



STEWARDSHIP REPORT



Dear Valued Members

Thank you for your membership, support, and partnership during what was undoubtedly the most challenging time in recent history for both the craft brewing community and society at large. No one was immune to hardship in 2020, including the Brewers Association. With the cancellation of all of our in-person events, representing a revenue reduction of nearly 70%, we reduced our workforce by 40% and recast our budgets to best position the association to support our members during unprecedented uncertainty. While remaining lean to weather economic fluctuations, some programs were paused in 2020 due to pandemic-related budget cuts, while others took on increasing importance to provide immediate resources to our members.

I am incredibly proud of the Brewers Association staff for its dedication to supporting you during the most challenging of times. As a team, we faced adjustments at all levels throughout the year. Like the breweries we represent, we displayed our adaptability, our creativity, and most importantly, our dedication to serve our members and help them weather the storm. While there were many challenges for the association, our members, and our community, there were many bright spots. This year's stewardship report is a reflection of those efforts and a celebration of our perseverance and successes in the face of adversity.

While there are signs of a potential end to the health and economic crisis, the challenges of 2020 will likely continue into some, if not all, of 2021. The Brewers Association will continue to work tirelessly to promote, protect, and advance the interests of you, our members, and the craft brewing community at large.

Thank you for your membership, support, and partnership. I look forward to forging the future of the craft brewing community with you.

Cheers,

Bob Pease
President & CEO

“While there were many challenges for the association, our members, and the industry, there were many bright spots. Brewers Association staff and member efforts resulted in real relief in a locked-down economy, saving many in the industry and delivering permanent federal excise tax reduction.”





Industry Snapshot

Small and independent craft brewers saw their production volume decline 9% in 2020. Early member surveys showed a 10% decline at mid-year and a 5% decline in the third quarter, suggesting weakening performance in Q4.

The numbers reflect large variations by brewer and region. For example, while the total craft volume was down 5% in the third quarter in 2020, the smallest brewers were hit harder due to their reliance on draught and at-the-brewery sales, down almost 30% during the quarter.

A TOUGH YEAR FOR THE SMALLEST BREWERIES

The smallest brewers were significantly impacted in 2020 as the on-premise bore the brunt of the pandemic's market disruptions. While data suggests that conditions improved between Q2 and Q3, most indicators showed on-premise sales still down 25% or more year-over-year in Q3. In addition, near real-time indicators from companies like BeerBoard and Nielsen CGA portrayed November and December numbers trending downward, suggesting that Q4 may have looked more like Q2 than a sustained recovery.

The boom in off-premise sales was a silver lining but benefited small brewers less due to lower share for craft in the channel. Brewers also bolstered growth with a significant increase in to-go, delivery, and other sales that don't fit neatly in the classic on-premise/off-premise dichotomy. Many of these sales were allowed through temporary regulatory or legislative actions that may expire in 2021.

OPENINGS AND CLOSINGS

Based on the Brewers Association's ongoing brewery tracking, the industry was on pace for around 716 openings in 2020, approximately 30% lower than 2019.

Regarding closings, the numbers are positive and perplexing. The final closure number in 2020 was 346, almost exactly the same percentage (3.9%) as closed in 2019 (334 total closings). We will certainly find more in our end-of-the-year sweep, but given the sharp decline in sales, it seems almost unimaginable that closings haven't risen more.

Altogether, the total brewery number again rose in 2020, a prospect that seemed unlikely in March. In terms of the new brewery pipeline, there are mixed signals, with the Tax & Trade Bureau (TTB) brewery permit number increasing from 11,584 in 2019 to 12,532 in 2020, but with Brewers Association brewery-in-planning memberships declining slightly year over year.

8,764

**U.S. Operating
Craft Breweries
in 2020**

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.



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



Protecting and Promoting Business Federal Government Affairs

The Brewers Association's federal affairs efforts took on added urgency in 2020 as the effects of the pandemic brought the craft brewing industry to the brink. 2020 was a year of big wins for Brewers Association members. Thanks to relationships and coalitions built over decades, the Brewers Association and member breweries were able to make meaningful contributions to COVID-19 relief provisions as well as achieve a permanent reduction in federal excise tax rates.



PASSAGE OF THE CRAFT BEVERAGE MODERNIZATION AND TAX REFORM ACT

On Dec. 27, 2020, language from the Craft Beverage Modernization and Tax Reform Act (CBMTRA), making the existing federal excise tax rates permanent, was signed into law. This effort was a top lobbying priority for the Brewers Association and came at a critical time for the industry. The successful passage of CBMTRA was the culmination of more than a decade of advocacy and a testament to the brewing industry's growing political influence, as more than three-fourths of the U.S. Congress supported the bill. **Small and independent breweries across the United States will save more than \$80 million each year on federal excise taxes.**

CORONAVIRUS RELIEF AND ASSISTANCE

The Brewers Association worked with Congress to advocate for crucial relief for small businesses. In March, the association sought to ensure that breweries would have access to much-needed capital, advocating for priorities like the Paycheck Protection Program (PPP), Economic Injury Disaster Loans (EIDL) and grants, and the suspension of federal excise tax payments. The Brewers Association continued to push for increased funding to the PPP as well as updates to the program to make it more beneficial to breweries.

