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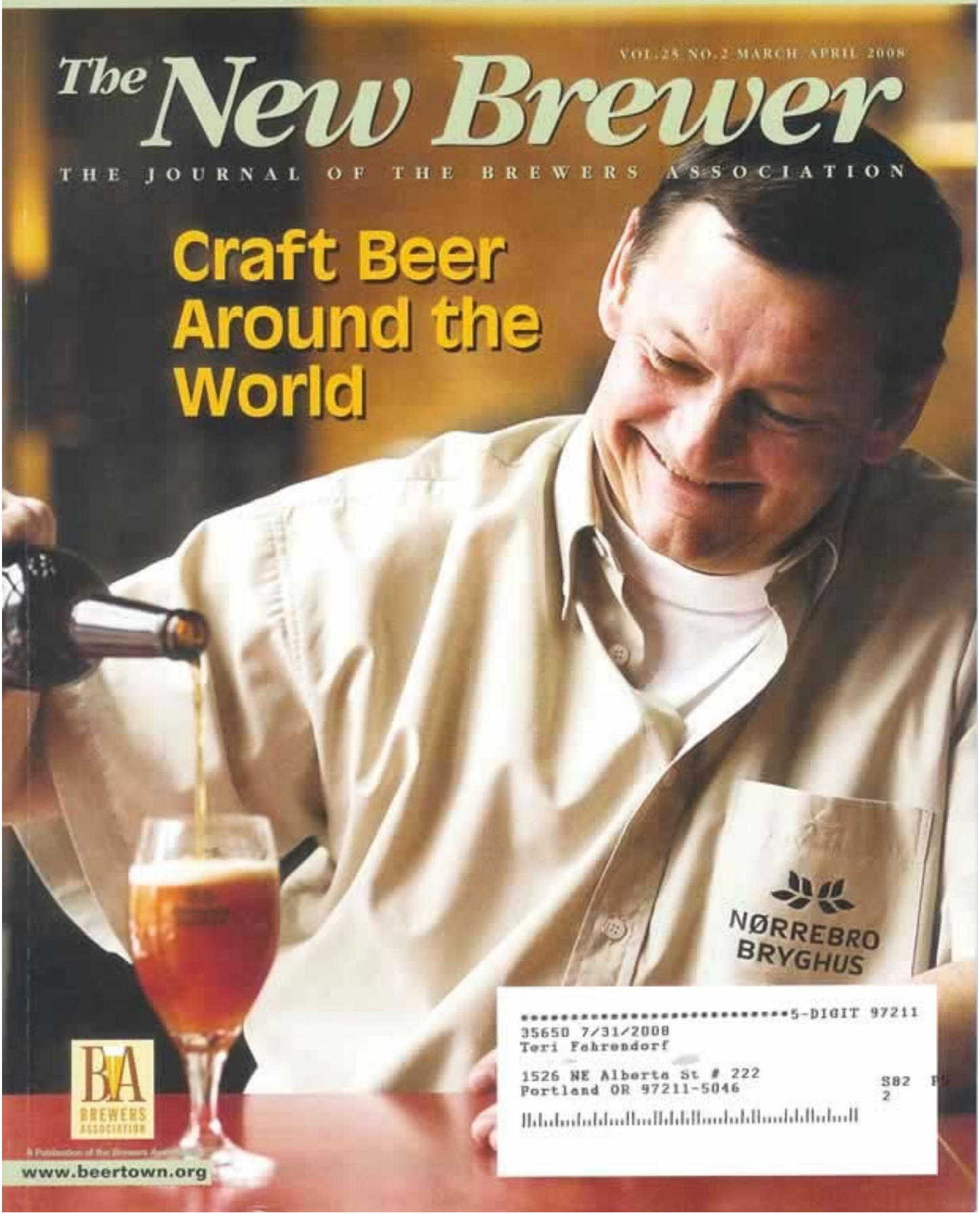
Craft Beer Around the World



