

Brewers Association 2020 Hop & Brewing Industry Update



“Yesterday’s home runs don’t
win today’s games”

– Babe Ruth



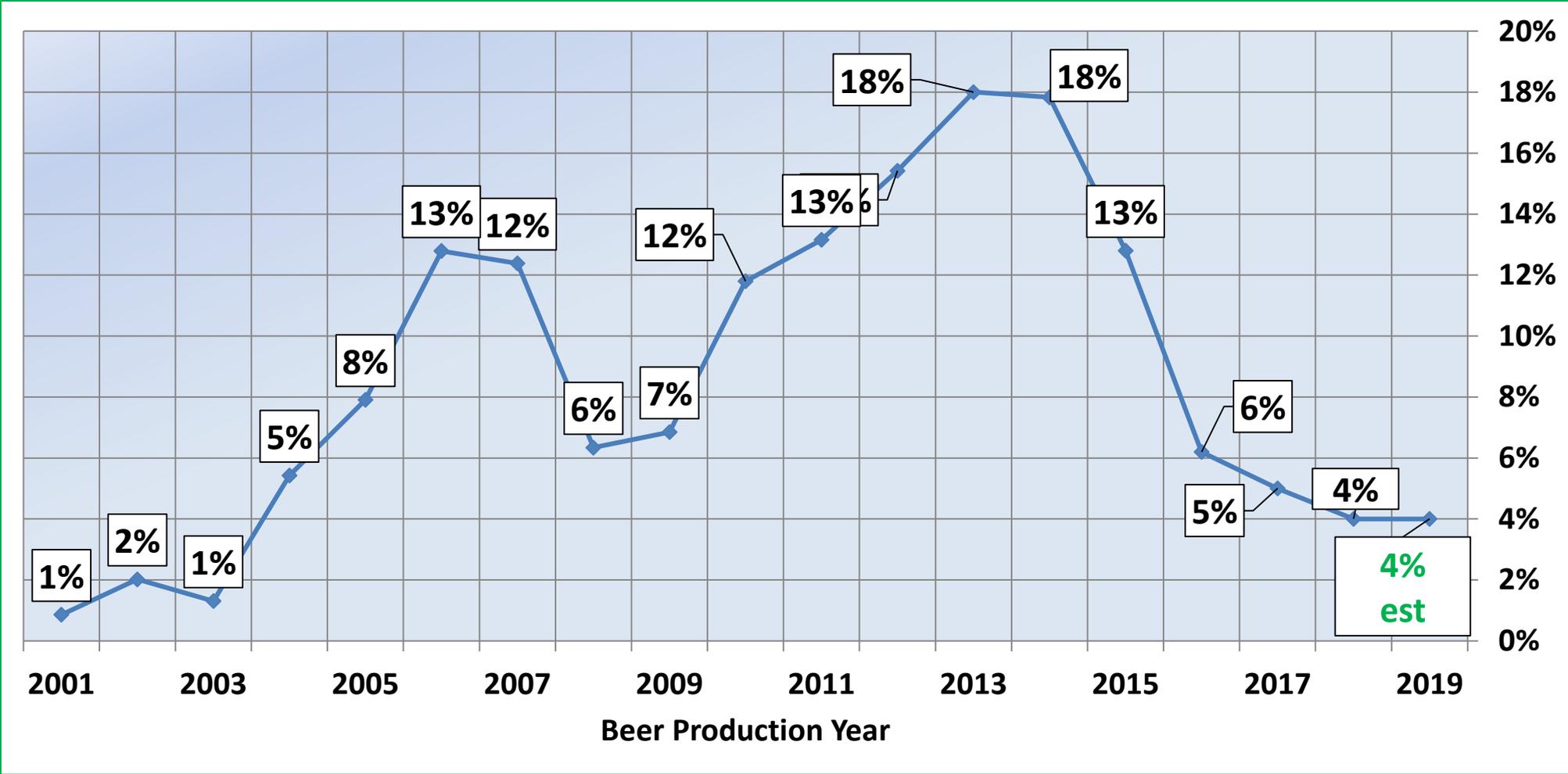
Objectives

- **Brewing & Hop Industry Updates**
- **Annual BA Hop Survey Results**
- **USDA-NASS Hop Stocks Report Analysis**
- **Federal & International Ag Affairs Update**
- **BA Grants & Research Support**
- **Public Hop Research Sensory Update**

