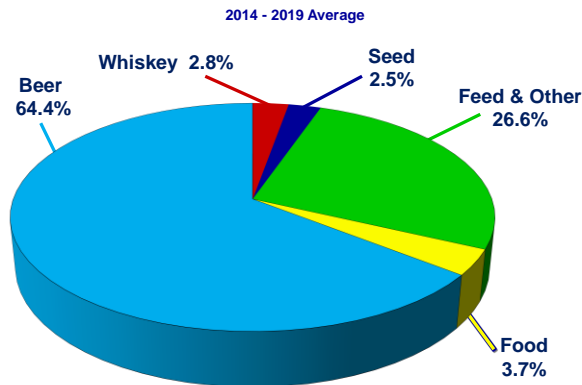


**ECONOMIC SIGNIFICANCE OF BARLEY**

One of the strengths of the U.S. economy is its crop production and agriculturally based industries. Crop and value-added product exports reduce the unfavorable trade balance and generate new employment, grower income, and federal revenue. Maintenance of U.S. strength in agriculture requires continuing efforts to improve crop productivity and quality. U.S. agricultural production that can supply both domestic demands and can compete in world markets will only be accomplished by strong investments in agricultural research programs. Innovative and competitive research will keep the U.S. at the forefront of the development and implementation of new agricultural technologies.

**Domestic Use of Barley in the US**



Barley is a significant U.S. crop. Barley production is approximately 162 million bushels with an estimated value of \$685 million as a raw agricultural commodity (2017 Census).

Barley producers stimulate the rural economy through the purchase of fertilizer, seed, chemicals, fuel, labor, other supplies and farm equipment. These variable cash expenses averaged \$477 million annually (2015-2019).

The impact of barley on the U.S. economy is even more significant if the value-added products

resulting from its utilization as an animal feed, in malt beverages, and in food products are considered. The economy also benefits from exports which annually average \$38 million for barley and its milled products, \$226 million for malt and malt extracts, \$648 million for beer, and \$1.03 billion for whiskey (2016-2020).

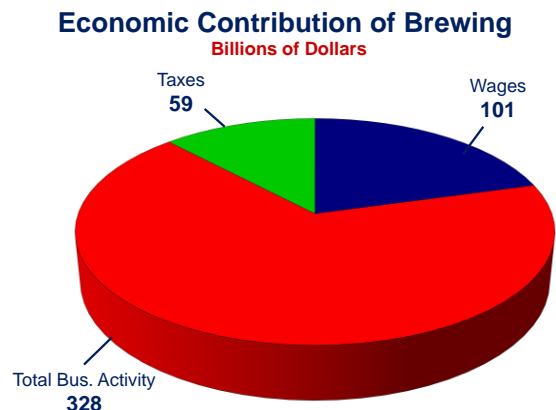
**BARLEY BALANCE SHEET**

ANNUAL FEDERAL RESEARCH INVESTMENT*	ANNUAL RETURN ON INVESTMENT
\$ 16.025 USDA-Agricultural Research Service (ARS)	\$ 0.7 Raw agricultural commodity
0.907 Other Grants (NIFA-AFRI, NSF)	328.4 Brewing industry business
NA USDA-NIFA Formula Grants (Hatch Act, Smith-Lever)	3.3 Federal excise tax revenue
<b>\$16.932 Million</b>	27.9 Federal income tax
	2.4 Value-added use as feed
	NA Value-added use as food
	<b>\$362.7 Billion</b>

\*FY2020 Funding Levels  
NA: Not Available

**ECONOMIC CONTRIBUTION OF THE BREWING INDUSTRY**

Barley is a critical and primary raw material for beer. **Without malting barley, there would be no beer.** The economic value of the U.S. brewing industry is substantial.



