

>>> 2019 HOP INDUSTRY <<<< ANNUAL REPORT



USA HOPS
HOP GROWERS OF AMERICA



>>> A Look Back at 2019 <<<



A Look Back at the Year

In an effort to demonstrate to Hop Growers of America members what is being done on their behalf throughout the year, Washington Hop Commission staff put together an Annual Report of activities for 2019. As the three organizations they are contracted to run in addition to the Commission (Hop Growers of America, Hop Growers of Washington, and the U.S. Hop Industry Plant Protection Committee) often perform work that is beneficial to HGA membership, we have included updates on those organizations and projects as well. We have also included submissions from other member states that we received so they can also report on their 2019 activities to the HGA membership.

We hope that this report helps you follow along with everything that we are doing on your behalf. We feel there has been a lot of excitement and change in 2019, and look forward to continuing to showcase the best that the American hop industry has to offer to brewers across the world in 2020. As a reminder, guests are always welcome to attend HGA Board meetings and we are happy to answer questions about these programs at any time. Here's to a great 2019 and looking forward to an even better 2020!

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>>> 2019 KEY EVENTS <<<

January



**Annual HGA Mtg.
& Convention**

**1/23 - 1/25
Monterey, CA**



March



**Congressional
Visits**

**3/11 - 3/13
Washington D.C.**

April



**Craft Brewers Conf.
& BrewExpo America**

**4/8 - 4/11
Denver, CO**



**IHGC
Meeting**

**4/26
Freising, Germany**



May

**UK Consul
Farm & Merchant Tour**

**5/15
Yakima, WA**



Brasil Brau

**5/28 - 5/30
São Paulo, Brazil**



June



**TU Berlin
Brewing Seminar**

**6/25
Berlin, Germany**



**Doemens Academy
Brewing Seminar**

**6/27
Munich, Germany**

>>> 2019 KEY EVENTS <<<

July



IHGC Congress

7/29 - 8/2
Ljubljana, Slovenia

**USAEDC
Conference**
7/9 - 7/11
Washington D.C.

September



BrewCon
9/3 - 9/5
Melbourne, Australia



Heriot-Watt Brewing Seminar

11/6
Edinburgh, Scotland



Weihenstephan Brewing Seminar

11/7
Munich, Germany



IHGC Executive Committee

11/11
Nuremberg, Germany



Global Hop Summit

11/18
Brussels, Belgium



Brau Beviale
11/12 - 11/14
Nuremberg, Germany

USAEDC
11/19 - 11/21
Baltimore, MD

INFRASTRUCTURE

ORGANIZATIONS & BOARDS

The Yakima team operates three organizations and several related committees benefitting the US hop industry. This includes Hop Growers of America. For state organizations see pgs. 23 - 29.

HOP GROWERS OF AMERICA

HGA's scope includes national and international issues impacting US hop growers. Governance is provided by the HGA Board. Your 2019 HGA Board of Directors was:

- Blake Crosby, President (Oregon)
- Graham Gamache, Vice President (Washington)
- Jared Favilla, Secretary-Treasurer (Washington)
- Kyle Shinn (Washington)
- Kevin Riel (Washington)
- Nathan Jackson (Idaho)
- Oliver Schroeder (Idaho)
- Jeff Bizon (Oregon)
- Annette Wiles, At-Large Individual (Nebraska)
- Jason Warren, At-Large Association (Michigan)

Alternates included Andy Roy (WA), Paul Fobert (OR), Diane Gooding (ID), Colbie Libsack (ID), Dan Wiesen (MI), and Matt Gura (MI). These individuals are involved in all board discussions, but only vote in the absence of their respective Director.

The HGA Board holds regular meetings in January, March, May, July, and October/November. The Annual Meeting is held during the American Hop Convention in January.

HGA's primary areas of responsibility include promotion and foreign market development, education, communications on behalf of the industry as a whole, statistics, and representation of the US hop industry at the International Hop Growers Convention. HGA is also responsible for the annual American Hop Convention, working closely with host organizations when not the host itself.

STAFF & OFFICE CHANGES // INTERNAL TEAM



ANN GEORGE, EXECUTIVE DIRECTOR

Ann George has served as the Executive Director of the Washington Hop Commission and Hop Growers of Washington since 1987. She has also fulfilled this role for Hop Growers of America since 2007. During her 32 years of service to the hop industry she was instrumental in the formation of the US Hop Industry Plant Protection Committee and international regulatory harmonization program, HGA Best Practices Committee and Good Bines educational platform. In addition to general program and office oversight, budgeting and planning for these three organizations and their committees, Ann manages Science and Technical programs, political and regulatory efforts, and has secured numerous grants to expand the hop industry's resources. A graduate of Washington State University, Ann holds a Bachelor of Science in Animal Science.



JAKI BROPHY, COMMUNICATIONS & MARKETING

Jaki Brophy joined the Washington Hop Commission, Hop Growers of America, and associated organizations in 2015. Focusing on the promotion of American-grown hops domestically and overseas through USDA's grant programs, Jaki also handles all press inquiries, works on special projects such as the website and other collaborative undertakings, while overseeing multiple domestic and overseas contractors, and working with HGA team members. With her first foray into promotions in 2003 and 10+ years post-grad experience, previous experience over the years has included product launches for a national brand; celebrity-focused events and donor thank you campaigns; a successful re-launch of a young professional's network in Chicago; an inter-corporation million-dollar safety campaign; the national launch of an independent musician; and a cross-country beer festival. She holds a Bachelor of Arts in Communication Studies, Public Relations from Eastern Illinois University.



JESSICA LUCAS, ACCOUNTING & COMPLIANCE

Jessica Lucas joins HGA with over 15 years of experience in compliance and accounting. Beginning her career in the US Navy, Jessica trained in compliance, payroll, travel and fiscal duties. Following her time in the navy, Jessica worked for Domex Superfresh Growers, the Washington State Department of Social & Health Services, and Yakima Valley College in a variety of capacities. Specializing in accounting, grant and contract management, and financial services, Jessica's specialized skills are unique to the HGA Team. Starting in January 2019, Jessica began managing HGA TEC program's finances, while also managing grants for four organizations: Washington Hop Commission, Hop Growers of America, Hop Growers of Washington, and the US Hop Industry Plant Protection Committee. Jessica holds a Bachelor of Arts Degree in Business Administration, with a specialty in Accounting from Washington State University.

STAFF & OFFICE CHANGES // INTERNAL TEAM CONT.



RACHEL BECKER, SPECIAL PROJECTS & EVENTS

Rachel Becker has over 5 years' experience in both craft brewing and hop industries. Rachel began her career at Sierra Nevada Brewing Co. in Chico, CA where she trained in raw materials, brewing, fermentation, cellar operations and hospitality in the Customer Experience Department. Rachel holds both MBAA Beer Steward and Associate Beer Steward Certificates. She held the position of Project Assistant and Event Coordinator for Hop Growers of America. She assisted in the execution of HGA's International Market Development Program, other in-house programs, and the American Hop Convention and other Washington Hop Commission and Hop Growers of Washington events. Rachel holds two bachelor's degrees in International Relations from California State University, Chico and German Studies from the University of Tübingen with a focus on German economics and international business relations. Rachel departed HGA at the end of 2019.



CAROL CAMDEN, ACCOUNTING & MEMBERSHIP

Carol Camden has over 35 years of experience in Accounting. For 20 years, Carol has been the Accountant for the Washington Hop Commission, Hop Growers of Washington, Hop Growers of America, and the US Hop Industry Plant Protection Committee. She also assists in various projects and events. Carol holds a Bachelor's degree in Accounting from Central Washington University.



MALISSA GATTON, SPECIAL PROJECTS & EVENTS

Malissa Gatton joins the HGA team with over 5 years of working within the local hop industry in both freelance and in-house capacities. Previous industry experience has included marketing and design/branding, communications and sales. Malissa's fiancé is co-owner of Varietal Beer Co. in Sunnyside, Washington. Helping out at the brewery in her free-time, she enjoys everything from kegging beer and working in the brewhouse, to helping organize events and hanging out in the beer garden practicing quality control. This association helps give her a full circle understanding of the connections between the hop and craft beer industries. Malissa sits on the Fresh Hop Ale Festival board, the Yakima Valley's annual post hop-harvest celebration, and is also a member of the leadership team for the Yakima chapter of the Pink Boots Society. She holds three associate degrees in Environmental Horticulture, Landscape Design, and Marketing & Graphic Design. She lives in Naches, Washington with her fiancé and four legged children

CONTRACTORS // DOMESTIC

BRYANT CHRISTIE, INC. – WASHINGTON HOP COMMISSION

Bryant Christie, Inc. – Washington Hop Commission

The WHC contracts with Bryant Christie to manage the International MRL (Maximum Residue Level) program on behalf of the US Hop Industry Plant Protection Committee (USHIPPC), maintaining and expanding trade markets through regulatory channels, and allowing more pest management options to growers. Ann George oversees Bryant Christie staff, advised by USHIPPC members.