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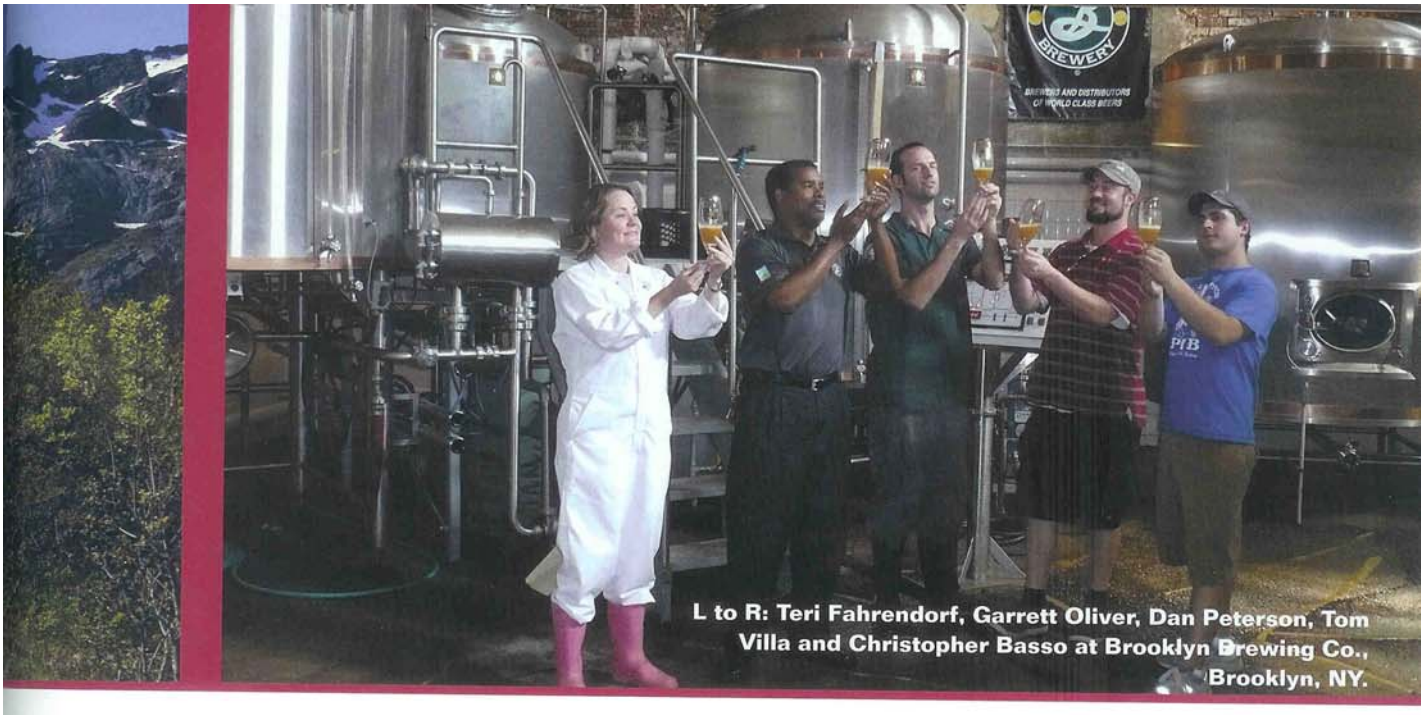
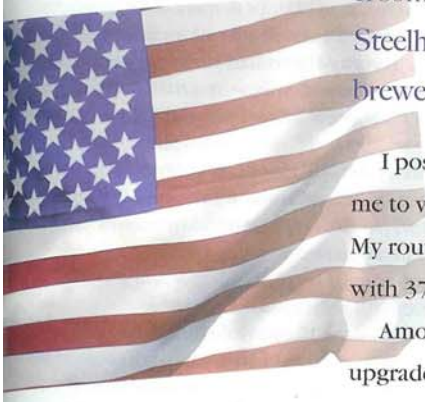
Across America's Beerscape