As 2020 drew to a close, the Brewers Association helped shape a year-end legislative package that secured additional PPP funding, fixed tax issues, expanded applicable uses of funds, simplified loan forgiveness, allowed full forgiveness for businesses who received PPP and EIDL emergency grants, and extended Section 1112 of the CARES Act. The Brewers Association continues to advocate for additional COVID-19 relief for small and independent brewers.

THE RESTAURANTS ACT

The Brewers Association advocated to get specific language including brewpubs, tasting rooms, and taprooms added to the RESTAURANTS Act, legislation to provide \$120 billion in grants to hospitality businesses. The final language was included in the HEROES 2.0 bill, which passed the House but stalled in the Senate. *[Note: The centerpiece of the RESTAURANTS Act, the Restaurant Revitalization Fund, was included in the American Rescue Plan Act, which was signed into law in March 2021.]*

PERISHABLE GOODS TAX CREDIT

Breweries across the country saw a significant volume of beer expire due to the closure of tasting rooms, bars, restaurants, and concert and sporting venues. The Brewers Association continues to work with a broad coalition and Congress to encourage a one-time tax credit for businesses impacted by monetary losses from unmerchantable goods due to the pandemic.

HILL CLIMB 2.0

Like everything else in 2020, the Brewers Association's annual Hill Climb went virtual. More than 120 small and independent craft brewers and brewers guilds from 47 states participated in the online Hill Climb, meeting with members of Congress and staff to advocate for issues ranging from the impact of coronavirus to federal excise taxes. This effort in particular positioned the Craft Beverage Modernization and Tax Reform Act for permanency by keeping champions engaged and amenable. The virtual event also broke new ground: broad online Hill Climbs were unknown or rare before the Brewers Association's event in May.

REGULATORY WINS

The Brewers Association joined industry trade groups to successfully lobby the Federal Alcohol and Tobacco Tax and Trade Bureau (TTB) to waive prior notification requirements to enable expedited drawback payments arising from the destruction of unmerchantable tax-paid beer.

The TTB published a final rule to address certain proposals included in Notice 176, Modernization of the Labeling and Advertising Regulations for Wine, Distilled Spirits, and Malt Beverages, which included a positive outcome for two issues raised in the Brewers Association's comments concerning the ability to use the term "draft" and the removal of the prohibition on using strength claims.

BREWERS ASSOCIATION POLITICAL ACTION COMMITTEE

In March, at the beginning of the pandemic, Brewers Association staff and PAC Committee members made the decision to pause fundraising efforts. Prior to the pause, the Brewers Association Political Action Committee had raised \$21,601.92. The Brewers Association PAC contributed \$14,500 in 2020. In the most recent election cycle, contributions were disbursed 53% to Democrats and 47% to Republicans. More information about the Brewers Association PAC contributions can be found on FEC.gov.



Colorado Pint Day commemorated 25 years for the Colorado Brewers Guild.

Protecting and Promoting Business State Government Affairs

The Brewers Association has long made supporting state brewers guilds and associations a priority. With crucial issues such as franchise law, self-distribution, direct-to-consumer shipping 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 2020, the Guilds Subcommittee of the Government Affairs Committee was formed to guide Brewers Association-guild communication and future priorities. The subcommittee is composed of eight guild representatives and five Brewers Association staff. Initial subcommittee projects included:

- Development of an eight-session guild leader "bootcamp" seminar series to educate new and existing guild leaders on the many and varied issues they face.
- Launch of a guild mentor program to match new guild leaders with veteran guild leaders with the goal of providing support and guidance as they develop and grow into the position. Seventeen mentor-mentee pairings are in active dialogue and a Brewers Association staff liaison has been assigned to each pairing.

In addition to holding weekly all-guild calls, the Brewers Association developed an extensive range of guild assets relating to issues of importance on the state level.

DIRECT-TO-CONSUMER SHIPPING RESOURCES

- The Brewers Association compiled a list of significant state COVID-19 relief measures related to direct-to-consumer sales (e.g., to go, delivery, and shipping) to better equip guilds to seek permanency of those rights in the future.
- In collaboration with United Parcel Service (UPS) and SOVOS ShipCompliant, the Brewers Association developed a compilation of state laws relating to interstate shipping abilities.
- The Brewers Association developed model legislative language to assist guilds in pursuit of direct-to-consumer legislation.

LEGISLATIVE PRIORITIES

- **Massachusetts:** Supported guild efforts to pass small brewer-friendly franchise legislation.
- **California:** Assisted state association in defeating franchise provisions adverse to small brewers.
- **Pennsylvania:** Advised on franchise law issues during guild negotiations with the state's wholesaler association.
- **Idaho:** Advised on strategy and legislation to prevent excise tax funds collected on strong beer from going into a fund supporting the state's wine industry.
- **Multiple states:** Guided legislative priorities and strategy.
- **Multiple states:** Provided consultations on federal antitrust and/or Commerce Clause implications of various guild activities or proposals.
- **Multiple states:** Offered advice and consultations related to state and local pandemic-related restrictions.

EDUCATIONAL PIECES AND TALKING POINTS

Newly developed documents included:

- White paper on distribution reform strategies including self-distribution, franchise, and direct-to-consumer abilities.
- White paper on the evolution of the post-Prohibition distribution landscape.
- Talking points to distinguish breweries from bars in state and local restrictions aimed to slow the spread of COVID-19.
- Talking points supporting direct-to-consumer retail rights.
- Talking points opposing state excise tax increases.