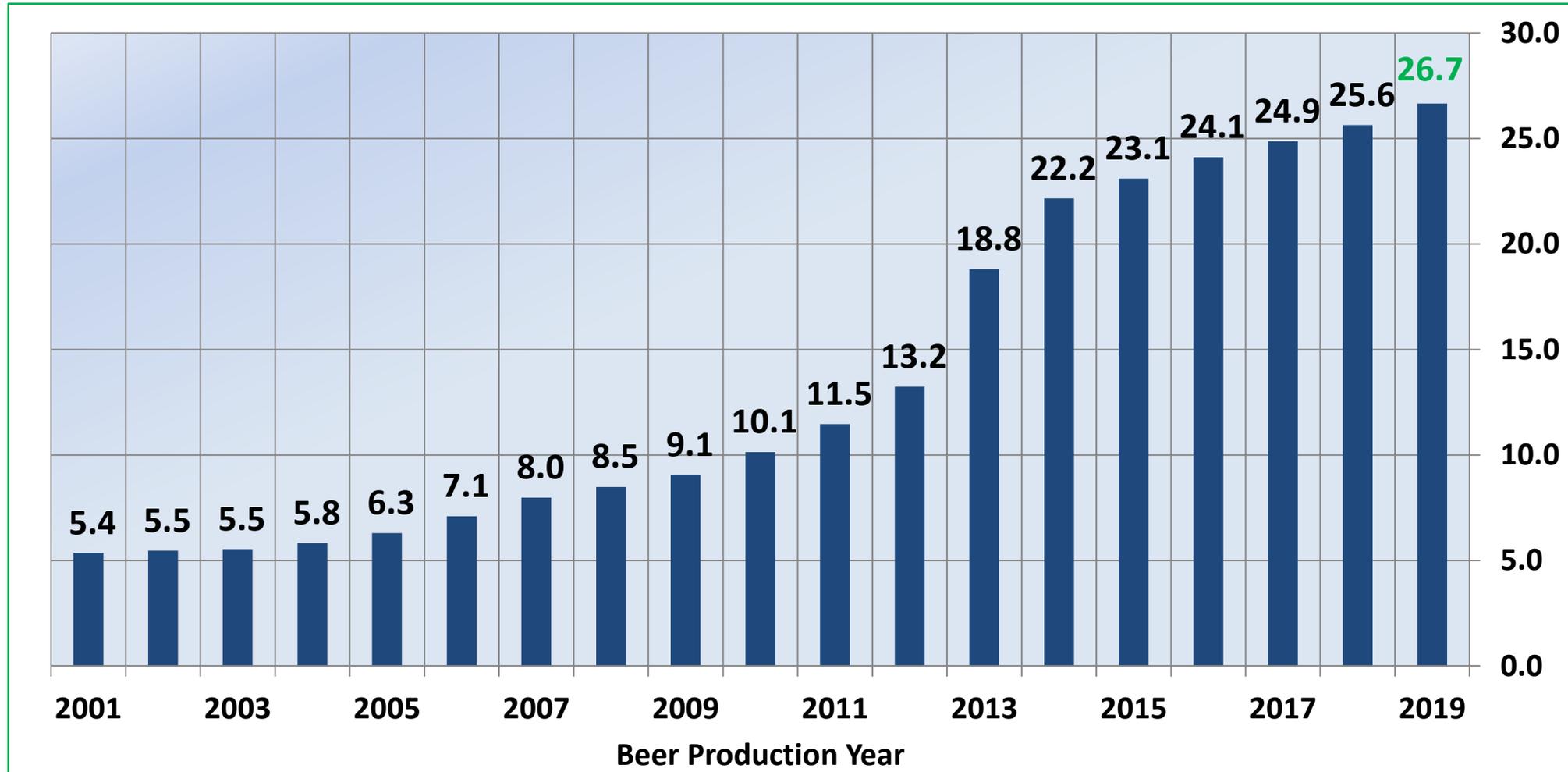
2019 Brewing Industry Update

- Total U.S. beer sales down **~1.5%** (through Nov)
- Total number of U.S. breweries tops **8,000** for first time ever (~7,000 one year ago)

US Craft Beer Volume % Change YOY



US Craft Beer Production Volume (MM US BBL)



2019 Hop Industry Update

- Ttl U.S. acres increased from 57,468 to **58,930 (+2.5%)**, an all-time high
 - PACNW acres increased by **1,500 (2.7%)**
 - Non-PACNW acres decreased by **47** from 2433 to **2386 (-1.9%)**
- Aroma Acreage proportion remained increased slightly in 2019
- Ttl U.S. production **+4.3%** to 113.0 MM pounds
- Non-PACNW production **-33% (-45% vs CY17) to ~1 MM pounds**
- PACNW yield increased from 1943 to 1981 pounds per acre (**2%**)
- Citra acreage (8,690) increased **36%**

Data courtesy USDA-NASS ©2019 and USAHops ©2020

2019 Brewers Association Hop Survey

- Annual Survey in July & August
- 12 Years of Data collected 2008 - 2019
- Look back to beer production years 2007 – 2018
 - 2019 Survey = 2018 Beer Production ≈ 2017 Crop Yr
- **Based on craft volume as defined**
- A SURVEY, so the results shown are NOT totals: “Actual Mileage May Vary”

Hop Survey Sponsorship

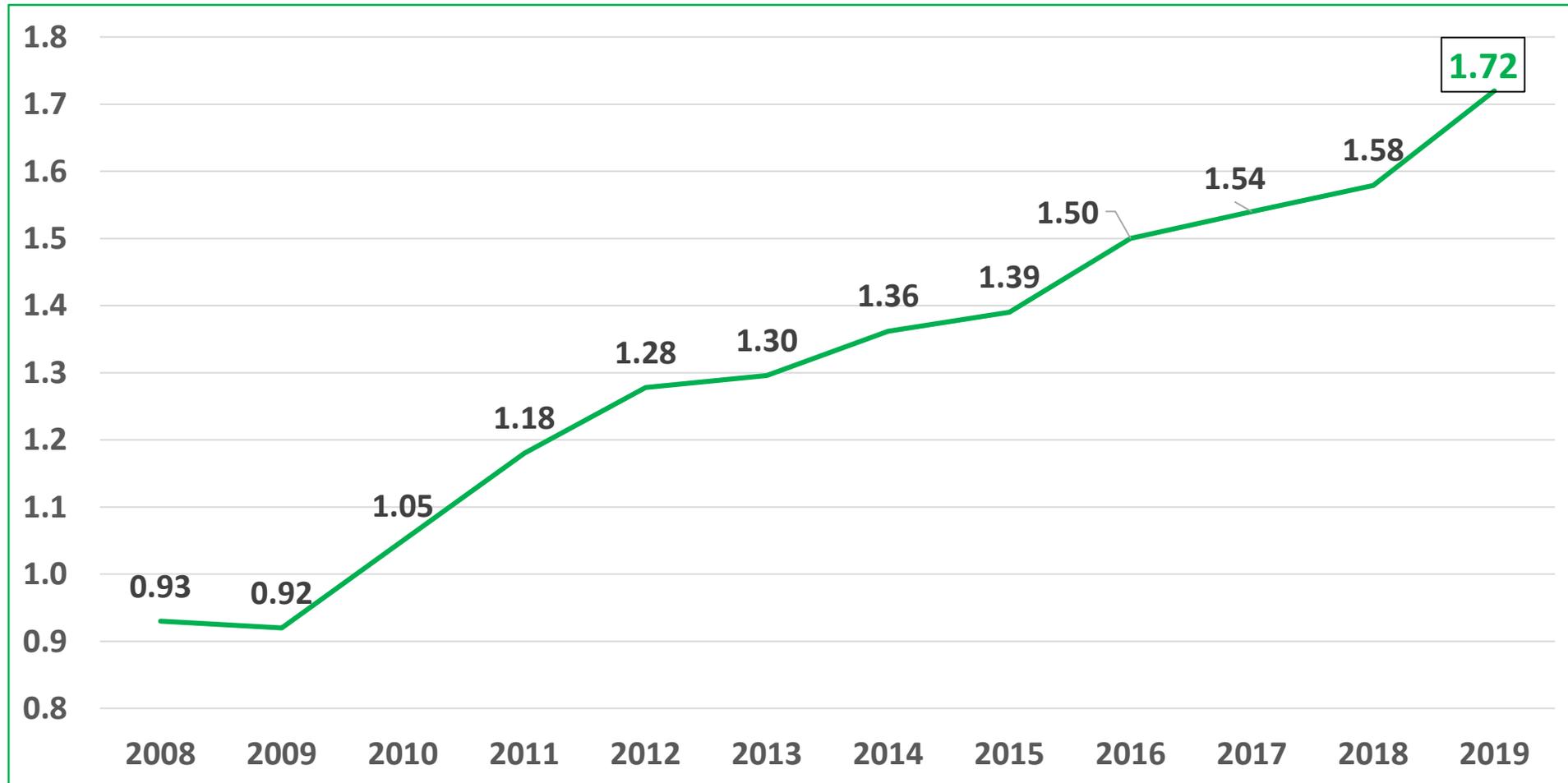


Cascade: Underplanted?