**BARLEY: ECONOMIC SIGNIFICANCE BY STATE**

State	Annual <sup>1</sup> Production	Crop <sup>1</sup> Value	Brewing Industry <sup>2</sup>			Whiskey Distillers <sup>5</sup>	Malt Plants <sup>4</sup>
			Employment	Total Bus. Activity	Taxes <sup>3</sup>		
	(million bu)	(million \$)		(million \$)	(million \$)		
Alabama	0.0	0.1	20,436	2,783	528	51	7
Alaska	0.2	0.6	5,396	773	117	45	1
Arizona	2.2	6.9	43,952	5,426	956	129	1
Arkansas			12,413	1,966	309	42	4
California	3.4	14.5	265,265	43,400	8,804	926	54
Colorado	8.1	39.7	73,405	13,620	1,929	434	48
Connecticut	0.0	0.0	21,347	3,058	597	104	6
Delaware	1.5	4.5	6,135	929	134	27	3
District of Columbia			9,680	1,043	198	12	3
Florida			153,054	18,875	3,659	334	18
Georgia	0.0	0.0	54,084	8,147	1,412	114	12
Hawaii			13,549	1,813	377	25	
Idaho	50.5	231.9	13,096	1,954	266	74	8
Illinois	0.0	---	89,592	13,915	2,257	290	21
Indiana	0.1	0.5	35,844	5,500	680	193	20
Iowa	0.1	0.5	27,535	3,868	530	105	9
Kansas	0.2	0.5	15,444	2,163	308	59	5
Kentucky	0.4	1.4	17,362	2,570	419	69	35
Louisiana			32,296	4,350	685	40	4
Maine	1.2	3.6	15,531	2,003	368	133	7
Maryland	2.1	5.8	31,727	4,053	872	113	18
Massachusetts	0.0	0.0	56,305	7,804	1,502	175	12
Michigan	0.3	0.7	62,688	8,815	1,383	403	27
Minnesota	5.4	23.0	50,022	6,908	1,223	196	19
Mississippi			8,527	1,200	242	14	3
Missouri	0.2	0.6	55,628	10,154	1,505	141	22
Montana	32.2	132.4	9,916	1,330	161	92	15
Nebraska	0.1	0.6	15,470	2,238	291	55	4
Nevada	0.1	0.6	32,438	4,255	962	45	7
New Hampshire			12,946	1,939	314	93	8
New Jersey	0.1	0.3	45,546	6,680	1,229	128	6
New Mexico	0.2	0.9	11,464	1,462	245	94	10
New York	0.5	2.1	137,712	24,232	5,920	431	73
North Carolina	0.7	1.9	63,883	9,242	1,595	338	17
North Dakota	29.3	124.5	6,711	889	133	22	2
Ohio	0.3	1.2	81,448	12,864	2,166	319	25
Oklahoma	0.3	1.2	18,900	2,903	445	55	4
Oregon	2.2	10.6	43,117	6,685	913	320	30
Pennsylvania	3.1	10.3	77,197	11,475	1,795	402	37
Rhode Island			7,161	876	184	33	2
South Carolina	0.1	---	26,233	3,293	637	88	21
South Dakota	0.5	2.0	7,227	925	129	33	3
Tennessee	0.1	---	28,646	4,208	830	108	23
Texas	0.8	2.7	170,200	25,473	4,208	346	36
Utah	1.5	4.2	12,447	1,604	227	42	5
Vermont	0.0	0.0	7,649	985	180	70	7
Virginia	1.0	2.5	56,126	8,827	1,733	296	24
Washington	5.1	17.8	53,516	8,276	1,491	430	59
West Virginia	0.1	0.2	6,188	968	143	28	10
Wisconsin	0.8	2.8	62,856	8,959	1,280	210	15
Wyoming	6.9	30.8	4,744	702	98	41	3
Total U.S.	161.6	685.0	2,189,472	328,377	58,579	8,367	823

<sup>1</sup> 2017 Census production and crop values. (Source: USDA\NASS). (---) Data not available for some minor states.