The Michigan Brewers Guild started a new podcast as part of its ongoing effort to inform, educate, and entertain beer lovers and its Enthusiast Members.



Guilds had to pivot during the pandemic and host virtual events such as happy hours while working tirelessly for breweries. (Courtesy New York State Brewers Association)

For the first time since Prohibition, the alcohol limit for draught and grocery store beer in Utah increased from 4% to 5% ABV thanks to new legislation signed last spring.



Supporting Business Health Technical & Quality Resources

Responding to profound challenges for the brewing community, Brewers Association staff and committee members delivered an abundance of timely technical resources in 2020, helping members navigate issues related to shutting down and reopening, food safety, and threats to the supply chain.

CLOSING AND REOPENING RESOURCES

The Brewers Association's COVID-19 resources helped brewers responsibly address crisis situations, including safely shutting down and reopening brewing operations. Newly developed documents included:

- Brewery Shutdown Safety Guidance
- Best Practices for Responsible Disposal of Beer
- Mitigating Beer Line Cleaning Risks
- Establishing and Ensuring Beer Shelf Life
- Safely Reopening Brewing Operations
- Restarting Yeast After a Prolonged Shutdown
- Assessing Aging Beer
- Best Practices in Preparation for Reopening After Extended Draught System Shutdown
- Sanitizer Recommendations During COVID-19 Virus Concerns

ADAPTING TO NEW REALITIES

The pandemic greatly impacted the supply chain for craft brewers, particularly concerning cans and CO₂. The Brewers Association provided timely updates on shortages and disruptions as well as best practices to proactively reduce resource use. These resources included:

- Draught To-Go Cans
- Mobile Canning Checklist
- These 6 Simple Energy Wins Could Save Your Brewery Money
- Is Your Brewery Using CO₂ Efficiently?
- Understanding and Ensuring CO₂ Supply Quality for Brewery Use
- Guidelines for Economical Use of Carbon Dioxide in the Brewery
- [Essential Supplier Letter Template](#)



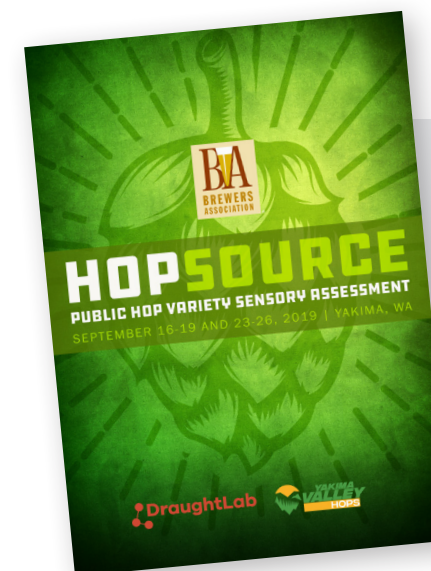
FOOD SAFETY PLANNING FOR CRAFT BREWERS

As emphasized by the Food Safety Modernization Act, safe production of alcoholic beverages is regulated by the U.S. Food and Drug Administration. In response to these regulatory changes, the Brewers Association recognized the need for an industry standard for safe brewing practices. The publication of *Food Safety Planning for Craft Brewers* provides timely guidance and best practices for managing food safety in a modern craft brewery.

LEADERSHIP SUPPORTING BREWERY SAFETY

The Brewers Association continued to focus on ensuring that breweries have the tools and resources to provide safe environments for brewery workers and reduce workplace injuries. These efforts included:

- Continued outreach, training, and education with the U.S. Department of Labor's Occupational Safety and Health Administration (OSHA) Region VIII and other industry partners.
- Delivering brewery-oriented training to more than 50 OSHA inspectors and consultation personnel in OSHA Region I.
- Passing significant milestones in utilization of the association's online safety training, with more than 12,000 registered users and over 50,000 lessons completed.
- Obtaining an \$80,000 grant through OSHA for the development of safety training for draught beer line maintenance. The course will open to Brewers Association members and nonmembers in early 2021.



HopSource Sensory Evaluation

The Brewers Association continued to gather sensory data through its HopSource program in 2020, setting up remote events to guide the development of disease-resistant hop cultivars and release them with no intellectual property protection.



Supporting Business Health Educational Resources

The Brewers Association produced more educational content in 2020 than ever before, expanding into new digital channels to help members navigate uncharted territory and meet unprecedented challenges.

COVID-19 RESOURCE CENTER

The Brewers Association designed the COVID-19 Resource Center to serve as a clearinghouse of information—including technical, business, and regulatory—for brewers. Newly developed resources, such as guidance on how to properly dispose of beer, helped members move decisively to meet unforeseen demands. The resource center also aggregated existing technical resources, surfacing guidance on sanitation and cleaning for easy access. Publication of the authoritative *Food Safety Planning for Craft Brewers* assisted brewers in meeting Food Safety Modernization Act (FSMA) compliance and implementing food safety planning into their operations.





Member Support
2020 brought dire financial straits to America’s small and independent breweries. The Brewers Association responded by offering complimentary memberships and monthly payment options, helping breweries stay connected to essential resources and information.



