, the Brewers Association political action committee worked to educate brewery owners, employees, and American Homebrewer Association members about its agenda in order to encourage political participation. The Brewers Association political action committee raised \$72,235 in contributions and dispersed \$45,500 to members of Congress.



# Protecting and Promoting Breweries: State Government Affairs

The Brewers Association has long prioritized supporting state brewers guilds and associations. With crucial issues such as franchise law, self-distribution, and the regulation of onsite retail sales almost wholly in the domain of state authority, the Brewers Association provides valuable resources to state guilds to assist in their efforts to ensure small brewers have equitable and open access to markets, distribution, and sales. In 2019, the Brewers Association supported six state guilds in efforts related to franchise modernization, self-distribution, trade practice, and on-premise brewery retail issues.



Los Angeles Brewers Guild



Guilds in action at Great American Beer Festival

## SIGNIFICANT STATE DEVELOPMENTS

### Maine

Legislation was signed into law increasing the self-distribution limit to 30,000 barrels. It also set a maximum amount of the distribution termination fee that the wholesale licensee is entitled to receive from a small beer manufacturer in connection with a non-good cause termination (if that small beer manufacturer's brands make up no more than 3% of the wholesale licensee's business). The legislation also provides for a shortened notification requirement, expedited arbitration, and the transfer of distribution rights upon notification, regardless of whether the terminated distributor has received the termination fee.

### Maryland

Legislation passed allowing breweries producing 20,000 or fewer barrels of beer per year to terminate a franchise agreement without cause; additionally, the termination notification period was reduced from 180 to 45 days. A separate bill signed into law increased tasting room sales limits, self-distribution limits, and production caps for certain licensees.

### North Carolina

The self-distribution threshold was increased to 50,000 barrels for breweries that sell fewer than 100,000 barrels of malt beverages annually.





Washington Brewers Guild with Speaker of the House Frank Chopp (D-Seattle)



The Brewers Association Board of Directors and Ohio Craft Brewers Association

## HOW TO GET INVOLVED

The Brewers Association provides programs and resources to encourage its members, as well as the greater beer and brewing communities, to take an active role in educating and championing the interests of small and independent brewers.

Support Your Local Brewery (SYLB) is a communication network that informs more than 81,000 brewery members, homebrewers, and beer enthusiasts nationwide about issues impacting small brewers. The network facilitates grassroots activity on behalf of small brewers and is designed for quick mobilization when issues arise, with SYLB members encouraged to contact their elected officials directly. In 2019, four action alerts were issued concerning franchise modernization (Massachusetts), brewery beer-to-go sales (Texas), and homebrew-related communications concerning event hosting (Nebraska) and expanded sales in homebrew shops (New York).



Washington Brewers Guild

✈️

## 2019 BA STAFF GUILD TRAVEL

✈️

57

total guild meetings & conferences attended

40

states

41

guild visits by BA staffers

39

speaking engagements by ambassadors/instructors

# STATE GUILDS

## EXECUTIVE DIRECTOR COOPERATIVE FUNDING GRANT PROGRAM

★ ★ ★ ★ ★ ★

**2016 Approved (9)**

Year 1: AL, AK, VT, KY, NH, MS, ID, DC, NJ

**2017 Approved (11)**

Year 1: AR, LA, MA, NE (4)

Year 2: AL, AK, DC, KY, MS, NH, VT (7)

**2018 Approved (13)**

Year 1: CT, MO, NV, UT, HI, OK (6)

Year 2: ID, MA, LA, NE (4)

Year 3: AK, KY, AL (3)

**2019 Approved (20)**

Year 1: SC, RI, DE, WY, TN

Year 2: AR, UT, MO, NV, HI, CT, OK

Year 3: AK, KY, NH, MS, ID, DC, LA, NE



# Industry Snapshot

Craft brewing production grew in 2019, but, as with 2018, the continued increase in breweries meant that the market also became more competitive, particularly in widely distributed channels.

## A COMPETITIVE MARKET

The Brewers Association 2019 mid-year survey measured 4% production growth year-over-year for small and independent brewers, down slightly from 5% in 2018. IRI Group scan data numbers through mid-November showed 2% growth for Brewers Association-defined craft brewers, similar to 2018 during the same period. According to reports in the second half of the year, 4% overall growth seemed likely for 2019.

With total beer sales static to down 1% in volume, craft brewer share of the U.S. beer market increased to just below 14% by volume in 2019.

## Record Number of Breweries

Growth in market share has been driven in part by the continued rise in the number of breweries. Although final numbers are still being compiled, it is certain that more than 8,000 American breweries operated in 2019, a record number for the United States. At the same time, the competitive market and the growing number of breweries led to more closures—it is likely that around 300 breweries closed in 2019.

It is anticipated that the number of openings will continue to rise in the coming years, with the U.S. Tax and Trade Bureau (TTB) showing 11,584 active brewer's permits as of Sept. 30, 2019. The increased number of openings will continue the trend of heightened competition in U.S. brewing.



## Number of Operating U.S. Breweries

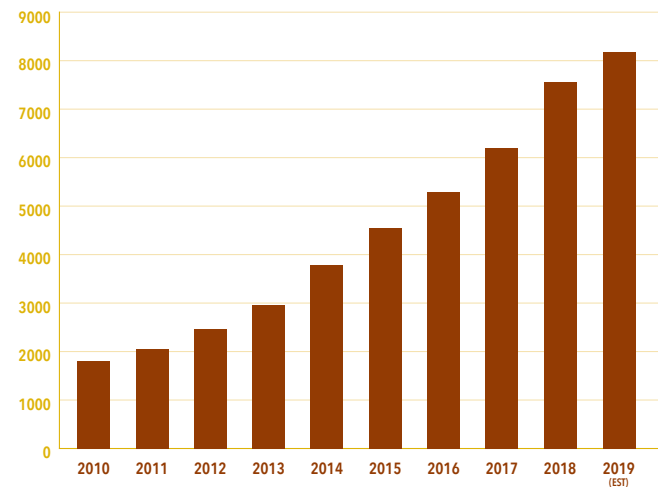


photo © Dustin Hall | The Brewtography Project





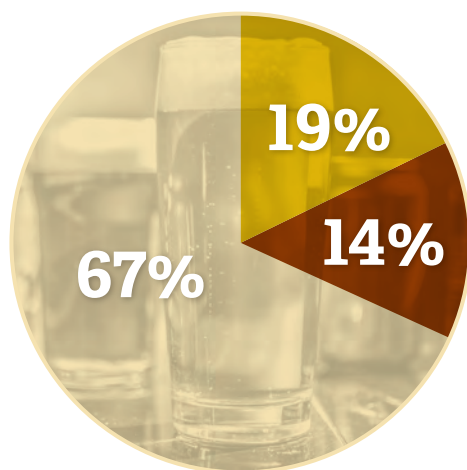
## JOBS AND ECONOMIC IMPACT

Brewery growth has driven tremendous job growth as well. The Brewers Association's Economic Impact Report, a biennial analysis featuring economic data of craft brewing for all 50 states and the District of Columbia, showed that craft brewers contributed \$79.1 billion to the U.S. economy in 2018, a 4% increase from 2017. Craft brewers were responsible for more than 550,000 full-time equivalent jobs, an 11% increase from 2017, with 150,000 of those jobs directly at breweries.

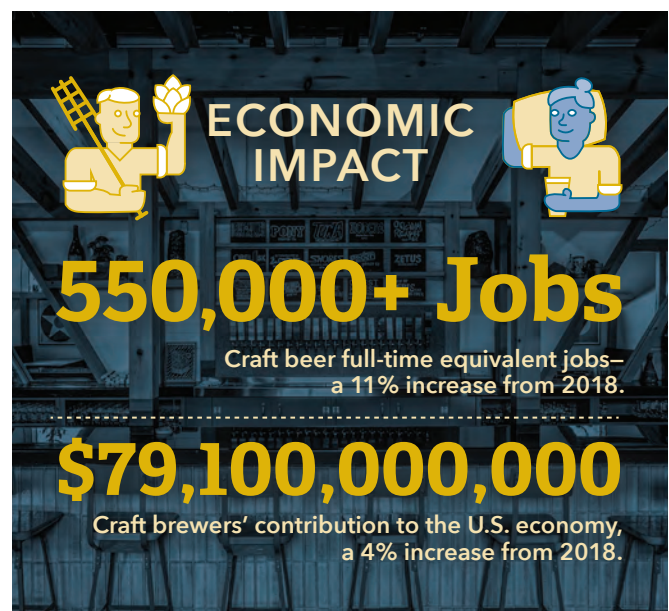
Based on preliminary Bureau of Labor Statistics figures, those jobs numbers could rise sharply in 2019, with ~9,000 new jobs being created between June 2018 and June 2019 in BLS data (QCEW, 2019).



