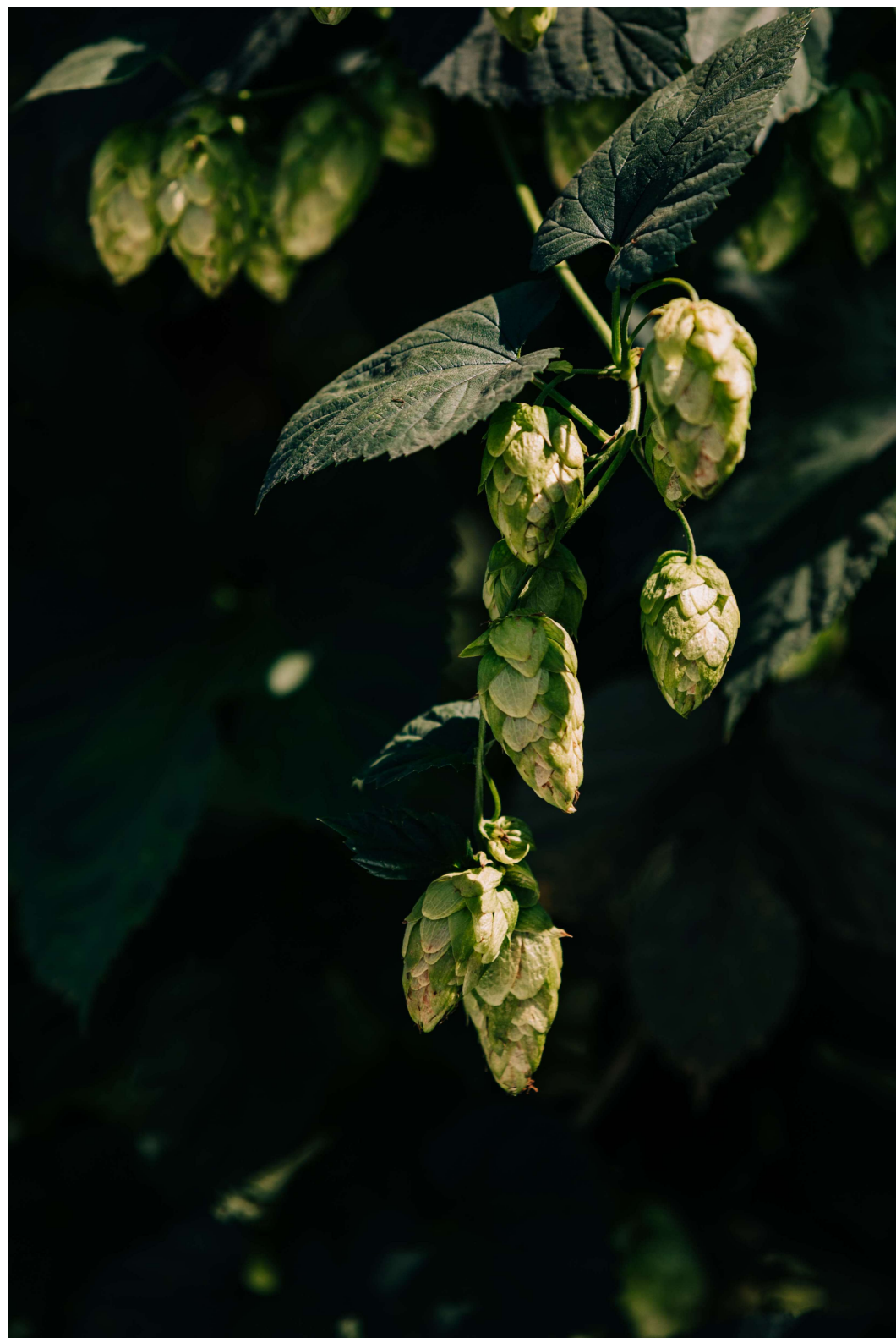




**FY2022**  
HOP INDUSTRY  
ANNUAL REPORT



## **TABLE of CONTENTS**

A Look Back At 2022.....	2
Board Of Directors.....	3
2022 Highlights.....	4
About HGA.....	5
Industry At A Glance.....	6
What We Do.....	7
Sustainability and Climate Strategy.....	8
Communications.....	9-10
American Hop Convention.....	11
Government Affairs.....	12
Research Initiatives.....	13-14
International Collaboration.....	15-17
Global Market Development.....	18-21
Connect With HGA.....	22

# 2022 A LOOK BACK



## **A Look Back With Board President Jason Perrault**

The Hop Growers of America organization has a vision in which “U.S. hop growers are world-leading stewards of their land and communities and set the global standard for quality in hop production.” A lofty vision sets high expectations and requires focused intentional effort. This report outlines those efforts over the past year.

It was a busy year. The stewardship focus took a big step forward with the adoption of the Sustainability and Climate Strategy. This strategy will provide focus and guidance to a very complex and critical effort. Meanwhile, the TEC program continues to bring awareness of U.S. hops and our quality message to brewers globally. Closer to home the HGA collaboration with affiliated hop and beer organizations in communicating legislative priorities serves as a unified voice in support of our industry to lawmakers in D.C.

There are many more activities outlined in the following pages that further highlight HGA’s efforts, all of which support a mission of cultivating resiliency for our family farms.