CBC ONLINE

With the cancellation of the in-person Craft Brewers Conference® & BrewExpo America®, the Brewers Association pivoted to offer a live seminar series, free to all, with interactive Q&As following each presentation. Expert speakers from across the industry led more than 70 educational seminars to help craft brewing professionals invest in their education at a time when most breweries were forced to shut down or limit their public-facing operations. In all, more than 12,400 individuals participated in CBC Online, averaging four seminars apiece.



THE NEW BREWER® MAGAZINE

The Brewers Association published six issues of *The New Brewer* magazine, perennially rated a top benefit in member surveys. Each edition in 2020 explored an important industry theme: raw materials, sales and marketing, brewery operations, industry review, international brewing, and sustainability.



COLLAB HOUR WEBINAR SERIES

The Brewers Association doubled down on virtual learning in 2020. In July, drawing on the popularity of CBC Online, the association debuted Collab Hour, a weekly webinar series dedicated to all aspects of the brewing business including regulatory issues, marketing, and technical brewing. This series replaced the bimonthly Power Hour series. All webinars are available for replay on BrewersAssociation.org.

2020 Collab Hour Webinars

- Yeast Handling: Equipment Design and Quality Considerations
- Getting Inside the Mind of the Craft Beer Consumer - 2020
- Flavor and The Bottle: What Is a Flavor and How Does It Impact Your Craft Beer
- Restarting Your Brewery Sustainably - Why Now Is a Unique Opportunity
- How to Get People to Care About Your Brewery
- SafetycausticfragileforkliftexithazardOSHA!
- A Journey Through IPA
- Beer Logistics - Export Industry Update
- 2020 Midyear State of the Craft Brewing Industry Update

- Building a Tech Stack: Insights from 1,500 Craft Producers
- Planning for Food Safety as the First Line of Defense
- Export Growth Opportunities for the Craft Brewing Industry
- Nielsen CGA On-Premise Trends & COVID-19 Impact Report
- Quality Labs for Small Brewers: Building a Foundation for Great Beer
- Extracting the Facts About the Malt Hot Steep
- Selling Craft Beer in Sweden
- Solving Hazy IPA Premature Settling & Removing Hop Creep with a Single Solution
- A Chat with the Economists: 2020 Beer Industry Data and Insights
- How to Make Hard Seltzer
- Draught Beer To-Go: Best Practices for Growlers and Crowler® Cans
- Filling with Finesse: Matching Your Fill Process to Your Beverage(s)
- 10 Data Points for 2020: Recapping a Tumultuous Year in Craft and Predictions for 2021
- Capture Your CO₂ - Case Studies to Reduce Cost & Increase Resilience



Driving On-Premise Sales

While every brewery felt the impact of the COVID-19 pandemic in 2020, those that rely on on-premise sales—especially taprooms and brewpubs—took the biggest hit. The Brewers Association marshalled significant resources to help these businesses stay afloat, deploying new campaigns and retooling existing ones to support on-premise sales.

PROMOTING ALTERNATIVE PURCHASING OPTIONS

At the onset of the pandemic, when many state and local orders put a stop to normal business operations, the Brewers Association developed a bank of creative assets for breweries to promote alternate purchasing options such as home delivery, curbside pickup, and online ordering. Beer lovers, in turn, were provided with a searchable list of these pivoting breweries on CraftBeer.com, the Brewers Association's consumer-facing website.

AMERICAN CRAFT BEER WEEK®

The 2020 American Craft Beer Week called upon beer lovers to pay it forward and #GiveCraftBeer. A digital toolkit with social media and PR assets helped breweries around the country promote the weeklong celebration and drive sales. On Untappd, users unlocked the American Craft Beer Week badge more than 281,000 times, and organic social media buzz generated a reach of 37 million.



BREWERY SUPPORT THROUGH THE HOLIDAYS

To bolster on-premise breweries throughout the busy holiday period, the Brewers Association developed an advertising campaign, executed with a national social media buy, to drive visits to taprooms and brewpubs and encourage purchases of beer, food, merchandise, and gift cards. The association also redesigned its long-running "Support Your Local Brewery" mark and deployed it to breweries for their use.



NATIONAL INDEPENDENT BEER RUN DAY

The second annual #BeerRunDay called upon beer lovers to stock up on craft beer in advance of their Fourth of July celebrations. The campaign drew strong media coverage—4,208,300 impressions—and generated considerable social media buzz, with an organic social reach of 10.2 million. This beer holiday serves to boost sales and further establish the Independent Craft Brewer Seal as a mark to look for when buying.



GREAT AMERICAN BEER FESTIVAL®



It was a year of firsts and profound changes for the association's signature festival and competition. In lieu of an in-person gathering in Denver, the Brewers Association developed a "brewery passport" program to drive beer lovers to breweries nationwide. In total, 1,100 breweries from all 50 states participated in the program.

On the competition side, the Brewers Association developed a new judging model to ensure the safety of staff, judges, and volunteers. Socially distanced judging took place in 35 sessions over 18 days with strict health and safety protocols in place. In a feat of logistics and teamwork, 8,806 entries from 1,720 breweries from all 50 states were evaluated in the 34th edition of the competition—all without a single case of COVID-19. The awards ceremony, produced in partnership with The Brewing Network and streamed live on YouTube and Facebook, drew more than 4,500 viewers. In the days after, the ceremony netted a total of 17,500 views.