By Teri Fahrendorf



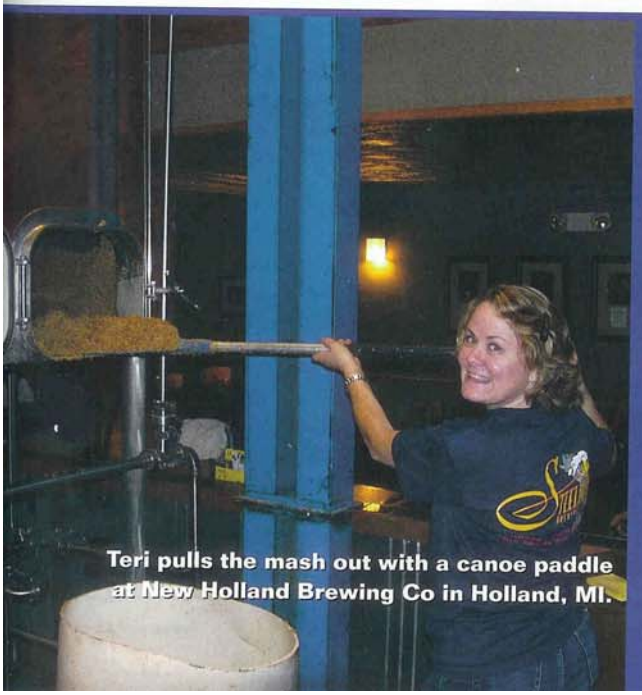
L to R: Teri Fahrendorf, Garrett Oliver, Dan Peterson, Tom Villa and Christopher Basso at Brooklyn Brewing Co., Brooklyn, NY.



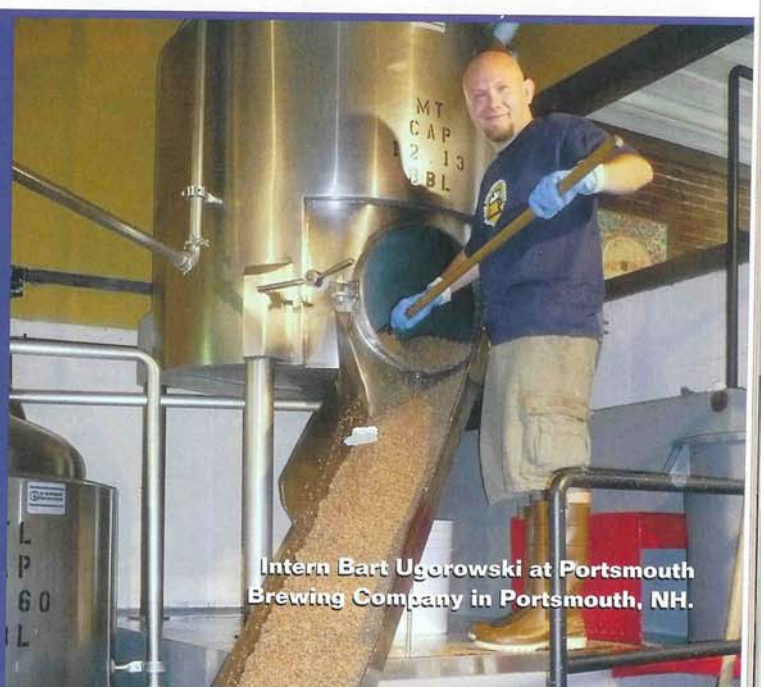
If somebody had told me in January 2007 that I would quit my brewmaster position at Steelhead after nearly 17 years and depart on a five-month road trip visiting brewers and breweries across the USA, I would not have believed it. Yet that is exactly what I did.

I posted to the Forum announcing my trip and encouraged brewers to e-mail me if they wanted me to visit their breweries. More invited me than I could visit, but I tried to fit in as many as I could. My route was somewhat dictated by where relatives live. In all, I visited 70 breweries, and brewed with 37 of those.

Among the way, the trends I observed involved expansion, innovative beer styles, equipment upgrades and the impact and availability and prices of malt and hops.



Teri pulls the mash out with a canoe paddle at New Holland Brewing Co in Holland, MI.