## U.S. Beer Volume Share



■ Craft ■ Import ■ Other Domestic



Want more statistics on the U.S. beer scene?  
Visit [BrewersAssociation.org](https://www.brewersassociation.org)



# Ensuring a Healthy Supply Chain

To further the development of a robust and sustainable supply chain, the Brewers Association research and service grants program awarded \$510,000 in competitive grant support to 17 research projects in 2019. Of those projects, 13 focused on malt barley, while four focused on hops. Since the inception of the grant program in 2015, the Brewers Association has provided more than \$2.2 million in funding for 94 projects addressing barley and hop variety development, disease research, and climate change in the supply chain.

Grant recipient project highlights from 2019 included: research to understand the genetics of drought and heat tolerance in hops, conducted with the hope of increasing resilience in future varieties; hardiness assessment of winter barley varieties in multiple regions throughout North America; and flavor outcomes in hops and malt resulting from genetics, on-farm practices, and processing.

Throughout 2019, the Brewers Association continued to work with the United States Department of Agriculture to revitalize public hop research by investing in public hop breeding. The Brewers Association



*Since 2015, the Brewers Association has provided more than \$2.2 million in funding for 94 projects addressing barley and hop variety development, disease research, and climate change in the supply chain.*

also communicated craft brewer needs and priorities to hop industry stakeholders, such as high-yielding varieties of hops with desirable aroma and flavor, superior disease resistance, and lower input requirements. In conjunction with barley and hop industry stakeholder groups, Brewers Association technical staff and supply chain member brewers partnered with

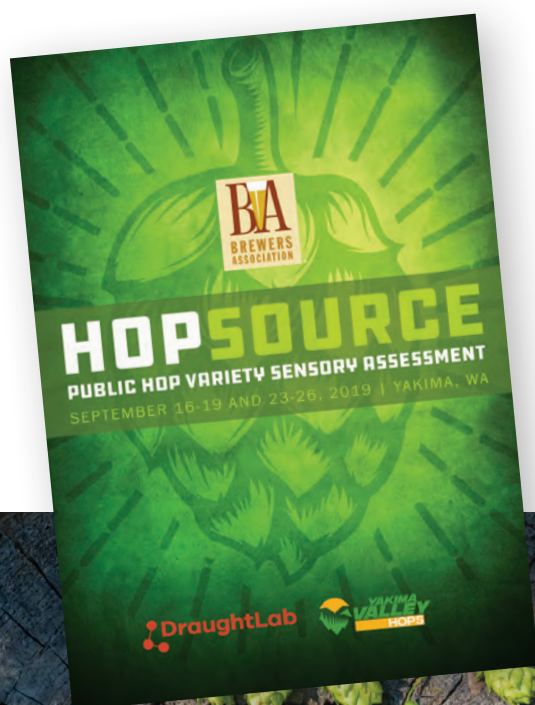






Brewers Association government affairs staff to seek federal agricultural policies and budget items that benefit hop and barley crops.

In September, Brewers Association staff conducted the second annual HopSource, an experimental hop sensory assessment to identify innovative hop varieties with positive aroma qualities. In 2020, consensus winners will be further assessed for yield, disease resistance, picking, and other agronomic factors in large-scale operations funded by the Brewers Association and implemented with its partners at the Hop Research Council.





# Supporting Business Health: Technical & Quality Resources

By building upon existing resources and launching new initiatives in 2019, the Brewers Association was able to expand its collection of technical resources available to members.

## AMBASSADOR OUTREACH

All Brewers Association technical resources are supported by an ambassador outreach program. Our ambassadors—experts in beer quality, safety, and sustainability—attend state brewers guild meetings and other industry events, disseminating information and promoting available resources. Brewers Association ambassadors presented at 28 different events in 2019.



Since the online Brewery Safety Training series launched in 2015, more than 39,000 lessons have been completed.

## SAFETY

The Brewers Association is committed to promoting brewhouse safety by providing free resources to both members and non-members. In 2019, utilization of the online Brewery Safety Training resource reached an all-time high with 9,680 lessons completed. Since the online training launched in September 2015, more than 39,000 have been completed.

The online curriculum is supported by best practice documents and regular member communication via the Safety Exchange and Lessons Learned programs. In 2019, the Brewers Association published Ensuring Safety During Brewery Tours, a best management practice guide addressing safety issues for brewery visitors. The Brewers Association also entered an



*Matt Gacich,  
Sustainability Ambassador*



*Neil Witte,  
Quality Ambassador*



*Melissa Antone,  
Quality Trainer*

industry alliance with the Region 8 office of the Occupational Safety and Health Administration (OSHA), the Colorado Brewers Guild, OSHA Consultation Services at Colorado State University, and the Master Brewers Association of the Americas. The alliance has proven to be an effective tool to reduce violations and fines for beverage manufacturers in Colorado.

Additionally, the Brewers Association safety subcommittee conducted a Brewery Safety Bootcamp during the 2019 Craft Brewers Conference. During the bootcamp, which focused on regulatory compliance, more than 450 attendees learned the basics of hazard analysis, as well as how to address and mitigate brewery hazards.







In 2019, the Brewers Association conducted eight beer quality workshops in Montana, Georgia, Massachusetts, Minnesota, Colorado, New Jersey, Arizona, and California.

## QUALITY

Eight Basics of Beer Quality Workshops, a hands-on program designed for brewers with little or no laboratory experience, were held in Montana, Georgia, Massachusetts, Minnesota, Colorado, New Jersey, Arizona, and California. These full-day workshops, led by quality instructor Lauren Torres, covered common methods used to ensure consistency and quality in a brewery. During each workshop, attendees had the opportunity to use lab equipment and practice quality analysis methods.



## DRAUGHT BEER QUALITY

As part of the ongoing effort to improve the quality of draught beer, the draught beer quality subcommittee, in conjunction with Brewers Publications, published a fourth edition of the *Draught Beer Quality Manual* (DBQM). The DBQM is the industry standard for brewers, equipment manufacturers, draught line installers, draught line cleaners, and draught beer retailers. New features in the revised manual include additional photos, charts, and other graphics, as well as updated line cleaning recommendations that reflect current best practices.

## SUSTAINABILITY BENCHMARKING

In 2019, the Brewers Association published the revised Sustainability Benchmarking Tool. Suitable for breweries of any size, the tool helps brewers monitor their resource use and easily identify areas to improve efficiency, thus increasing profitability. Users of the new Excel-based tool can choose from a basic version, which tracks 14 key performance indicators (KPIs), or an advanced version, which can track up to 39 KPIs. The data collected allow brewers to anonymously compare their efficiency with other breweries in their region, as well as with breweries of similar production volume around the U.S.



## TECHNICAL COMMITTEE SUMMIT

In April, the technical committee gathered in Boulder, Colo., for the third biennial Technical Summit. The purpose of the summit is to align technical committee priorities with Brewers Association strategic objectives, as well as develop technical project ideas for 2020 and beyond.

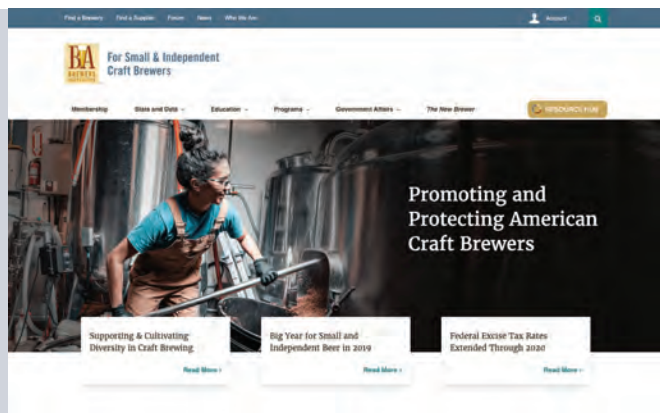
## BEER STYLE GUIDELINES

Technical staff developed and published the 2019 Brewers Association Beer Style Guidelines. The Brewers Association guidelines define the 2019 Great American Beer Festival and 2020 World Beer Cup beer style categories, reflecting the evolution of styles based on beers in the marketplace.



# Supporting Business Health: Educational Resources

When it comes to advancing the Brewers Association's mission of promoting and protecting American craft brewers, their beers, and the community of brewing enthusiasts, education is crucial. Four educational initiatives stood out in 2019.