2020 GABF Competition Statistics

- 8,806 beers judged
- 1,720 breweries
- 115 judges
- 272 total medals awarded
- 240 medal-winning breweries
- 337 first-time GABF entrants
- 19 first-time GABF winners



SMALL BREWERY SUNDAY

Small Brewery Sunday, the concluding "beer holiday" of 2020, asked beer lovers to support small and independent craft breweries with their dollars, at the source. The Brewers Association equipped breweries with 47 free promotional assets to drive traffic to their businesses and generate revenue on the holiday and during the lead-up. Paid social media buys, targeted media outreach, and a strategic partnership with Untappd bolstered this grassroots campaign and surpassed all previous beer holiday campaign performances, garnering a combined 7.56 billion impressions and a 34% increase in brewery participation.





Building a Diverse & Inclusive Craft Beer Community

Since the creation of its Diversity Committee in 2017, the Brewers Association has made strides to foster a craft brewing community that provides opportunity, education, and enjoyment for all. In 2020, the Brewers Association Diversity Committee changed its name to the Diversity, Equity & Inclusion (DEI) Committee. The Brewers Association DEI Committee is composed of a cross-section of industry members working to promote positive industry-wide change for both brewers and beer lovers alike.

DEI DEPARTMENT

In 2020, the Brewers Association created a DEI department in response to the evolving needs of members and to the long-standing challenge of realizing a craft brewing community that is truly representative of the communities where craft beer is produced and enjoyed. The Brewers Association realizes that diversity, equity, and inclusion are not merely “social” issues nor are they matters of partisan politics. DEI joins quality, safety, and sustainability as value-added practices that drive success, improve the well-being of workers and customers, and support resiliency for an industry recovering from the effects of COVID-19. The new department is headed by Equity



and Inclusion Partner Dr. J Jackson-Beckham, who previously served as the association’s diversity ambassador. Jackson-Beckham will help to shape Brewers Association internal strategies to strengthen the association’s ability to support members’ progress toward becoming industry leaders in the DEI space.

DEI COMMITTEE REFRESH

The name change from the “Diversity Committee” to the “DEI Committee” aligns with the nomenclature of the association’s new DEI department but also with the broader professional sphere. More importantly, the change signaled a significant shift in emphasis for the committee. The committee has realized a

number of notable successes since its inception in 2017. However, the societal events of 2020 served as a reminder that there is much work to do. In its fourth year, the DEI Committee decided to move from an “advisory” focus to an “implementation” focus. To facilitate this change, the committee has decided to move to a subcommittee structure to address specific issues and projects and began recruitment efforts in the new year.

FIELD TRAINING

While acting as diversity ambassador, Jackson-Beckham gave six presentations throughout the year, attending guild meetings and conferences to educate brewers on how best to diversify both their customer and employee bases. Originally scheduled to deliver eight face-to-face presentations, Jackson-Beckham was only able to attend the Michigan state guild conference before large gatherings were restricted nationwide due to COVID-19. With adaptability from Brewers Association staff and

guild leaders, Jackson-Beckham presented at the virtual Craft Brewers Conference in April and virtual state guild conferences in North Carolina, Iowa, Massachusetts, and California.

CODE OF CONDUCT

The Brewers Association Code of Conduct and corresponding complaint process, developed by the board of directors in collaboration with the Governance and DEI committees and staff, codifies its commitment and responsibility as an industry to respect the law, promote and consume beer responsibly, and eliminate discrimination, harassment, and bias of all types. The Code of Conduct complaint process aims to hold our peers accountable for unacceptable behavior while pursuing an educational path toward a more professional, responsible, inclusive, and respectful environment. The Code of Conduct was adopted by the board as official policy on Aug. 6, 2020, and the complaint process was adopted Sept. 10, 2020.





Korea International Beer Expo, July 2020

Growing American Craft Globally

American craft brewers are looked upon as leaders in the global craft beer arena, and demand for full-flavored, high-quality American craft beer continues to grow worldwide. In 2020, the Brewers Association Export Development Program (EDP) continued its work to complement U.S. brewers' efforts toward international expansion. Program activities are funded by grants from the U.S. Department of Agriculture.

INTERNATIONAL TRADE SHOW AND FESTIVALS

Despite the pandemic's impact on event participation, the EDP showcased American craft beer in a variety of in-person and virtual shows that resulted in increased international consumer, trade, and media awareness as well as new distribution opportunities.

- Beer & Food Attraction - Italy
- Planète Bière - France
- BrewLDN - United Kingdom
- Global Craft Insight Forum - China
- Korea International Beer Expo - South Korea
- Great British Beer Festival - United Kingdom
- Brau Beviare - Germany
- Beer Summit - Brazil

INTERNATIONAL COMPETITIONS

American craft brewers found success in two prestigious European beer competitions in 2020: the Brussels Beer Challenge and the European Beer Star. The EDP covered entry fees and coordinated shipments to both competitions, which represent valuable opportunities to generate awareness for American craft beer in Europe and beyond. EDP members won 53 awards in 2020.