<sup>2</sup> Source: Economic Impact, 2018 Prepared for the Beer Institute by John Dunham and Associates.

<sup>3</sup> Taxes paid and generated - business, consumption & personal.

<sup>4</sup> Various published and unpublished sources. Malting companies include those under construction.

<sup>5</sup> Sku's Recent Eats "The Complete List of American Whiskey Distilleries & Brands"

MAJOR & REGIONAL BREWERS IN THE UNITED STATES<sup>1</sup>

STATE	COMPANY	CITY
Alaska	Alaskan Brewing Co.	Juneau
	Denali Brewing Co.	Talkeetna
Alabama	Good People Brewing Co.	Birmingham
Arkansas	Lost Forty Brewing	Little Rock
Arizona	Four Peaks Brewing Co.	Tempe
	Huss Brewing Co.	Phoenix
	SanTan Brewing Co.	Chandler
California	21 <sup>ST</sup> Amendment Brewery	San Francisco
	AleSmith Brewing Co.	San Diego
	Anchor Brewing Co.	San Francisco
	Anderson Valley Brewing Co.	Boonville
	AB InBev	Fairfield
	AB InBev	Los Angeles
	Ballast Point Brewing Co.	San Diego
	Bear Republic Brewing Co.	Healdsburg
	Belching Beaver Brewery	San Diego
	BJ's Chicago Pizza & Brewery	Huntington Beach
	The Bruery	Placencia
	Calicraft Brewing Co.	Walnut Creek
	Coronado Brewing Co.	Coronado
	Drakes Brewing	San Leandro
	Fieldwork Brewing	Berkeley
	Figueroa Mountain Brewing	Buellton, California
	Firestone Walker Brewing Co.	Paso Robles
	Fort Point Beer Co.	San Francisco
	Golden Road Brewery	Los Angeles
	Gordon Biersch Brewing Co.	San Jose
	Green Flash Brewing Co.	San Diego
	Hermitage Brewing Co.	San Jose
	Karl Strauss Breweries	San Diego
	Knee Deep Brewing Co.	Auburn
	Lagunitas Brewing Co.	Petaluma
	Latitude 33 Brewing Co.	Vista
	Lost Coast Brewery and Café	Eureka
	Modern Times Beer	San Diego
	Molson Coors Beverage Co.	Irwindale
	Mother Earth Brew Co.	Vista
North Coast Brewing Co.	Fort Bragg	
Pizza Port	Carlsbad	
Russian River Brewing Co.	Santa Rosa	
Saint Archer Brewing Co.	San Diego	
Sierra Nevada Brewing Co.	Chico	
Stone Brewing Co.	San Marcos	
Trumer Brauerei	Berkeley	
Colorado	AB InBev	Fort Collins
	Avery Brewing Co.	Boulder
	Blue Moon Brewing Co.	Denver
	Boulder Beer Co.	Boulder
	Breckenridge Brewery	Littleton
	CANarchy	Longmont

<sup>1</sup> Breweries with production of 15,000 barrels or more in 2019.