Intern Bart Ugorowski at Portsmouth Brewing Company in Portsmouth, NH.

Open fermenter at Magic Hat Brewery in Burlington, VT.

Expansion

At the beginning of the trip I saw a huge amount of optimism from the breweries I visited. My impression was that everyone seemed to either have just completed an expansion, were in the middle of one, or were about to start one. I noticed 10 types of expansion plans.

1. Nine breweries seemed to be in continuous expansion mode.
2. Eight had just completed an expansion, and had another expansion in the planning stages.
3. Eleven had just completed an expansion, and had no more expansion plans.
4. Five planned to expand at their current location.
5. Three planned to expand by building one or more additional locations in existing buildings elsewhere.
6. Three were either in the middle of building, or were about to start building new "green field" breweries, either as an additional location, or to move into and vacate the old location. ("Green field" means an undeveloped site, normally covered in grass or brush.)
7. Five have ideas for expansions but haven't made plans yet.
8. Two can expand by increasing the amount of beer they have contract brewed elsewhere.
9. One was cramped and out of room, but had no current plans for expansion.
10. Twenty-three had no plans to expand and would stay as is. One of those was fairly new at two years old.

Just as the push for brewery capacity expansion appeared to be a nationwide trend in 2007, so also was the trend toward beer style innovation.

Regional Styles

At one time I believed the West Coast held the license on beer style innovation, but now I cannot honestly say that. Innovation may have started on the West Coast and then jumped to Colorado and the East Coast, but now it has squarely landed in the Midwest. Perhaps it started with Goose Island's landmark Bourbon County Stout that added barrel-aged beers to the good beer map. Perhaps it was New Glarus's Wisconsin Belgian Red. The important thing is that the revolution is now in progress nationwide. Even the larger established regional breweries are innovating in small batches. I can probably list at least one innovative beer that I tasted at each brewery I visited. Some breweries like Avery, Jolly Pumpkin, Short's, Ommegang and Allagash seem to make nothing but innovative and unusual beers.

There were definitely some regional style variations. The West Coast was very fixed on American-style ales. Southern California vied with Oregon and Washington for the most hop bitterness. Other than Sierra Nevada, California's largest craft breweries are smaller than the Pacific Northwest's largest

TERI'S U.S. ROUTE

Lars Larson of Trumer Brauerei in Berkeley, CA.

Teri brooms the mash down the chute at Capital Brewing Co. in Madison, WI.

craft breweries. In fact, after Sierra Nevada, the next five largest West Coast regional breweries are in the Pacific Northwest (Widmer, Bridgeport, Redhook, Pyramid and Deschutes). This regional domination affects styles, and causes the Pacific Northwest as a whole to lean toward standard-yeast beers, such as ales and a few lagers. California's less dominant large brewery scene allows for smaller breweries to innovate with yeasts, bacteria and wood aging. Breweries such as Port Brewing, Russian River and Firestone Walker are developing reputations for their unique beers. (You won't find any of the top-10 West Coast craft breweries creating a 100-percent Brettanomyces-fermented beer like Russian River has done.)

Colorado and the Rocky Mountain states seemed to be on par with the Pacific Northwest. The beers and styles brewed there were very similar to Oregon and Washington. Utah also had tasty standard-yeast beers brewed with gravity-defying skill to Utah's archaic alcohol restrictions.

As one would guess, the Midwest leans toward lagers, and the East Coast toward English-style ales rather than American-style ales. Alan Pugsley and his Peter Austin systems hit New England early, so that region leans toward Ringwood yeast and open fermenters.

East of Wisconsin, those breweries that produce Belgian-style beers seem to specialize in that, such as Jolly Pumpkin, Ommegang and Allagash. They don't produce Belgian-style beers as a line extension to their "regular" beers like New Glarus, Upland, Port Brewing, Russian River, and a host of small breweries on the West Coast that dabble in Belgian-style beers. New York was the exception to this rule, with both Southampton Publick House and Brooklyn Brewery producing a full lineup of ales, lagers, Belgians and a mix of wacky, innovative beers and variations on traditional styles.