AMERICAN CRAFT BEER AMBASSADORS

Ambassadors are stationed overseas to assist the EDP by developing trade relationships, generating media coverage, and coordinating a consistent market presence for American craft beer through events and tastings. European PR efforts generated



Planète Bière, Paris, France, October 2020

DIGITAL MARKETING

more than 100 pieces of media coverage across the region. In China, the program expanded the reach of American craft beer through engaging e-commerce retailers, partnering with online beer rating apps, and hosting trade and media at tasting events in Shanghai, Beijing, Shenzhen, and Guangzhou.

With the annual American Craft Beer Experience festival in Japan canceled, the EDP and importers of American craft beer pivoted to a digital marketing campaign that resulted in significant reach for American craft beer in Japan, generating 25,600 web sessions, 59,300 page views, 1,700 webinar views, and 4.6 million ad impressions.

MEMBER EDUCATION

The EDP published two market research reports on Brazil and China. Member education included online webinars covering international trademark registration, global shipping logistics, and distribution opportunities in foreign markets.

VIDEO DEVELOPMENT

The EDP produced two educational and marketing videos for use in EDP programming and by brewery members in other consumer and trade education efforts. The first focused on generating excitement and interest around the American craft beer story, and the second aimed to educate retailers on how to better deliver high quality beer to beer drinkers.



American Craft Beer Experience Campaign, Tokyo, Japan, November 2020



American Craft Beer Tasting, Shenzhen, China, July 2020



American Homebrewers Association®

Established in 1978, the American Homebrewers Association (AHA) has nearly 39,000 members worldwide and is dedicated to fostering community and empowering homebrewers to make the best beer in the world.

HOMEBREWING IN THE TIME OF COVID

With people spending more time at home than ever, 2020 brought a renewed interest in homebrewing. Starting in April, weekly introductory posts targeting beginning homebrewers were published and promoted on the AHA's social channels and pitched to media. The copy was quarantine-themed, ranging from "You've Already Watched Tiger King. And Made Sourdough Bread. Now Make Your Own Beer!" to "Quarantine Activities: Making Your First Batch of Beer," and included recipes for using sourdough starter due to the increased interest in fermented bread during quarantine.

In April, staff launched a COVID-19 homebrew supply shop online directory to promote alternative purchasing options and provide general support to shops, including "Support Your Local Homebrew Shop" social media assets for both retailers and homebrewers. All annual events shifted to virtual "gatherings" with a record-setting number of gallons pledged for Big Brew and Learn to Homebrew Day.



2020 by the NUMBERS*

- **38,904** total members
- **1,044** monthly membership subscribers
- **2,300** AHA member deal locations
- **11,250** Brew Guru® downloads
- **377** clubs insured through the AHA

Top photo © Jesse James Galarza

HOMEBREW EVENTS

May 2, 2020

23rd annual Big Brew for National Homebrew Day

- 56** states and territories
- 77** countries
- 4,841** participants
- 31,338** gallons brewed

Nov. 7, 2020

22nd annual Learn to Homebrew Day

- 51** states and territories
- 40** countries
- 777** participants
- 4,642** gallons brewed



HOMEBREW CON™

June 18-20, 2020

The 42nd annual National Homebrewers Conference, aka Homebrew Con, was planned for Nashville, Tenn., but was instead held online due to the pandemic. Bailey Spaulding, CEO and brewmaster of Jackalope Brewing Co., delivered the keynote address. The online conference drew more than 1,100 participants and included more than 40 educational seminars and virtual meetups.

*Due to the pandemic, the 2020 National Homebrew Competition was canceled.



WEBSITE REFRESH

HomebrewersAssociation.org was significantly redesigned in 2020 with the aim of improving the user experience and converting more visitors to members. Conversion-focused upgrades included artfully designed paywalls, monthly membership slide-ups, and new cider- and mead-focused landing pages featuring locked content. Member-exclusive features were added as well, including a dashboard with the ability to save recipes and articles for later reference.

MONTHLY MEMBERSHIP

In the spring, the AHA launched a monthly membership option. For \$3.99, less than the cost of a pint, monthly membership delivers the entire suite of digital benefits, including locked website content, seminar recordings, medal-winning recipes, discounts at more than 2,300 breweries and homebrew supply shops, and six issues of Zymurgy magazine. Dedicated social media and marketing campaigns steered lapsed members and new homebrewers to this attractive membership option, garnering 1,044 subscribers.

HOMEBREW LEGISLATIVE EFFORTS

With support from the AHA, House Bill 502 was successfully passed in Idaho removing a requirement for ingredients produced in the state. Efforts to pass legislation in West Virginia (H4158) related to age and manufactured quantity stalled with the

Senate Judiciary Committee. In New York, legislation (H9063) in support of homebrew shops ultimately failed in the state Senate after passing the state General Assembly. The Homebrew on the Hill Competition was not held in 2020.



ZYMURGY® MAGAZINE

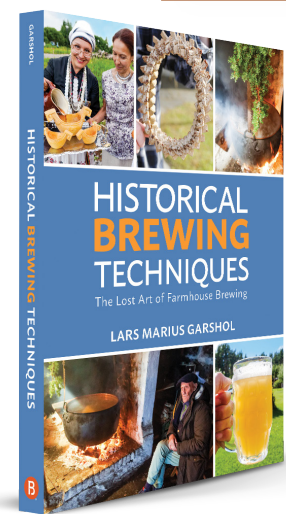
Zymurgy magazine, the association's flagship publication and top-rated member benefit, published six editions in 2020. Feature stories covered a wide variety of topics in fermentation, from historical witbier to milkshake IPA to brewing with cannabis. Digital issues of Zymurgy magazine were upgraded from an obsolete app to an online magazine platform, allowing direct links to articles, downloadable issues, and an improved reader experience.