AGRALYTICA – HOP GROWERS OF AMERICA

Hop Growers of America contracted with Agralytica to research and compose HGA's Country Progress Report (CPR) and Unified Export Strategy (UES) reports. Both reports require considerable time, research, and are a requirement for receiving grant funds from USDA which funds 70% of all costs to the program. These funds vary year-to-year, but they consistently pay for over 70% of all program costs for HGA's international promotion program, otherwise known as the TEC (Technical Education & Communication) program. Also included in this contract is survey work to help HGA identify benchmarks to evaluate program success. This work also fulfills HGA's third-party evaluation requirement. Jaki Brophy oversees Agralytica staff, advised by HGA Board members. Callanan & Callanan will be taking over this contract in 2020.

CONTRACTORS // ABROAD

MK2 | EUROPE – HOP GROWERS OF AMERICA

mk2 | Europe – Hop Growers of America

Hop Growers of America contracts with Cologne-based mk2 agency to handle all European representation. mk2 executes all European brewing school seminars, BrauBeviale/Drinktec, the European IPA Contest, and other special projects as they arise, including media dinners in Munich, representation at special U.S. Embassy affairs, and other one-off projects. Jaki Brophy oversees mk2 staff, advised by HGA Board members.

RIVER GLOBAL | BRAZIL – HOP GROWERS OF AMERICA

Hop Growers of America contracted with São Paulo-based River Global to execute the Brasil Brau trade show in 2019 as they entered into the Brazilian market. Jaki Brophy oversees River Global staff, advised by HGA Board members.

DAYLIGHT AGENCY | AUSTRALIA – HOP GROWERS OF AMERICA

Hop Growers of America contracted with Sydney-based Daylight Agency to execute the Brew-Con trade show in 2019 as they entered into the Australian market. Jaki Brophy oversees Daylight Agency staff, advised by HGA Board members.

ANNUAL CONVENTION



Portola Hotel & Spa | Monterey, CA

CONVENTION

Hop Growers of America's 2019 American Hop Convention hosted by Hop Growers of Washington saw the second highest attendance with 576 total attendees, a 28% increase from 2018. In addition to attendees, the event continues to draw a steady increase of support from sponsors and the brewing industry with beer donations.

The 2019 American Hop Convention was held at the Portola Hotel & Spa in Monterey, California. The Convention's content is driven by its host organization thus allowing each event to have unique content and educational focuses that vary from year to year. 2019 saw meeting program focuses such as hop and brewing industries economic discussions and forecasts. In addition, federal tax reform, H2-A program seminar and disruptive weather were topics of focus among many others. Evening events at the Portola Hotel's Memory Garden and the Monterey Bay Aquarium made 2019's Convention a unique Californian experience.

Hop Growers of America looks forward to the upcoming 2020 Convention hosted by the Oregon Hop Growers Association at the Portland Marriott Downtown Waterfront in Portland, Oregon.

VALUE ADDED

WEBSITE // “GOOD BINES”

After the 2017 launch of the USA Hops website (usahops.org), HGA launched the Member Area in 2018, providing infrastructure for our Good Bines program. Good Bines features educational modules addressing food safety and best practices issues as an online resource for members. In 2019, we launched the Best Practices Directory, allowing farms to list themselves on the public side of the website and showcase Good Bines modules they’ve completed and other third-party programs they participate in. Additionally, two new modules were added as well as other resources.

The Member Area was designed to allow farm owners the ability to provide access to this content to their employees, as well as the ability to delegate responsibilities on the website. This includes: adding other employees and designating access to different functions like managing module completion and trainings, and managing the company or farm’s listing(s) on usahops.org’s public directories. To learn more about developments to come and the group providing guidance on these materials and focus areas, please see “Best Practices” on pg. 27

INTERNATIONAL MARKETS

2019 continued to be an action-packed year for the Technical Education & Communication (TEC) program with two new trade shows executed in two new markets: Brazil and Australia. After much discussion and strategic planning sessions, HGA participated in both Brasil Brau and BrewCon in 2019 to directly compare the two shows as HGA was looking to add one more trade show activity for the foreseeable future. After participating and reporting back to the Board of Directors, HGA has decided to focus on the Brazilian market, committing to add Brasil Brau in the rotation of events and will look to engage in the Australian market as time, resources, and market conditions allow in the coming years. HGA staff will also add seminars when possible to further engage in the Brazilian market with plans to start in 2020.

In addition to doubling the amount of trade shows in 2019, HGA continued to participate in their core activities: Craft Brewers Conference & Trade Expo, BrauBeviale, and four brewing school seminars: two in June and two in November. Additionally, HGA also hosted their long-standing American Craft Beer Tasting at BrauBeviale, concluding the event by announcing the winners of the 2019 European IPA Contest.

On the back-of-house side of the program, HGA successfully transitioned accounting and compliance in-house, and no longer rely on an outside contractor to carry out those obligations, reducing admin costs.

Furthermore, a significant improvement to financial reports and analyzation has been a benefit of this change, in addition to real-time knowledge of budget status allowing better event planning and execution for the program. Dialing in costs & budget estimations will continue to be a focus in 2020 after our first year of fully managing the TEC budget & corresponding documentation.

Finally, as a requirement, two major reports are due annually to USDA - FAS (United States Department of Agriculture – Foreign Agriculture Service) to carry out these programs. HGA staff engage a contractor (Agralytica for 2019 services, Callanan & Callanan for 2020 work) to put forward the best possible report with extensive research & to fulfill a required third-party analysis. HGA staff also travel to two yearly conferences held in the D.C. area to enhance relationships with employees at USDA – FAS. As a direct result of facetime at these meetings, American hops have been showcased outside of the regular, annual HGA activities, at Embassy events, a Polish beer festival, and an Eastern European seminar – all with reduced staff involvement & financial contributions. HGA is working on co-operative activities again within a few different market locations for 2020.

HGA has seen a 23.5% increase to their Market Access Program (MAP) allocation budget over a 6-year period to execute their overseas (and CBC) promotion program. Funding for 2020 will be \$398,002, which is a \$13,658 (3.4%) increase despite many other cooperators with USDA - FAS seeing a drop in their allocations for 2020. MAP funds are the lionshare of HGA’s promotions program budget with some supplemental funds from grower contributions to the budget from yearly assessment payments. Additionally, HGA receives funds from USDA - FAS to procure hops and repack them into 1 oz sample packs with HGA branding.

TRADE SHOWS

In 2019, HGA added on two new trade shows in addition to the two other trade shows they participate in annually. In addition to Craft Brewers Conference Trade Expo and BrauBeviale, Hop Growers of America was also at Brasil Brau in São Paulo, Brazil in May, and at BrewCon in Melbourne, Australia in September. Between all four trade shows, HGA collected the contact information of 3,350+ brewing industry professionals from across the world, and interacted with even more. Despite best efforts, 100% collection is not attainable. Eighteen different varieties of hops were showcased, all with a corresponding beer, and 22,829 individual, HGA-branded 1 oz. sample packs were handed out on four different continents this year (Australia, South America, North America, and Europe). Most importantly, for every person who received a sample, they were also provided with information on the American hop industry and our hops, as well as a merchant guide so they left with a number of options of people they could buy hops from.



Social Media Post from
Brasil Brau

BRASIL BRAU

The addition of two new trade shows in 2019 was challenging, especially as they were two new markets for us with, consequentially, two new sets of regulations to learn for importing beer and hops for the trade shows in addition to logistics and execution. However, we felt the challenge was worth it due to the benefit of a direct comparison of the two shows HGA was choosing between to add to the “core” basis of programs going forward. Both markets show potential and promise, but Brazil was the stronger contender with virtually non-stop, high-volume traffic at the booth for the entirety of the show, and attendees showed a strong desire for more American hops and information on them. With show organizers reporting approximately 10,000 visitors, we interacted with many attendees and were able to collect 362 contacts. Due to cultural obstacles, HGA was only able to collect the information of a percentage of booth visitors. To note, in-country contractors were on-site with staff and fluent in Portuguese, but most attendees do not carry business cards and register their badges under a generic email. As a point of reference, HGA ran out of all hop samples and beer by the end of the show despite bringing enough for a seminar as well that had to be cancelled. Overall, we were pleased with the results of the show and look forward to the next one in 2021.