BrewersAssociation.org website overhaul

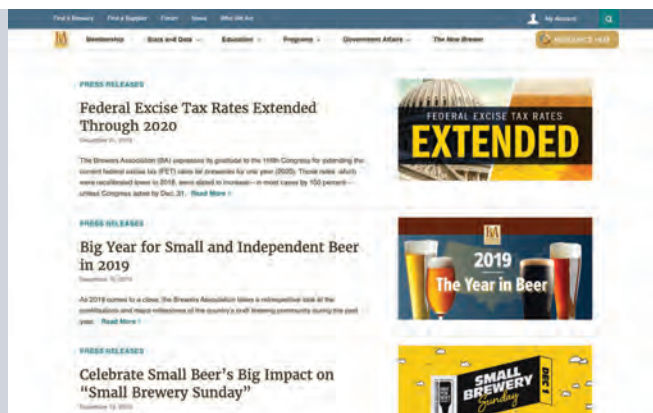
## A RELAUNCHED AND REIMAGINED WEBSITE

A rich cache of member resources, BrewersAssociation.org was completely overhauled in 2019, improving usability and helping members find key resources faster. Members can now access the entirety of the Brewers Association's resources within a single, searchable repository named Resource Hub. Home to more than 800 videos, articles, and seminars, the hub helps members do their jobs with greater efficiency, safety, profitability, and sustainability.

## POWER HOUR: ONLINE EDUCATION FOR BREWERS

Power Hours are 60-minute live webinars that cover a wide range of subjects including technical brewing, market changes, statistical insights, and brewery marketing. In 2019, the Brewers Association hosted six Power Hours on the following topics:

- Increase Your Bottom Line by Decreasing Your Footprint
- Ensuring Safety During Brewery Tours
- Craft Beer and Beyond
- Getting Inside the Mind of the Craft Beer Consumer
- Federal Trade Practices: What Every Brewer Should Know
- Hazard Assessment: The Safety Tool for Busy Brewers



## THE NEW BREWER® MAGAZINE

The Brewers Association published six bimonthly issues of *The New Brewer* magazine, which remains a top-rated benefit in member surveys. Each edition in 2019 explored an important industry theme: taprooms, strategies for success, industry review, technical brewing, sales and marketing, and raw materials. Archived issues from 2000 onwards are available to all members on the Brewers Association website.





# DENVER



**14,000**  
ATTENDEES

**1,000**  
EXHIBITORS

**96**  
EDUCATION  
SEMINARS

## CRAFT BREWERS CONFERENCE® & BREWEXPO AMERICA®

The premier brewing industry event in North America, the Craft Brewers Conference (CBC) serves the entire brewing community, including breweries of all sizes and types, distributors, retailers, educators, and suppliers.

In 2019, more than 14,000 brewing professionals convened in Denver to discuss and celebrate America's craft brewing business and culture. The conference featured noted speakers from outside the craft brewing community including entrepreneur, pilot, and Iron Maiden frontman Bruce Dickinson.



At BrewExpo America, the trade show component of the conference, more than 1,000 exhibitors showcased the latest and best products and services the industry has to offer.





# Fueling Independence

With the Independent Craft Brewer Seal and supporting initiatives, the Brewers Association brings clarity and transparency to the marketplace and drives beer drinker awareness of—and preference for—independent beer. With the creation of two holidays to celebrate and promote beer sales occasions—National Independent Beer Run Day and Small Brewery Sunday—as well as the continued promotion of the Independent Craft Brewer Seal, 2019 was a big year for independent beer.



## NATIONAL INDEPENDENT BEER RUN DAY

Independent craft brewers have long provided flavor and refreshment for Independence Day celebrations. It was a natural progression to create a holiday on July 3 to remind beer lovers to make a beer run in advance of their Fourth of July festivities.

The National Independent Beer Run Day campaign featured several memorable and funny videos. The “Don’t Forget” series portrayed beer-loving characters who had forgotten important Fourth of July supplies—meat for the grill, sunscreen, fireworks—but luckily remembered the independent craft beer.

On July 3, the Brewers Association also made a valiant attempt at the “World’s Longest Cheers,” with a charismatic host personally naming every single

U.S. craft brewery in alphabetical order, without taking a break, live on social media. Four hours and more than 7,300 breweries later, the Brewers Association made history (if not the record books).

These videos aimed to drive people to their local taproom, brewpub, or beer retailer to purchase independent craft beer. In all, more than 1,000 breweries got involved on social media to promote this new holiday, helping spread the word to millions of beer lovers and setting the stage for an even larger showing in 2020.







## SMALL BREWERY SUNDAY

On the heels of a successful National Independent Beer Run Day, the Brewers Association launched another beer holiday into the national consciousness: Small Brewery Sunday®. Sharing a similar spirit with Small Business Saturday the day prior, Small Brewery Sunday called on beer lovers to raise a glass of their favorite lager or ale to America's 7,000-plus small and independent craft brewers. The holiday was positioned as an opportunity to celebrate indie breweries for generating local jobs, donating to local charities, and providing valuable "third places" in which to connect with neighbors.

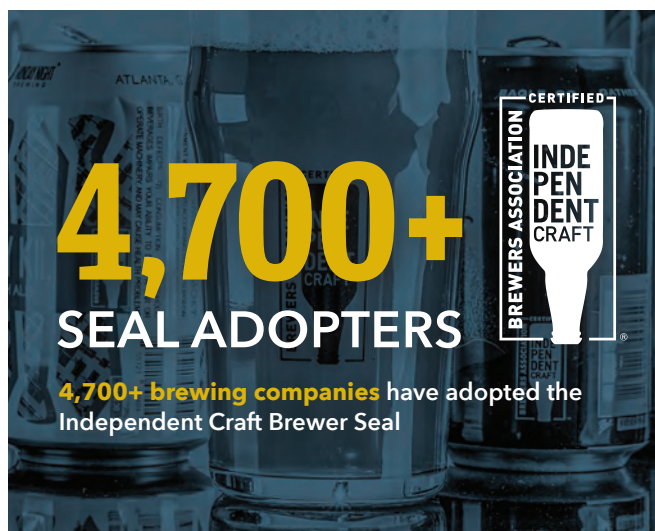
## THE INDEPENDENT CRAFT BREWER SEAL: A BEACON FOR BEER LOVERS

Now in its third year, the Independent Craft Brewer Seal has become a sought-after badge for independence-minded beer lovers, with increasing prominence on shelves, tap handles, menus, websites, beer labels, and more. At the end of 2019, 4,739 breweries had adopted the seal. The independent craft brewer supporter seal, which debuted in 2019, was quickly adopted by retailers, beer lovers, state guilds, media, and industry suppliers.



## INDEPENDENT CRAFT BREWER SUPPORTER SEAL MAKES ITS DEBUT

The supporter seal—which emulates the Independent Craft Brewer Seal for U.S. craft breweries—is available to any champions of independent craft breweries, including retailers, distributors, homebrew shops, state brewers guilds, festivals, websites, and allied trade companies, and can be accessed on a newly launched website, SupportIndependentBeer.com. In 2019, 974 individuals and organizations signed up to use the supporter seal.





# Promoting Craft Brewers

In support of the Brewers Association's core value of "promoting and celebrating the small, independent, traditional, and innovative culture of American craft brewers," the Brewers Association offered a variety of educational and experiential opportunities throughout 2019.



## CRAFTBEER.COM

CraftBeer.com continued to bring beer lovers the stories of small and independent U.S. craft breweries, publishing more than 230 original articles and an additional 600-plus press releases from breweries. Overall, the site hosted nearly 3 million sessions in 2019 and grew its social following to 230,000 across seven channels. CraftBeer.com garnered several awards including two honorable mentions from the prestigious FOLIO: Ozzie and Eddie Awards in Manhattan. Beer lovers rated CraftBeer.com the top beer publication for information for the second consecutive year, according to the Awareness, Attitude & Usage survey from the Sterling Rice Group (SRG).

## GREAT AMERICAN BEER FESTIVAL®

### Three days. One love.

More than 60,000 beer lovers gathered in Denver, Colo. for the 38th annual Great American Beer Festival (GABF), discovering new flavors, meeting the personalities behind their favorite beers, and reveling in the ongoing American brewing renaissance.

The festival provided educational opportunities at the Protect Craft Guilds Pavilion, Brewers Studio Pavilion, and CraftBeer.com Campground. At PAIRED®, approximately 4,000 guests sampled unique craft beer and food pairings in an intimate setting.

Entertainment highlights included bluegrass headliners at the Ikon Pass Stage presented by WinterWonderGrass®, dancing at the Silent Disco, the Jameson Caskmates Barrel-Aged Beer Garden, and the popular Friday Festival Flair contest.





