HGA Annual Meeting
Portland, OR
January 24, 2019

2019

CBC
April 9-11

June Brewing School Seminars
June 25 & 27

Doemens

IHGC
July 29-Aug 2

USAEDC
July 9-11

Brasil Brau
May 28-30

Global Hop Summit
Nov 18

USAEDC
Nov 19-21

BrauBeviale
Nov 12-14

BrauBeviale
Sept 4-6

Annual Meeting
Jan 24
2019 Market Prioritization

Australia vs. Brazil

2019

June Brewing School Seminars
June 25 & 27

Doemens
Technische Universität Berlin

IHGC
July 29-Aug 2

USAEDC
July 9-11

Brazil Brau
May 28-30

Annual Meeting
Jan 24

November Brewing School Seminars
Nov 6-7

Global Hop Summit
Nov 18

USAEDC
Nov 19-21

BrauBeviale
BrauBeviale & IPA Contest
Nov 12-14

BrewCon
Sept 4-6
2019 Trade Shows

CBC

Brasil Brau

BrewCon

BrauBeviale

Connected with:

3,350+ brewing industry professionals

Served 31 different beers
Brasil Brau
brasil_brau A Brasil Brau é sucesso de público graças a estrelas cervejeiras e a possibilidade de visitar o stand e saborear as cervejas disponíveis. Esse evento reúne os melhores representantes do mundo da cerveja e é um marco para o mercado cervejeiro.

@usaHops #americanhops

SAO PAULO EXPO

@BRASIL_BRAU
Fourth Annual IPA Contest

2109 Style: Hazy IPA

Braukollektiv
Bruce IPA 🇩🇪 1

Brauerei Lemke
Hazy IPA 🇩🇪 2

BRLO
In Hops we Trust 🇩🇪 3

10 Participants
5 countries

CHEERS TO HOPPY BEERS!

Full-Page Ad from BIER & BRAUHAUS
Brewing School Seminars

Doemens & TU Berlin
June 25 & 27
Tim Kostelecky

Heriot Watt & Weihenstephan
Nov 6-7
Matthew Brynildson

4 Schools | 142 Students | 109 surveys

Post Seminar Evaluation Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Interacting with HGA at the event or trade show increased my knowledge of American hop varieties</td>
<td>94%</td>
</tr>
<tr>
<td>Participating in this event was a good use of my time</td>
<td>93%</td>
</tr>
<tr>
<td>I would recommend attending this event or something similar to my colleagues</td>
<td>94%</td>
</tr>
</tbody>
</table>

Identified areas of less familiarity:

Contracting
Storage Best Practices
Coming Soon - 2020

CBC Expo – San Antonio
4 European Brewing School Seminars
2 Brazilian Seminars
Brau Beviale
European IPA Contest
USAEDC

• Previous:
  – Numerous Embassy Events
  – Poland Beer Festival (2018)
  – Prague Industry Seminar (2018)
  – Continued Increases in grant funding

• Possible 2020:
  – Poland Beer Festival
  – Brazilian IPA Contest Partnership with USDA-FAS
  – Reverse Trade Mission

TEC Budget Increases

2020 Funding: $398,002
2019 Funding: $384,344
        +$13,658 – 1 year
2020 Funding: $398,002
2019 Funding: $384,344
2018 Funding: $369,840
2017 Funding: $331,816
2016 Funding: $350,592
2015 Funding: $322,074
        +$75,928 – 6 years
2019 Statistical Packet

Highlights:

- PNW Acreage Harvested increased 2.74%
- Non PNW Acreage is becoming more difficult to collect, but general trend is slight decrease (est. 1.93%)
- Overall US acreage increase of 2.54%