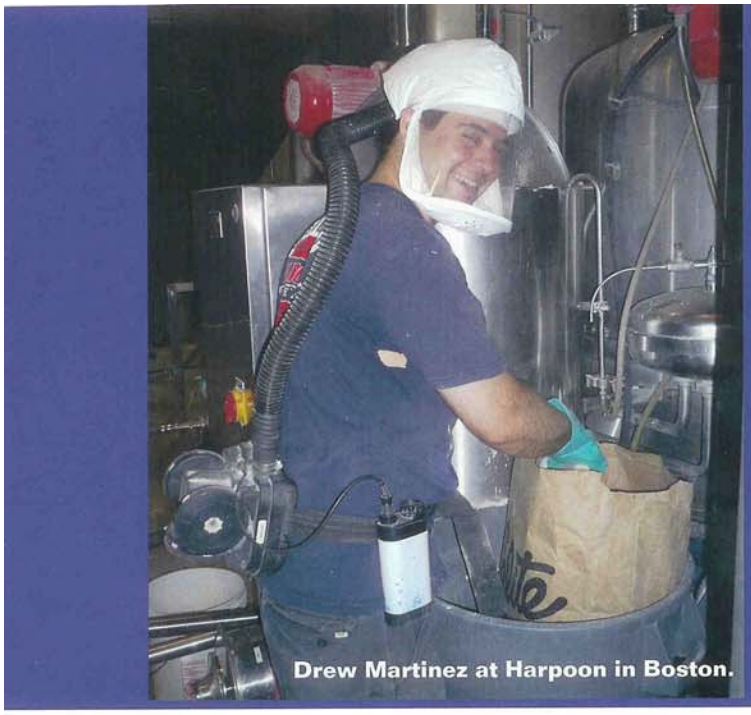
There are seasonal regional style variations as well. For East Coast and Midwest breweries, Pumpkin Ale has replaced Oktoberfest as the "must brew" autumn seasonal. This is especially true on the East Coast, where one brewery began shipping their pumpkin beer in August in order to hit the marketplace first, and their distributor loved it. The West Coast is not immune to pumpkin beers. One notable example is Elysian's Pumpkin Ale Festival, where their house pumpkin ale is served from a hollowed-out pumpkin on the bar top.

Because of distance from the hop fields, "fresh hop" or "wet hop" beers are rare east of the Washington-Oregon-California border. The early contender for the name was "harvest ale" or "hop harvest ale." That name seems to be out of favor now. One regional variation on the name is that the Pacific Northwest prefers "fresh hop" and Southern California prefers the term "wet hop." Northern California, dominated by Sierra Nevada, goes with the Pacific Northwest preferred "fresh hop."

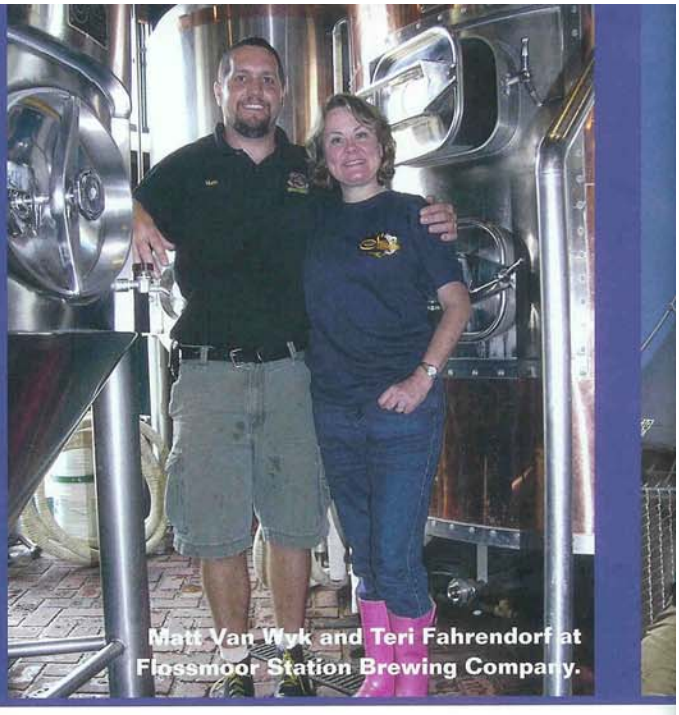
Among the West Coast states, Oregon dominates the fresh hop beer idea. The Oregon Brewers Guild sponsors a roving Fresh Hop Beer Tastival mini beer fest that visits various areas of the state for beer fans to line up and taste fresh hop beers side-by-side. No other state or region has embraced this style as thoroughly as Oregon has.