Jaki Brophy Visits with an Attendee

CRAFT BREWERS CONFERENCE & TRADE EXPO

For the seventh year, HGA exhibited at the Craft Brewers Conference, taking place this time in Denver, Colorado in April. Working with two public hops, Cascade and Cashmere; and two proprietary hops, Azacca® and Sabro™ Brand HBC 438; Odell Brewing Co. brewed three fantastic beers to serve at the booth and to showcase these hops which were on display and handed out throughout the show. Additionally, two more experimental hops from the public breeding program were at the booth, W11059-059 and 2000009-003. Stone Brewing Company and Karl Strauss Brewing Company each brewed a beer, respectively, to rotate at the booth, but more specifically to be featured at one of our seminars for CBC – this one held with multiple collaborators. The seminar focused on highlighting the public breeding program and exciting potential releases. Finally, HGA had another seminar at CBC, announcing the launch of Good Bines, the Best Practices platform on the member side of usahops.org. HGA collected 1,345 contacts at CBC, and connected with many others who either didn't get captured, or at our seminars. Thank you very much to our crew of delegates who donated their time: Candi Fitch of the Idaho Hop Commission, Greg Hopper of Hopster Hops in CO, Erik & Ashely Sauve of Sauve & Son Farm Inc. in WA, and Garrett Weaver of Coleman Ag in OR. Finally, 3,000 one-ounce samples were handed out during the show.



The USA Hops Booth at CBC

BREWCON

With Australia being the other market of interest for HGA to potentially add into the rotation of events, we participated in BrewCon in 2019. While not nearly as busy as Brasil Brau, there was still a good attendance for the higher spending per-capita market. BrewCon was also recommended as the show to connect with craft brewers in the market as they are the equivalent to the Brewers Association for Australia. Attendees were excited to try some beers they normally don't have access to, and very happy to bring home a good amount of hop samples to experiment with, some of the varieties they don't normally have access to or haven't used before. While HGA wasn't able to connect with as many people as they normally do at more populated trade shows, they were still able to make good connections in the market, hear the types of questions people in Australia have, and introduce them to some varieties they hadn't been able to sample before. Additionally, HGA started exploring other options to connect with the market that may be a good alternative to trade shows in future years if resources and market conditions allow.



BREWCON | Melbourne, Australia



Hop and Beer Samples at the HGA Booth

BRAU BEVIALE

Hop Growers of America returned to Nuremburg once again with 15 hops, 16 beers, 10 grower delegates and 4 staff. With a steady crowd at the booth for the entirety of the 3-day show, hops went especially quick despite bringing the same amounts and volumes as usual – all varieties were cleaned out by the afternoon of day 2 with the exception of one box held behind for the final day which were gone late-morning on day 3. Also very popular again was our craft beer tasting event. The room set for 120 was completely filled, and a few more guests were at the back of the room as well. At the end of the seminar, winners from our fourth annual IPA contest were announced, based off of twelve qualified judges' evaluations in the beer and hop industry. The trade show, overall, saw 40,000+ visitors with nearly 1,100 exhibitors to visit across the expansive grounds. The HGA booth collected the contact information of 1,500+ guests and handed out 682 pounds of hop samples – 10,852 1 oz samples. Thank you very much to our hard-working grower delegates: Jamie Coggins, WA; Megan Twomey, WA; Jeff & Linda Butsch, OR; Tony Weathers, OR; David & Brook Henze, OR; Oliver & Teresa Schroeder, ID; Sean Trowbridge, MI. Staff representation at BrauBeviale was Jaki Brophy and Rachel Becker (HGA), and Jens Hombeck and his colleague Brigitte Hörster (mk2 – HGA's European consultants).

TOTAL SAMPLES
HANDED OUT AT
TRADE SHOWS IN

2019

22,829

1oz SAMPLES

10 PUBLIC
6 PROPRIETARY
2 EXPERIMENTAL

KEY ▶

- Brasil Brau**
- CBC**
- BrewCon**
- BrauBeviale**

CASCADE	952	500	704	723	2,879
CHINOOK	952	0	704	723	2,379
CLUSTER	952	0	0	723	1,675
COMET	952	0	704	723	2,379
CTZ	952	0	0	723	1,675
CASHMERE	0	500	0	723	1,223
AZACCA™	0	500	0	723	1,223
CENTENNIAL	0	0	704	723	1,427
W1121-059	0	500	0	0	500
IDAHO-7™	0	0	0	723	723
CRYSTAL	0	0	704	723	1,427
LOTUS™	0	0	0	723	723
NUGGET	0	0	0	723	723
PEKKO®	0	0	0	723	723
WILLAMETTE	0	0	0	723	723
SABRO® BRAND HBC 438	0	500	0	723	1,223
CITRA® BRAND HBC 394	0	0	704	0	704
2000009-033	0	500	0	0	500

Beer Served at Trade Shows in 2019

Sierra Nevada, Pale Ale, BB
Georgetown, Bodhizafa, BB
North Coast Brewing Co., Red Seal Ale, BB; Brau
Sierra Nevada, Hazy Little Thing, BB
Russian River Brewing Company, Pliny the Elder, BB
Odell Brewing Co., Loa of Agriculture, CBC
Odell Brewing Co., Night on Sabro™ Mountain, CBC
Odell Brewing Co., Movin' Through Cashmere, CBC
Stone Brewing, Single Hop IPA, CBC
Karl Strauss Brewing Company, Karl's Hoppy Lager, CBC
Yak Ales, Fat Yak Original Pale Ale (Australian), BC
Little Creatures, Pale Ale (Australian), BC
Odell Brewing Co., Colorado Lager, BC
Sierra Nevada, Tropical Torpedo, BC
Founder's, Centennial IPA, BC
Three Floyds, Zombie Dust, BC
Deschutes Brewing Co., Mirror Pond Pale Ale, Brau
Russian River Brewing Co., Blind Pig IPA, Brau
Bell's Brewery, Two Hearted Ale, Brau
Alvarado St. Brewery, Back in Action, Brau
Firestone Walker Brewing Co., Cashmere XPA, Brau
pFriem Family Brewers, IPA, Brau
Allagash Brewing Co., River Trip, Brau
No-Li Brewhouse, Born & Raised IPA, Brau
Ninkasi Brewing Co., Oatis Oatmeal Stout, Brau
New Belgium Brewing Co., Fat Tire, Brau
Firestone Walker Brewing Co., Mind Haze, Brau
Oxbow Brewing Co., Grizacca, Brau
Karl Strauss Brewing Co., Boat Shoes Hazy IPA, Brau
Left Hand Brewing Co., Lotus Room, Brau
Odell Brewing Co., Mountain Standard IPA, Brau

CBC = Craft Brewers Conference

BB = Brasil Brau // Brau = BrauBeviale // BC = BREWCON

SEMINARS // TEC

HGA hosted four seminars at brewing school programs this year in Europe, engaging in-depth with 142 students who, on average, agreed or strongly agreed by 94% that the seminar increased their knowledge of American hop varieties, and that they would recommend the experience to a colleague. To make the most of our time and the contractor's trips overseas, we consolidate these four school seminars in two trips: TU Berlin & Doemens Academy Munich in June, and Heriot-Watt & Weihenstephan Munich in November, the week prior to Brau. Taking the first set of seminars, Tim Kostelecky (Haas, retired) spoke to 43 students, and Matthew Brynildson (Firestone Walker, Brewmaster), spoke to 101 students in the fall. All four of these seminars are excellent opportunities to connect with, and influence, future beer industry professionals towards the end of their education when they are primed to absorb the information and take it out into the work force. While many are now more knowledgeable about American hops than students were a few years ago, access to these hops are still primarily rare for these students who spend a few hours with the speaker to learn about the American hop industry, the advantages of working with it, and then – everyone's favorite part – doing a live sensory of fresh-from-the-U.S. hop samples and corresponding beers to showcase your hops in a final product.



Matthew Brynildson gets technical
at Weihenstephan



Tim Kostelecky addresses students
at the Doemens Academy



Brewing Class in Session at Heriot-Watt University

Post Seminar Evaluation Questions

Questions throughout the talk also allowed students to get more in depth and personalized feedback. As the general knowledge base of American hops (and beer) is increasing with this audience, HGA engaged Tim Kostelecky to update the presentation to include more technical information which proved to be appreciated and provoked more technical questions from the audience. As Mr. Kostelecky ran the Haas Hops Academy for many years, putting together a curriculum

for many brewers in the United States with considerable experience, we very much appreciate his expertise in updating our materials presented to the students. Combined with the award-winning experience of Matthew Brynildson, we are confident that, with this update, students this year were especially treated to very valuable, informative sessions which hopefully increase the appreciation and usage of American hops for years to come. We look forward to continuing to push the bar of the information we present to stay current and engaging, maintaining and enhancing the reputation of Hop Growers of America as a neutral, valuable educational resource to the international brewing community.

???'S	Averaged response of all 4 school attendees that replied "Agree" or "Strongly Agree"
Interacting with HGA at the event or trade show increased my knowledge of American hop varieties	94%
Participating in this event was a good use of my time	93%
I would recommend attending this event or something similar to my colleagues	94%

USDA FUNDING INCREASES

2020 FUNDING: \$398,002

2019 FUNDING: \$384,344

2018 FUNDING: \$369,840

2017 FUNDING: \$331,816

2016 FUNDING: \$350,592

2015 FUNDING: \$322,074

2019 >>> 2020: 1 YEAR

+\$13,658 or 3.5%

2015 >>> 2020: 6 YEARS

+\$75,928 or 23.5%

*For main spending account, does not include funding for purchasing samples. Overall, most cooperators have been experiencing a decline in funding.