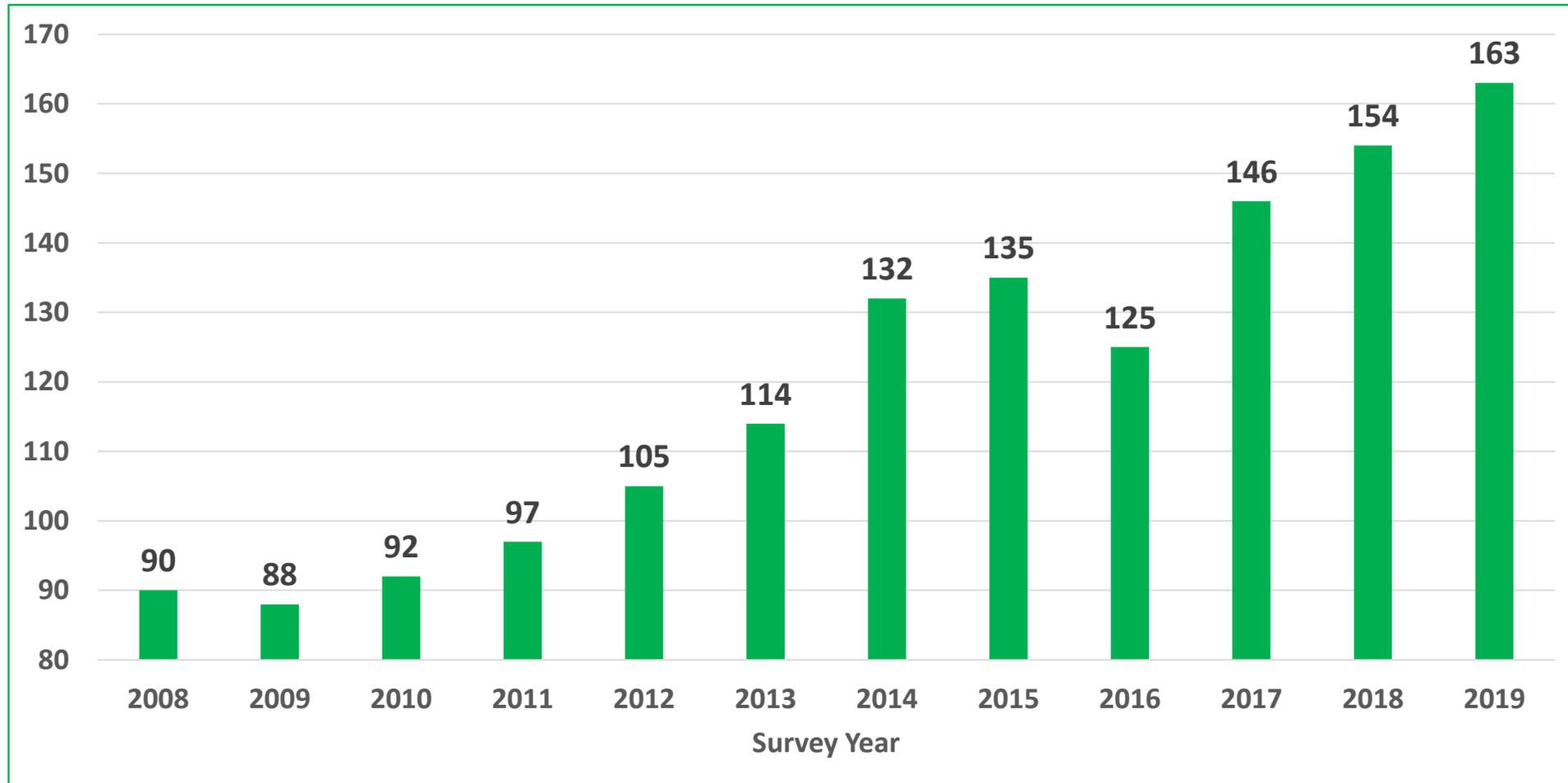
2019 Hop Survey Results Summary

- Hop Usage Rate: **+2.5%** to **1.72 PPB**
- Variety Usage increased to an all-time high of **163** varieties
- U.S. craft brewers remain loyal to U.S. varieties at **87%** of total pounds
- Shortfalls measured In 2018 in different varieties from 2017
- Galaxy repeats as highest Impact imported variety
- Hop Cost Per Barrel Continues to Increase Sharply
- Proportion of US 2017 crop consumed by craft decreased
- Contracting rates increased sharply after three years of declines

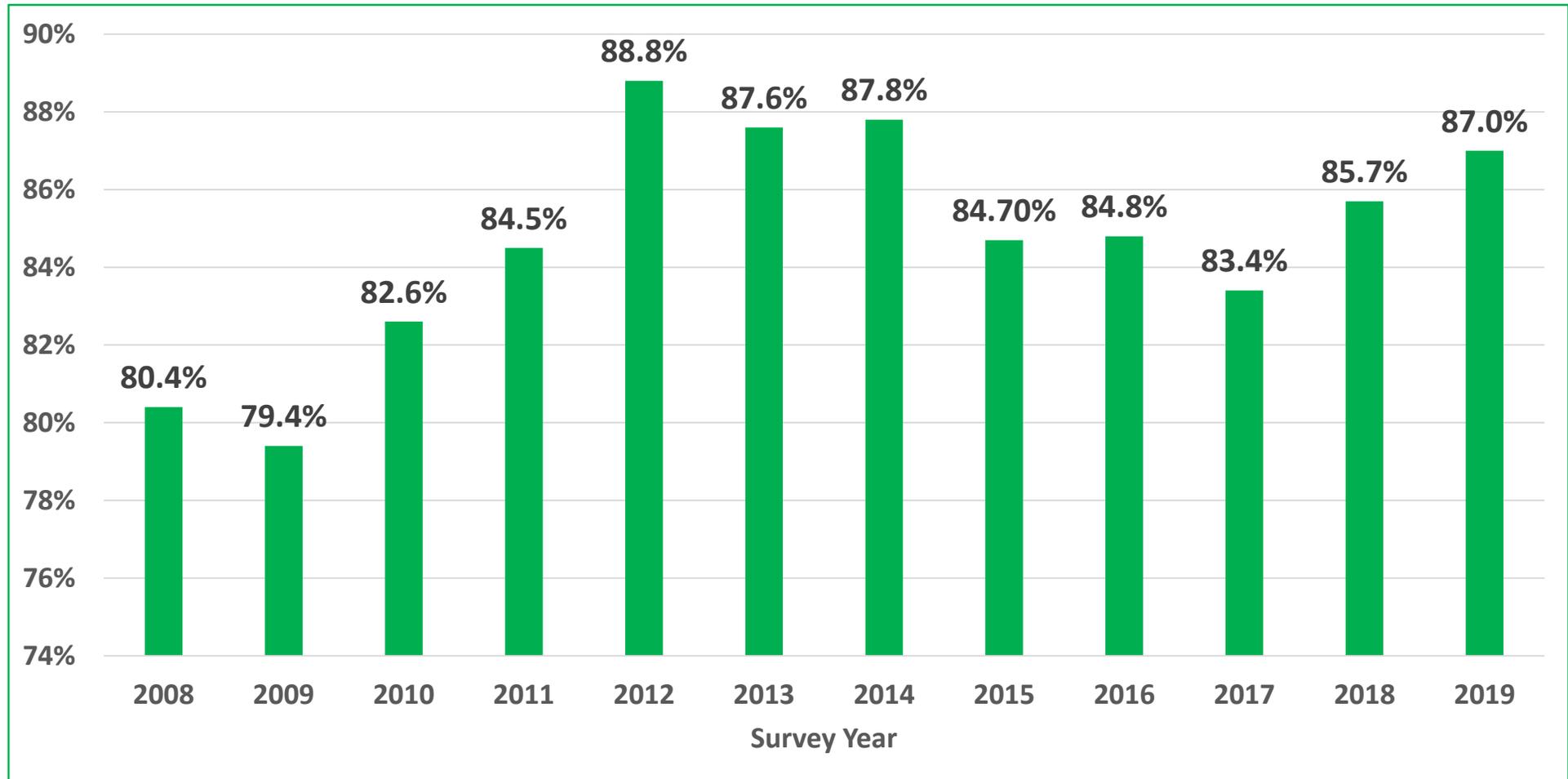
Average Hopping Rate (Pounds per Barrel)