### Best in Show

The 33rd annual Great American Beer Festival competition, the largest ever, awarded 318 medals to the best beers in the United States. In total, 2,295 breweries from all 50 states plus Washington, D.C., Puerto Rico, and the U.S. Virgin Islands entered the competition, with 322 judges evaluating 9,497 entries across 107 beer categories. Overall, a beer had a 3.4% chance of winning a medal.



### NIGHT AT THE MUSEUM: BREWING A REVOLUTION

In October, a display within the refreshed "FOOD: Transforming the American Table" exhibit opened at the Smithsonian's National Museum of American History, highlighting the history and industry of craft brewing and homebrewing in the United States. The display is a result of the Brewing History Initiative, made possible by support from the Brewers Association, to collect, document, and preserve the history of brewing, craft brewers, and the beer industry in America.

### SAVOR™: AN AMERICAN CRAFT BEER & FOOD EXPERIENCE

One special night, hundreds of ways to savor. The 12th edition of SAVOR continued to elevate the relationship between craft beer and fine food. The pairing event served as the pinnacle of what has informally become "SAVOR week" in Washington, D.C., a district-wide, weeklong celebration of American craft beer. The event relocates to The Anthem, the capital's hottest new venue, on May 15, 2020.





# Growing American Craft Globally

Fifteen years ago, small and independent American craft beer had virtually no international presence—when opportunities for export did arise, it suffered from limited awareness surrounding beer’s proper storage and handling. Today, small and independent American craft beer is one of the driving forces behind quality beer internationally. Thanks to American craft beer, demand has increased for innovative beer styles around the world.

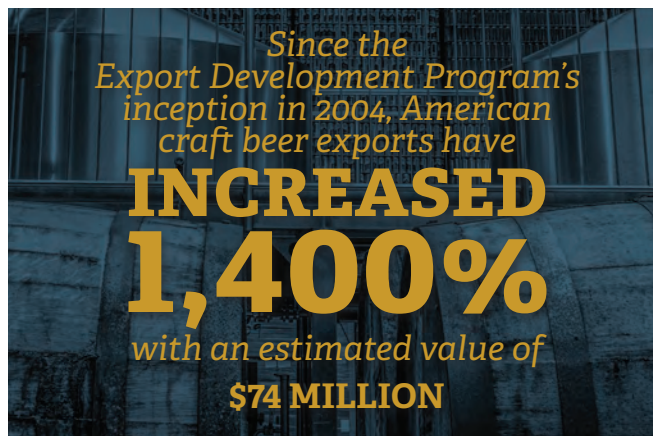


2019 American Craft Beer Experience, Tokyo, Japan

Funded by grants from the United States Department of Agriculture, the Brewers Association Export Development Program (EDP) works to assist quality-focused U.S. brewers in identifying opportunities for international expansion and media promotion of American craft beer. The EDP focuses on overseas event participation, as well as educating international trade partners on best distribution practices to preserve beer flavor. Through the EDP, resources such as the Best Practices Guide to Quality Craft Beer, as well as technical seminars, are distributed throughout global markets.



Quality best practices seminar at Craft Beer China Conference & Expo, Shanghai.



EDP initiatives have benefited newly exporting members, the conditions surrounding the opening of new breweries in international markets, and more generally, the reputation of American craft beer abroad. Today, the Export Development Program boasts more than 90 members, all of whom participate by sending beer to events, festivals, and competitions around the world. Additionally, the EDP works to bring key international figures from like-minded organizations and breweries to the U.S. to participate in the Craft Brewers Conference, World Beer Cup, and Great American Beer Festival.



Craft Beer Rising, London. Bill Butcher (Port City Brewing Company), Rick Chapman (Coronado Brewing Company), Steve Parr (Brewers Association), Lisa Pumphrey (Lickinghole Creek Craft Brewery), Richard Miller (Hardywood Park Craft Brewery), Lotte Peplow (Brewers Association)





Media Dinner during Great British Beer Festival week, London, U.K. Chef Civan Er (Chef/Owner Yeni Restaurant), Adam Dulye (Brewers Association), Jamil Zainasheff (Heretic Brewing Company), Lotte Peplow (Brewers Association), Yael Lempert (Deputy Chief of Mission at the U.S. Embassy in London), Jeff Beagle (Country Boy Brewing), Kathy Yeo (FAS/USDA London)

Since the program's inception in 2004, U.S. member breweries have gained distribution agreements throughout Europe, Asia, North America, and South America. Member brewers have also won countless awards in international competitions. American craft beer exports have increased 1,400%, with an estimated value of \$74 million.

The Brewers Association and the Deputy Chief of Mission of the Embassy of the United States of America in Berlin, Robin S. Quinville, hosted an American craft beer pairing dinner at the diplomat's residence on October 21. The dinner took place during Berlin Food Week to highlight the innovation, creativity, and diversity of small and independent American craft brewers.

The menu, designed and curated by Brewers Association executive chef Adam Dulye and Ben Pommer, head of culinary at Berlin's BRLO Brwhouse, showcased the latest trends in craft beer and food in the U.S. and Europe. Guests included members of the United States Embassy, European trade, media, and EDP program members: Jennifer Glanville, Brewer and Director of Partnerships, Boston Beer Company, Steve Grossman, Beer Ambassador, Sierra Nevada Brewing Company, and Matthew Brynildson, Brewmaster and Partner, Firestone Walker Brewing Company.



Left to Right: William Trautman, Jessica Loeser, FAS/USDA, Matthew Brynildson, Firestone Walker Brewing Company, Bob Pease, Brewers Association, Deputy Chief of Mission of the Embassy of the United States of America in Berlin, Robin S. Quinville, Steve Grossman, Sierra Nevada Brewing Company, Jennifer Glanville, Boston Beer Company, Lotte Peplow, Brewers Association

## 2019 EXPORT DEVELOPMENT PROGRAM EVENT PARTICIPATION

- Australian International Beer Awards
- Brussels Beer Challenge Competition
- Beer Attraction, *Italy*
- Copa Cervezas de America Competition
- Beijing Craft Beer Invitational
- Brau Beviale, *Germany*
- Craft Beer Rising Festival, *United Kingdom*
- Planete Biere, *France*
- Stockholm Beer and Whiskey, *Sweden*
- Cerveza Mexico Expo, *Mexico*
- Great British Beer Festival
- Korea International Beer Expo
- American Craft Beer Experience, *Japan*
- European Beer Star Competition
- Vancouver Craft Beer Week Festival
- International Beer Cup, *Japan*
- Craft Beer China Conference & Exhibition

*To get involved in the Brewers Association Export Development Program, please contact **Steve Parr**, [steve@brewersassociation.org](mailto:steve@brewersassociation.org).*



# Building a Diverse & Inclusive Craft Beer Community

Since the creation of its diversity committee in 2017, the Brewers Association has made strides to foster an inclusive and diverse craft brewing community for all. The Brewers Association diversity committee is composed of a cross-section of industry members working to establish organizational structure and promote institutional change regarding diversity, equity, and inclusion for both brewers and beer lovers alike.



## RESOURCES ON DIVERSITY AND INCLUSION BEST PRACTICES

In January 2019, the Brewers Association released a collection of best practice guides to lay the groundwork for addressing, creating, and managing a diversity and inclusion program. Authored by Brewers Association diversity ambassador Dr. J. Nikol Jackson-Beckham, this five-part members-only resource is designed to help breweries of all sizes with everything from starting the conversation about why diversity matters and what it means to them,



Diversity ambassador Dr. J. Nikol Jackson-Beckham

to setting up a framework to assess the success of a diversity and inclusion program. Each of the five resources is easy to follow and builds in progression from the previous guide.

## DIVERSITY AND INCLUSION EVENT GRANT PROGRAM

In May 2019, the Brewers Association announced the recipients of its first-ever diversity and inclusion event grants. The grants support local and regional events that promote and foster a diverse and inclusive craft beer community. Out of 51 applicants, six events were awarded a total of \$20,000 by the Brewers Association diversity committee: Tapping Opportunity (Cleveland, Ohio), HeART and Soul Brew Fest (Richmond, Va.), Fresh Fest Beer Fest (Pittsburgh, Pa.), Beers With(out) Beards (Brooklyn, N.Y.), Suave Fest (Denver, Colo.), and Craft Beer Employment Fair (Boston, Mass.).

## BENCHMARKING DATA ON DIVERSITY

The first benchmarking survey of brewery owner and employee diversity, in terms of gender, race, and ethnicity, was completed and made available to Brewers Association members in August 2019. This data was



Suave Fest, Raices Brewing Company, Denver, Colo.





