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3rd and Final Malting Barley Harvest Report: German 2015 Spring Barley

Ladies and Gentlemen.

This final malting barley crop report for 2015 by the Braugersten-Gemeinschaft e.V. (German Malting Barley Association) is based on evaluations of the 2015 spring barley crop conducted by the various Agriculture Institutes and Chambers of Agriculture in the German states. The report also incorporates data published by the German Federal Statistics Office.

In 2015, German farmers cultivated some 368,000 ha of spring barley. Planting got off to an early start this year thanks to near-optimal soil conditions with sufficient residual moisture in March. April, though, brought several dry and often cold days, but the crop survived well; and by May, entered into a rapid development phase. Precipitation in May was sufficient, albeit with significant regional variations. Then, in early June, temperatures soared to high-summer levels and moisture became scarce. As a result, the crop matured unusually fast and gave plenty of cause for concern. Only after the harvest was completed, did it become clear that favorable root developments in the spring combined with the lack of rain in June had resulted in well-formed kernels with satisfactory plumpness values.

In addition, a hot and dry July allowed for a wide harvest window, and most stocks could be harvested under optimal conditions. Therefore, German farmers were able to record good spring barley results, in spite an unusually dry and very hot summer. The average yield per hectare was 55.3 metric tons (MT); and the average plumpness value (the percentage of kernels with a diameter of >2.5 mm) was 91.6%. Because of great regional variations in precipitation, the protein content of German 2015 spring barley varied accordingly, too. The attached table, therefore, shows both the average protein values and, for several states, the percentage of the crop with protein values in the desirable range of 10.0% to 11.5%.

The average protein content of the entire German 2015 spring barley crop is 10.6%, which is in line with the most optimistic quality expectations from earlier in the year. However, because of regional variations, even some fields with borderline protein values (<9% and >12% protein) were processed. Using standard analytical quality indicators, some 1.4 million MT of Germany's total spring barley crop of 1.95 million MT must be considered — purely mathematically — to be of malting barley quality.

The main spring barley varieties planted in Germany in 2015 were Propino, Grace, Catamaran, Quench, and Marthe

For the Braugersten-Gemeinschaft e.V.

Walter König

Attachment: 3rd and Final German Spring Barley Harvest Report 2015 (Table)

3rd and Final Brewing Barley Harvest Report for Germany as of November 27, 2015

State	Statistics		Expert Assessments													Main Brewing Barley Varieties
	Acreage Spring Barley in 1,000 ha		Harvest Volume				Brewing Barley Acreage in 1,000 ha				Quality Expectations			Estimated Brewing-Quality Barley in 1,000 MT		
	2014	2015	Yield MT/ha		Spring Barley in 1,000 MT		Acreage in 1,000 ha		Protein Content %		Portion with Protein Content Between 10.0 and 11.5	Plumpness %		2014	2015	
Baden-Wuerttemberg	60,3	58,5	6,00	5,60	356,0	328,0	44,0	45,0	9,5-10	10,3	approx. 65	88-92	88,0	193,0	220,0	15-22% Grace 45% Propino 15% Avalon 8% Quench 8% Sunshine 2-3% Planet
Bavaria	99,4	104,9	6,09	5,47	605,3	573,4	95,0	100,0	10,2	10,5	47,0	89,0	89,0	440,0	425,0	51% Grace 14% Catamaran 15% Marthe 3% Solist
Brandenburg	6,5	7,8	2015 Results for Brandenburg not available													
Hesse	18,3	19,8	5,52	5,00	101,3	97,1	17,0	18,0	9,5	10,5	80	<90	96-98	86,4	85,0	50% Propino 10% Marthe 10% Grace Rest: Catamaran Breeding up: Avalon
Mecklenburg-Vorpommern	6,7	7,0	5,76	5,33	38,9	37,3	2,8	2,9	9-9.5	10,5	80	95,0	92,0	12,0	11,0	Quench, Grace
Lower Saxony	38,1	45,7	6,20	5,90	223,0	269,0	20,0	26,0	8,8	10,7	dep. on region: 60-80; avg. 75; sample interval 9.2-12.7	94,0	92-93	156,0	185,0	90% Quench
North-Rhine-Westphalia	8,7	14,0	6,21	5,50	53,9	57,0	4,2	4,3	10,5	10,5	90	>90	>92	26,0	24,0	85% Propino 5% Avalon 5-10% Quench
Rhineland-Palatinate	42,7	42,4	5,63	5,52	240,4	234,0	36,3	38,2	10,7	10,6	51,0	95,8	95,9	204,0	211,0	55% Propino 30% Avalon 13% Catamaran 2% others
Saxony	22,5	25,7	6,45	5,78	145,0	148,8	22,3	20,0	10,5	11,0	not available	93,0	91,5	97,0	95,0	Quench, Grace, Marthe, Solist
Saxony-Anhalt	7,4	7,7	6,36	5,12	47,0	39,0	5,0	5,0	10,3	11,6	not available	92,0	94,0	28,0	12,0	Quench, Solist
Schleswig-Holstein	6,5	5,4	6,50	not available	42,0	not available	3,0	not available	10-11	not available	not available	90,0	not available	35,0	not available	not available
Thuringia	27,8	29,2	6,34	5,39	172,0	158,0	25,0	28,0	10,5	11,5	37,0	95,0	95,5	155,0	140,0	Quench, Grace, Marthe, Catamaran
Germany	344,9	368,1	6,05	5,53	2.025,0	1.942,0	274,6	287,4	10,1	10,6	approx. 72%	91,6	91,6	1.432,0	1.408,0	

Source: Braugersten-Gemeinschaft e.V., Munich