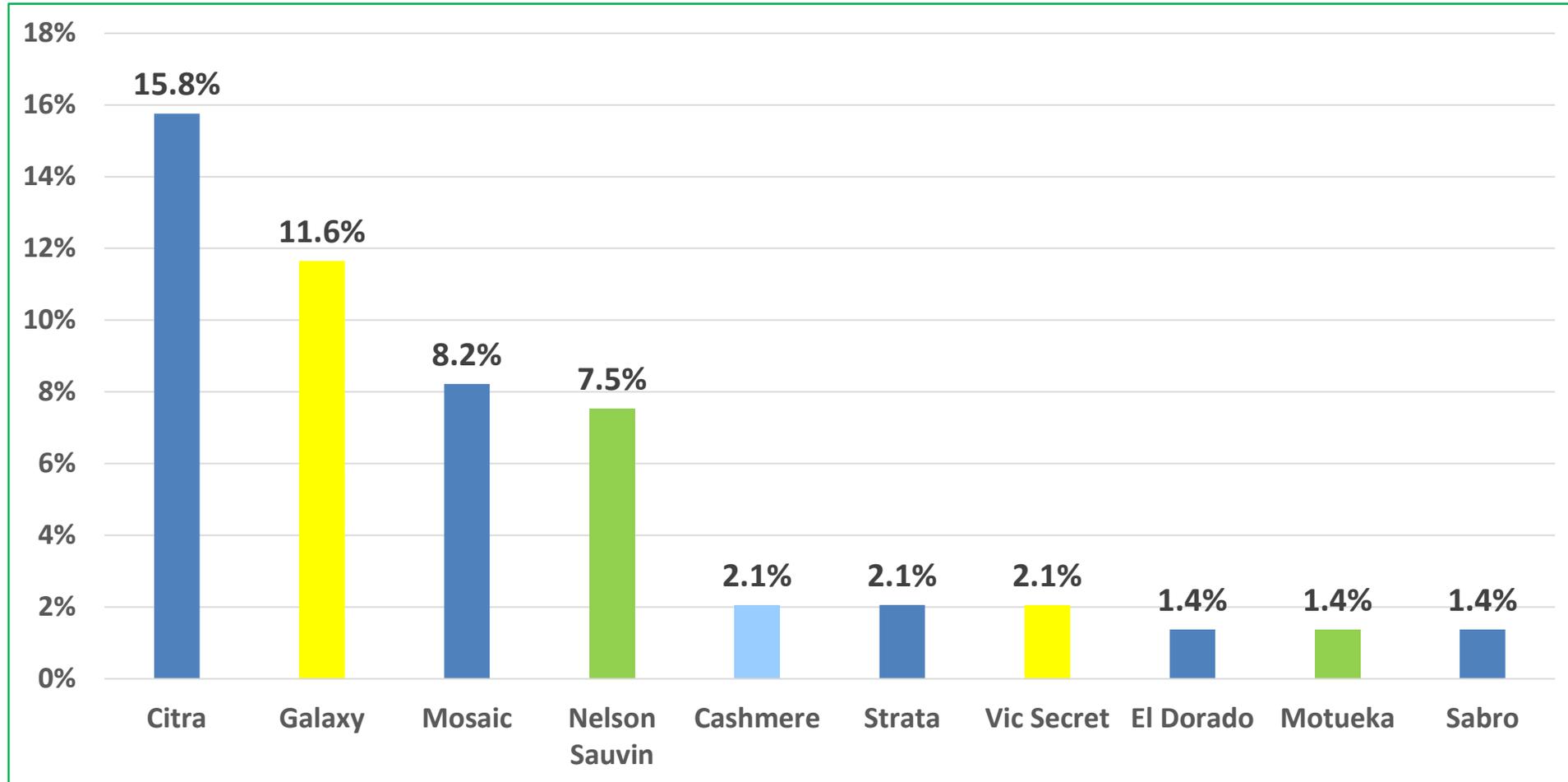
Total Number of Varieties Used



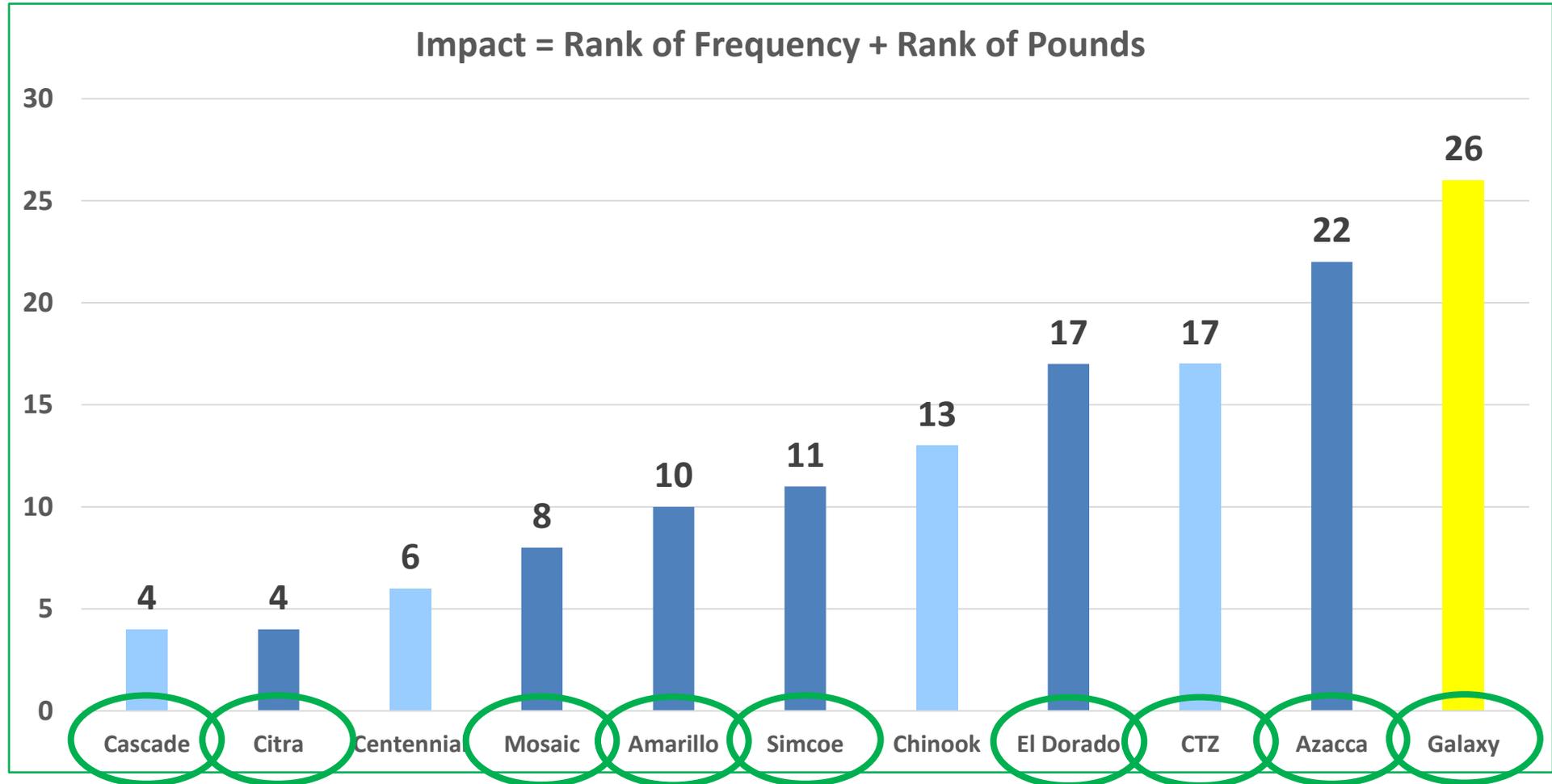
Percentage U.S Grown Hops Used