Sincerely,

Jason Perrault  
HGA President

# 2022 BOARD OF DIRECTORS

## EXECUTIVE BOARD

**Jason Perrault, President | Washington**

**Oliver Schroeder, Vice President | Idaho**

**Jared Favilla, Secretary-Treasurer | Washington**

Kyle Shinn | Washington

Trishia Gasseling | Washington

Nathan Jackson | Idaho

David Henze | Oregon

Alexa Weathers | Oregon

Christopher Holden | New York



# 2022 HIGHLIGHTS

**SERVING THE US HOP INDUSTRY FOR 65 YEARS:** Incorporated in 1957, Hop Growers of America seeks to increase global utilization of U.S. hops by facilitating communication between hops growers, merchants, and brewers on the quality, variety, and tradition of hops produced in the United States.

**66TH ANNUAL AMERICAN HOP CONVENTION ~ TAMPA, FL:** After gathering virtually in 2021, the U.S. hop industry converged around the theme Growing Resilience in sunny Tampa, Florida to assemble the 66th Annual American Hop Convention January 18-21 in 2022. *Learn more on page 11*

**VIRTUAL CONGRESSIONAL VISITS:** HGA, Hop Research Council and state hop grower associations from Washington, Oregon and Idaho met with Members of Congress and their staff virtually in lieu of the traditional “Fly-In” to Washington, DC. *Learn more on page 12*

**TEC PROGRAM ACTIVITIES:** The Trade Education and Communication program facilitated international seminars and trade shows in Europe and Brazil to connect brewers with the merits of U.S. hops. *Learn more on pages 18-21*

**SUSTAINABILITY AND CLIMATE STRATEGY:** This year the HGA Board of Directors approved a Sustainability and Climate Strategy to guide investment and research initiatives of the organization. *Learn more on page 8*

**WELCOME, DR. PACO GONZALEZ:** In March the U.S. hop industry welcomes a new USDA-ARS Hop Horticulturist based in Prosser, Washington. *Meet Paco on page 14.*

**NEW BREWER - US HOP HARVEST REPORT:** Each year Hop Growers of America is invited to contribute the U.S. Hop Harvest Report to the Brewer’s Association New Brewer Magazine. The winter issue routinely examines the raw materials supply chain and delivers updates on barley and hop harvests on a national and global scale.

**NEW VIDEOS HIGHLIGHT THE HOP INDUSTRY:** HGA developed video assets to showcase the multitude of innovations at the core of U.S. hop production. *Learn more on page 10*

# About Hop Growers of America

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**Hop Growers of America (HGA) is a trade organization striving to cultivate resiliency in the American hop industry by facilitating collaboration among growers, merchants, and brewers to empower producers with the research, policy, and marketing tools to remain as world-leading stewards of their land and communities.**



## **HGA supports several programs strengthening the U.S. hop industry:**

The Best Practices Committee operates to connect industry members to reputable approaches to farm management. The committee provides educational platforms and funds research to develop novel advancements to inform the operational decisions of producers.

The Trade, Education, and Communications Program (TEC) builds long-term global demand for U.S. hops. Through the TEC program HGA shares the story of how U.S. producers responsibly grow high-quality hops with the international brewing community at trade shows, technical seminars, and IPA Contests.

The U.S. Hop Industry Plant Protection Committee (USHIPPC) assists producers in navigating pest management issues by directing the delivery of plant protection tools. The committee also endeavors to harmonize international standards and secure trade access for U.S. hops abroad.

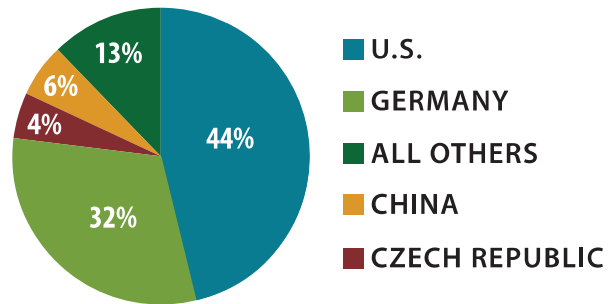
The Liaison Committee coordinates hop inspection activities between Washington, Idaho, and Oregon's respective state inspection labs, the USDA, and industry partners to ensure consistent and accurate inspection practices, bale labeling, and reporting measures.

# Industry At A Glance

Hop Growers of America collaborates with federal, state, and industry partners to compile statistics that provide a clear view of the U.S. hop industry. An atypical spring in the Pacific Northwest defined 2022 as a challenging year for U.S. hop production, hastening a crop 12.21% lower than 2021's record year at 102.2 million pounds.

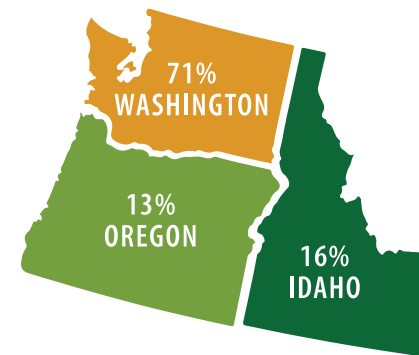
## 2022 WORLD HOP PRODUCTION

In 2022 the United States provided 44% of the world's hop supply.