Mass Bay Employment Fair, Hop Forward

compiled in order to help breweries know where they stand and measure future progress. The results show that like craft consumers, brewery employees are disproportionately white and male relative to both the general U.S. population and where breweries are located.

## FIELD TRAINING

Diversity ambassador Dr. J. Nikol Jackson-Beckham gave 10 presentations throughout the year, attending guild meetings and educating brewers on how best

to diversify both their customer and employee bases. The chair and assistant professor of communication studies at Randolph College, Dr. Jackson-Beckham has a decade of homebrewing experience and has conducted extensive research about beer and its place in American culture.

## INCLUSIVITY POSTER

In December 2019, the Brewers Association created an inclusivity poster available for download to all members. The sign is a way for breweries to show their commitment to maintaining a welcoming and safe environment for all people—including customers, employees, visitors, vendors, and clients—regardless of age, race, ethnicity, nationality, sexual orientation, gender identity and expression, religion, or disability.



The We Welcome Everyone poster is available for free download in English and Spanish at [BrewersAssociation.org](https://BrewersAssociation.org)



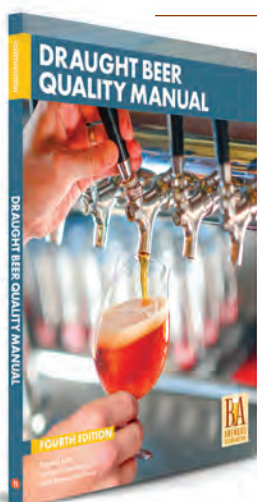
Fresh Fest, Pittsburgh, Pa.



# **Brewers Publications®**

Brewers Publications supports the mission of the Brewers Association by publishing books of enduring value for amateur and professional brewers alike. Brewers Publications is the leading publisher of contemporary and relevant brewing literature for today's craft brewers and homebrewers. In 2019, Brewers Publications released four books, bringing its total number of unique titles to 58, with 51 in print, 50 available electronically, and one audio book.

## 2019 RELEASES



### ***Draught Beer Quality Manual (4th Edition)***

prepared by the technical committee of  
the Brewers Association

\$24.95, Paperback | April Release

Completely revised and updated to include new technologies, this book is an indispensable resource for brewers, wholesalers, retailers, and draught system installers.

# 101,505

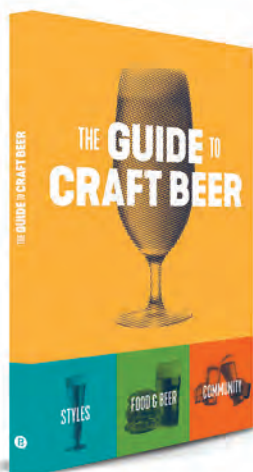
BOOKS SOLD IN 2019

### ***Simple Homebrewing: Great Beer, Less Work, More Fun***

by Drew Beechum and Denny Conn

\$19.95, Paperback & eBook | May Release

Featuring fun and expert advice, *Simple Homebrewing* helps amateur brewers develop a straightforward brewing process, making homebrewing more accessible and enjoyable.



### ***The Guide to Craft Beer***

by Brewers Publications

\$12.95, Paperback | August Release

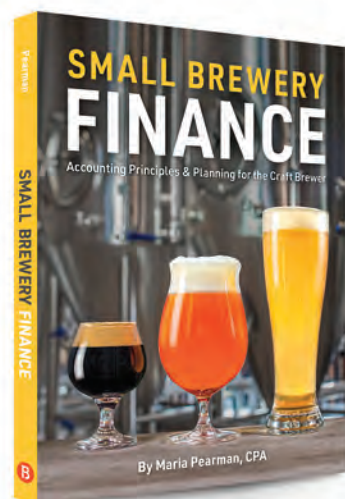
This resource—perfect for both novice and seasoned craft beer drinkers—includes beer basics, descriptions of various beer styles, and recommended food pairings for an enhanced sensory experience.

### ***Small Brewery Finance: Accounting Principles and Planning for the Craft Brewer***

by Maria Pearman, CPA

\$95.00 Paperback & eBook | October Release

A comprehensive, results-oriented guide for brewery owners and entrepreneurs competing in today's market.







# American Homebrewers Association®

Since 1978, the American Homebrewers Association (AHA) has grown to more than 44,000 members worldwide while remaining dedicated to its mission of fostering community and empowering homebrewers to make the best beer in the world.



## HOMEBREW CON™

The 41st annual Homebrew Con took place in Providence, R.I. with nearly 3,000 attendees. Conference goers heard remarks from keynote speaker Dan Kleban, co-founder of Maine Beer Company, and chose from more than 70 educational seminars organized into 12 tracks.

## NATIONAL HOMEBREW COMPETITION

The 2019 competition judged 9,189 entries from 3,492 homebrewers located in all 50 states and Washington, D.C. as well as 17 countries. Since the inaugural AHA National Homebrew Competition in 1979 in Boulder, Colo., 152,429 brews have been evaluated.

## BREW GURU®

Brew Guru is a free app featuring hundreds of medal-winning homebrew recipes, association news, and an AHA Member Deal locator displaying nearby promotions. In 2019, Brew Guru 3.0 was released, featuring a faster framework, intuitive interface, and alerts to nearby deals.

## HOMEBREW LEGISLATIVE EFFORTS

In 2019, the AHA assisted with legislative and regulatory issues on behalf of homebrewers in Arkansas,

Hawaii, Missouri, Nebraska, Nevada, New York, North Carolina, Ohio, Pennsylvania, Virginia, and Wisconsin. On the federal level, the AHA conducted homebrew tastings, demonstrations, and a homebrew competition with legislators and their staff in Washington, D.C.

## ZYMURGY® MAGAZINE

For more than 40 years Zymurgy® has been the preeminent magazine for homebrewers. The recent redesign highlights the expert instruction and tutorials, insightful cultural content, and dozens of unique recipes with its clean modern layout, striking photography, and bold headlines. Don't miss the new "Ask the Staff" section—it's a delight!

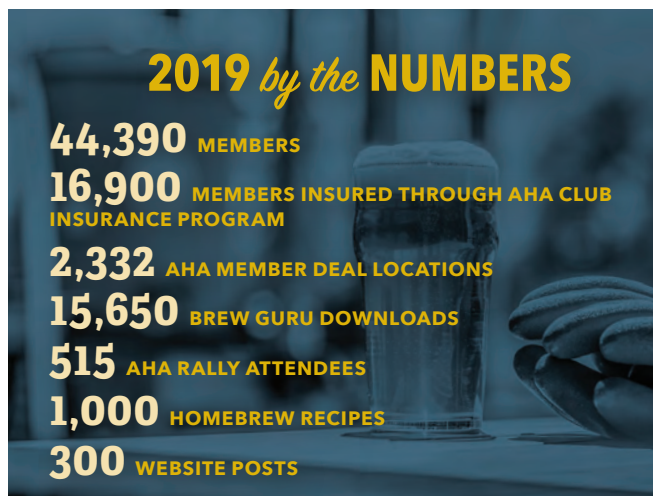
## ANNUAL HOMEBREW EVENTS

### May 4, 2019

The 22nd Big Brew for National Homebrew Day featured 279 events in 47 states and 8 countries with 3,593 participants brewing 9,118 gallons of beer.

### Nov. 2, 2019

The 21st Learn to Homebrew Day featured 199 events in 42 states and 8 countries with 3,054 participants brewing 3,947 gallons of beer.





# 2019 By the Numbers



## NO. OF MEMBERS

**10,966**

BA members, all classes

**44,390**

AHA members



## EVENTS

### Great American Beer Festival

**60,000**

Attendees

**4,280**

Volunteers

### Craft Brewers Conference

**14,818**

Attendees

### Homebrew Con

**2,500**

Attendees

### SAVOR

**2,000**

Attendees

### Total

**79,318**



## INDEPENDENT CRAFT BREWERS SEAL

**4,700+**

Brewing companies adopted the independent craft brewer seal, representing more than 85% of the craft beer brewed in the U.S.



