



Idaho Barley Commission Partners with American Heart Association and Go Red for Women to Raise Awareness of Including High Fiber Barley in a Healthy Diet

Heart disease and stroke cause 1 in 3 deaths among women each year – more than all cancers combined.

Fortunately, 80 percent of cardiac and stroke events may be prevented with education and action. The Idaho Barley Commission is partnering with the American Heart Association – Idaho and Go Red for Women to help educate women on healthy eating choices, including barley's role in a heart-healthy diet. Barley beta-glucan fiber significantly lowers total cholesterol and LDL cholesterol levels reducing the risk of cardiovascular disease.



IBC and AHA teamed up for the second Bring on the Barley Recipe Challenge featuring healthy barley salads. The winning recipe was featured as the main dish for the 2022 Boise Go Red for Women luncheon. In addition, IBC Executive Director Laura Wilder is serving on the Idaho AHA Go Red Executive Leadership Team. For more recipes and information about barley, go to www.eatbarley.com. To learn more about heart disease and prevention, go to: <https://www.heart.org/>. ■

Warm Your Heart Sweet and Tart Barley Salad with 5-Spice Honey Vinaigrette



The winning recipe from the 2021 Idaho Barley Commission and American Heart Association "Bring on the Barley" Recipe Challenge was "Warm Your Heart Sweet & Tart Barley Salad" which can be served with a lean protein such as salmon, chicken, beef or tofu for a hearty, nutritious main dish salad. The salad was served as the main dish at the 2022 Idaho Go Red for Women Luncheon in Boise on February 25. The recipe can be found at www.EatBarley.com under the salads tab in the recipe section. This recipe was created by Jamie Parchman of Harlequin, Texas.



IBC Executive Director Laura Wilder and Communications Consultant Liz Wilder promote barley as part of a heart healthy diet on IBC social media on National Wear Red Day.



Idaho Barley Growers Contribute Nearly a Quarter Billion Dollars to Idaho’s Economic Output Annually – 2021 Yielded Devastating Economic Impact

FROM ECONOMIC STUDY BY RECON INSIGHT GROUP, L.L.C.

Idaho has become the single largest barley producing state in the nation, producing 37% of all U.S. barley in 2021. Most of that barley is sold locally within the state to large malting facilities. Barley production nationally has been in decline for the last two decades, but Idaho’s barley production has remained stable. However, with the drought, supply chain, and COVID-19 related disruptions last year, 2021 saw the lowest barley production of the last decade.

Average Annual Impacts

Because 2021 was a particularly difficult year, it’s important to look at how barley impacts the state in a typical year, then compare the 2021 contributions barley added to Idaho’s gross state product.

Direct Production

2021 Idaho barley production levels were the lowest of the decade.

Acres, yields, and prices were all at historic lows, resulting in the value of production being 46% lower than the 2013 peak production value and 27% below the baseline value of production. Table 1 shows the acres, yields, prices, and values of production. This production value is used as direct contributions. Typically, only barley exports are claimed as the direct contributions, however, in the case of barley, all or nearly all production is exported, though it usually goes through some value-added processing in-state before exiting the economy and bringing those new dollars into the state. For the 2021 FY barley generated \$209.3 million in

Table 1: Idaho Barley Acres, Yields, Sales, and Value from 2017-2021

Year	Harvested Acres	Yield (BU/AC)	Production (BU)	Price (\$/BU)*	Value of Production*
2017	510,000	95	48,450,000	\$4.75	\$230,137,500
2018	530,000	101	53,530,000	\$5.03	\$269,255,900
2019	530,000	104	55,120,000	\$5.02	\$276,702,400
2020	500,000	110	55,000,000	\$4.92	\$270,600,000
2021	490,000	89	43,610,000	\$4.80	\$209,328,000

*2021 values are projections. Source: USDA NASS Quick Stats.



direct sales, which translates into \$99.7 million in direct gross state product (see Table 2).

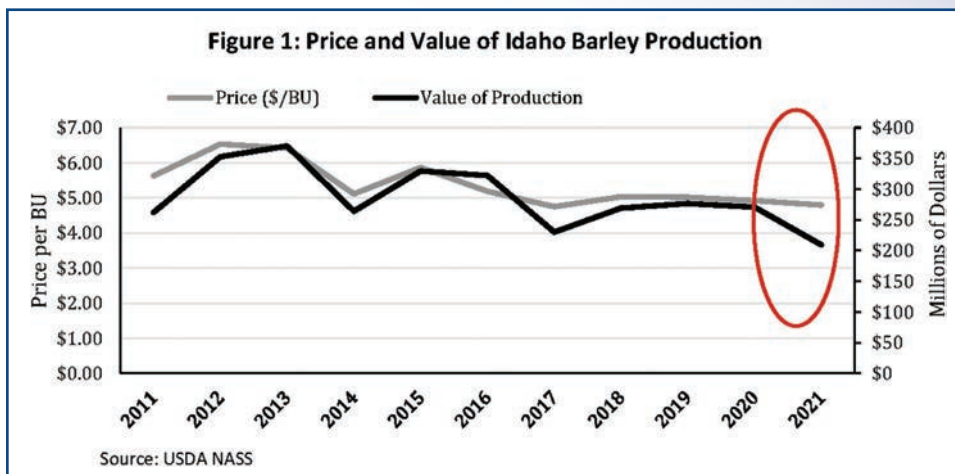
Direct Coverage Payments (ARC-CO and PLC)

Coverage payments to Idaho growers in 2021 will not be paid until October of 2022 and are estimated to be lower than they might have otherwise been. Under the 2019 Farm Bill growers are allowed to switch base acres between agriculture risk coverage (ARC) and price loss coverage (PLC) plans. Most growers have historically been in PLC. But given the change in prices vs. the changes in value of output (see the circled area below in Figure 1), it looks as though 2021 conditions would have seen higher payments from the ARC program.