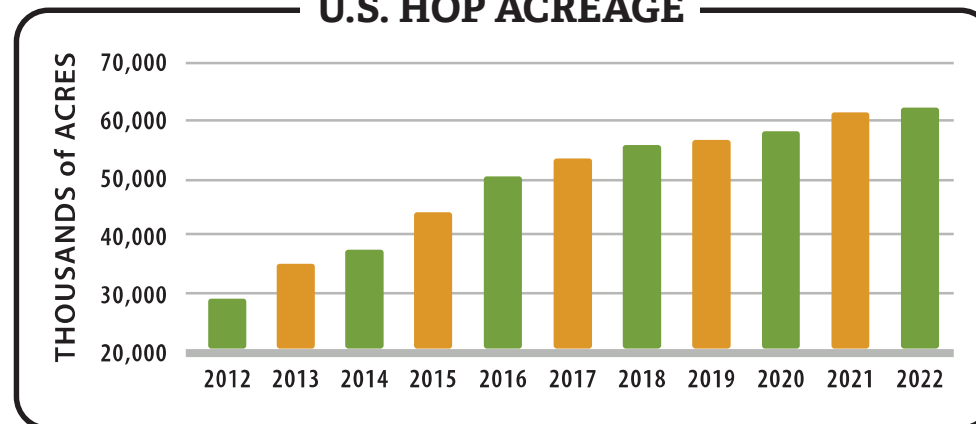


## 2022 PNW PRODUCTION BY STATE

The Pacific Northwest states of Washington, Idaho, and Oregon account for 98% of U.S. hop production.



## U.S. HOP ACREAGE



# What We Do: HGA Vision, Mission, and Values

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## **Vision**

U.S. hop growers are world-leading stewards of their land and communities and set the global standard for quality in hop production.

## **Mission Statement**

HGA cultivates resiliency for American hop producers.

## **Values**

### ***Quality***

American farming operations have honed the craft of cultivating high-quality hops over generations, and today the pride and responsibility of this profession remains woven into the identity of each producer. Growers harness a meticulous attention to detail, integrate systems of accountability, and provide transparency in each facet of production to deliver a world-renowned commodity that continues to revolutionize the brewing industry.

### ***Innovation***

In an industry characterized by profound volatility, at the heart of our growers' legacy is the relentless drive to innovate. Attuned to the inherent complexities of farming ecosystems, American hop producers tirelessly refine operational strategies and collaboratively fund research initiatives to embrace global shifts in market, climate, and regulatory conditions.

### ***Stewardship***

Instilled with the timeless principle 'you reap what you sow,' American hop growers invest in their natural, material, and human resources to nurture environmental security, economic stability, and social equity, strengthening the rural communities they call home.

# Sustainability and Climate Strategy

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**The Hop Growers of America Sustainability and Climate Strategy provides a framework to guide research and investment initiatives of the organization. In a world confronted by a shifting climate, growing populations, and shrinking natural resources, the concept of 'sustainability' is often heralded as a silver bullet. In reality, the path towards sustainability is often as complex as the challenges we face and requires balancing people, prosperity, and the planet to forge positive change.**

## People

**American hop producers have been rooted in their communities for generations**

*How HGA can support our people:*

- Support and strengthen food safety practices
- Support employees with fair wages and working conditions
- Provide community philanthropy/support/services
- Promote practices minimizing the health stress of the producer
- Promote workforce development by offering professional development opportunities
- Assist industry recruitment efforts
- Facilitate industry recognition and awards

## Prosperity

**Hop production serves as the backbone of rural economies, and supports the vitality of the U.S. brewing sector.**

*How HGA can support prosperity:*

- Assist with the cost-efficiency of production
- Support the continuity of family farms
- Provide a high-quality product
- Maintain strong systems of traceability
- Remedy trade barriers
- Build and support long-term global demand for U.S. hops
- Provide legislative advocacy for industry needs
- Develop and interpret crop reports (statistics)
- Support hop variety development with attention to harvest windows and aromatic profiles
- Maintain relationships with international industry partners and collaborate on issues of common concern

## Planet

**Driven by the spirit of innovation, American hop producers attend to the distinct nuances of each ecosystem and relentlessly seek new information to nourish their natural resources.**

*How HGA can support our planet:*

- Promote practices enhancing biodiversity and native wildlife habitat
- Support initiatives to protect soil health, such as:
  - Integrating cover crops/soil fertility plans
  - Minimizing soil compaction
  - Exploring novel soil amendments
  - Maximize value of hop biomass byproduct
- Support projects to refine IPM approaches, including:
  - Promotion of responsible use of plant protection products
  - Seeking new tools and find alternatives to traditional plant protection products
  - Harmonize MRL standards to grant diversity of plant protection tools
  - Investigation of bio-control measures
  - Exploration pollinator/beneficial insect habitats
  - Promotion and support of clean plant use
- Promote the conservation and maintenance of high-quality water, including:
  - Precision Irrigation/drone mapping of water stress
  - Widespread adoption of soil moisture monitors
  - Practices protecting the integrity of water systems
- Support projects minimizing the generation of waste, such as:
  - Investigate potential recycling options for drip tape/tube and other inputs
- Support research initiatives aiming to lower carbon footprint of hop production, such as:
  - Investigating more energy-efficient equipment
  - Modifying current structures to conserve energy (i.e. kilns)
  - Practices enabling fewer trips to field
  - Increasing renewable/alternative energy sources
- Support the breeding of high-yielding, pest/heat/drought tolerant hop varieties requiring less inputs to grow



## Communications // Good Bines

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Good Bines is an educational program administered by Hop Growers of America, designed to connect hop industry members to reputable approaches to farm management. Online modules spanning key production topics are available, including Food Safety, Water & Irrigation, Business Management, Soil Fertility, Integrated Pest Management, and Sustainability. Growers can complete self-assessments to become Good Bines certified and showcase their commitment to best practices.