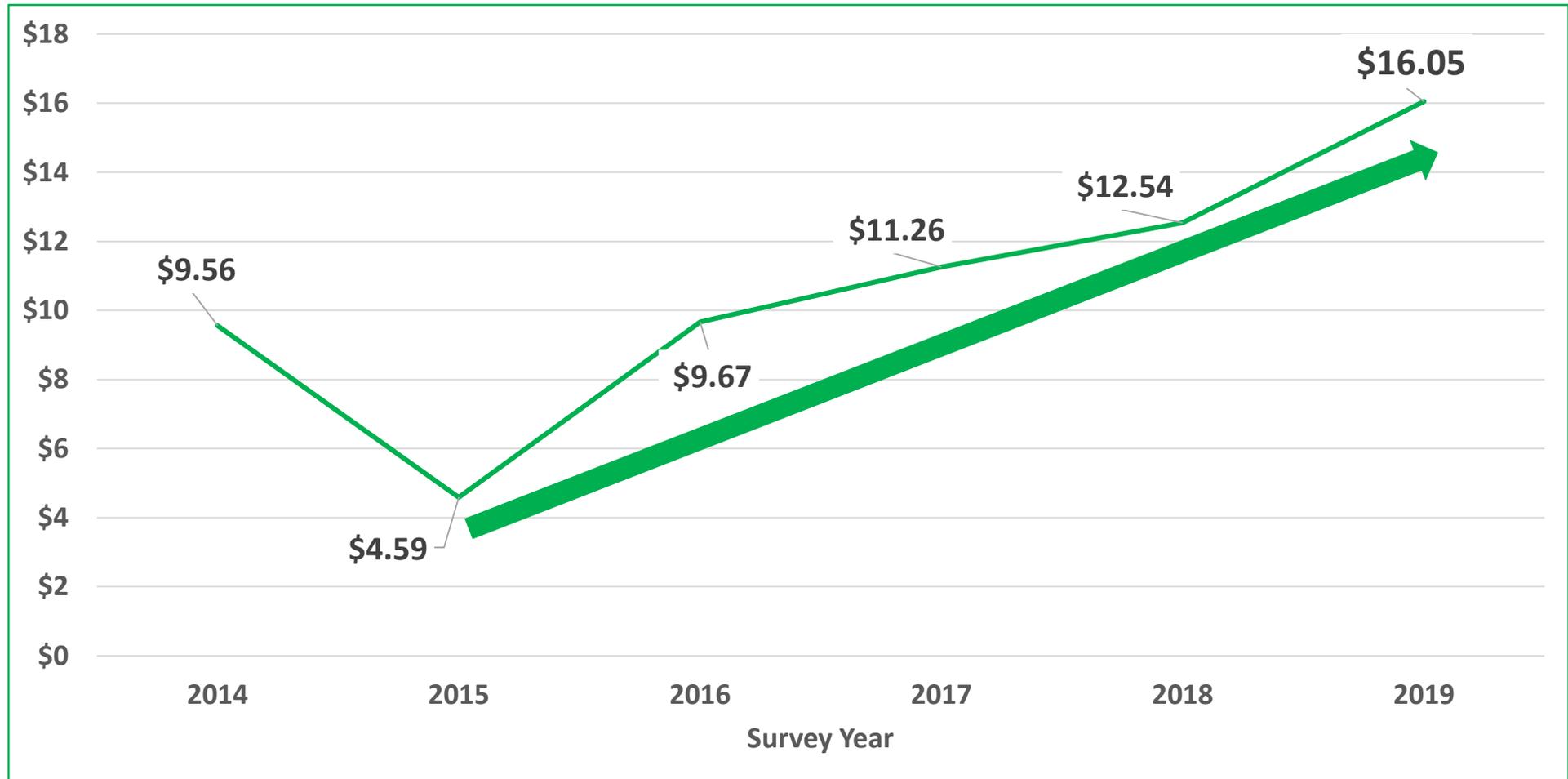
Variety Shortfall



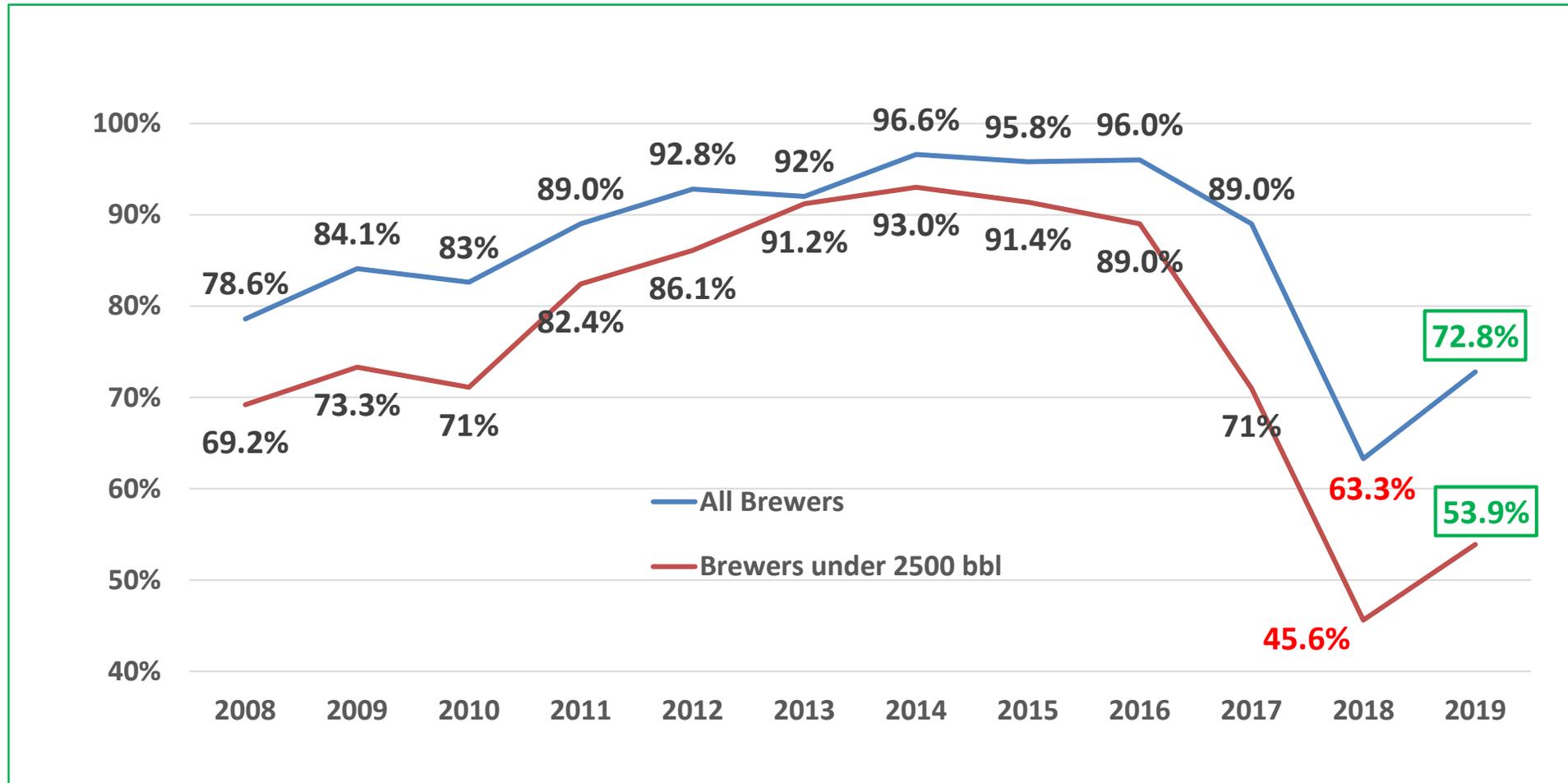