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 2020, Brewers Publications released three books, bringing its total number of unique titles to 61, with 54 in print, 53 available electronically, and one audiobook. Browse the complete library at BrewersPublications.com.

2020 RELEASES



HISTORICAL BREWING TECHNIQUES:
The Lost Art of Farmhouse Brewing
By Lars Marius Garshol
\$24.95, paperback and e-book | April release

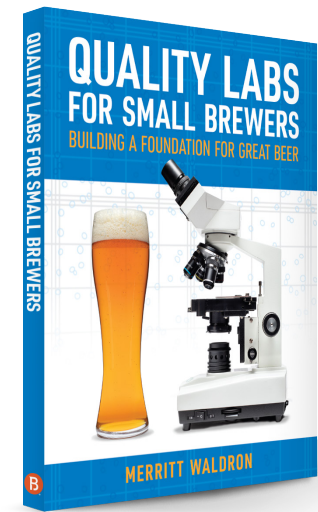
Historical Brewing Techniques brings readers along for a journey that is equal parts history, cultural anthropology, social science, and travelogue, all through the lens of beer.

89,723
BOOKS SOLD IN 2020



HOW TO MAKE HARD SELTZER:
Refreshing Recipes for Sparkling Libations
By Chris Colby
\$19.95, paperback and e-book | August release

How to Make Hard Seltzer is the first comprehensive book on the topic and provides recipes and guidance from the country’s best producers for making seltzer for both commercial and home enjoyment.



QUALITY LABS FOR SMALL BREWERS:
Building a Foundation for Great Beer
By Merritt Waldron
\$95.00, paperback and e-book | July release

Quality Labs for Small Brewers emphasizes the importance of establishing a quality program through step-by-step instruction with hands-on material using examples, instructions, samples, and templates.

Financials

2020 FINANCIAL STATEMENT (CONSOLIDATED)

Revenue:	2020 Actual	2019 Actual
Adver. & Spons. Revenue	1,982,023	4,648,272
Book/Merch. Sales	975,175	1,310,378
Membership Revenue	4,853,358	5,148,687
Event Revenue	1,701,215	16,173,153
All Other Revenue	225,838	487,222
Total Revenue	\$9,737,609	\$27,767,712
Expenses:		
Gen. Office/Admin. Exp.	633,831	753,381
Deprec. & Amort.	336,306	369,714
Salaries & Benefits	6,424,857	7,727,006
Insurance Expense	140,240	144,220
Legal Fees	272,317	426,669
Rent Expense	516,541	523,407
Event Operations	487,740	5,509,295
Sales & Marketing	790,152	2,322,494
Printing	343,104	462,122
Postage & Shipping	436,371	622,158
Cost Of Goods Sold	181,100	301,346
Travel	151,911	1,053,635
Outside Services	1,879,566	4,984,788
Donations/Grants	34,492	1,089,211
All Other Expenses	689,814	838,296
Total Expenses	\$13,318,342	\$27,127,742
Operational Net	(\$3,580,733)	\$639,970

DECEMBER 31st, 2020 ABBV. BALANCE SHEET

Assets:	12/31/20	12/31/19
Cash	1,174,803	4,025,614
Reserves	20,274,750	24,043,840
Accounts Rec.	927,828	1,383,073
Inventory	846,337	758,112
Prepaid Expenses/Other	779,850	1,220,788
Total Current Assets:	24,003,569	31,431,427
Long-Term Assets	230,674	178,826
Fixed Assets	4,707,431	4,984,852
Total Assets:	\$28,941,674	\$36,595,105
Liabilities:	12/31/20	12/31/19
Accounts Payable	626,923	928,643
Deferred Deposits	4,551,053	10,655,015
Other	490,381	604,354
Total Current Liabilities	5,668,357	12,188,012
Long-Term Liability	230,674	178,826
Retained Earnings	24,053,269	21,311,819
Current Yr. Earnings	-1,010,626	2,916,449
Total Liabilities & Equity	\$28,941,674	\$36,595,105

2020 Governance

FEBRUARY 2020—FEBRUARY 2021



February 18, 2020
Front row (L-R): Kevin Blodger, Wynne Odell, Larry Horwitz, Roxanne Westendorf, Melissa Romano, Sara Nelson; Second row (L-R): Julie Verratti, Leah Cheston, Larry Chase, Garrett Marrero, Steve Hindy, Jennifer Talley, Leslie Henderson; Third row (L-R): Peter Skrbek, Jason Perkins, Fred Matt, Jill Marilley, Dan Kleban, Jose Mallea, Sean Casey, Tim Brady