In an effort to recognize the time and resources invested in industry best practices, Hop Growers of America has sanctioned the use of Good Bines logos for use by hop growers. The logos will highlight completion of the Water & Irrigation, Food Safety and Risk Assessment modules. The logos are viable for one year and must be renewed on an annual basis, upon renewal of these three self-assessment modules (certificates of completion expire annually). Growers are welcome to utilize the logo on their institutional stationary, on-site facilities, websites, and promotional materials. To attain access to the logo each year, producers must submit all three Good Bines certificates of completion for the modules noted above OR active GLOBALG.A.P. compliance documents to Maggie Elliot at [melliot@wahops.org](mailto:melliot@wahops.org).



## Communications // New Industry Videos

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### **In 2022 HGA sanctioned the development of video assets for the U.S. hop industry.**

Working with the creative agency Digital Vendetta HGA developed 6 vignettes and one 12-minute long video encompassing the multitude of innovations inherent to U.S. hop production. The featured topics included Integrated Pest Management, Precision Irrigation, Carbon Sequestration, Breeding for Stress Tolerance, Practices to Maintain High-Quality Hops, and Climate Strategy. These videos will be integrated into promotional materials to reach the international brewing community.

HGA extends a special thank you to Sodbuster Farms, Perrault Farms, Gooding Hop Farms, Loftus Ranches, Goschie Farms, as well as Drs. Dave Gent and Kayla Altendorf for their participation.



# American Hop Convention

After gathering virtually in 2021, the U.S. hop industry converged around the theme Growing Resilience in sunny Tampa, Florida to assemble the 66th Annual American Hop Convention January 18-21 in 2022. Cigar City Brewing honored the gathering by crafting an American Pale Ale fitting for the occasion, 'Bract Together Again.' Hosted by Hop Growers of Washington, the event drew 452 attendees and delivered highlights including a keynote marketing discussion led by Park Howell, industry updates from the merchant and brewing sectors, and a moonlit cruise across Tampa Bay.



# Government Affairs

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**HGA collaborates with state hop grower organizations, Hop Research Council, as well as the Brewers Association and Beer Institute to advocate for federal legislative support.**

**In 2022 HGA conducted virtual visits with the entire Pacific Northwest congressional delegation.**

## **The top six requests of the U.S. hop industry included:**

### **1 // USDA-ARS Hop Research - Hop Plant Health Initiative**

- FY 2022 the USDA-ARS was appropriated \$2.6 million for hop research.
- FY 2023: Continue current \$2.6 million appropriation to prioritize hop research to strengthen the supply chain for global demand of high quality U.S. hops and strengthen our Climate Smart production system.

### **2 // Labor**

- The need for a reliable and legal source of workers is a top priority for the agriculture industry and we support the bipartisan Farm Worker Modernization Act.

### **3 // Wildfire and Hurricane Indemnity Program - Plus (WHIP+)**

- The 2020 wildfire season in the Pacific Northwest was one of the most destructive on record. In early September, high winds combined with continued dry weather caused the fast expansion of multiple wildfires and severe smoke conditions. Following harvest, 1 million pounds of hops with an estimated value of \$10 million were rejected due to smoke taint.
- The Wildfire and Hurricane Indemnity Program - Plus (WHIP+) compensates producers for loss due to natural disasters including WILDFIRES. The US hop industry supports the Congressional effort to renew WHIP+ for 2020 crops damaged by wildfire.

### **4 // Critical USDA Program Support**

- The National Agricultural Statistics Service
- FAS Foreign Market Development programs, including the Market Access Program and Quality Samples Program
- The FAS Technical Assistance for Specialty Crops Grant Program
- Specialty Crops Research Initiative and Specialty Crops Block Grant Program
- National Clean Plant Network

### **5 // IR-4 Program**

- The IR-4 Project is a collaborative USDA-Land Grant University national research program to develop data required by US EPA to support the registration of crop protection products for specialty crops.
- IR-4's support of new registrations addresses gaps in specialty crop pest management.
  - New invasive pests
  - Loss of existing product registrations
  - Access to newer, reduced risk chemistries to improve impacts on climate, the environment, workers and consumers
- Increase funding from \$14.5m to \$25m during FY 2023 (the amount authorized by Congress in 2018 Farm Bill)