TERI'S TRIP BY THE NUMBERS

139 days
70 breweries
3 presentations (American Brewers Guild, Liquid Poets Homebrew Club, and GABF "You Be the Judge" booth)
2 brewing schools (Siebel Institute, American Brewers Guild)
2 beer festivals (Michigan Beer Festival, Great American Beer Festival)
2 beer-centric tap houses (Redbones BBQ, Falling Rock)
2 breweriana collections (antique advertising, world's largest beer can collection)
2 distilleries (Stranahan's Colorado Whiskey (distill with) and Woodford Reserve (visit))
2 beer judgings (Great American Beer Festival, Alpha King Challenge)
1 beer ingredient wholesaler (BrewCraft USA)
1 laboratory services company (Brewing & Distilling Analytical Services)
1 beer conference (MBAA Hop Symposium)



Drew Martinez at Harpoon in Boston.



Matt Van Wyk and Teri Fahrendorf at Flossmoor Station Brewing Company.

The one place that style innovation has not taken root is in the Great Plains states. Not only is the population fewer per mile, but the craft breweries and brewpubs are a day's drive apart. At Rapid City, S.D.'s only brewpub, Firehouse Brewing, nearly all the clientele drank Coors Light. In contrast, Granite City Food & Brewery in Sioux Falls, S.D. is part of an innovative chain of 18 brewpubs. The innovation is in the design: All the wort is brewed at the mothership wort brewery in Ames, Iowa, then shipped unfermented in tanker trucks to the other 17 locations, where a restaurant manager trained in fermentation adds yeast, monitors the fermentation and filters the beer into serving tanks.

Brewing Equipment

I already mentioned one of the differences in brewing equipment, and that is New England favors open-topped fermenters. Some of them are huge! Magic Hat has 150-barrel open fermenters, and Shipyard has some 300-barrel open fermenters (to my knowledge, the largest in the U.S.). On the West Coast, Anchor has its traditional coolship-type shallow open fermenters in a positive air displacement room. Some of the smallest brewpubs also have open fermenters. Oregon's McMenamins breweries started that way. Along my route, I did not find any non-Peter Austin derived open-topped fermenters until I hit Flat Branch Brewpub in Columbia, Mo. Most breweries in the U.S. have converted to closed fermentation, unless they are brewing open-topped with Peter Austin's Ringwood yeast, or come out of the Peter Austin New England tradition, like Magic Hat, Gritty McDuff's and Shipyard.

Most breweries have also converted from horizontal fermenting or conditioning tanks to cylindroconical tanks. The breweries where I spotted horizontal tanks included Mia & Pia's converted dairy tanks in Oregon. Even the kettle is a converted horizontal dairy tank. Capital Brewing (Wisconsin), Smuttynose (New Hampshire) and Portsmouth (New Hampshire) still have horizontal tanks. Even Anheuser-Busch is in the process of converting its horizontal tanks to cylindroconical.

Another regional variation is the number of women brewers. Perhaps there are just more breweries on the coasts than in the central part of the nation. The three states with the highest number of active women brewers are California (eight), Oregon (five) and Massachusetts (five). You can see the list of women brewers at www.terifahrendorf.com/pink-boots-society.htm.

The Shape of Things to Come

As I look back at my blog and reminisce about my trip, I am struck by the list I posted under my New Glarus visit in mid-July. There was a glaring absence of discussion along my route so far about hop and malt availability or prices.