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</thead>
<tbody>
<tr>
<td>1</td>
<td>Cascade (6,619)</td>
<td>Cascade (6,790)</td>
<td>Cascade (7,581)</td>
<td>Cascade (7,175)</td>
<td>Citra®, HBC 394 (6,652)</td>
<td>Citra®, HBC 394 (9,035)</td>
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<tr>
<td>2</td>
<td>CTZ (5,775)</td>
<td>CTZ (5,323)</td>
<td>Centennial (5,082)</td>
<td>Centennial (5,534)</td>
<td>CTZ (6,102)</td>
<td>CTZ (6,539)</td>
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<tr>
<td>6</td>
<td>Citra®, HBC 394 (1,761)</td>
<td>Mosaic®, HBC 369 (1,800)</td>
<td>Mosaic®, HBC 369 (2,525)</td>
<td>Mosaic®, HBC 369 (2,773)</td>
<td>Chinoook (2,839)</td>
<td>Centennial (3,680)</td>
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<tr>
<td>7</td>
<td>Chinoook (1,641)</td>
<td>Chinoook (1,787)</td>
<td>Chinoook (1,940)</td>
<td>Chinoook (2,429)</td>
<td>Mosaic®, HBC 369 (2,768)</td>
<td>Amarillo®, VGXP01 (2,369)</td>
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<tr>
<td>8</td>
<td>Nugget (1,628)</td>
<td>Summit (1,620)</td>
<td>Summit (1,769)</td>
<td>Willamette (1,657)</td>
<td>Amarillo®, VGXP01 (2,734)</td>
<td>Chinoook (2,368)</td>
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<tr>
<td>9</td>
<td>Willamette (1,159)</td>
<td>Willamette (1,359)</td>
<td>Willamette (1,561)</td>
<td>Summit (1,616)</td>
<td>Palhto®, HBC 682 (1,659)</td>
<td>Palhto®, HBC 682 (2,150)</td>
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<tr>
<td>10</td>
<td>Apollo™ (985)</td>
<td>Apollo™ (994)</td>
<td>Apollo™ (970)</td>
<td>Apollo™ (912)</td>
<td>Summit (1,574)</td>
<td>Summit (1,072)</td>
</tr>
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US Hop Acreage 1992-2019

US Hop Production 2019

• PNW new record: 112,041,200 pounds, increase of 4.8%
• Non-PNW difficult to estimate. Decreased due to reported acreage reduction and weather-related yield reductions
• Total estimate: 113 million pounds, +4.28%
IHGC Updates

2020 meetings include:

- Excursion to Argentina in late February / early March
- Summer Executive Committee meeting in Freising – August 7
- Fall Executive Committee meeting in Nuremberg – November 9
Best Practices Committee

- Program launched 2016 with Specialty Crop Block Grant ($131,253)
- Oversight by grant advisory committee
- Transitioned to Standing Committee in 2018, with formal membership appointed by identified stakeholder sectors
Output

- GLOBALG.A.P. Hop Sub-Scope
- 2 self-assessment modules: Food Safety and Risk Assessment
- 2 educational modules: Water Quality Testing, Soil Fertility
- 2 IPM educational modules in development: Scouting and Resistance Management
Output

- Creation of Good Bines platform in HGA website member area
- Creation of Best Practices Directory on HGA website (BA Grant)
- Compilation of “Other Resources” on Good Bines platform (Member Area)

Next steps

- Creation of Case Studies (ABI grant)
- Identification of additional educational resources
- Grower education and increase in Good Bines platform / Best Practices Directory usage
## US Hop Industry Plant Protection Committee

2020 priorities include:
- European Union MRL policies – hazard-based assessment, cut-off criteria
- Korea MRL establishment (Specialty Crop Block Grant)
- Codex
- Other markets: Japan, Canada, Taiwan, Australia, China, etc.
Other projects

- Completed studies for clofentezine (Apollo) miticide in 2019 (4-year TASC grant, $440,000)
- Work underway to prepare dossier for submission to Codex for support of MRLs in Codex and EU
- US registration review underway

Korea project

- Supported by Specialty Crop Block Grant ($213,325)
- Seeking harmonized MRLs for over 30 compounds
- Includes developing the dossier for 10-12 compounds not supported by registrants
2021 & 2022 Hop Growers of America Annual Convention Updates

2021 - Santa Rosa, California

- Hyatt Regency, Sonoma
  - January 17-23, 2021
2021 - Santa Rosa, California

• Dinner at Russian River Brewing Company

2021 - Santa Rosa, California

• Hosted by Idaho Hop Growers Association
  – Idaho is very excited to host the 2021 Convention, and be back in the rotation!
  – A lot of exciting things to come your way!
  – Watch for the registration and reservation information to be released Summer 2020!
2022 Convention
January 19-21
TAMPA FLORIDA