IPA CONTEST

The fourth set of winners for the European IPA contest were announced at the end of the Craft Beer tasting at BrauBeviale. This project continues to be an exciting chance to introduce interesting craft brewers in Europe to American hop varieties while experimenting in new recipes for their brewery. Many of these recipes they keep afterwards, with beers from the contest ending up in tap rooms and on store shelves. For this reason, HGA likes to identify different styles for the contest in hopes that the brewery does not already have a beer in this style, increasing the chances of keeping the recipe (and hop purchasing). Additionally, the winner is granted the rights to use the artwork to put on their winning beer label, identifying the beer as the gold medal winner of the contest. Recent examples of previous contest beer success is a number still on tap and in stores; the 2018 gold medal winner also taking gold for their West Coast IPA in the Meininger's International Craft Beer Awards in Germany; and the 2017 bronze winner taking the platinum medal for their American-Style IPA, also in the Meininger's International Craft Beer Awards. For 2019, the style was an East Coast Hazy IPA. For the first time this year, a proprietary hop was included in the mix as well. Each brewery that participated got 22 pounds each, per variety of: Cascade, Cashmere, Comet, and Bru-1. Participants are chosen based on past year's performance when applicable, as well as reputation in the industry. Beers from the contest were served at the BrauBeviale booth alongside beers we shipped in from the U.S., and a number of brewers notified us of their interest to participate in the 2020 contest. Twelve qualified judges from the beer and hop industries judged the beers using BJCP score sheets to determine a winner.



Full-Page Ad from BIER & BRAUHAUS



Jaki Brophy Poses with the IPA Contest Winners and HGA Speaker Matthew Brynildson

European IPA Contest Winners:

1. Braukollektiv – Bruce IPA
2. Brauerei Lemke – Hazy IPA
3. BRLO – In Hops we Trust

Participants:

1. Pivovar Mazak (Czech Republic)
2. Mondo Brewing (UK)
3. Kehrwieder Kreativbrauerei (Germany)
4. Hanscraft (Germany)
5. Brauerei Lemke (Germany)
6. Segull 67 (Iceland)
7. Remmarlöv Bryggeri (Sweden)
8. Braukollektiv (Germany)
9. Hopfenstopfer (Germany)
10. BRLO (Germany)

2019 Brasil Brau

FINAL

EVENT BUDGET TOTAL: \$24,704

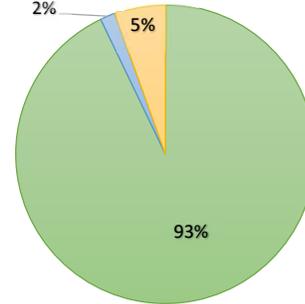
Funding Sources

MAP Reimbursement	20,731
QSP Reimbursement	3,540
Grower Funding	433
Total From 2019 Funding Sources	\$ 24,704

Total Expenses paid in 2018	\$36,096
Total 2019 Event Cost	\$ 60,800

Funding Sources Used

- MAP Reimbursement
- Proprietary Hop Income
- Grower Funding



Expense Category Totals

- STAFF AND DELEGATE TRAVEL EXPENSES
- PROMOTIONAL AND EDUCATIONAL MATERIAL
- MISC
- HOP PRODUCT AND SHIPPING EXPENSES
- BOOTH EXPENSES



Expense Category Totals

BOOTH EXPENSES	13,135
HOP PRODUCT AND SHIPPING EXPENSES	5,482
MISC	652
PROMOTIONAL AND EDUCATIONAL MATERIAL	1,014
STAFF AND DELEGATE TRAVEL EXPENSES	4,421
Total Expenses	\$ 24,704

Estimated total cost for the 2020 grant year
= **\$17,000 (2021 Event Pre-Payments)**
* \$17,000 MAP Funding

* Note: \$11,596 Staff Travel and \$24,500 Contractor Fees (including vendor and booth expenses) paid in 2018 *



Featured Specialty Brews By:

- "Pliny the Elder" - CTZ by Russian River Brewing Co.
- "Red Seal Ale"- Cluster by North Coast Brewing Co.
- "Bodhizafa"- Chinook by Georgetown Brewing Co.
- "Pale Ale" - Cascade by Sierra Nevada Brewing Co.
- "Hazy Little Thing IPA" - Comet by Sierra Nevada Brewing Co.



Hops Featured Included:

- * CTZ
- * Cluster
- * Chinook
- * Cascade
- * Comet

Event Details:

- Show organizers reported around 10,000 attendees
- HGA Distributed 4,760 1oz. samples of hops, 2,000 Variety Manuals & 1,500 Merchant Guides
- HGA poured 1,175 beers for attendees

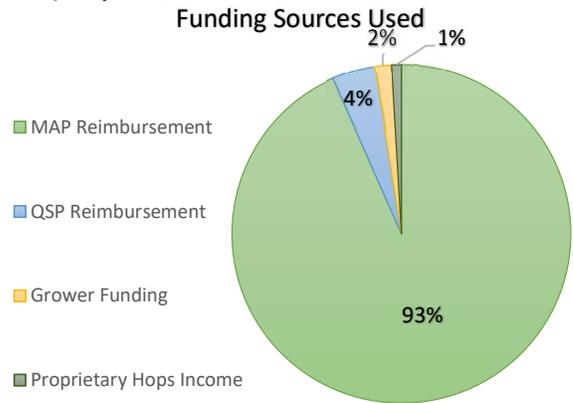
2019 BrewCon

FINAL

EVENT BUDGET TOTAL: \$54,182

Funding Sources

MAP Reimbursement	50,603
QSP Reimbursement	2,212
Grower Funding	867
Proprietary Hops Income	500
Total From Funding Sources	\$ 54,182



Expense Category Totals



Expense Category Totals

BEER PURCHASE AND SHIPPING EXPENSES	4,163
BOOTH EXPENSES	12,612
CONTRACTOR EXPENSES	15,460
HOP PRODUCT AND SHIPPING EXPENSES	4,298
PROMOTIONAL AND EDUCATIONAL MATERIAL	3,984
STAFF TRAVEL EXPENSES	13,665
Total Expenses	\$ 54,182

Hops Featured Included:

- * Cascade
- * Centennial
- * Chinook
- * Citra®
- * Comet
- * Crystal

Featured Specialty Brews By:

- "Pale Ale" - Cascade by Little Creatures
- "Centennial IPA" - Centennial by Founders Brewing Co.
- "Fat Yak Pale Ale" - Chinook by Matilda Bay Brewing Co.
- "Zombie Dust Pale Ale" - Citra® by 3 Floyds Brewing Co.
- "Tropical Torpedo IPA" - Comet by Sierra Nevada Brewing Co.
- "Colorado Lager" - Crystal by Odell Brewing Co.

2019 Brewing Seminars

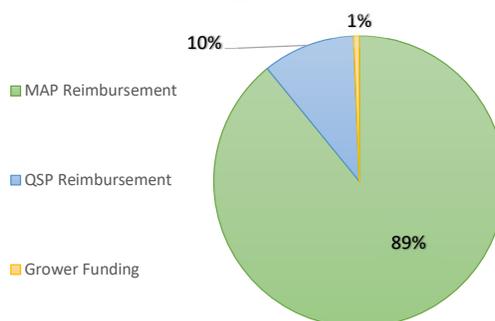
FINAL

EVENT BUDGET TOTAL: \$56,479

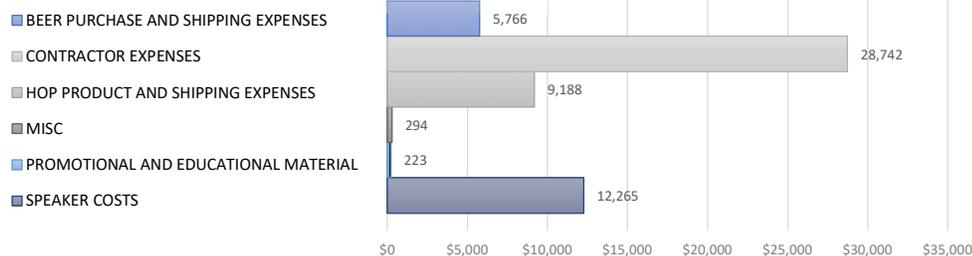
Funding Sources

MAP Reimbursement	50,332
QSP Reimbursement	5,801
Grower Funding	345
Total From Funding Sources	\$ 56,479

Funding Sources Used



Expense Category Totals



Expense Category Totals

BEER PURCHASE AND SHIPPING EXPENSES	5,766
CONTRACTOR EXPENSES	28,742
HOP PRODUCT AND SHIPPING EXPENSES	9,188
MISC	294
PROMOTIONAL AND EDUCATIONAL MATERIAL	223
SPEAKER COSTS	12,265
Total Expenses	\$ 56,479