Dan (Carey) wanted to know what topics or themes were coming up during my tour. Only a few came to mind:

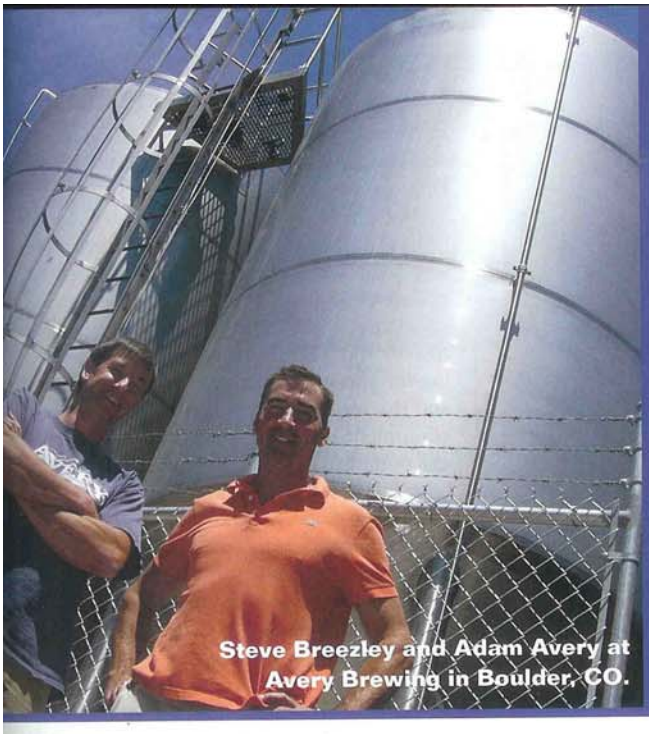
1. *The price of stainless, and the loss/theft of stainless kegs is killing everybody.*
2. *There is a lot of capacity being built: I'm seeing new breweries built by experienced 35-year-old brewers, and small distributing craft breweries upgrading to 30-, 50- or 100-barrel batch size.*
3. *Some distributing breweries wanted to know if it was true that brewpub brewers cut corners on quality control because the beer is consumed so much quicker in a brewpub.*
4. *Some Southwest and Midwest brewers wanted to know why West Coast brewers are too lazy to filter, and how they managed to convince the public that unfiltered beer is somehow better for you, as if it was whole wheat bread.*

Interesting topics, but best left to another article on another day.