## COMPETITIONS

### Great American Beer Festival

**9,497**

Entries

**2,295**

Breweries

**322**

Judges

### National Homebrew Competition

**9,189**

Entries

**3,492**

Homebrewers

**17**

Countries

### Total Competition Entries

**18,686**



## RESEARCH GRANTS FUNDED

**\$510,000**

17 hop and barley projects



## DIVERSITY & INCLUSION EVENT GRANTS FUNDED

**\$20,000**

six events



## GOVERNMENT AFFAIRS

**325**

Office visits by 134 brewers during annual Hill Climb

**\$72,235**

Political action committee contributions

**73 & 342**

Number of co-sponsors in the Senate and House, respectively, for the Craft Beverage Modernization & Tax Reform Act

**\$45,500**

Political action committee disbursements to members of Congress



## ESTIMATED ANNUAL SAVINGS

**\$80,000,000**

Estimated federal excise tax annual savings for U.S. small brewers, resulting from the passage of the Craft Beverage Modernization & Tax Reform Act



## STATE GUILDS EXECUTIVE DIRECTOR COOPERATIVE FUNDING GRANT PROGRAM

**\$365,322**

20 Guilds Funded



## BA FORUM

**1,840**

Topics started

**476,768**

Page views



## MAGAZINE READERSHIP

### The New Brewer

**43,000**

Readership

**28,000**

Circulation

### Zymurgy®

**62,000**

Readership

**51,000**

Circulation



## EDUCATION/RESOURCES

**10,000+**

Free online brewery safety training courses completed

**874**

Live Power Hour attendees



## BOOKS SOLD

**101,505**

brewing books and ebooks



## SOCIAL MEDIA AUDIENCE

**762,784**



# Financials

## 2019 FINANCIAL STATEMENT (CONSOLIDATED)

<b>Revenue:</b>	<b>2019 Actual</b>	<b>2018 Actual</b>
Adver. & Spons. Revenue	4,648,272	4,972,195
Book/Merch. Sales	1,310,378	1,405,879
Membership Revenue	5,148,687	5,122,013
Event Revenue	16,173,153	17,345,726
All Other Revenue	487,222	455,403
<b>Total Revenue</b>	<b>\$27,767,712</b>	<b>\$29,301,216</b>
<b>Expenses:</b>		
Gen. Office/Admin. Exp.	753,381	868,433
Deprec. & Amort.	369,714	356,273
Salaries & Benefits	7,727,006	7,583,246
Insurance Expense	144,220	227,058
Legal Fees	426,669	460,141
Rent Expense	523,407	499,877
Event Operations	5,509,295	6,139,445
Sales & Marketing	2,322,494	3,811,164
Printing	462,122	522,560
Postage & Shipping	622,158	812,263
Cost Of Goods Sold	301,346	335,131
Travel	1,053,635	1,574,315
Outside Services	4,984,788	5,161,688
Donations/Grants	1,089,211	597,394
All Other Expenses	838,296	941,949
<b>Total Expenses</b>	<b>\$27,127,742</b>	<b>\$29,890,937</b>
<b>Operational Net</b>	<b>\$639,970</b>	<b>(\$589,721)</b>

## DECEMBER 31st, 2019 ABBV. BALANCE SHEET

<b>Assets:</b>	<b>12/31/19</b>	<b>12/31/18</b>
Cash	4,025,614	3,095,621
Reserves	24,043,840	20,303,174
Accounts Rec.	1,383,073	2,162,683
Inventory	758,112	795,297
Prepaid Expenses/Other	1,220,788	1,335,075
Total Current Assets:	31,431,427	27,691,850
Long-Term Assets	178,826	132,197
Fixed Assets	4,984,852	5,260,716
<b>Total Assets:</b>	<b>\$36,595,106</b>	<b>\$33,084,764</b>
<b>Liabilities:</b>	<b>12/31/19</b>	<b>12/31/18</b>
Accounts Payable	928,643	674,420
Deferred Deposits	10,655,015	10,465,325
Other	604,354	501,003
Total Current Liabilities	12,188,012	11,640,748
Long-Term Liability	178,826	132,197
Retained Earnings	21,311,819	22,003,285
Current Yr. Earnings	2,916,449	-691,466
<b>Total Liabilities &amp; Equity</b>	<b>\$36,595,106</b>	<b>\$33,084,764</b>

# 2019 Governance

FEBRUARY 2019–FEBRUARY 2020



**Front Row (L-R):** Leslie Henderson, Garrett Marrero, Cyrena Nouzille, Leah Cheston, Kevin Blodger. **Second Row (L-R):** Larry Horwitz, Jill Marilley, Wynne Odell, Roxanne Westendorf, Julie Verratti, Steve Hindy. **Third Row (L-R):** Tim Brady, Eric Wallace, Rob Tod, Jose Mallea, Larry Chase, John Mallett, Dan Kleban, Sean Casey

## Jill Marilley

American Homebrewers Association Representative (Wash.)

## Garrett Marrero

Maui Brewing Co. (Hawaii)  
Packaging Breweries Representative

## Cyrena Nouzille

Ladyface Ale Companie (Calif.)  
Pub Breweries Representative

## Wynne Odell

Odell Brewing Co. (Colo.)  
Packaging Breweries Representative

## Rob Tod (Past Chair)

Allagash Brewing Co. (Maine)  
Packaging Breweries Representative

## Julie Verratti

Denizens Brewing Co. (Md.)  
Pub Breweries Representative

## Eric Wallace (Chair)

Left Hand Brewing Co. (Colo.)  
Packaging Breweries Representative

## Roxanne Westendorf

American Homebrewers Association Representative (Ohio)

## BOARD OF DIRECTORS

### Kevin Blodger

Union Craft Brewing (Md.)  
At-Large Representative

**Tim Brady** Whetstone Station  
Restaurant & Brewery (Vt.)  
Pub Breweries Representative

### Sean Casey

Church Brew Works (Pa.)  
Pub Breweries Representative

### Larry Chase (Secretary/Treasurer)

(Ore.)  
At-Large Representative

### Leah Cheston

Right Proper Brewing Co. (D.C.)  
Pub Breweries Representative

### Leslie Henderson

Lazy Magnolia Brewing Co. (Miss.)  
Packaging Breweries Representative

**Steve Hindy** Brooklyn Brewery (NY)  
Packaging Breweries Representative

**Larry Horwitz** Ten20 Butchertown  
Beer Exchange (Ky.)  
At-Large Representative

### Dan Kleban (Vice Chair)

Maine Beer Co. (Maine)  
Packaging Breweries Representative

### Jose Mallea

Biscayne Bay Brewing (Fla.)  
At-Large Representative

### John Mallett

Bell's Brewery, Inc. (Mich.)  
Packaging Breweries Representative

## COMMITTEES

### Executive Committee

- Eric Wallace (Chair)  
Left Hand Brewing Co.
- Dan Kleban (Vice Chair)  
Maine Beer Co.
- Larry Chase (Secretary/Treasurer)  
Brewery-in-Planning
- Rob Tod (Past Chair)  
Allagash Brewing Co.
- Bob Pease President & CEO,  
Brewers Association

### Brewpubs Committee

- Cyrena Nouzille (Co-Chair)  
Ladyface Ale Companie
- Tim Brady (Co-Chair) Whetstone  
Station Restaurant and Brewery
- Sean Casey The Church Brew Works
- Larry Chase Brewery-in-Planning

- Leah Cheston  
Right Proper Brewing Co.
- Tom Dargen CraftWorks  
Restaurants and Breweries Inc.
- Jess Griego Bosque Brewing Co.
- Kyle Kensrue Randolph Beer
- Alex Lovinggood  
Brickstone Brewery
- Tony Simmons  
Pagosa Brewing Co.
- Dharma Tamm  
Rogue Ales & Spirits
- **Staff liaisons:** Sarah Billiu, Paul  
Gatza, Stephanie Johnson Martin,  
Bob Pease, Bart Watson

### Diversity Committee

- Kevin Blodger (Chair)  
Union Craft Brewing

- Nick Purdy Wild Heaven Beer
- Heather Sanborn  
Rising Tide Brewing Co.
- Michael Smothers Firestone  
Walker Brewing Company
- Andrea Stanley Valley Malt
- Julie Verratti Denizens Brewing Co.
- Lynne Weaver  
Three Weavers Brewing Co.
- Roxanne Westendorf  
AHA Governing Committee
- J. Nikol Jackson-Beckham, Ph.D.  
Brewers Association  
Diversity Ambassador
- **Staff liaisons:** Ryan Farrell, Julia  
Herz, Alana Koenig-Busey, Bob  
Pease, Ann Obenchain

### Events Committee

- Leslie Henderson (Chair)  
Lazy Magnolia Brewing Co.
- Tomme Arthur The Lost Abbey
- Tim Brady Whetstone Station  
Restaurant and Brewery
- Bill Butcher Port City Brewing Co.
- Sam Calagione  
Dogfish Head Craft Brewery
- Bill Covalleski Victory Brewing Co.
- Jennifer Glanville Boston Beer Co.
- Jeff Mendel Left Hand Brewing Co.
- Jennifer Talley 1849 Brewing Co.
- David Thibodeau Ska Brewing Co.
- **Staff liaisons:** Tara Forster, Nancy  
Johnson, Bob Pease, Kathryn  
Porter Drapeau, Chris Williams