Estimated total cost for the 2020 grant year = \$123,450 (\$58,400 for four seminars in Pan-Europe and \$65,050 for two seminars in Brazil)

- * \$103,250 MAP Funding
- * \$1,900 QSP Funding
- * \$8,300 Grower Funding

June Brewing Seminars

Location: Technical University in Berlin and Doemens Academy in Munich
Speaker: Tim Kostelecky

Hop Varieties Presented: Cascade, Cashmere, Centennial, Chinook, Crystal, CTZ, Galena and Willamette

Beers Tasted: Sierra Nevada Pale Ale, No-Li Brewing Born & Raised IPA, New Belgium Fat Tire Ale, Ninkasi Total Domination IPA, Founders Brewing Centennial IPA, Firestone Walker Mind Haze IPA and Elysian Brewing Inmortal IPA

Attendee #'s: 53 Total

November Brewing Seminars

Location: Heriot-Watt University in Edinburgh, Scotland and Weihenstephan in Munich, Germany

Speaker: Matthew Brynildson

Hop Varieties Presented: Cascade, Cluster, Comet, Crystal, CTZ and Willamette

Beers Tasted: Deschutes Brewing Co. Mirror Pond Pale Ale, North Coast Brewing Co. Red Seal Ale, pFiem Family Brewers IPA, Russian River Brewing Co Blind Pig IPA, No-Li Brewhouse Born & Raised IPA, and New Belgium Brewing Co Fat Tire Amber Ale

Attendee #'s: 101 Total

2019 IPA Contest

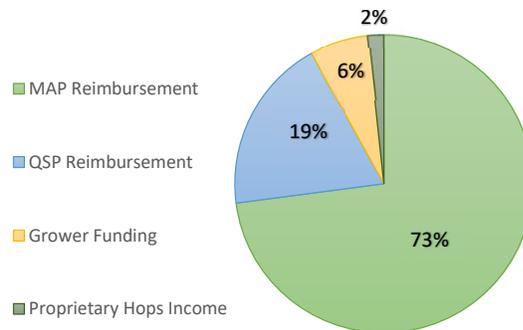
FINAL

EVENT BUDGET TOTAL: \$29,463

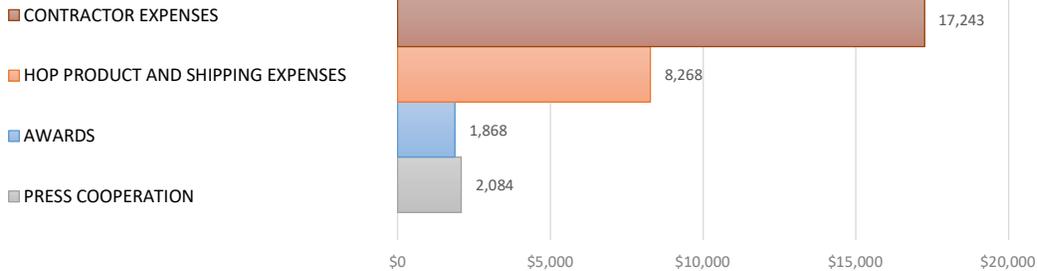
Funding Sources

MAP Reimbursement	21,485
QSP Reimbursement	5,610
Grower Funding	1,868
Proprietary Hops Income	500
Total From Funding Sources	\$ 29,463

Funding Sources Used



Expense Category Totals



Expense Category Totals

CONTRACTOR EXPENSES	17,243
HOP PRODUCT AND SHIPPING EXPENSES	8,268
AWARDS	1,868
PRESS COOPERATION	2,084
Total Expenses	\$ 29,463

Estimated total cost for the 2020 grant year = **\$34,200**

- * \$25,000 MAP Funding
- * \$6,000 QSP Funding

Featured Hops Include:

- * Bru 1™
- * Cascade
- * Cashmere
- * Comet

Style: Hazy New England IPA

Participating Breweries:

- Braukollektiv (Germany) – <http://www.braukollektiv.com/>
- Brauerei Lemke (Germany) – https://www.lemke.berlin/am_alex/
- Kehrwieder Kreativbrauerei (Germany) – <https://www.kehrwieder.beer/>
- Hopfenstopfer (Germany) – <https://hopfenstopfer.brauerei-haeffner.de/shop/>
- Hans Craft (Germany) – <http://hc-co.de/de/>
- Mondo Brewing (UK) – <https://mondobeer.com/>
- Seagull 67 Brewing (Iceland) – <http://www.segull67.is/>
- Pivovar Mazak (Czech Republic) – <https://pivovarmazak.cz/>
- Remmarlöv Gårdsbryggeri AB (Sweden) – <https://remmarlov.se/>

2019 Craft Brewers Conference

FINAL

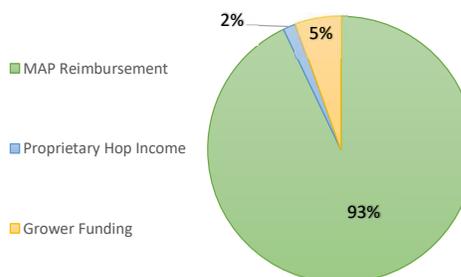
EVENT BUDGET TOTAL: \$61,641

Funding Sources

MAP Reimbursement	57,260
Proprietary Hop Income	1,000
Grower Funding	3,381
Total From Funding Sources	\$ 61,641

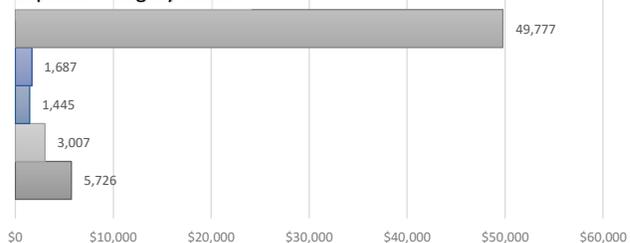
Total Expenses Paid in 2018	\$12,669
Total Expenses Paid for 2020 Event	-\$13,800
Total 2019 Event Cost	\$ 60,510

Funding Sources Used



Expense Category Totals

- BOOTH EXPENSES
- HOP PRODUCT AND SHIPPING EXPENSES
- MISC
- PROMOTIONAL AND EDUCATIONAL MATERIAL
- STAFF AND DELEGATE TRAVEL EXPENSES



Expense Category Totals

BOOTH EXPENSES	49,777
HOP PRODUCT AND SHIPPING EXPENSES	1,687
MISC	1,445
PROMOTIONAL AND EDUCATIONAL MATERIAL	3,007
STAFF AND DELEGATE TRAVEL EXPENSES	5,726
Total Expenses	\$ 61,641

Estimated total cost for the 2020 grant year = **\$75,000**
* \$71,000 MAP Funding

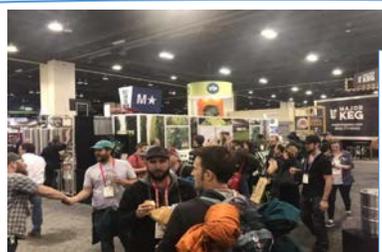
* Note: \$13,800 Beer Station and Booth Space Expenses included for the 2020 event and \$12,668.65 Staff Travel expenses were paid in 2018 *



Hops Featured

Included:

- * Cascade
- * Cashmere
- * Azacca®
- * Sabro™
- * W1159-059
- * Exp 2000009-033



Featured Specialty Brews By:

- "Loa of Agriculture" - Cascade & Azacca® by Odell Brewing Co.
- "Night on Sabro™ Mountain" - Sabro™ & Cashmere by Odell Brewing Co.
- "Movin' Through Cashmere" - Cashmere & Cascade - Odell Brewing Co.
- "Single Hopped IPA" - W1121-059 - Stone Brewing Co.
- "Hoppy Pilsner" - 2000009-033 (Triumph) - Karl Strauss Brewing Co.