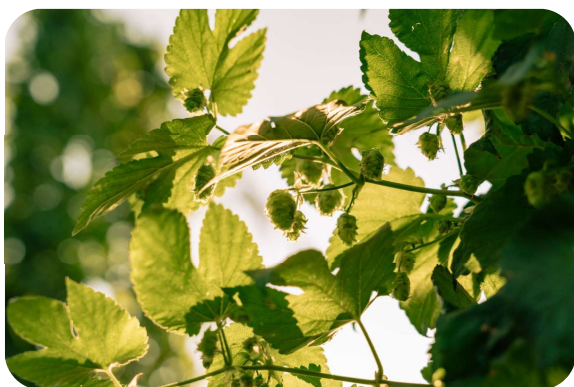
### **6 // International Trade**

- The EU's "hazard-based" pesticide evaluation system does not employ a "risk-based" scientific assessment as required by the WTO. As a result of the EU policy, numerous pesticides are being withdrawn from use in the EU and associated Maximum Residue Levels are being eliminated. This loss is adversely impacting the export of agricultural goods to the EU, including hops. We urge Congressional support of US trade negotiators to address this issue.

# Research Initiatives // USHIPPC Projects

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**HGA contributes funding and holds representation on the U.S. Hop Industry Plant Protection Committee (USHIPPC). This committee assists in the delivery of plant protection tools by developing the data needed to facilitate the registration of crop protection products and also endeavors to harmonize international standards, securing trade access for U.S. hops abroad. The committee directed several key accomplishments in 2022:**



## **USHIPPC Secures TASC Grant for India Medicinal Use Restriction**

In 2022 the U.S. Hop Industry Plant Protection Committee (USHIPPC) secured a USDA-FAS Technical Assistance for Specialty Crops (TASC) grant for \$137,000 to expand industry efforts addressing a restriction in India requiring imported hop pellets to be implemented for medicinal use only. These funds enabled travel to India in October of 2022, and the series of meetings revealed the discrepancy of enforcement gaps concerning the end use requirement. While trade is occurring, the industry will advance work to remove the measure as it poses potential risk as a trade irritant. Industry representatives will return to India to activate stakeholder engagement on the issue.

## **IR-4 Food Use Workshop Successes**

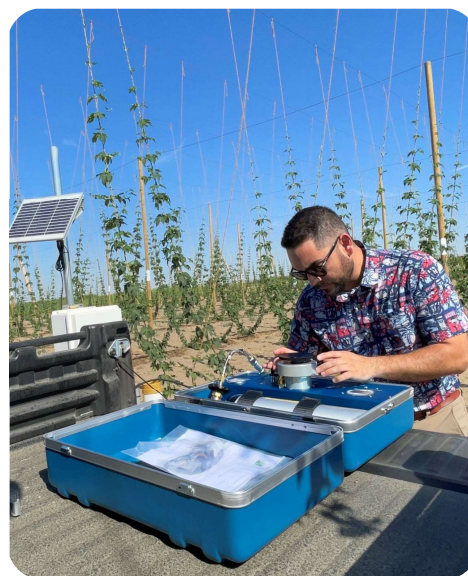
The IR-4 Food Use Workshop was a sweeping success this year as hop industry researchers successfully secured funding for multiple studies submitted by the U.S. Hop Industry Plant Protection Committee. Next year residue studies will commence on mefenflufenazole, (Revysol), a fungicide with powdery mildew efficacy as well as Quizalofop, a herbicide of high priority to the Northeast and Northcentral U.S. hop growing regions. Dr. Moretti was also granted funding for a proposal to IR-4's "Integrated Solutions" program to fund efficacy and crop safety studies for the biological herbicide MB-105.





## Research Initiatives // Welcome, Dr. Paco Gonzalez

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### Welcome, Dr. Paco Gonzalez!

In March a new scientist joined the hop research team: USDA-ARS Hop Horticulturist Dr. Paco Gonzalez. Dr. Gonzalez is based out of the Washington State University Irrigated Agricultural Research and Extension Center (WSU-IAREC) in Prosser, Washington with a research focus centering around understanding and mitigating abiotic stress in hops.

Born in Michoacán, Mexico Dr. Gonzalez immigrated with his family to the United States when he was 9 years old. Raised in the Columbia Basin, he graduated from Othello High School and earned an associate degree in agricultural business from Columbia Basin College in Pasco, Washington.

While attaining a Bachelor of Science in Agricultural Food Systems at Washington State University, Dr. Gonzalez had the opportunity to work in the Crop and Soil Science Laboratory. An innately curious individual, he found himself inherently drawn to the pursuit of knowledge and enjoyed the tangible, hands on approach of conducting studies. The experience inspired him to continue his education at WSU and earn a Ph.D. in Horticulture.

Surrounded by agriculture his entire life, Dr. Gonzalez knew he wanted to contribute to the strength of cropping systems, and was attracted to launch his career in service to the hop industry because of the deeply rooted support of stakeholders and true need for horticulture and physiological research. He is excited to facilitate research initiatives to advance the resiliency of the U.S. hop industry.

# International Collaboration

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The International Hop Growers Convention (IHGC) serves as a forum for hop growers from across the globe to convene three times annually to share crop reports and deliberate issues of common concern. HGA is a member and represents U.S. hop growers at these meetings.