Colorado (cont.)	CraftWorks Brewery & Restaurant	Broomfield	
	Denver Beer Co.	Denver	
	Dry Dock Brewing Co.	Aurora	
	Eddyline Brewing	Buena Vista	
	Great Divide Brewing Co.	Denver	
	Left Hand Brewing Co.	Longmont	
	Molson Coors Beverage Co.	Golden	
	New Belgium Brewing Co.	Fort Collins	
	Odell Brewing Co.	Fort Collins	
	SKA Brewing	Durango	
Connecticut	Sleeping Giant Brewing Co.	Denver	
	Upslope Brewing Co.	Boulder	
	New England Brewing Co.	Woodbridge	
	Stony Creek Brewery	Branford	
	Two Roads Brewing Co.	Stratford	
	Delaware	Dogfish Head Craft Brewery	Milton
	District of Columbia	DC Brau Brewing	Washington
	Florida	3 Daughters Brewing	St. Petersburg
		AB InBev	Jacksonville
		CANarchy	Tampa
Coppertail Brewing		Tampa	
D.G. Yuengling & Son		Tampa	
Florida Beer Co.		Cape Canaveral	
Funky Buddha Brewery		Oakland Park	
Georgia	AB InBev	Cartersville	
	Creature Comforts Brewing Co.	Athens	
	Molson Coors Beverage Co.	Albany	
	New Realm Brewing	Atlanta	
	Scofflaw Brewing Co.	Atlanta	
	Sweetwater Brewing Co.	Atlanta	
	Terrapin Beer Co.	Athens	
Hawaii	Maui Brewing Co.	Lahaina	
Iowa	Toppling Goliath Brewing Co.	Decorah	
Illinois	Goose Island Beer Co.	Chicago	
	Half Acre Beer Co.	Chicago	
	Revolution Brewing	Chicago	
	Two Brothers Brewing Co.	Warrenville	
Indiana	Sun King Brewing	Indianapolis	
	Three Floyds Brewing Co.	Munster	
	Upland Brewing Co.	Bloomington	
Kentucky	Braxton Brewing Co.	Covington	
	Country Boy Brewing	Lexington	
	Lexington Brewing & Distilling Co.	Lexington	
Louisiana	Abita Brewing Co.	Abita Springs	
	Parish Brewing Co.	Broussard	
	Urban South Brewery	New Orleans	
Maine	Allagash Brewing Co.	Portland	
	Baxter Brewing Co.	Lewiston	
	Maine Beer Co.	Freeport	
	Peak Organic Brewing Co.	Portland	
	Shipyard Brewing Co.	Portland	
Maryland	DuClaw Brewing Co.	Baltimore	
	Evolution Craft Brewing Co.	Salisbury	
	Flying Dog Brewing Co.	Frederick	

<sup>1</sup> Breweries with production of 15,000 barrels or more in 2019.

Maryland (cont.)	Stillwater Artisanal Ales	Baltimore
Massachusetts	Berkshire Brewing Co. Boston Beer Co. Harpoon Brewery Jack's Abby Brewing Lord Hobo Brewing Co. Night Shift Brewing Tree House Brewing Co. Trillium Brewing Co. Wachusett Brewing Co. Wormtown Brewery	South Deerfield Boston Boston Framingham Woburn Everett Charlton, Boston Westminster Worcester
Michigan	Atwater Brewing Co. Bell's Brewery, Inc. CANarchy Founders Brewing Co. New Holland Brewing Co. Old Nation Brewing Co. Shorts Brewing Co.	Detroit Galesburg Comstock Grand Rapids Holland Williamston Bellaire
Minnesota	August Schell Brewing Co. Bent Paddle Brewing Co. Castle Danger Brewery Fulton Beer Indeed Brewing Co. Summit Brewing Co. Surly Brewing Co. Third Street Brewhouse	New Ulm Duluth Two Harbors Minneapolis Minneapolis St. Paul Minneapolis Cold Spring
Missouri	4 Hands Brewing Co. AB InBev Boulevard Brewing Co. Kansas City Bier Co. Schlafly Beer Urban Chestnut Brewing Co.	St. Louis St. Louis Kansas City Kansas City Maplewood St. Louis
Montana	Big Sky Brewing Co. Kettlehouse Brewing Co. Montucky Cold Snacks	Missoula Missoula Bozeman
Nevada	Revision Brewing Co.	Sparks
New Hampshire	AB InBev Cisco Brewers Portsmouth Smuttnose Brewing Co.	Merrimack Portsmouth Portsmouth
New Jersey	AB InBev Cape May Brewing Co. Kane Brewing	Newark Cape May Ocean Township
New Mexico	La Cumbre Brewing Co. Marble Brewery Santa Fe Brewing Co.	Albuquerque Albuquerque Santa Fe
New York	AB InBev Blue Point Brewing Co. Brewery Ommegang Brooklyn Brewery The Bronx Brewery Captain Lawrence Brewing Co. Genesee Brewery	Baldwinsville Patchogue Cooperstown Brooklyn The Bronx Elmsford Rochester

<sup>1</sup> Breweries with production of 15,000 barrels or more in 2019.