Event Details:

- 14,000 attendees
- HGA connected with 1,345 attendees during the 3-day show
- 79% of surveyed attendees plan to recommend U.S. hops to colleagues
- 25% of surveyed attendees said they would likely increase their use of American hop varieties in the next 6 months
- Delegates who donated their time and expertise to join us:
 - Candi Fitch (Idaho Hop Commission, ID)
 - Greg Hopper (Hopster Hops, CO)
 - Erik & Ashely Sauve (Sauve & Son Farm Inc., WA)
 - Peter Weathers (Sodbuster Farms, OR)
 - Garrett Weaver (Coleman Ag., OR)

Average Delegate Travel expenses: **\$659.82 each**

2019 BrauBeviale

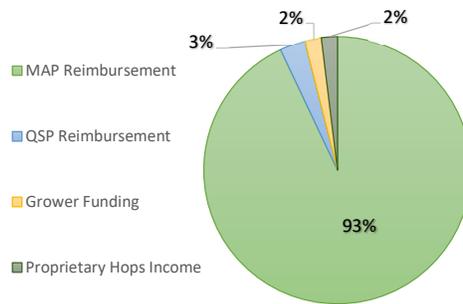
FINAL

EVENT BUDGET TOTAL: \$129,844

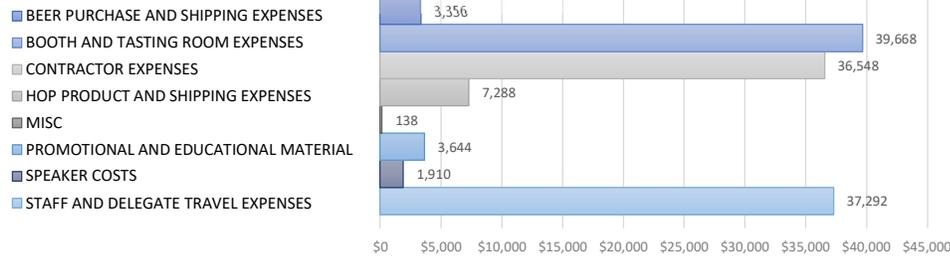
Funding Sources

MAP Reimbursement	120,735
QSP Reimbursement	4,002
Grower Funding	2,606
Proprietary Hops Income	2,500
Total From Funding Sources	\$ 129,844

Funding Sources Used



Expense Category Totals



Expense Category Totals

BEER PURCHASE AND SHIPPING EXPENSES	3,356
BOOTH AND TASTING ROOM EXPENSES	39,668
CONTRACTOR EXPENSES	36,548
HOP PRODUCT AND SHIPPING EXPENSES	7,288
MISC	138
PROMOTIONAL AND EDUCATIONAL MATERIAL	3,644
SPEAKER COSTS	1,910
STAFF AND DELEGATE TRAVEL EXPENSES	37,292

Total Expenses \$ 129,844

Estimated total cost for the 2020 grant year = **\$156,700**

- * \$143,700 MAP Funding
- * \$7,600 QSP Funding

Featured Specialty Brews By:

- | | |
|--------------------------------------------------------------|-------------------------------------------------------|
| "Mirror Pond Pale Ale" - Cascade by Deschutes Brewing Co. | "IPA" - Chinook by pFriem Family Brewers |
| "Cashmere XPA" - Cashmere by Firestone Walker Brewing Co. | "Two Hearted Ale" - Centennial by Bell's Brewery |
| "Red Seal Ale" - Cluster by North Coast Brewing Co. | "Lotus Room" - Lotus™ by Left Hand Brewing Co. |
| "Bling Pig IPA" - Crystal by Russian River Brewing Co. | "Born & Raised IPA" - CTZ by No-Li Brewhouse |
| "Fat Tire Amber Ale" - Willamette by New Belgium Brewing Co. | "Oatmeal Stout" - Nugget by Ninkasi Brewing Co. |
| "Mind Haze IPA" - Idaho 7™ by Firestone Walker Brewing Co. | "Grizacca" - Azacca® by Oxbow Brewing Co. |
| "Boat Shoes Hazy IPA" - Pekko® by Karl Strauss Brewing Co. | "Mountain Standard IPA" - Sabro™ by Odell Brewing Co. |

Featured Hops Include:

- * Azacca®
- * Cashmere
- * Chinook
- * Cascade
- * Centennial
- * Cluster
- * Crystal
- * CTZ
- * Idaho 7™
- * Lotus™
- * Nugget
- * Pekko®
- * Sabro™
- * Willamette

Event Details:

- Over 40,000 attendees from around the globe
- HGA connected with over 1,500 attendees during the 3-day show
- HGA organized a guided craft beer tasting with 120 attendees. Guidance provided by Matthew Brynildson of Firestone Walker Brewing Co.
- 56% of surveyed attendees plan to commercialize a new higher hopped beer using U.S. hops in the next 6-12 Months.
- 60% of surveyed attendees reported commercializing at least one beer with U.S. hops in the last year.
- Delegates who donated their time and expertise to join us!
 - Jeff and Linda Butsch (4-B Farms, OR)
 - Jamie Coggins (ADHA, WA)
 - David and Brooke Henze (Coleman Ag, OR)
 - Oliver and Teresa Schroeder (Schroeder Hop, ID)
 - Sean Trowbridge (Top Hops, MI)
 - Megan Twomey (ADHA, WA)
 - Tony Weathers (Kerr Supply Co., OR)

IHGC REPRESENTATION

The International Hop Growers Convention provides a forum for hop growers from across the globe to meet three times annually to share crop reports, statistics, and discuss issues of common concern. Hop Growers of America is a member, representing US hop growers at these meetings. Statistical estimates are provided for each meeting and compiled with those from other member countries by the Economic Commission. HGA distributed these reports to US growers following each meeting in 2019. The Scientific and Technical Commission provides a forum for hop researchers to collaborate internationally. This commission has also taken on the task of maintaining the international list of hop varieties and variety codes, to ensure these are harmonized worldwide.

The Regulatory Harmonization Commission, chaired by Ann George, has focused on the harmonization of pesticide maximum residue levels (MRLs). In August Otmar Weingarten, Executive Director of the German Hop Growers Association, was appointed to co-chair this committee with Mrs. George. Having a European-based co-chair will facilitate efforts to address issues associated with the European Union's cut-off criteria and hazard-based assessment of pesticide registrations. The first of these European-based efforts was the Global Hop Summit in Brussels on November 18, which was held for the benefit of those in the EU making these MRL regulatory decisions. Representatives from across Europe and the U.S. in both the hop and beer industries discussed the repercussions these decisions would have on both industries for their consideration. Jaki Brophy attended this meeting on behalf of HGA.

IHGC's biennial congress was held in Ljubljana, Slovenia from July 29 – August 2. Ann George attended this meeting on behalf of the USHIPPC and Jaki Brophy and Rachel Becker attended this Congress on behalf of Hop Growers of America. The US recipients of the International Order of the Hop included Bud Hollingbery, Dr. Thomas Shellhammer, Mary Jane Craigen, and Jason Perrault. Ann George was awarded the second degree of this award, Officer of the Order of the Hop.

Other IHGC meetings in 2019 included April in Freising and November in Nuremburg, Germany. HGA represented the US hop industry at both sessions.

STATISTICS

Hop Growers of America collaborates with USDA National Agricultural Statistics Service, state hop commissions, hop merchant companies, researchers, and other information sources to create some of the most accurate statistics available for US agricultural crops. USDA-NASS publishes five hop reports annually: March Hop Stocks, June Hop Acreage, August Pre-Harvest Estimates, September Hop Stocks, and the December National Hop Report. HGA utilizes these reports along with data from the IHGC and other sources to prepare the annual Statistical Packet, released in January.

Scientific, Technical & Regulatory Work

RESEARCH & TECHNICAL

The Washington Hop Commission provided grants in 2019 to hop researchers at Washington State University and USDA-ARS including Drs. Doug Walsh, Scott Harper and David Gent, to address issues related to entomology, virus and viroids, and pathology. Washington, Oregon and Idaho Hop Commissions are also members of Hop Research Council, providing additional research funding through dues and assessments to that organization.

Washington, Oregon and Idaho Hop Commissions are also active members of the National Clean Plant Network's Tier 2 Advisory Board for Hops and work closely with the Clean Plant Center Northwest, which is responsible for supplying virus-free foundation stock for propagation of clean planting material for the hop industry.

LEGAL & REGULATORY ADVOCACY

The US hop industry's legislative and regulatory advocacy program is a broad, collaborative effort that includes Hop Growers of America, state hop grower organizations and Hop Research Council. We also collaborate closely with the Brewers Association and Beer Institute on issues of common concern. Targeted Congressional visits by representatives of the hop and brewing industries have resulted in the approval of an additional \$1.7 million appropriation for USDA-ARS hop research, bringing the total appropriation to \$2.6 million. This will expand existing pathology and public hop breeding efforts, allowing for the addition of two new scientific positions for the hop industry: a new USDA hop breeder, and a research physiologist dealing with abiotic stress. Both will be stationed at WSU-IAREC, Prosser.

On the regulatory front, the hop industry has spent efforts the past four years to relieve the hop industry of unnecessary Food Safety Modernization Act (FSMA) requirements. Working with the US Food and Drug Administration FSMA, we are pleased to report a significant action by the US Food and Drug Administration was issued in March 2019: the agency announced it will not enforce Produce Safety Rule requirements for hops. This relieves entities growing, harvesting, packing, or holding hops from the requirements of the Produce Safety Rule while the agency further reviews the topic and considers possible rulemaking. The same action was announced for wine grapes, pulse crops, and almonds.

Hop Growers of America, along with the WA, OR, and ID Hop Commissions, have worked together on this issue for the past four years, and a portion on HGA's Convention Income was utilized to hire a law firm specializing in this area of law (along with the other commodities listed above). The complete Guidance Document is available at <https://www.usahops.org/growers/food-safety.html>.