### CBC Seminar Selection Subcommittee

- Tim Brady
- Larry Chase
- Leah Cheston
- Carol Cochran
- Jason Ebel
- Patrick Fowler
- Matt Gacioch
- Leslie Henderson
- Laura Hill
- Larry Horwitz
- Walker Modic
- Campbell Morrissey
- Gene Muller
- Jason Murphy
- Jason Perkins
- Joleen Senter Durham
- Chris Shields



- Brandon Smith
- Kent Taylor
- Dan Wade
- Robin Wibby
- Ryan Wibby
- Mark Youngquist
- Matt Stinchfield
- Neil Witte
- **Staff liaisons:** Sarah Billiu, Adam Dulye, Paul Gatz, Julia Herz, Nancy Johnson, Ann Obenchain, Graham Rausch, Damon Scott, Chuck Skyeck, MacKenzie Staples, Chris Swersey, Kristi Switzer, Emma Vawter, Bart Watson

### Finance Committee

- Larry Chase (Chair)  
*Brewery-in-Planning*
- Leah Cheston  
*Right Proper Brewing Co.*
- Chris Frey *Fantasy Fermentation*
- Leo Govoni *Big Storm Brewery*
- Cyrena Nouzille  
*Ladyface Ale Companie*
- Austin Roark *Dixie Brewing Co.*
- Adam Robbings *Reuben's Brews*
- Jeff Schrag *Mother's Brewing Co.*
- Peter Skrbek *Deschutes Brewery*
- Kent Taylor *Blackstone Brewing Co.*
- Todd Webster *Thorn Brewing Co.*
- **Staff liaisons:** Tom Clark, Bob Pease, Drew Rosanova

### Governance Committee

- Wynne Odell (Chair)  
*Odell Brewing Co.*
- Tim Brady *Whetstone Station Restaurant and Brewery*
- Leslie Henderson  
*Lazy Magnolia Brewing Co.*
- Dan Kleban *Maine Beer Co.*
- Jill Marilley *Everett, Wash.*
- Garrett Marrero *Maui Brewing Co.*
- Roxanne Westendorf  
*Cincinnati, Ohio*
- **Staff liaison:** Paul Gatz

### Taproom Subcommittee

- Wynne Odell (Chair)
- Tim Bullock
- David Burman
- Kurtis Cummings
- Jack Dyer
- Brian Eaton
- Charles Frizzell
- Gay Gilmore
- Ali Hovan
- Melissa Romano
- Andy Skelton
- Michelle Yovich
- **Staff liaisons:** Paul Gatz, MacKenzie Staples, Bart Watson

### Government Affairs

- Dan Kleban (Chair) *Maine Beer Co.*
- Josh Aubuchon  
*Florida Brewers Guild*
- Alicia Barr *FiftyFifty Brewing Co.*

- Robert Burns *Night Shift Brewing*
- Gary Fish *Deschutes Brewery*
- Jeff Hamilton *Sprecher Brewing Co.*
- Daniel Harrison *Country Boy Brewing*
- Jim Koch *Boston Beer Co.*
- Ryan Krill *Cape May Brewing Co.*
- Jose Mallea *Biscayne Bay Brewing Co.*
- Garrett Marrero *Maui Brewing Co.*
- Nick Matt *Saranac/Matt Brewing Co.*
- Tom McCormick  
*California Craft Brewers Association*
- Gene Muller *Flying Fish Brewing Co.*
- Sara Nelson *Fremont Brewing Co.*
- Scott Newman-Bale  
*Short's Brewing Co.*
- Rob Tod *Allagash Brewing Co.*
- Eric Wallace *Left Hand Brewing Co.*
- **Staff liaisons:** Acacia Coast, Paul Gatz, Pete Johnson, Katie Marisic, Bob Pease, Bart Watson

### Market Development Committee

- Garrett Marrero (Co-Chair)  
*Maui Brewing Co.*
- Fred Matt (Co-Chair)  
*Saranac/Matt Brewing Co.*
- Pamela Brulotte *Icicle Brewing Co.*
- Archie Gleason *Sycamore Brewing*
- Tom McGinty *Seismic Brewing Co.*
- Steve McGlone *Mad Tree Brewing*
- Matt Moberly *Bell's Brewery, Inc.*
- Tim Moynihan *Stone Brewing*
- Kristen Muraro *Ska Brewing Co.*
- Jon Schwartz *Mass Bay Brewing Co.*
- Eric Smith *Odell Brewing Co.*
- George Ward *Boston Beer Co.*
- Evan Weinberg  
*Cismontane Brewing Co.*
- Ken Wilson *Lumberyard Brewing Co.*
- **Staff liaisons:** Paul Gatz, Julia Herz, Bob Pease, Andy Sparhawk, Bart Watson

### Brewers Association PAC Committee

- Dan Kleban (Chair) *Maine Beer Co.*
- Robert Burns *Night Shift Brewing*
- Ryan Krill *Cape May Brewing Co.*
- Jose Mallea *Biscayne Bay Brewing Co.*
- Garrett Marrero *Maui Brewing Co.*
- Sara Nelson *Fremont Brewing Co.*
- Julie Verratti *Denizens Brewing Co.*
- **Staff liaisons:** Katie Marisic, Bob Pease

### PR & Marketing Committee

- Steve Hindy (Co-Chair)  
*Brooklyn Brewery*
- Jose Mallea (Co-Chair)  
*Biscayne Bay Brewing Co.*
- Bridget Barrett  
*Great Lakes Brewing Co.*
- Sam Calagione  
*Dogfish Head Craft Brewery*
- Doug Constantiner  
*Societe Brewing Co.*

- Colby Cox *Roadhouse Brewing Co.*
- Matt Cutter *Upslope Brewing Co.*
- Linus Hall *Yazoo Brewing*
- Jim Koch *Boston Beer Co.*
- Randy Mosher *Randy Mosher Design*
- Jessica Paar *Boston Beer Co.*
- Julian Shrago *Beachwood Brewing*
- Marty Shutter *Ozark Beer Co.*
- Hugh Sisson *Heavy Seas Beer*
- Neal Stewart *Deschutes Brewery*
- **Staff liaisons:** Helen Anderson, Jess Baker, Paul Gatz, Julia Herz, Ann Obenchain, Bob Pease

### Export Development Subcommittee

- Eric Wallace (Chair)
- Dave Cole
- Steve Grossman
- Ron Jeffries
- Fred Mendes *Boston Beer Co.*
- Richard Miller
- Brandon Richards
- David Thibodeau
- **Staff liaisons:** Adam Dulye, Steve Parr, Bob Pease

### Technical Committee

- Larry Horwitz (Co-Chair)  
*Ten20 Butchertown Beer Exchange*
- John Mallett (Co-Chair)  
*Bell's Brewery, Inc.*
- Justin Ainsworth  
*Sierra Nevada Brewing Co.*
- Chris Bogdanoff  
*Heroes Restaurant and Brewery*
- Tom Flores *Brewer's Alley*
- Jamie Floyd *Ninkasi Brewing Co.*
- Bridget Gauntner *Bell's Brewery, Inc.*
- Ken Grossman  
*Sierra Nevada Brewing Co.*
- Geoff Larson *Alaskan Brewing Co.*
- Chris McCombs  
*Coopersmith's Pub & Brewing*
- Walker Modic *Bell's Brewery, Inc.*
- James "Otto" Ottolini *BrewHub*
- Jason Perkins *Allagash Brewing Co.*
- Brandon Smith  
*Sierra Nevada Brewing Co.*
- Mitch Steele *New Realm Brewing Co.*
- Jennifer Talley *1849 Brewing Co.*
- Kent Taylor *Blackstone Brewing Co.*
- David Wilson *Alaskan Brewing Co.*
- **Staff liaisons:** Paul Gatz, Bob Pease, Damon Scott, Chuck Skyeck, Chris Swersey

### Draught Beer Quality Subcommittee

- Bridget Gauntner (Chair)
- Erik Budrakey
- Ben Geisthardt
- Rob Gerrity
- Jaime Jurado
- Charles Kyle
- Matthew Laibson
- David Munro
- Jeff Schaefer

- Ken Smith
- Neil Witte (Ambassador)
- Matt Meadows
- **Staff liaisons:** Paul Gatz, Bob Pease, Damon Scott, Chuck Skyeck, Chris Swersey