Variety Impact & Thiol Flavor Domination



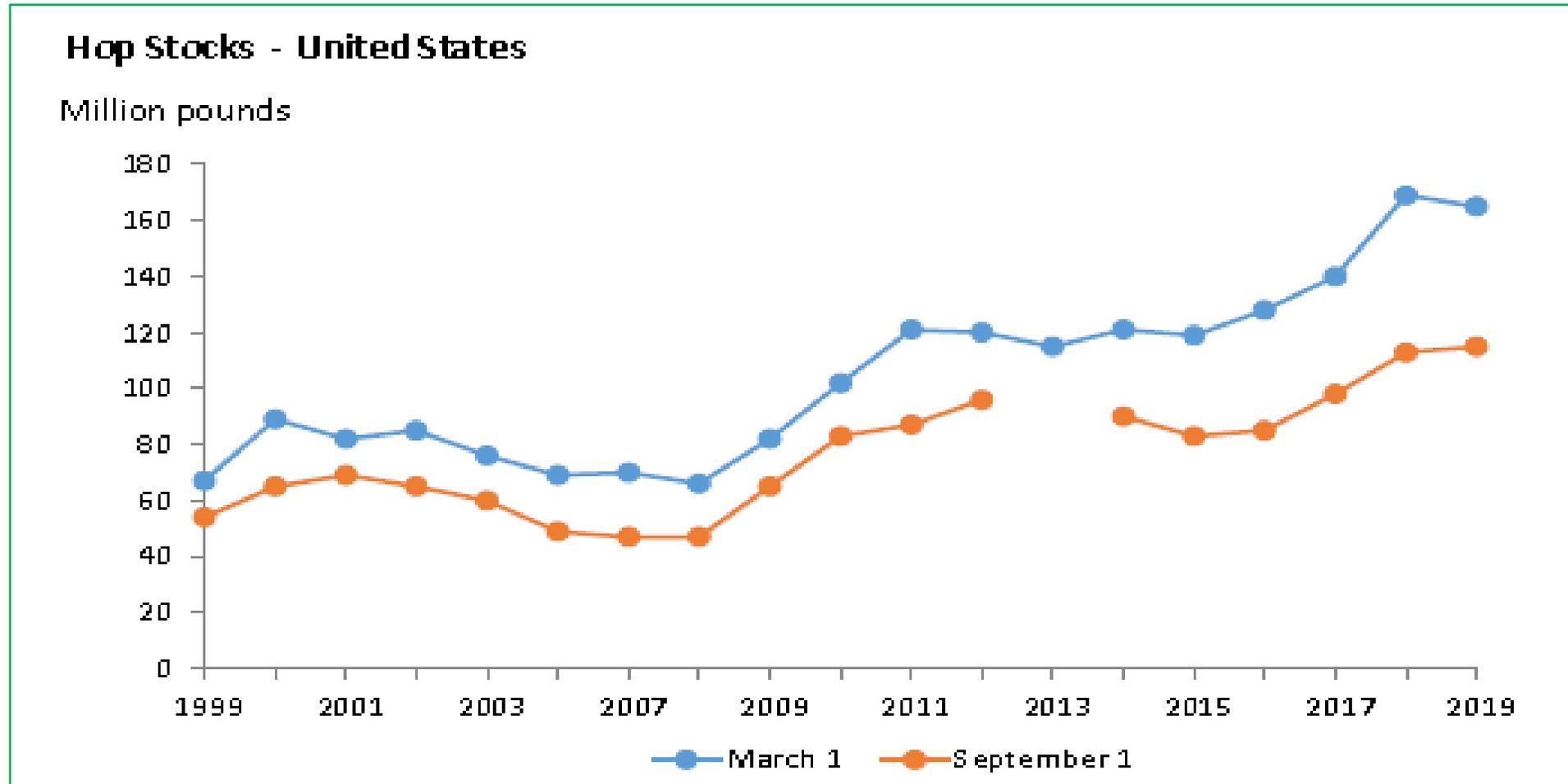
Aggregate Hop Cost per Aggregate Barrels Across All Respondents