USHIPPC | 2 mtg/year

The US Hop Industry Plant Protection Committee (USHIPPC) was formed in 1988 to coordinate plant protection issues and pesticide registration efforts on behalf of hop growers in Washington, Oregon and Idaho. At the time, growers had experienced registration cancellations and resistance development that left them with a very limited plant protection toolbox.

The initial goal of seeking new registrations for hop plant protection products was expanded in 1992 with the launch of the International Harmonization program. The hop industry contracted with Bryant Christie Inc., a Seattle-based technical consulting firm specializing in international regulatory issues, phytosanitary barriers to trade and harmonizing global pesticide MRLs. Our contract with BCI has continued for 28 years, with the program expanding from initial focus on the European Union, Canada, Japan, and Codex (international standards developed under the World Health Organization) to its current ongoing efforts in 11 countries. A key component of this program is the Hop MRL Tracking Chart. The chart tracks MRLs in these 11 markets and is updated and shared on a monthly basis. The Global summary can be found on the HGA website at <https://www.usahops.org/growers/plant-protection.html>. Matt Lantz, BCI's Vice President, Global Access, is a familiar face at hop industry meetings and the annual Hop Convention where he reports on his team's progress.

USHIPPC's efforts are funded with annual contributions from the Washington, Oregon and Idaho Hop Commissions, along with contributions from several hop merchants/processors – currently including John I. Haas, S.S. Steiner, Yakima Chief, Kalsec, Crosby Hop Farms, Roy Farms, Hollingbery & Son, and BSG Hops. Grants from several sources, including EPA, USDA Technical Assistance for Specialty Crops, Western IPM Center, Specialty Crop Block Grant Programs, and pesticide registrant companies have helped provide funding for concentrated efforts in specific markets or to fund necessary studies required to move forward with import tolerance requests. In 2018, the German Hop Growers Association and German Hop Merchants formally joined the International Harmonization effort, now contributing half of the contract for Bryant Christie's base program, which was expanded to include German priorities as well as those of the US hop industry.

The committee is guided by 8 voting members: 2 representatives each for the three state hop commissions, and 2 representatives for Hop Growers of America. 2019 members included John Solt (Chair) and Michelle Gooding from Idaho; Cheyne Fobert and Alexa Weathers from Oregon; Patrick Smith and Andrew Jaques from Washington; and Kyle Shinn and Jared Favilla representing HGA. Representatives of the eight merchant-processor companies who provide financial support also serve on the committee, which meets twice annually (at the American Hop Convention and in conjunction with the HRC Summer Meeting). Ann George has administered the committee and its programs since its inception.

In addition to managing domestic registration priorities and international harmonization efforts for the US hop industry, the committee has also represented the hop industry on specific plant protection and international regulatory issues over the years, communicating directly with EPA, Congress, US Embassies and Consulates as needed. To further the collaboration of USHIPPC and US hop plant protection researchers with colleagues in Europe, Ann George and Matt Lantz serve as members of the European Union Commodity Expert Group for Hops, ensuring coordination on priorities and research plans/results. Recognizing the importance of international harmonization of regulations impacting the shipment of hops, IHGC established its Regulatory Harmonization Commission in 2014, chaired by Ann George. During 2019, Otmar Weingarten, Executive Director of the German Hop Growers Association, was named co-chair to allow more direct involvement in the European Union's regulatory approach to pesticide registrations and MRLs.

For the past two years, USHIPPC has added a key priority of seeking hop MRLs in the new Korean positive list system. We successfully secured a \$248,490 Specialty Crop Block Grant through Washington State Department of Agriculture in October 2019 to fund a focused effort to achieve additional harmonized MRLs in Korea over the next three years.

This year we also completed a four-year study funded with a \$440,000 grant from the USDA Technical Assistance for Specialty Crops program to develop data to support Codex and European Union MRLs for clofentezine, a new miticide that is being pursued for US registration through the IR-4 program. For that project, USHIPPC contracted with three different laboratories and two technical consulting firms to conduct a metabolism study, analytical method development and third-party validation of the analytical method. Funding also covered the preparation of

BEST PRACTICES

The HGA Best Practices Committee became fully functional in 2019 with committee members formally representing US hop growers, merchants and brewers.

Voting members were:

Oregon Hop Commission: Paul Fobert and David Henze
Idaho Hop Commission: Oliver Schroeder and Mark Hanson
Washington Hop Commission: Jessica Riel and Carman McKinney, Chair
Hop Growers of America: Jenny Napier,
Ohio Hop Growers Guild and Mark Trowbridge, Hop Growers of Michigan

In addition, non-voting positions were held by:

Merchant-Processor Members: Kevin Madsen, Hopsteiner;
Marisol Summers, John I. Haas; and Steve Carpenter, Yakima Chief.

Brewing Sector Members:

Jessica Newman, ABInBev; Chris Swersey, Brewers Association;
and Scott Dorsch, Odell Brewing Co.

During 2019, the committee worked to refine goals and objectives, as well as to define program success. With the Good Bines educational platform well-established in the usahops.org Member Area, plans for future education and self-assessment materials were prioritized. The platform now includes four modules: Foundations of Food Safety, Risk Assessment, Irrigation Water Microbial Testing, and Soil Fertility.

The Best Practices Directory, located on the public side of our website at <https://www.usahops.org/hop-finder/best-practices/>, was expanded to include four icons for independent third-party programs and three Good Bines self-assessment/educational modules. The directory provides US hop growers with a mechanism to communicate their commitment to best practices, food safety and sustainability to potential brewery customers. Each grower controls the information listed in the directory from their “My Account” page in the website’s Member Area. Listing in the directory is voluntary.

Initial development of the Good Bines platform and educational modules was funded through a WSDA Specialty Crop Block Grant and managed by HGA. In 2019, two additional grants were received to expand Good Bines. The Anheuser-Busch Foundation provided a \$30,000 grant to develop Case Studies, the first of which will focus on water management and is in production. The US Hop Industry Plant Protection Committee provided funding to develop two educational modules focused on Integrated Pest Management issues, including Resistance Management and Scouting. Those modules will be produced in 2020.

LIASON | 2 mtg/year

The Hop Liaison Committee serves to coordinate hop inspection activities between the State Hop Inspection Labs, USDA, hop merchant companies, and hop growers. The committee meets twice annually. Historically, the committee addressed only Washington’s inspection program as it originated out of the WHC. However, due to more frequent movement of hop bales between states for inspection, the committee was regionalized three years ago. Hop Liaison Committee now coordinates with hop inspection laboratories in Washington, Oregon and Idaho, along with their respective state hop commissions and merchant companies to ensure consistent inspection practices, bale labeling and reporting across /the industry.

During the past two years, the Hop Liaison Committee worked to harmonize bale stencil format across US hop production regions and worked with the International Hop Growers Convention (IHGC) to implement harmonized hop variety codes worldwide. The committee is co-chaired by Dave Tobin from Hopsteiner and Missy Raver from Yakima Chief.

State Organizations

Washington Hop Commission

The Washington Hop Commission is an agency of the State of Washington, established in 1964. Primary areas of focus include research, education and technical issues, including pesticide registration and issue management, bale labeling and inspection requirements, and marketing/promotion/education.

Commissioners hold four regular public meetings annually, in March, May, July, and October. Special meetings may also be held as needed.

2019 WHC Commissioners and Officers:

- Reggie Brulotte, Chair
- Devon Newhouse, Vice Chair
- Elizabeth McGree, Secretary-Treasurer
 - Patrick Smith
 - Martin Olsen
 - Patrick Gasseling
 - Jessica Riel
- Brad White, Washington State Department of Agriculture



New Logo Updated in 2019

WHC Committee Chairs and Representatives:

- Hop Research Council – Patrick Smith
- Hop Liaison Committee – Dave Tobin and Missy Raver
- National Clean Plant Network for Hops – Megan Twomey
- US Hop Industry Plant Protection Committee – Andrew Jaques and Patrick Smith

WHC activities included:

- Administration of Hop Growers of America, Hop Growers of Washington, US Hop Industry Plant Protection Committee (USHIPPC), HGA Best Practices Committee, Hop Liaison Committee, HGA's TEC Program, and other special projects.
- Research funding, both directly and through Hop Research Council. Direct grants in 2019 were provided to Drs. Doug Walsh and Scott Harper, WSU; Dr. David Gent, USDA-ARS; and to 2nd Sight Bioscience for the first year's payment of a 3-year study for development of an automated hop twiner.
- Participating in the Washington Beer Awards and American Homebrewers Association as a sponsor.
- Management of grants and projects for USHIPPC, Best Practices, and David Gent.
- Finally, the WHC also updated their logo.