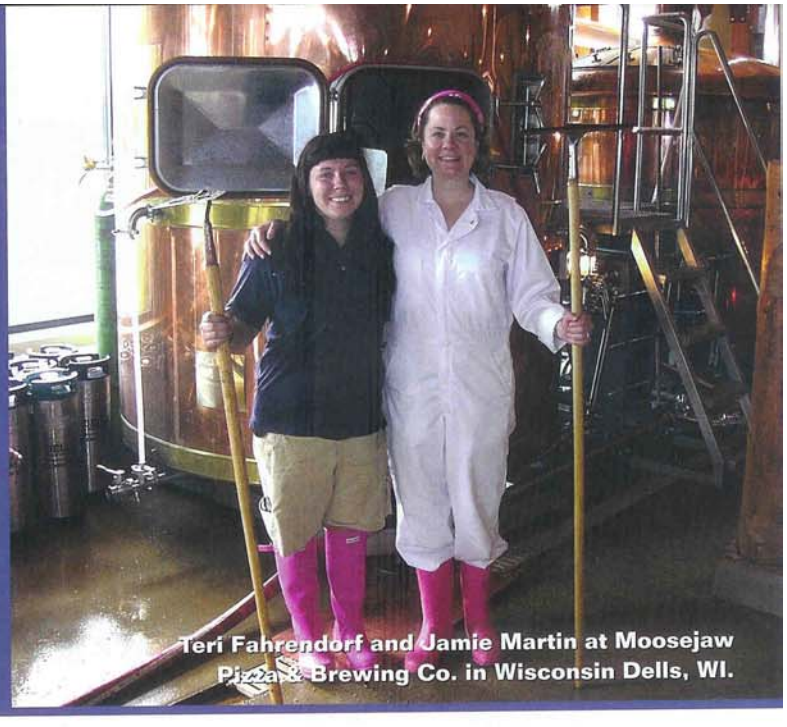
Malt and Hops

The general pessimism began to appear in late August and early September. The fear factor was full blown by mid-September at my visit to Stoudt's Brewery in Adamstown, Pa. I joined the brewers for a laptop presentation given by the Brewery Supply Group sales rep. Nothing makes a believer out of you like visuals. Photos of drought and fires. Photos of pre-sprout barley knocked to the ground by rain. Rumors of Cascade hops selling for $15 a pound, if you could get them. Or in the case of the sales rep, if you had any to sell. Suddenly the price of stainless and keg theft was no longer the hot topic. "Did you contract your hops and malt yet?" was the question echoing across the nation.

My route home from the East Coast was much more direct than my route east had been. Nevertheless, it was interesting to note that the proportion of breweries that planned to expand was significantly less. Was that a fluke, because I was traveling through the southern Midwest? One of the breweries



Steve Breezley and Adam Avery at Avery Brewing in Boulder, CO.



Teri Fahrendorf and Jamie Martin at Moosejaw Pizza & Brewing Co. in Wisconsin Dells, WI.

I visited on my way home has since decided to consolidate its operations: Flying Dog Brewery will be relocating its Denver operations to its larger brewery in Maryland. Efficiency became the name of the game.

I heard rumors of small breweries and brewpubs in the planning stages that put their plans in mothballs, or delayed opening for the time being. Some of these new breweries couldn't secure their raw materials for the year. In the game of musical hops, they'd begun to look for hops just as the music stopped.

Prior to my departure and the first half of my trip, there were plenty of brewing jobs beckoning me. In fact, several brewers teased me and invited me to stay during my journey, as they were shorthanded and couldn't find experienced brewers to fill their open positions. Then the general pessimism of autumn caused many openings to be closed, as brewery owners assessed what

the increase in prices and general economic downturn might mean to their breweries. People took a "sit and wait" stance.

Because I have been in the industry a long time, I do see parallels from the summer of 2007 to the summer of 1995. In both instances, many breweries coincidentally had simultaneous plans to build, expand or start. Also in both years, used equipment was selling for almost as much as new equipment, and the lead times for manufacturing new equipment was quite long. There was a general optimism that "nothing can stop us now" both in 1995 and 2007.

What is different now is that 2007's problematic raw materials commodities sourcing and pricing were not present in 1995, and the general economy was in an upward trend in 1995. Conversely, 1996 began a trend in falling domestic beer sales and an upsurge in imported beer popularity.

However, we may not hit the kind of low we did in the late 90s. Beer sales are still quite strong, and if breweries can get malt and hops, they are selling all the beer they can make. Imports are not taking off like a rocket like they did in the late 90s either.

I'm not worried about the survival of the large and medium-sized craft breweries, or the brewpubs. A brewpub is also a restaurant. Worst-case scenario, a brewpub could buy beer to sell across the taps. All the large and medium-sized breweries, and most breweries over three years old, probably contracted their malt and hops for the year in August or September 2007. It is the smallest distributing craft breweries that I am worried about. Their sole purpose is to make and sell beer. If they can't get raw materials, their purpose ceases to exist.

Nobody wants to be short, so everybody who contracted for ingredients has contracted long. It's a kind of insurance, and no brewery will free up that percentage over the previous year until they know how much they'll actually need before the 2008 crop is available, and until they know the 2008 crop is coming in just fine, without damage, and what the impact of ethanol production and feed crops will have on the price and especially the availability of malt. The same goes with hops.

Teri Fahrendorf recently relocated to Portland, Ore., where her husband, former brewmaster Jon Graber, is operations manager for BrewCraft USA. She is currently writing a business plan for her beer-centric taphouse/bottle shop/pizza pub. Read the complete adventures of her road trip at www.roadbrewer.com.