The Regulatory Harmonization Commission aims to collaboratively approach the harmonization of pesticide maximum residue levels (MRLs) and other trade concerns for the international hop industry. Maggie Elliot, Science and Communications Director of Hop Growers of America, and Erich Lehmail, the recently appointed Executive Director of the German Hop Growers Association co-chair and provide leadership for the IHGC Regulatory Harmonization Commission.

The Order of the Hop is the highest honor bestowed in the international hop industry. Instituted in the 14th century, the Order of the Hop served as a mark of distinction for individuals who contributed to the advancement of the “noble” plant essential to beer production. In the 21st century the award is conferred to hop growers, brewers, administrators, researchers, and those who lead notable advances in hop culture. The Order of the Hop is endowed every other year at the International Hop Growers Convention Congress. In 2022 the IHGC Congress assembled in Prague, Czech Republic, and 9 Americans received the Order of the Hop for their outstanding contributions to the global industry.



# International Collaboration (continued) - Order of the Hop

## The 2022 U.S. recipients of the Order of the Hop include:



### Leslie Roy

Leslie Roy serves as the co-owner of Roy Farms based in Moxee, Washington and has provided leadership to the hop industry in many capacities. Leslie has served as a Washington Hop Commissioner, Board Director for Hop Growers of America, and has also engaged with the International Hop Growers Convention for over 30 years, operating as a Vice President of the organization from 1999-2012 and President since 2013. Over the years he has represented the US Hop Industry in various capacities on both state and federal legislative issues. He has worked on many subcommittees and domestic and international events of the U.S. hop industry, including WSU Cost studies, hosting domestic and international groups, conducting research projects on hop composting, low trellis hop spacing, development of new mechanical hop harvesting technology, and others.

Bob is a 3rd generation Washington Hop farmer. He serves as President and CEO of William Gasseling Ranches, Inc. Bob served on the Board for Hop Growers of Washington (President) and the Washington Hop Commission for many years during the 1980s and early 1990s and was appointed to serve as Liaison between the two boards of directors. He also served on the Board for Hop Growers of America. Bob was a founding member of Washington Growers League. He was one of the original owners of Yakima Chief Inc. (1997), serving on the

Board of Directors for Yakima Chief Inc.



### Robert Gasseling



### Douglas Weathers

Douglas Weathers of Sodbuster Farms in Salem, Oregon is a fourth-generation hop farmer who over more than 45 years of his career has supported research and new developments, formed industry committees, built and grown farms and multi-national industry marketing companies, and has been active in community philanthropy. Under his leadership, Sodbuster Farms has expanded to 1,400 acres and focuses on crop quality through the work of a team of employees and investments in technology and harvesting equipment. Doug also played an important role in the development of Hop Union, Yakima Chief-Hop Union, and Yakima Chief Hops, currently serving on the Board of Directors as a farmer-owner of the company.

With a PhD in molecular virology, Dr. John Reeves's expertise was instrumental in establishing the hop industry's greenhouse-based virus-free plant propagation program. He developed AB's Ten-Point Program on Quality and Farm Sustainability, helping growers implement these important quality standards. He also coordinated major work on Virus Free research leading to major strides in the hop industry's understanding of viruses and their influence on hop production. John also worked as the first CEO of Yakima Chief, and in this role assembled a strong leadership team which in less than 18 months designed and constructed a new state-of-the-art CO2 extraction

facility in Sunnyside, Washington.



### John Reeves



### Darren Gamache

Raised in the Yakima Valley of Washington State, Darren Gamache grew up working on the family farm. As a young adult Darren developed a strong interest in hop aroma, which inspired a professional expertise of formulating evaluating processes for measuring hop aroma based in chemistry. His lab research focused on fingerprinting hop aromas to measure variety specifics, affording craft brewers a better tool in attaining repeatability. Darren continues to refine the processes and work toward an improved hop selection process within the national and international hop industries.



# International Collaboration (continued) - Order of the Hop

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## Matthew Brynildson

Matthew Brynildson, Brewmaster of Firestone Walker Brewing Company has served as a speaker for Hop Growers of America for over a decade and played an integral role in shaping the outreach as an educationally centered program defining the merits of American hops in brewing. Matt started his career as a hop chemist and continued his education at the Siebel Institute, and joined Firestone Walker Brewing Company in 2001. Matt has been named Champion Brewmaster four times at World Beer Cup, Brewer of the Year six times at Great American Beer Festival, and the 2007 recipient of the Russell Scherer Award for Innovation in Brewing. His innovative approach to brewing has inspired generations of brewers to experiment with new hop-forward recipes.



## Pedro Venegas

Pedro Venegas grew up working in the hop industry, with his entire family serving as employees of Yakima Chief Ranches. His feel for hops and his ability to lead created an opportunity to become Traffic Manager at Yakima Valley Hop Storage and in time, he assumed management of warehouse operations for Yakima Chief. Brewers soon began to appreciate Pedro's passion for hops and he interacted with brewers at many tradeshow, at the warehouse, and at breweries. Pedro is recognized for his experience and knowledge in making sure the right hops are in the right brew kettle to produce the right beer for beer drinkers across the planet. He is currently leveraging all of his experiences in hops through the years into a successful role as Vice-President of Planning and Grower Relations at Yakima Chief Hops.