Hop Growers of Washington

2019 HGW Directors:

- Jessica Riel, President
- Andy Roy, Vice President
- Cherie Steinmetz, Secretary-Treasurer
 - Paul Merritt
 - Jeff Perrault
 - Martin Olsen



New Logo Updated in 2019

HGW's meetings are held in conjunction with the Washington Hop Commission meetings in March, May, July, and October, and hosts the Washington Hop Growers Annual Meeting in early January. The group also hosts the American Hop Convention every fourth year, including the 2019 event in Monterey, CA

HGW Legislative & Regulatory Activities:

Legislative and regulatory issue management is a key program area for Hop Growers of Washington. The Board annually reviews major issues of concern to the hop industry and establishes position statements utilized in communications with Congress, the State Legislature and government agencies. Current position statements support funding for: USDA-ARS hop research, National Clean Plant Network for Hops, the IR-4 Program, USDA National Agriculture Statistics Service (USDA-NASS), USDA Foreign Agriculture Service grant programs (including the Market Access Program and related grant programs which fund HGA's TEC program), and competitive grant programs (such as the Specialty Crop Block Grant program). Other key issues include labor, immigration and water supply.

HGW is increasing its focus on labor issues. During 2019 the organization partnered with the Washington Tree Fruit Association on an amicus brief regarding the Washington State Supreme Court's hearing on the overtime exemption for agriculture and co-sponsored an educational seminar on the H-2A program with Washington Growers League.



HGW Booth at the Fair!

Central Washington State Fair

Hop Growers of Washington continued to exhibit at the Central Washington State Fair from September 20-29th, 2019 in Yakima, Washington. With over 300,000 attendees, the State Fair continues to be an important educational outreach opportunity for HGW. Panels were updated to reflect up-to-date information on the hop industry. Changes included updating Citra® Brand HBC 394 as the largest variety by acreage in the United States. Yakima Valley and US production statistics were also updated to reflect current supply volumes.

Hop Growers of Washington thanks sponsors Gasseling Ranches for donating 6 hop bines and Green Acre Farms for donating a 200 lb. bale of hops for fair attendees to experience and take home.

Oregon Hop Commission

Founded in 1964, the Oregon Hop Commission is dedicated to enhancing the Oregon hop industry by expanding opportunities for growth through research, education, and promotion. The commission's primary objective is to fund research that supports the economic stability of hop production in Oregon. Promotion and marketing efforts are achieved through a collaborative approach with other hop growing states, led by a partnership with Hop Growers of America. The commission is grower-funded through assessments collected at a rate of \$0.018/lbs. A board of nine directs the commission and includes seven producers, one dealer/handler, and one public member. Standing committees include Research, Education, and Government Affairs. The commission meets monthly on the third Thursday at 12:00 noon with a hosted lunch.

2019 Oregon Hop Commissioners:

- Paul Fobert, Chair
- Brandon Davidson, Vice Chair
- Bill Delema, Secretary/Treasurer (Dealer/Handler)
 - Jeff Bizon
 - Brian Bolduc
 - David Henze
 - Todd Koch
 - Ben Smith
- Tyler Bruck (Public Member)

OHC Representatives and Committee Chairs:

- Hop Research Council – Cheyne Fobert
- National Clean Plant Network for Hops – Jeff Butsch
- US Hop Industry Plant Protection Committee – Alexa Weathers; Cheyne Fobert
- Best Practices Committee – Brian Bolduc; David Henze
 - OHC Research Committee - Jeff Bizon, Chair
 - OHC Education Committee - Tony Weathers, Chair
 - Government Affairs Committee - Fred Geschwill, Chair

OREGON HOP GROWERS ASSOCIATION

The association was the original hop grower organization and provided the foundation for the creation of the Oregon Hop Commission. The purpose and pursuit of the association is to work with agencies in response to the needs of Oregon hop growers and to engage in activities which promote a healthy hop industry in the State of Oregon. The Oregon Hop Growers Association is the proud host of the 2020 American Hop Convention in Portland, Oregon.

2019 Oregon Hop Grower Association Officers:

- Tony Weathers, President
- Steve Charron, Vice President
- Michelle Palacios, Secretary/Treasurer

Government Affairs Committee Created

The Oregon hop industry formalized its efforts to track and monitor legislative activities through the creation of the OHC Government Affairs Committee. The committee provides leadership for the selection of Oregon delegates to the annual hop industry trip to Washington, DC and monitors local government and state-wide legislation that impacts the hop industry. Additionally, the committee assists the commission to interface with government agencies and elected officials.



Oregon Hop Field Day

Held annually on the Third Friday in July, the Oregon Hop Field Day is an educational and networking event for members of the Oregon hop industry. The July 19th schedule included a demonstration of the new hop picking machine spiral let-down at B&D Farms in St. Paul followed by a field stop at Stauffer Farms in Hubbard. The field stop featured talks from Dr. David Gent on his spore trapping project and cover cropping recommendations from the Marion County Extension Service. We joined forces with Hop Quality Group for the Field Day's evening event and co-hosted our dinner at the Hop Warehouse in Hubbard. t



Oregon Brewers Festival and Fresh Hop Beer Festivals

Each year brewers from throughout Oregon descend on hop farms across the Willamette Valley seeking farm fresh hops for their fresh hop beers. While the beers are enjoyed at bars and tap rooms many are also showcased at a series of fresh hop festivals, including the St. Paul Fresh Hop Festival. The festival brings farmers and craft brewers together to raise funds that benefit the local community. The Oregon Brewers Festival, held at Tom McCall Waterfront Park celebrated its 33rd anniversary. Each year Oregon hop growers decorate the festival with fresh hop bines to bring a piece of the farm to the event.



We Grow Your Beer Tailgate at Oregon State University

The November 16 tailgate was held at OSU's research brewery in Weigand Hall before the OSU Beavers vs. ASU Sun Devils football game. The event included spotlights on hop, barley, and fermentation science research at the university. In the weeks leading up to the tailgate, four hop farms participated in a friendly brewing competition at the OSU brewery and attendees enjoyed the delicious brews at the event where the winners were announced.

Idaho Hop Commission

Idaho 2019-2020 Commissioners:

Brock Obendorf – Chairman
Mike Gooding – Vice Chairman
Oliver Schroeder
Nate Jackson



Hop Growers of America Board Members:

Nate Jackson; Oliver Schroeder
Alternates: Diane Gooding; Colbie Libsack
Hop Research Council
Diane Gooding
US Hop Industry Plant Protection Committee
Michelle Gooding
National Clean Plant Network – Hops
Kevin Weilmunster

Idaho Hop Growers Association

2019-2020 Officers:
Michelle Gooding, President
Oliver Schroeder, Vice President
Corey Coles, Secretary/Treasurer



Memberships:

Hop Growers of America
Board Members: Nate Jackson; Oliver Schroeder
Alternates: Diane Gooding; Colbie Libsack

Hop Research Council
Diane Gooding

US Hop Industry Plant Protection Committee
Michelle Gooding

National Clean Plant Network – Hops
Kevin Weilmunster

Sponsorships:

July 4, 2019 – 4th of July Celebration, Wilder, Idaho
September 7, 2019 – Freedom Brewfest, Caldwell, Idaho
October 4, 2019 – Yakima Fresh Hop Party

Beer Marketing and Tourism Conference, Boise, Idaho

The 3rd Annual Beer Marketing & Tourism Conference (BMTC) was held in Boise, Idaho, on March 26-29, 2019. BMTC helped provide timely information about the important and growing functions of beer marketing and beer tourism that participants could bring home to both grow and improve local offerings. As a sponsor of the event the Idaho Hop Growers Commission had a booth in the trade show and were given time on the lunch program to talk about Idaho Hops. Brock Obendorf and Oliver Schroeder gave the presentation.



Executive Director Candi Fitch attended CBC with HGA

The Executive Director was pleased to be invited to CBC to work at the booth with industry members from other areas as well as work alongside the HGA staff. This was a beneficial learning experience for Candi.

HGA/HRC Meetings in Boise, Idaho, Hop Commission hosts Dinner and Tour of Idaho Growing Region

The Idaho Hop Growers Commission was excited that the summer meetings for HGA and HRC were held in Boise. The Commission hosted the tour and the dinner that was very well attended. The tour took the participants through the hop region, and finished the evening with dinner at Hopland, in Wilder, Idaho.



New U of I Entomologist Tours Idaho Hop Region

Justin Clements, Entomologist for the University of Idaho, will be starting his position in Idaho in January 2020. In September, Justin visited Idaho and spent some time learning about hops. Candi Fitch, Executive Director, and Ann Jacops, Assistant Director took Justin to visit with Idaho Hop companies, and to see all aspects of hop harvest. We are looking forward to Justin moving to Idaho.



Leadership Idaho Agriculture, Congressional Aide Fact-Finding Tour

Leadership Idaho Agriculture hosted the LIA Congressional Aides Fact Finding Tour from August 12 to 15, 2019. The tour was held in the Treasure Valley and was designed to bring Congressional Aides from Washington, DC, to Idaho for them to experience and learn about issues facing Idaho agriculture. The Idaho Hop Growers Commission was a sponsor for the tour, and two of the tour stops included hops. Michelle Gooding of Gooding Farms showed the group around a hop field, and she spoke to the tour about growing hops. The group visited one of Obendorf's pickers, and Brock Obendorf covered the harvesting process.



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