New York (cont.)	Industrial Arts Brewing Co.	Garnerville
	Ithaca Beer Co.	Ithaca
	The Matt Brewing Co.	Utica
	Montauk Brewing Co.	Montauk
	Singlecut Beersmiths	Astoria
	Sixpoint Brewery	Brooklyn
	Sloop Brewing	East Fishkill
	Southern Tier Brewing Co.	Lakewood
North Carolina	Aviator Brewing Co.	Fuquay Varina
	CANarchy	Brevard
	Catawba Brewing	Morganton
	Foothills Brewing Co.	Winston Salem
	Highland Brewing Co.	Ashville
	LoneRider Brewing Co.	Raleigh
	New Belgium Brewing Co.	Asheville
	NoDa Brewing Co.	Charlotte
	Olde Mecklenburg Brewery	Charlotte
	Red Oak Brewing Co.	Whitsett
Sierra Nevada Brewing Co.	Mills River	
Wicked Weed Brewing	Ashville	
Ohio	AB InBev	Columbus
	Boston Beer Co.	Cincinnati
	BrewDog Brewing Co.	Columbus
	Christian Moerlein Brewing Co.	Cincinnati
	Columbus Brewing Co.	Columbus
	Fat Head's Brewery	Middleburg Heights
	Great Lakes Brewing Co.	Cleveland
	MadTree Brewing	Cincinnati
	Molson Coors Beverage Co.	Trenton
	Platform Beer Co.	Cleveland
Rhinegeist Brewing	Cincinnati	
Oklahoma	Choc Beer Co.	Krebs
	COOP Ale Works	Oklahoma City
Oregon	10 Barrel Brewing Co.	Bend
	Boneyard Beer Co.	Bend
	Breakside Brewery & Taproom	Portland
	Buoy Beer Co.	Astoria
	Crux Fermentation Project	Bend
	Deschutes Brewing Co.	Bend
	Ecliptic Brewing	Portland
	Fort George Brewery	Astoria
	Full Sail Brewing Co.	Hood River
	GoodLife Brewing Co.	Bend
	Hop Valley Brewery	Eugene
	McMenamins Breweries	Portland
	Ninkasi Brewing Co.	Eugene
	Pelican Brewing Co.	Pacific City
	PFriem Family Brewers	Hood River
	Portland Brewing Co.	Portland
Rogue Ales	Newport	
Widmer Brothers Brewing Co.	Portland	

<sup>1</sup> Breweries with production of 15,000 barrels or more in 2019.

Pennsylvania	Boston Beer Co. City Brewing Co. D.G. Yuengling Son, Inc. The Lion Brewery, Inc. Neshaminy Creek Brewing Co. Pittsburgh Brewing Co. Sly Fox Brewing Co. Straub Brewery, Inc. Tröegs Brewing Co. Victory Brewing Co. Yards Brewing Co.	Breinigsville Latrobe Pottsville Wilkes-Barre Croydon Pittsburgh Pottstown St. Mary's Harrisburg Downingtown Philadelphia
Rhode Island	Narragansett Brewing Co.	Providence
South Carolina	Westbrook Brewing Co.	Mt. Pleasant
Tennessee	City Brewing Co. CraftWorks Brewery & Restaurant Wiseacre Brewing Co. Yazoo Brewing Co. Yee-Haw Brewing	Memphis Chattanooga Memphis Nashville Nashville
Texas	AB InBev Austin Beerworks Deep Ellum Brewing Co. Independence Brewing Co. Karch Brewing Co. Live Oak Brewing Co. Molson Coors Beverage Co. Rahr and Sons Brewing Co. Real Ale Brewing Co. Revolver Brewing Saint Arnold Brewing Co. Spoetzl Brewery, Inc.	Houston Austin Dallas Austin, Houston Del Valle Fort Worth Fort Worth Blanco Granbury Houston Shiner
Utah	CANarchy Epic Brewing Co. Uinta Brewing Co.	Salt Lake City Salt Lake City Salt Lake City
Vermont	The Alchemist Fiddlehead Brewing Co. Harpoon Brewery Long Trail Brewing Co. Magic Hat Brewing Co. Zero Gravity Craft Brewery	Stowe Shelburne Windsor Bridgewater Corners South Burlington Burlington
Virginia	AB InBev Devils Backbone Brewing Co. Hardwood Park Craft Brewery Molson Coors Beverage Co. O'Connor Brewing Co. Port City Brewing Co. Starr Hill Brewing Co. Stone Brewing Three Notch'd Brewing Co.	Williamsburg Lexington Richmond Elkton Norfolk Alexandria Crozet Richmond Charlottesville