BOARD OF DIRECTORS

Kevin Blodger <i>Union Craft Brewing (Md.)</i> At-Large Representative	Larry Chase (<i>Secretary/Treasurer</i>) (Ore.) At-Large Representative	Steve Hindy (<i>Past Chair</i>) <i>Brooklyn Brewery (N.Y.)</i> Packaging Breweries Representative	Jose Mallea <i>Biscayne Bay Brewing (Fla.)</i> At-Large Representative
Tim Brady <i>Whetstone Station Restaurant & Brewery (Vt.)</i> Pub Breweries Representative	Leah Cheston <i>Right Proper Brewing Co. (DC)</i> Pub Breweries Representative	Larry Horwitz <i>Ten20 Craft Brewery (Ky.)</i> At-Large Representative	Jill Marilley <i>Everett, Wash.</i> American Homebrewers Association Representative
Sean Casey <i>Church Brew Works (Pa.)</i> Pub Breweries Representative	Leslie Henderson <i>Lazy Magnolia Brewing Co. (Miss.)</i> Packaging Breweries Representative	Dan Kleban (<i>Chair</i>) <i>Maine Beer Co. (Maine)</i> Packaging Breweries Representative	Garrett Marrero (<i>Vice Chair</i>) <i>Maui Brewing Co. (Hawaii)</i> Packaging Breweries Representative

COMMITTEES

Executive Committee

- Dan Kleban (Chair) *Maine Beer Co.*
- Garrett Marrero (Vice Chair) *Maui Brewing Co.*
- Larry Chase (Secretary/Treasurer) *Medford, Ore.*
- Steve Hindy (Past Chair) *Brooklyn Brewery*
- Bob Pease *President & CEO, Brewers Association*

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- Sean Casey *The Church Brew Works*
- Leah Cheston *Right Proper Brewing Co.*

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- Alex Lovinggood *Barn Town Brewing Co.*
- Cyrena Nouzille *Agoura Hills, Calif.*
- Tony Simmons *Pagosa Brewing Co.*
- Dharma Tamm *Rogue Ales & Spirits*
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- Nick Purdy *Wild Heaven Beer*
- Heather Sanborn *Rising Tide Brewing Co.*
- Michael Smothers *Firestone Walker Brewing Co.*
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- Lynne Weaver *Three Weavers Brewing Co.*
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- Staff liaisons:** Ryan Farrell, J. Nikol Jackson-Beckham, Ph.D., Bob Pease, Erin Walters

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- Jasmine Hairston

- Nick Purdy
- Virginia Morrison
- Christina Sayer
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Events Committee

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- Tomme Arthur *The Lost Abbey*
- Tim Brady *Whetstone Station Restaurant & 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*
- Jennifer Talley *1849 Brewing Co.*

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Packaging Breweries Representative

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Packaging Breweries Representative

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Taproom Breweries Representative

Peter Skrbek
Deschutes Brewery (Ore.)
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Denizens Brewing Co. (Md.)
Pub Breweries Representative

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American Homebrewers Association Representative

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- Tyrell Elliott
- Jessica Fierro
- Matt Gacioch
- Audra Gaizunas
- Laura Hill

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- Jason Murphy
- Johnny Osborne
- Jason Perkins
- Abigail Perkins
- Jon Renthrope
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- Chris Shields
- Matt Stinchfield
- Kent Taylor
- Tranice Watts
- Robin Wibby
- Ryan Wibby
- Michael Williams
- Ron Yovich
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- Cyrena Nouzille
- Austin Roark *Dixie Brewing Co.*
- Adam Robbings *Reuben's Brews*
- Jeff Schrag *Mother's Brewing Co.*
- Peter Skrbek *Deschutes Brewery*
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- Todd Webster *Thorn Brewing Co.*
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- Larry Chase
- Leslie Henderson *Lazy Magnolia Brewing Co.*
- Jill Marilley
- Roxanne Westendorf
- Staff liaison:** Paul Gatz

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- Alicia Barr *FiftyFifty Brewing Co.*
- Lauren Bennett McGinty
- Minnesota *Craft Brewers Guild*
- Robert Burns *Night Shift Brewing*

- Gary Fish *Deschutes Brewery*
- Jeff Hamilton *Sprecher Brewing Co.*
- Daniel Harrison *Country Boy Brewing*
- Dan Kleban *Maine Beer Co.*
- Jim Koch *Boston Beer Co.*
- Ryan Krill *Cape May Brewing Co.*
- Jose Mallea *Biscayne Bay Brewing Co.*
- Nick Matt *Saranac/Matt Brewing Co.*
- Tom McCormick *California Craft Brewers Association*
- Gene Muller *Flying Fish Brewing Co.*
- Sara Nelson *Fremont Brewing*
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- Bridget Barrett *Great Lakes Brewing Co.*
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- Matt Cutter *Upslope Brewing Co.*
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- Randy Mosher *Randy Mosher Design*
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- Julian Shrago *Beachwood Brewing*

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- Hugh Sisson *Heavy Seas Beer*
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- Ken Grossman *Sierra Nevada Brewing Co.*
- Geoff Larson *Alaskan Brewing Co.*
- John Mallett *Bell's Brewery, Inc.*
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- Mandi McKay *Sierra Nevada Brewing Co.*
- Walker Modic *Bell's Brewery, Inc.*
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- Ken Smith *Boston Beer Co.*
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- Jennifer Talley *1849 Brewing Co.*
- Kent Taylor *Blackstone Brewing Co.*
- Lauren Torres *Bell's Brewery, Inc.*
- David Wilson *Alaskan Brewing Co.*

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