Craft Brewer Contracting

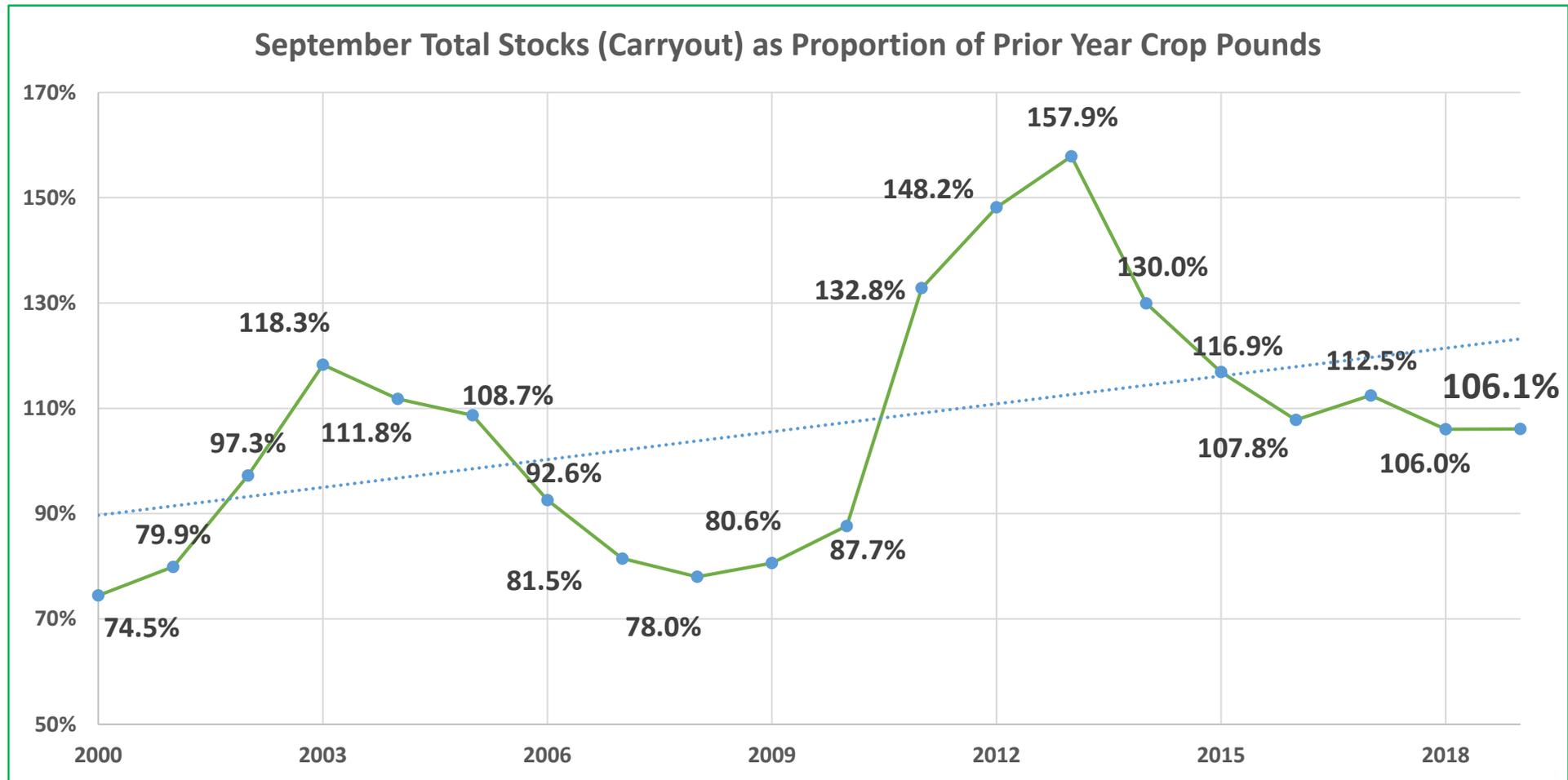


2019 Hop Stocks Analysis



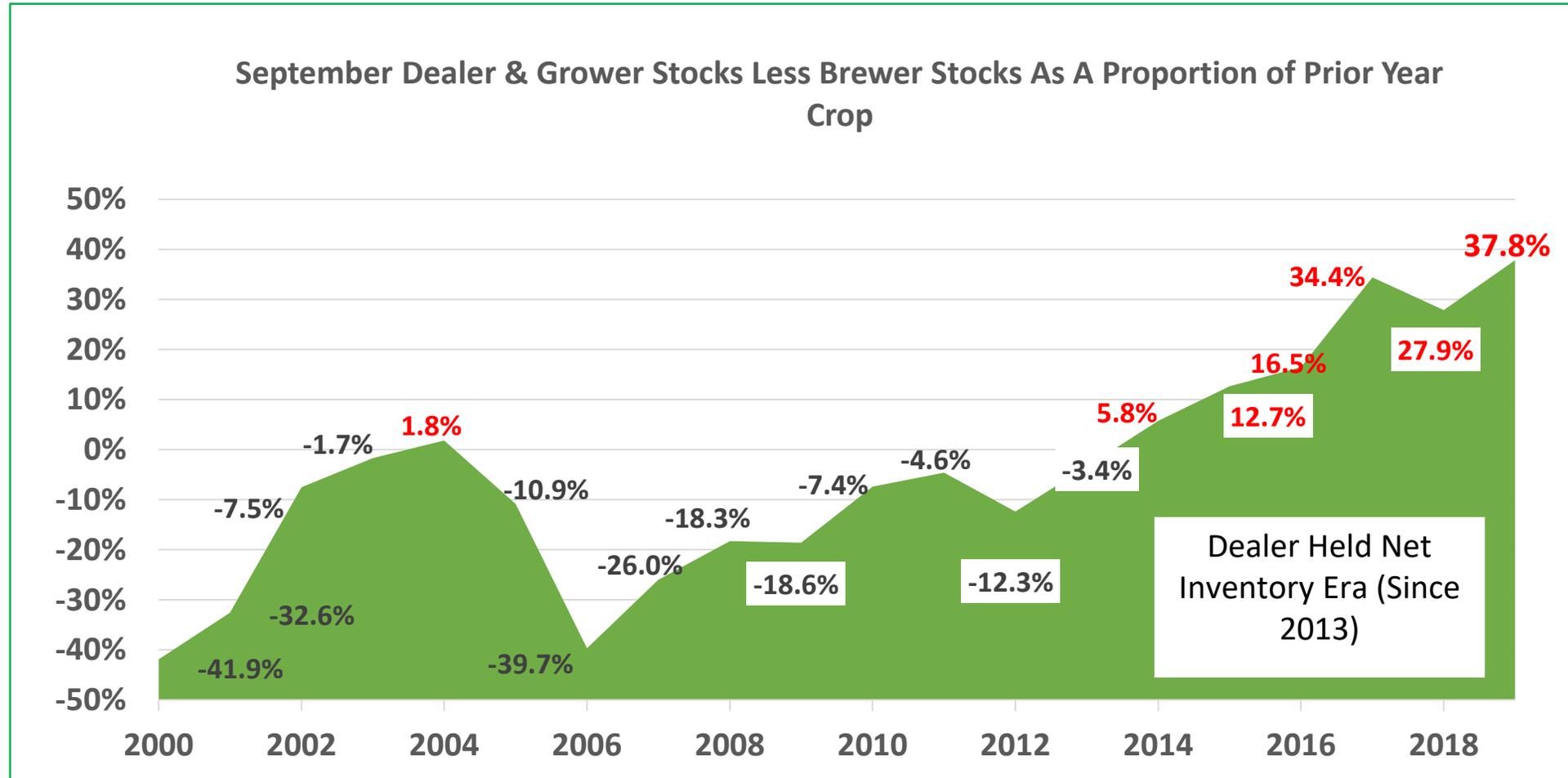
Source: USDA-NASS 2018 Hop Stocks Report