<sup>1</sup> Breweries with production of 15,000 barrels or more in 2019.

Washington	Bale Breaker Brewing Co.	Yakima
	Elysian Brewing Co.	Seattle
	Fremont Brewing Co.	Seattle
	Georgetown Brewing Co.	Seattle
	Iron Horse Brewery	Ellensburg
	Mac and Jack's Brewery	Redmond
	No-Li Brewhouse	Spokane
	Pyramid Breweries	Seattle
	Redhook Ale Brewery	Seattle
	Reuben's Brews	Seattle
Silver City Brewery	Silverdale	
Wisconsin	City Brewing Co.	La Crosse
	Jacob Leinenkugel Brewing Co.	Chippewa Falls
	Lakefront Brewery Inc.	Milwaukee
	Milwaukee Premium Brewing Co.	Milwaukee
	Minhas Craft Brewery	Monroe
	Molson Coors Beverage Co.	Milwaukee
	New Glarus Brewing Co.	New Glarus
	Octopi Brewing	Waunakee
	Rhineland Brewing Co.	Rhineland
Stevens Point Brewery	Stevens Point	
Wyoming	Melvin Brewing Co.	Alpine

<sup>1</sup> Breweries with production of 15,000 barrels or more in 2019.



MALTING PLANTS IN THE UNITED STATES<sup>1</sup>

<b>STATE</b>	<b>COMPANY</b>	<b>CITY</b>
Alaska	Artic Harvest Distillery	North Pole
Arizona	Sinagua Malt	Camp Verde
California	Admiral Maltings	Alameda
	Eckert Malting & Brewing Co.	Chico
	Grizzly Malt	Santa Rosa
Colorado	Colorado Malting Company	Alamosa
	Grouse Malting & Roasting Co.	Wellington
	Leopold Bros. Distilling	Denver
	Molson Coors Beverage Co.	Golden
	Proximity Malt	Monte Vista
	Root Shoot Malting	Loveland
	Troubador Maltings LLC	Ft. Collins
Connecticut	Thrall Family Malt	Windsor
Delaware	Proximity Malt	Laurel
Georgia	Georgia Malt	St. Calhoun
Idaho	AB InBev	Idaho Falls
	Great Western Malting Co.	Pocatello
	InteGrow Malt	Idaho Falls
	Mashbill Farms	Eagle
	Mountain Malt	Idaho Falls
Illinois	Mammoth Malt	Thawville
Indiana	Sugar Creek Malt Co.	Lebanon
Iowa	Black Gold Malt Farm	Cascade
Kansas	Amber Waves Malt	Garden Plains
Kentucky	South Fork Malthouse	Cynthiana
Maine	Blue Ox Malthouse	Lisbon Falls
	Maine Craft Distilling	Portland
	Maine Malt House	Mapleton
Maryland	Amber Fields Malting & Brewing	Keymar
	Chesapeake Malting	Havre de Grace
	Dark Cloud Malthouse	Cooksville
Massachusetts	Stone Path Malt	Wareham
	Turner Hill Malting	Edgemont
	Valley Malt	Hadley
Michigan	Arrowhead Malt House LLC	Spring Arbor
	Emergent Malt	Zeeland
	Empire Malting Co.	Empire
	Great Lakes Malting Co.	Traverse City
	Koops' Malt Haus	Mount Pleasant
	Mitten State Malt	Okemos
	Motorcity Malt House LLC	Macomb
	U.P. Malt Company	Marquette
	Valley View Farm LLC	East Jordon
Minnesota	AB InBev	Moorhead
	Malteurop North America	Winona
	Maltwerks	Detroit Lakes
	Rahr Malting Company	Shakopee
	Vertical Malt	Fisher