Based on linear regression and given the mix of coverage on barley base acres, it is estimated that 2021 payments to Idaho growers will be slightly higher than \$31 million. Those dollars translate into payments to farm income and are only loosely tied to barley output. It is also important to note that the impacts from these dollars are all captured under the household-to-business contributions (i.e., induced contributions).

2021 Total Barley Contributions to Idaho

The total contributions of barley to the state of Idaho are those stemming from both the production and coverage payments. While the sales figures are useful in tracing the transactions in the economy, there is significant double counting that occurs in sales numbers, which must be accounted for. Removing the double counting leave us with the gross state product figures that are used for reporting total contributions, highlighted in Table 2 below. Total 2021 contributions from both production and coverage payments amount to \$216 million, and support roughly 2,150 FTE jobs. While this may not seem significant relative to the entire economy this is significant as it is only one commodity, and most farms will produce more than just one product. It is also



the initial and essential reason why the malting facilities exist in the state. Malt facilities have much lower transport costs because they can locate near their primary input and, because they are in Idaho, they have access to high quality inputs. This is true for Idaho’s dairy’s as well since barley also acts as a feed grain in the dairy supply chain.

2021 Statewide Idaho Barley Damages

The difference between the 2021 contributions and the baseline contributions represents the losses to the Idaho

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Table 2: Total 2021 Idaho Barley Contributions

	Sales	GSP	Income	Jobs
Direct	\$209,328,000	\$99,651,567	\$38,877,670	473
Indirect	\$108,360,021	\$53,404,017	\$34,608,188	874
Induced	\$116,483,751	\$62,936,873	\$33,663,945	801
Total	\$434,171,772	\$215,992,457	\$107,149,803	2,148



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economy from the market conditions and their negative influence on the barley growers and their supply chains. Table 3 shows the GSP and Employment contributions for both the baseline and 2021 years. The difference is reported in the final column of the table.

While the baseline contributions are close to a quarter of a billion dollars, the 2021 contributions were just \$216 million, \$57.7 million less than the baseline. This means full time equivalent employment in Idaho was almost 550 jobs less than it would have been had barley hit its traditional targets. These losses exist even with the increased 2021 coverage payments that were meant to offset the damages from the price and yield shocks of this past year.

Conclusions

The economic contributions of barley growers in Idaho continue to be nearly a quarter of a billion dollars in agricultural economic output. 2021 however, was a down year due to drought and market factors that caused prices, yields, and value to be the lowest of the decade. The sector as a whole produced over \$99.7 million in direct

Table 3	Baseline Barley Contributions to GSP	2021 Barley Contributions to GSP	Lost Barley Contributions from 2021 Market Conditions
Direct Barley Contributions	\$130,323,501	\$99,651,567	(\$30,671,934)
Indirect (earned from business-to-business transactions) Barley Contributions	\$69,841,335	\$53,404,017	(\$16,437,318)
Induced (earned from spending for personal activity) Barley Contributions	\$73,479,998	\$62,936,873	(\$10,543,125)
Total Barley Contributions to Idaho Gross State Product	\$273,644,835	\$215,992,457	(\$57,652,378)
Direct Barley Employment	619	473	-146
Indirect (earned from business-to-business transactions) Barley Employment	1,142	874	-269
Induced (earned from spending for personal activity) Barley Employment	936	801	-135
Total Barley Supported Employment in Idaho	2,698	2,148	-549

economic contribution for the state (gross state product). Those added dollars then circulate in the economy, traveling through the barley and household supply chains, supporting nearly another \$53.4 million in indirect, business-to-business, value-added transactions. Employee income is also spent in the state's economy, generating activity in those industries that support household purchases such as food retailers, automotive maintenance, electricity, etc. Those household-to-business expenditures and their associated ripple effects generate approximately \$62.9 million in additional value-added. The entire 2021 barley sector in Idaho is responsible for just under \$216 million dollars in economic activity, supporting just under 2,150 full time equivalent jobs.

As substantial as barley is in supporting Idaho's GSP, it was roughly \$57.7 million dollars lower than the decade long average, suggesting that farmers and their vendors were devastated by the 2021 market and growing conditions. If the 5-6 years trend of barley production spikes continues, 2022 may see some recovery. Sustaining that recovery will be key for 2023 and beyond. Idaho's growth and comparative advantage in agricultural production is a sign that barley will maintain its presence and prevalence within the state but building national and international demand for high quality barley will be essential to restoring the market to its full potential. ■