### Engineering Subcommittee

- Chris McCombs (Chair)
- Kent Taylor (Vice Chair)
- Matthew Bailey
- Sean Diffley
- Chris Labbe
- Greg Lemermeier
- Allan MacDonald
- Kyle Moore
- Eric Ritchson
- Greg Schlichting
- Tom Schmidlin
- John Seabrooks
- Brandon Smith
- **Staff liaisons:** Paul Gatz, Damon Scott, Chuck Skyeck

### Quality Subcommittee

- Jason Perkins (Chair)
- Rob Christiansen
- Tom Flores
- Jamie Floyd
- Max Kravitz
- Phil Leinhart
- Alastair Pringle
- Thomas Shellhammer
- Jordan Skeen
- Alan Windhausen
- **Staff liaisons:** Paul Gatz, Damon Scott, Chuck Skyeck, Chris Swersey

### Safety Subcommittee

- Chris Bogdanoff (Chair)
- Ken Anderson
- Rachel Bell
- Rob Cardosi
- Andy Clearwaters
- Brian Godfrey
- Dana Johnson
- Chris LaPierre
- Bill Lenczuk
- Tony McCrimmon
- Nicole Reiman
- Andy Scanlon
- Matt Stinchfield (Ambassador)
- **Staff liaisons:** Paul Gatz, Bob Pease, Damon Scott, Chuck Skyeck, Chris Swersey

### Supply Chain Subcommittee

- Mitch Steele (Chair)
- Peter Bouckaert
- Vinnie Cilurzo
- Scott Dorsch
- Jason Ebel
- Christian Holbrook
- Matt McComish
- Jeremy Moynier
- Tom Nielsen
- James "Otto" Ottolini
- Zach Turner
- David Wilson

- Katie Wallace
- **Staff liaisons:** Paul Gatz, Bob Pease, Damon Scott, Chuck Skyeck, Chris Swersey, Bart Watson

### Sustainability Subcommittee

- Walker Modic (Chair)
- Adam Beauchamp
- Carol Cochran
- Christian Ettinger
- Saul Klorys
- Adam Lawrence
- Mandi McKay
- Ben Roesch
- John Stier (Mentor)
- Luke Truman
- Matt Gacioc (Ambassador)
- Katie Wallace
- **Staff liaisons:** Paul Gatz, Damon Scott, Chuck Skyeck, Chris Swersey

### AHA Governing Committee

- Roxanne Westendorf (Chair & BA Board Designate)
- Jill Marilley (Vice Chair & BA Board Designate)
- Shawna Cormier (Secretary)
- Jen Blair
- Martin Brungard
- Debbie Cerda
- Sandy Cockerham
- Denny Conn
- Phil Farrell
- Dennis Mitchell
- Jeff Rankert
- Donna Reuter
- Goose Steingass
- Carvin Wilson
- Kathy Yan Li
- **Staff liaison:** Gary Glass, Duncan Bryant



# Brewers Association Team



**Bob Pease**  
President  
& CEO



**Paul Gatz**  
Senior Vice President,  
Professional Brewing  
Division



**Nancy Johnson**  
Senior Vice President,  
Meetings and Events



**Stephanie Johnson Martin**  
Senior Vice President,  
Operations

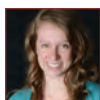


**Ryan Farrell**  
Vice President,  
Staff Development

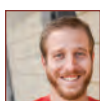
## Membership & Member Services



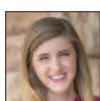
**Bart Watson**  
Chief Economist



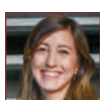
**Sarah Billiu**  
Membership  
Team Lead



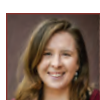
**Graham Rausch**  
Membership  
Coordinator



**MacKenzie Staples**  
Educational Content  
Manager



**Emma Vawter**  
Membership  
Coordinator



**Jessica O'Leary-Brennan**  
Membership Assistant



**Dan Goloback**  
Operations  
Manager



**Erin Walters**  
Member Services  
Team Lead



**Emily Silver**  
Member Services  
Specialist

## Technical Resources



**Chuck Skypeck**  
Technical Brewing  
Projects Manager



**Chris Swersey**  
Supply Chain  
Specialist/  
Competition Manager

## Government Affairs



**Katie Marisic**  
Federal Affairs  
Director



**Pete Johnson**  
State and Regulatory  
Affairs Manager



**Acacia Coast**  
State Guilds  
Manager

## Craft Beer Program



**Julia Herz**  
Craft Beer Program  
Director



**Andy Sparhawk**  
Digital Content Editor



**Helen Anderson**  
Craft Beer Program  
Marketing Coordinator

## The New Brewer



**Jill Redding**  
Editor-in-Chief -  
*The New Brewer* &  
BA Special Projects



**Amahl Turczyn**  
Associate Editor,  
*The New Brewer*  
& Zymurgy

## Export Development Program



**Steve Parr**  
Export Development  
Program Manager

## Events



**Kathryn Porter**  
Associate  
Event Director



**Chris Williams**  
Senior  
Event Manager

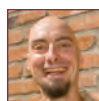


**Tara Forster**  
Event  
Coordinator



**Millie Shamburger**  
Event  
Coordinator

## American Homebrewers Association



**Gary Glass**  
AHA Director



**Matt Bolling**  
AHA Events  
Planner



**Duncan Bryant**  
AHA Associate  
Director



**Dave Carpenter**  
Editor-in-Chief - *Zymurgy*  
& AHA Special Projects



**John Moorhead**  
AHA Competition  
Coordinator



**Megan Wabst**  
AHA Administrative  
Assistant



**Emily Bishop**  
AHA Membership  
Coordinator

## Brewers Publications



**Kristi Switzer**  
Brewers Publications  
Publisher

## Sales



**Kevin Doidge**  
Sales Director



**Kari Harrington**  
Business Development  
Manager for Advertising  
& Sponsorship - West



**Tom McCrory**  
Business Development  
Manager for Advertising  
& Sponsorship - East



**Joe Damgaard**  
Advertising &  
Sponsorship Associate



**Marc Preo**  
Special Projects  
Coordinator



## Marketing



**Ann Obenchain**  
Marketing  
Director



**Rachel Staats**  
Senior Marketing  
Manager



**Lara Betthausen**  
Social Media  
Manager



**Jeb Foster**  
Marketing  
Manager

## Information Technology



**Ryan Latham**  
IT Director



**Aaron Schuette**  
Junior Software  
Developer



**Aaron Hart**  
Software  
Developer

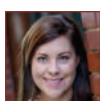
## Web



**Cindy Jones**  
Web Director



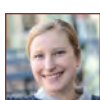
**Nate Zander**  
Solutions  
Architect



**Lisa Carlson**  
Web Developer



**Meghan Storey**  
Web Project Manager



**Karna Murphy**  
Archivist

## Creative



**Luke Trautwein**  
Creative Director



**Jason Smith**  
Art Director



**Sarah Baldwin**  
Web Designer



**Danny Harms**  
Senior Designer



**Kate Sanford**  
Production Designer

## Finance



**Tom Clark**  
Finance Director



**Drew Rosanova**  
Accounting  
Manager

## Operations



**George Myler**  
Warehouse/Shipping  
Manager



**Stacey Wetzel**  
Shipping  
Assistant

## Human Resources



**Alana Koenig-Busey**  
Office Manager

## Contractors



**Melissa Antone**  
Quality Trainer



**Tim Brady**  
Beer Server Training  
Manual Instructor /  
Membership Ambassador



**Matt Gacloch**  
Sustainability  
Ambassador



**Dr. J. Nikol Jackson-Beckham**  
Diversity Ambassador



**Yandong Lu**  
Craft Beer Ambassador  
in China



**Matt Meadows**  
Draught Beer  
Quality Ambassador



**Lotte Peplow**  
Craft Beer Ambassador  
in Europe



**John Stier**  
Sustainability  
Mentor



**Matt Stinchfield**  
Safety Ambassador



**Lauren Torres**  
Quality Instructor



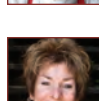
**Alan Windhausen**  
Quality Trainer



**Neil Witte**  
Quality Ambassador



**Adam Dulye**  
Executive Chef



**Carol Hiller**  
Volunteer and Event  
Operations Manager



*Equal Opportunity: Brewers Association is an equal opportunity employer and does not discriminate on the basis of race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, or marital/familial status.*



1327 Spruce Street  
Boulder, CO 80302



@BrewersAssoc

**Featured on the front cover:** Hopewell Brewing Co., Chicago, Illinois  
© 2019 Dustin Hall, The Brewtopography Project

1327 Spruce Street, Boulder, CO 80302 USA  
1.888.822.6273 (US and Canada only) | 1.303.447.0816  
[BrewersAssociation.org](http://BrewersAssociation.org) | [info@brewersassociation.org](mailto:info@brewersassociation.org)