## Matt Lantz

Matt Lantz serves as Vice President for Global Access for Bryant Christie Inc. (BCI), a United States international agriculture trade policy consulting firm and has worked with the U.S. hop industry for decades resolving trade barrier challenges. In this role Matt has worked to open foreign markets for the industry and addresses international agricultural policy concerns. For over 23 years, Matt has worked to resolve phytosanitary, sanitary, tariff, labeling, and food additive issues. Matt is a leading voice on how pesticide Maximum Residue Levels (MRLs) affect agricultural trade. Matt has navigated pesticide regulatory transitions in Japan, South Korea, Taiwan, Hong Kong, China, Australia, Canada, and the European Union. In 2017, Matt coauthored a book on pesticide maximum residue levels (MRLs) entitled Declining International Cooperation on Pesticide Regulation.



## William "Bill" Coleman

Bill is the fifth generation of a six-generation Oregon farming family. Throughout their careers Bill and his brothers have expanded their agricultural footprint in Willamette Valley, today encompassing multiple crops and over 2,000 acres of hops. Bill has played an integral role in the U.S. hop industry by serving on the Hop Growers of America Board during the late 1970s and 80s. In the mid 1980's he attended the International Hop Congress in Paris, representing the industry. With an inventive and efficient eye, has administered a significant impact on improving hop farming and harvesting processes. He was an early proponent of cooling tunnels in the storeroom to improve hop quality, as he found if he blew cool night air through the pile in the storeroom, he produced a better hop that would not sweat in the bale, allowing him to dry the hops with more moisture. Bill enjoys history and can give you a detailed account of how hop industry has grown in the Pacific Northwest and especially Oregon in his lifetime.



**Hop Growers of America thanks the Order of the Hop Recipients for their tireless service of leadership to the U.S. hop industry.**

# Global Market Development - Overview

The Trade Education and Communication (TEC) program's primary objective is to increase trade awareness, global utilization, and demand of U.S. hops. To accomplish this, HGA implements a variety of targeted trade activities each program year. These include but are not limited to: brewing contests, key trade shows, and technical – educational seminars led by renowned Brewmasters for both student and professional brewer audiences alike.

In 2022 Hop Growers of America administered 12 activities around the world to foster long-term demand for U.S. hops.

96 percent of the Trade Education and Communication's program funding is awarded through USDA-Foreign Agricultural Services (FAS) Market Access (MAP) and Quality Samples (QSP) grant programs.



**Pan Europe**

## Key results of the 2022 survey efforts:



**Brazil**

**488** **Trade show responses to drinktec online survey**  
While 2022 Brasil Brau trade show responses were slightly higher, the response rate from drinktec attendees set records when compared with previous years.

**86%** **Better understand U.S. hop qualities post-EU events**  
HGA significantly improved the learning satisfaction rate for EU attendees compared with its 2021 program, where only 72% of EU event attendees reported an increased understanding of U.S. hop qualities after the event.

**44%** **Targeted brewers have launched 10+ new beers with U.S. hops in the past 12 months**  
Pan-European brewers' commercialization rates of new craft beer launches with U.S. hops were almost twice those of Brazilian brewers in 2022, affirming the market significance of U.S. hops in Europe.

**539** **Trade show responses to Brasil Brau online survey**  
Brasil Brau response rates were the highest of all three surveyed trade shows in 2022.

**96%** **Better understand U.S. hop qualities post-BR events**  
Brazilian event participants reported the highest learning satisfaction rate across all target markets, with 86% of EU trade attendees reporting an improved understanding of U.S. hop qualities post-event.

**87%** **Actively Experimenting or brewing with U.S. hops**  
Brazilian brewers remained enthusiastic about the sales opportunities U.S. hops present, with stronger active experimentation rates compared to their Pan-European counterparts (72%) in the 2022 program year.

**12 Total Activities:** **7** Hop and Brewing Educational Seminars **2** Brewing Contests **3** Trade Shows



# Global Market Development - European Union

In Europe, HGA continued to build its relationship with the region’s most influential brewing schools and local craft breweries by conducting 4 technical seminars, a brewing contest, and operating a booth at the drinktec trade show. All activities were organized as a joint effort by HGA and in-market contractor mk-2, in cooperation with the brewing school professors, U.S. Brewmaster speakers, and EU breweries.

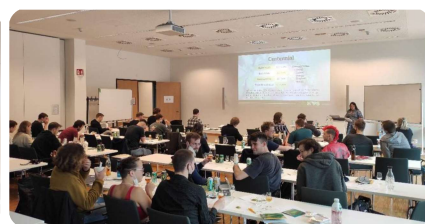
drinktec is regarded as the World’s Leading Trade Fair for the Beverage and Liquid Food Industry and takes place every 4 years in Munich, Germany. Held from September 12-16, the trade show attracted nearly 50,000 visitors. HGA served 14 selected craft beers and featured 12 hop varieties. Alec Mull, Vice President of Brewing Operations at Founders Brewing Company delivered a brewing seminar on behalf of HGA at the trade show to 90 attendees.

Additionally, representatives from the U.S. State Department including U.S. Consul General Timothy Liston, Foreign Commercial Officer Sean Timmins, and Commercial Specialist Kelly Grower from the U.S. Consulate in Munich stopped by to support the program.