Missouri	Gateway Custom Malt	Montgomery City
Montana	Farm Power Malt	Power
	Gallatin Valley Malt	Bozeman
	Malteurop North America	Great Falls
	Montana Craft Malt	Butte
Nebraska	Nebraska Malt	Lincoln
Nevada	Bently Heritage Estate Distillery	Reno
	40 Mile Malt	Fallon
	Frey Ranch Estate Distillery	Fallon
	Rebel Malt	Reno
New Jersey	Rabbit Hill Farms	Shiloh
New Mexico	New Mexico Malt/Morrow Farms	Hatch
New York	Black Dirt Malt	Pine Island
	Convergence Craft	Albany
	Hillrock Estate Distillery	Ancram
	Hudson Valley Malt	Germantown
	Murmuration Malts	Bloomfield
	New York Craft Malt	Batavia
	Niagara Malt	Cambria
	Stoutridge Vineyard & Distillery	Marlboro
	Subversive Malting & Brewing	Catham
North Carolina	Carolina Malt House	Cleveland
	Epiphany Craft Malt	Durham
	Riverbend Malt House	Ashville
North Dakota	Two Track Malting	Bismarck
Ohio	Haus Malts	Cleveland
	Heartland Malting	Bascom
	Little Miami Farms	Spring Valley
	Ohio Malting Company	Wakeman
	Origin Malt	Marysville
	Rustic Brew Farm	Marysville
	West Branch Malts	Brunswick
	Yarian Quality Malts	New Waterford
Oregon	Christensen Farms Malting Co.	McMinnville
	Gold Rush Malt LLC	Baker City
	Mecca Grade Estate Malt	Madras
	Tiller Malt	Portland
Pennsylvania	Appalachian Malting	Portage
	C'N'C Malting Company	Butler
	Deer Creek Malthouse	Glen Mills
	Double Eagle Malt	Philadelphia
	Milledgeville Malt Works	Carlton
	Sprague Farm and Brew Works	Venango
South Carolina	Palmetto Malt	Charleston
Tennessee	Corsair Artisan Distillery	Nashville
	Volunteer Mission Malt	Murfreesboro
Texas	Blacklands Malt	Leander
	Maverick Malt House	Vega
	TexMalt	Fort Worth
Utah	Solstice Malt	Salt Lake City
Vermont	Peterson Quality Malt	Monkton
Virginia	Copper Fox Distillery & Maltings	Sperryville
	Mount Gilead Malt	Lovettsville
	Murphy & Rude Malting Co.	Charlottesville

Washington	Great Western Malting Company LINC Foods (Palouse Pint Malt) Mainstem Malt Skagit Valley Malting	Vancouver Spokane Walla Walla Mt Vernon
Wisconsin	Malteurop North America Briess Malt & Ingredients Company Briess Malt & Ingredients Company Boortmalt	Milwaukee Chilton Manitowoc Sheboygan
Wyoming	Wyoming Malting Co. Wyoming High Desert Malt	Pine Bluffs Powell

<sup>1</sup> Malt plants operating or under construction.