2019 Hop Stocks Analysis



Data Source: USDA-NASS 2019 Hop Stocks Report

2019 Hop Stocks Analysis



Data Source: USDA-NASS 2019 Hop Stocks Report

Federal Affairs Outreach 2019



International Ag Policy



Kindly hosted by
Representation of the
Free State of Bavaria
to the European Union

Global Hop Summit

<https://www.deutscher-hopfen.de/de/Presse/Global-Hop-Summit>

Principles of Integrated Crop Protection

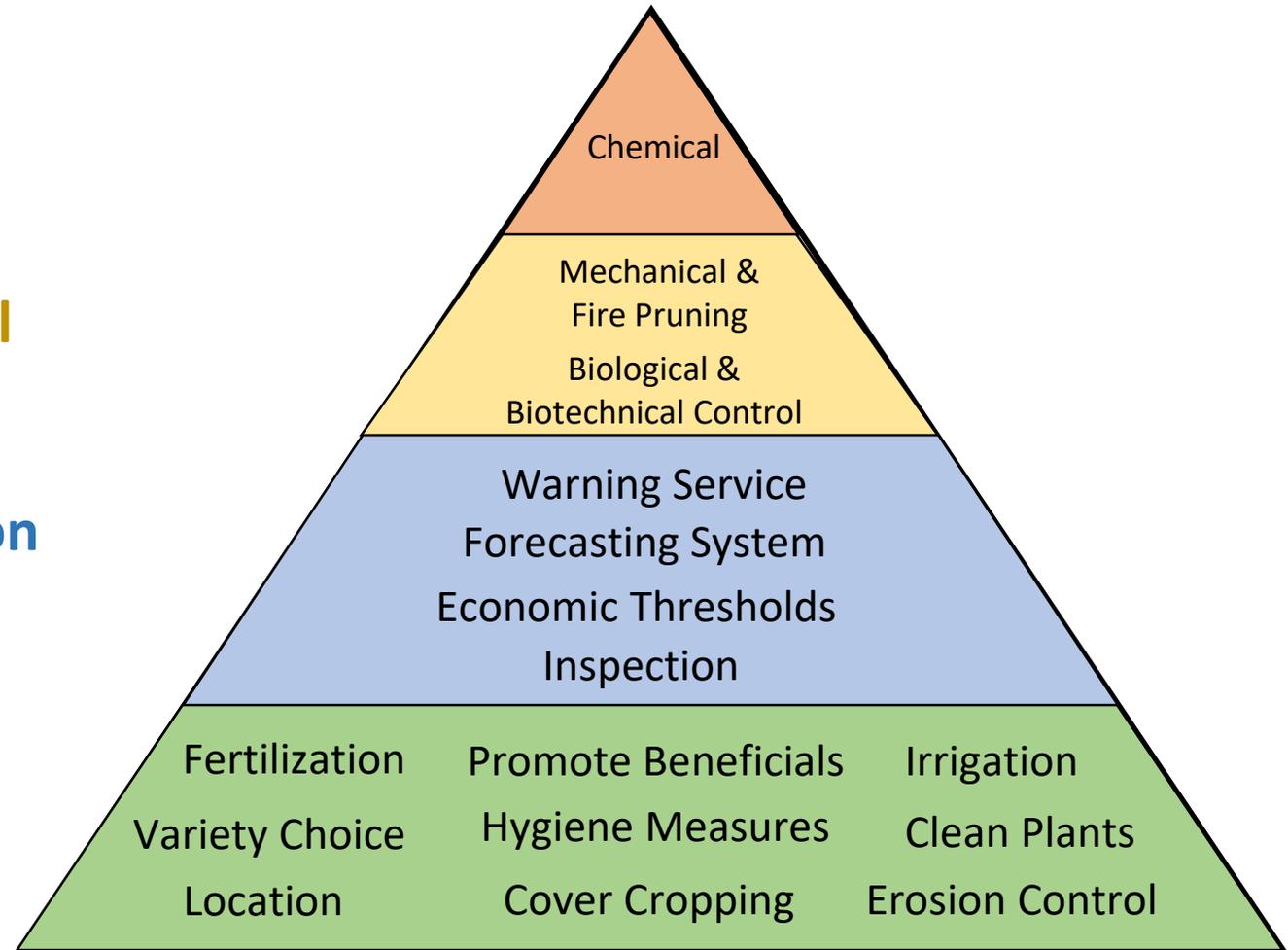


Chemical Control

No Chemical Control

Pest Control, Decision Support

Preventive Action



Grants and Research Funding Update

Years	2015 - 2019
Competitive Research Grants	\$879,589
HGA Sponsorships and Projects	\$26,500
HRC Dues & Growout Funds	\$229,594
USDA Breeding Program	\$687,357
Total Hop Industry Support	\$1,823,040

Best Practices Directory

Best Practices Directory

Filter by 3rd Party:

Filter by Good Bines:

Select a State ▼

CRAZY HORSE HOPS

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Public Hop Program Research



Renee Eriksen:

Genetics of

- Drought Tolerance
- Heat Stress



Dan Groenendale

Angela Randazzo

Public Breeding Sensory Update

DraughtLab

BA
BREWERS
ASSOCIATION

Hop Breeding
Sensory Assessment

JOIN

The banner features a red background with a white molecular structure pattern. It includes the DraughtLab logo in the top left, the Brewers Association logo in the center, the event title in white text, and a white 'JOIN' button at the bottom.





CHEERS!