*The seminars attracted over 150 students.*



*Speaker Alec Mull*  
drinktec



*Speaker Alexandra Nowell*  
Technical University, Berlin  
Doemens Academy, Germany



*Speaker John Mallett*  
VLB, Berlin  
Heriot-Watt University, Edinburgh

### Featured Hops Seminar Beer Samples Included

- Centennial Stone Brewing Co | IPA
- Crystal Sierra Nevada Brewing Co | Torpedo IPA
- Cascade Sierra Nevada Brewing Co | Pale Ale
- Cascade Cigar City | Jai Alai IPA
- Idaho 7™ Aslan Brewing Co. | Batch 15 Hazy IPA
- Idaho 7™ Firestone Walker | Mind Haze Hazy IPA
- Adeena™ Single Hill Brewing Co | Adams Pilsner
- Talus™ Single Hill Brewing Co | Lateral A
- El Dorado® Stone Brewing Co | Hazy IPA
- Citra Fremont | Lush IPA
- Amarillo® Fort George Brewery | Suicide Squeeze



### EU IPA Contest

9 breweries participated in the contest.

### 2022 CONTEST WINNERS

- 1st Place - Retaliation Kveik DIPA | Bereta Brewing
- 2nd Place - Lightning Strikes Twice Kveik DIPA | Hop Hooligans
- 3rd Place - Aurora Kveik IPA | Alefarm



# Global Market Development - Brazil

In Brazil, HGA promoted the reach of U.S. hops by facilitating 2 technical seminars, hosting a brewing contest, and administering a booth at the trade show Brazil Brau. Brewing professionals Matthew Brynildson of Firestone Walker Brewing Company and Alexandra Nowell of Drink Anemone LLC contributed their expertise to serve as speakers for the Brazil seminars. All activities were conducted in partnership between HGA and in-market contractor River Global.

Assembled every other year, Brasil Brau is the core brewing industry trade fair of the country. The 2022 event held from May 30 – June 1 in São Paulo witnessed over 7,000 people in attendance from across Brazil and Latin America, representing a record turnout. USDA's Agricultural Trade Office Director, Nicolas Rubio, visited the trade show booth and also participated in the award ceremony of the 2nd Annual Brazil IPA Contest.

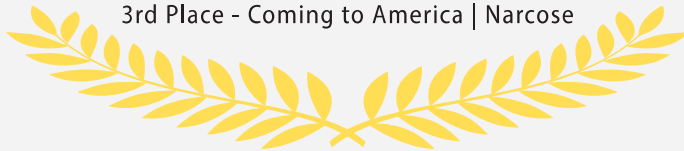
## 2nd Brazil IPA Contest

10 breweries participated in the contest.

### 2022 CONTEST WINNERS

- 1st Place - Split | Koala San Brew
- 2nd Place - USA Hops IPA | Cervejaria Tarantino
- 3rd Place - Coming to America | Narcose

West  
Coast  
IPA



USDA's Agricultural Trade Office Director, Nicolas Rubio, and staff assisted in promoting this event and participated in the award ceremony.



HGA and River Global staff at Brazil Brau.

Hops brought to Brasil Brau: Cascade, Cashmere, Comet, Idaho Gem™, Adeena™, Amarillo®, HBC 586 c.v., Simcoe®



Speaker **Alexandra Nowell**  
Instituto da Cerveja, São Paulo



Speaker **Matt Brynildson**  
ESCM, Blumenau

### Featured Hops Seminar Beer Samples Included

- Amarillo® Fort George Brewery | Suicide Squeeze
- Cascade New Belgium Brewing Co. | Voodoo Ranger Juice Hazy IPA
- Comet Breakside Brewery | Rainbows & Unicorns IPA
- Simcoe® Bale Breaker Brewing Co. | Hazy L IPA
- Adeena™ Stoup Brewing Co. | German Style Pilsner
- HBC 586 c.v. Odell Brewing Co. | Hazer Tag IPA



# Global Market Development - Global

## Craft Brewers Conference

As interest for craft beer continues to blossom around the world, the Craft Brewers Conference & BrewExpo America (CBC) endures as a pivotal platform for HGA to connect with industry partners. While it is the only domestic trade show HGA participates in, CBC attracts brewing industry members from an international audience.

CBC 2022 was held in Minneapolis, Minnesota May 2-5 and attracted approximately 10,000 visitors. Surly Brewing Company crafted 4 beers for the event featuring the hops Vista, Triumph, USDA 2000010-008, USDA W1108-333, HBC 586 c.v., Adeena™, and Belma®. Attendees stopping by the booth were able to taste and smell the hops in the beers, and then participate in sensory activities facilitated by the HGA delegation. Booth visitors were also given take-away bags containing the featured hop samples in 1oz packages, hop industry educational materials, and HGA branded giveaway items.

HGA delivered two seminars to over 300 participants at the event, including *The Sensory Evaluation of New Hop Selections from the U.S. Public Hop Breeding Program* and *Sustainability Starts in the Field: A Life Cycle Assessment of USA Hops*.

The Craft Brewers Conference remains an important technical and educational resource for the hop industry's global partners and allows HGA to maintain relationships and engage with brewers from both established and emerging markets.



# Connect With Us

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Hop Growers of America



USA Hops



American Hop Convention