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Crop Report #1: German 2017 Spring Barley

Ladies and Gentlemen.

Based on preliminary assessments by the German state agricultural associations involved with brewing barley, the Braugersten-Gemeinschaft e.V. (German Malting Barley Association) has compiled an overview of summer barley plantings expected for the cultivation year 2017. The acreages listed in the attached table are expert estimates based on seed sales and on-site surveys. Official statistics relating to the actual area under cultivation are not yet available.

Average temperatures in Germany in the winter of 2016/2017 were 0.9 °C (approximately 33.6 °F). This is 0.7 °C (approximately 1.3 °F) above the long-term average of for the reference years 1961 to 1990. Aggregate rainfall was measured at 115 liters per square meter (4.53 inches), which was only 64% of the long-term average of 181 liters per square meter (7.13 inches). Most of that precipitation fell in solid form, which means that higher elevations were covered with a stable blanket of snow. Especially in the south of Germany, many fields with snow cover were also hit by severe frosts. Periods of sunshine reached an aggregate of 210 hours in Germany in the winter of 2016/2017, which is about 136% of the normal of 155 hours. This makes the past winter the sunniest on record since the compilation of such comprehensive data was started in 1951.

Brewing barley state organizations now forecast a total area of spring barley cultivation in Germany of about 340,000 ha (roughly 840,000 acres). The state of Mecklenburg-Vorpommern saw an unusually large amount of spring barley planting last year because of prior damage to winter wheat, rapeseed, and barley. This year, acreage figures in that state have returned to the level of 2015 of about 12,000 ha (29, 650 acres). This decrease, however, is almost made up by an increase this year in spring barley cultivation in Bavaria. In all other German states, the cultivation areas for spring barley have remained fairly unchanged from the previous year. Plantings are in full swing and are expected to be mostly completed by the end of March. Very low temperatures in January, which occasionally reached -15 °C (5 °F), produced plenty of frost tilth for good spoil structures. The low moisture level in the soil allowed the fields to dry quickly so that early planting could proceed under general good to optimum soil conditions. Roughly half the expected 2017 spring barley acreage had been planted at the time of this report; and many of the seeds were already at or slightly past their imbibition and emergence stage.

The varieties favored by growers this year have all been recommended by the Berlin Program. They are mainly Avalon, Solist, Quench, and Catamaran. The variety RGT Planet,

however, is largely being phased out for processing by the German brewing industry. However, it is still being cultivated on a small scale in several of the German states.

The next German spring barley crop report of the German Malting Barley Association will be released around the middle of May.

For the Braugersten-Gemeinschaft e.V.

Walter König

Attachment: 1st German 2017 Spring Brewing Barley Crop Report.

1st German 2017 Spring Brewing Barley Crop Report

	Acreage 2016 in ha	Acreage 2017 in ha	Brewing Barley Acreage 2017 in ha	Time of Planting	Acreage Currently Planted as a Percentage of Total Acreage	Soil and Planting Conditions	Winter Damage	Current Crop Conditions	Key Varieties as a Percentage of Total Acreage
Bavaria	92.400	98.000	94.000	started calendar week 11	20%	good	none; possibly a few fields of winter rapeseed plowed under because of dryness in fall	planted or prior to emergence	Grace Solist Catamaran Avalon Marthe
Baden-Württemberg	53.500	53.000	53.000	late-February to mid-March	50%	good frost till; optimal planting conditions	none	germination stage	Avalon Grace Quench RGT Planet
Brandenburg	7.700	8.000							
Hesse	14.600	15.000	14.000	started mid-February in Ried region; in mid-range mountains, planting has started	30% - 40%	satisfactory; little winter moisture	none	early plantings at emergence stage	40% Avalon Propino Marthe RGT Planet
Mecklenburg-Vorpommern	12.900	5.000	2.000	started calendar week 11	10% - 25%	very moist soils; current warm and windy weather causes fast drying; makes planting possible, but expected rains and variable weather in coming days will interrupt planting	none	winter barley: green stage, at tillering; spring barley not yet emerged	RTG Planet Solist Quench
Lower Saxony	50.100	50.000	27,000 - 28,000	started March 5 in Peine region	20% - 50%	regional variations; generally good; some fields too moist	none	being planted	80% Quench 20% Avalon
North-Rhine-Westphalia; North Eifel foothills	12.000	12.000	3.000	started calendar week 11	planting has started	good frost till; fields are drying out	none	planting has started	70% - 80% Avalon 10% - 20% Propino 5% - 10% RTG Planet
Rhineland-Palatinate	35.000	33.000	29.700	warm regions calendar weeks 9 - 11; elevations calendar weeks 11 - 13	40%	good to very good	none	in warmer regions at emergence	75% Avalon 20% Catamaran
Saxony	23.300	23.300	20.000	started March 15	max. 10%	currently winter moisture	no significant damage	being planted	Quench Solist RTG Planet Avalon
Saxony-Anhalt	7.400	7.000	6.000	started mid-March	80%	optimal	very little	just prior to emergence	Quench Solist RTG Planet
Schleswig-Holstein	7.100	7.000							
Thuringia	25.000	26.000	24.000	March	70%	moist	none	germination to emergence	Quench Avalon Solist RTG Planet
GERMANY	341.000	337.300	245.700		approx. 50%				

Current as of March 23, 2017