

# USDA NASS Hop Survey Program

## HGA Annual Meeting Portland 2020



**United States Department of Agriculture  
National Agricultural Statistics Service  
Mark Cerise USDA/NASS Northwest RFO**



**January 24, 2020**



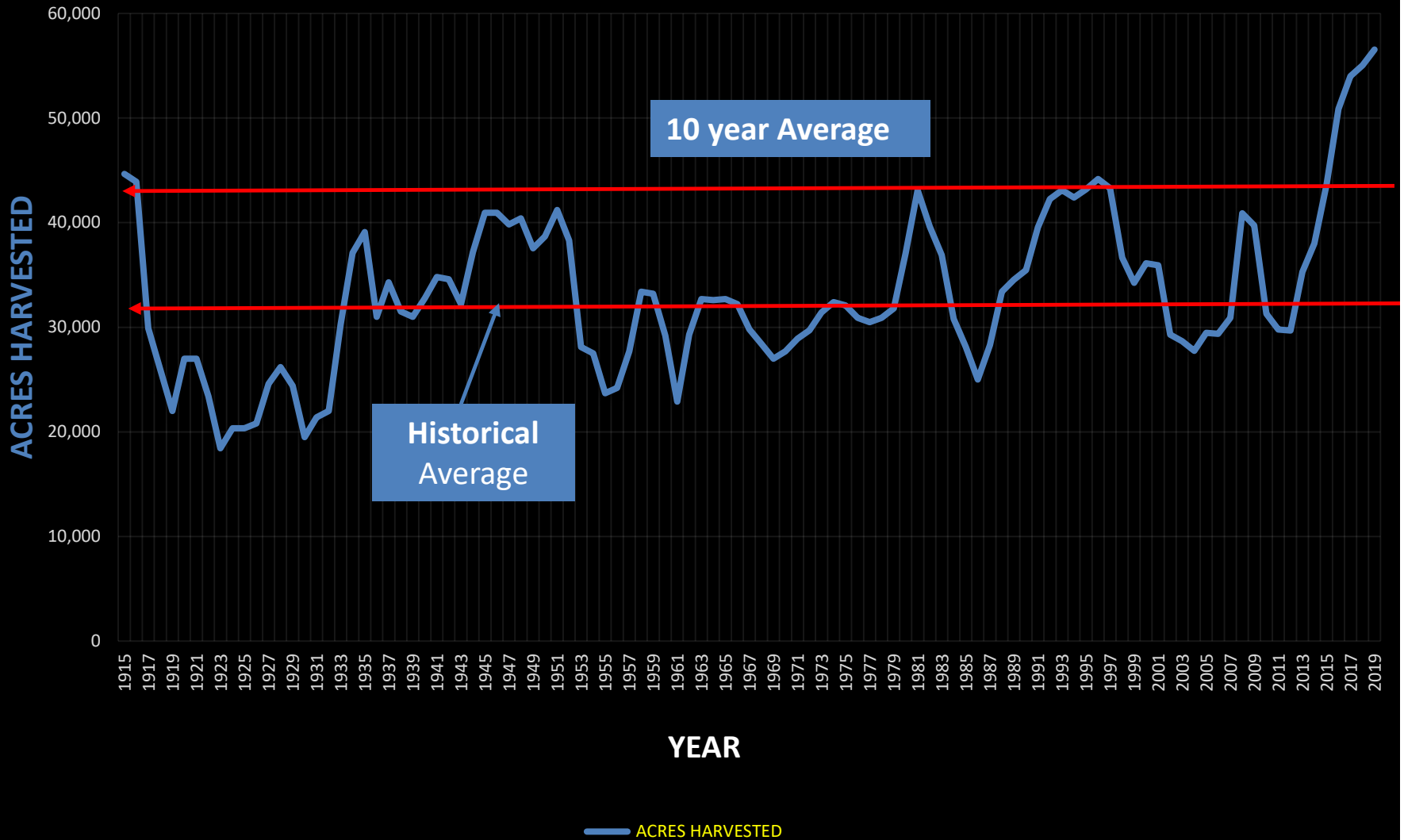
# NASS Hop Survey Info

- Execute Five Surveys Annually and a Complete Census every 5 years
- All five annual surveys involve hop growers In ID, OR and WA
- Three surveys are focused on acreage and production
  - June Grower Inquiry – Hops acreage strung for harvest
  - August Production Forecast
  - November Production and Acreage – Actual Harvested Data
    - Estimate a State and National value of production
    - Release: *National Hop Report*; December 18, 2020
- Two surveys are focused on Hop stocks → Hop Growers **PLUS** Hop dealers, Large Brewers, and 50 largest Regional Craft Brewers
  - March Hop Stocks – Estimate Stocks for brewer and dealer/grower categories
    - Focus: Initial flow of 2019 crop into supply chain
  - September Hop Stocks – Same estimate but focus shifts to disappearance of stocks

# Some NASS Hop Survey Attributes

- The June and November acreage and production surveys have the highest response rates in NASS
  - The acreage and production numbers typically have complete returns for over 98% of the acreage strung for harvest
  - Large amount of time spent on data collection
  - Over 30% of data collected via “Web”
- The two Hop stock surveys also enjoy good response rates for the dealers/growers and Brewers
  - We enjoy reliable response from the largest dealers and brewers
  - Continually working to improve the brewer sample
  - Survey the length of the supply chain

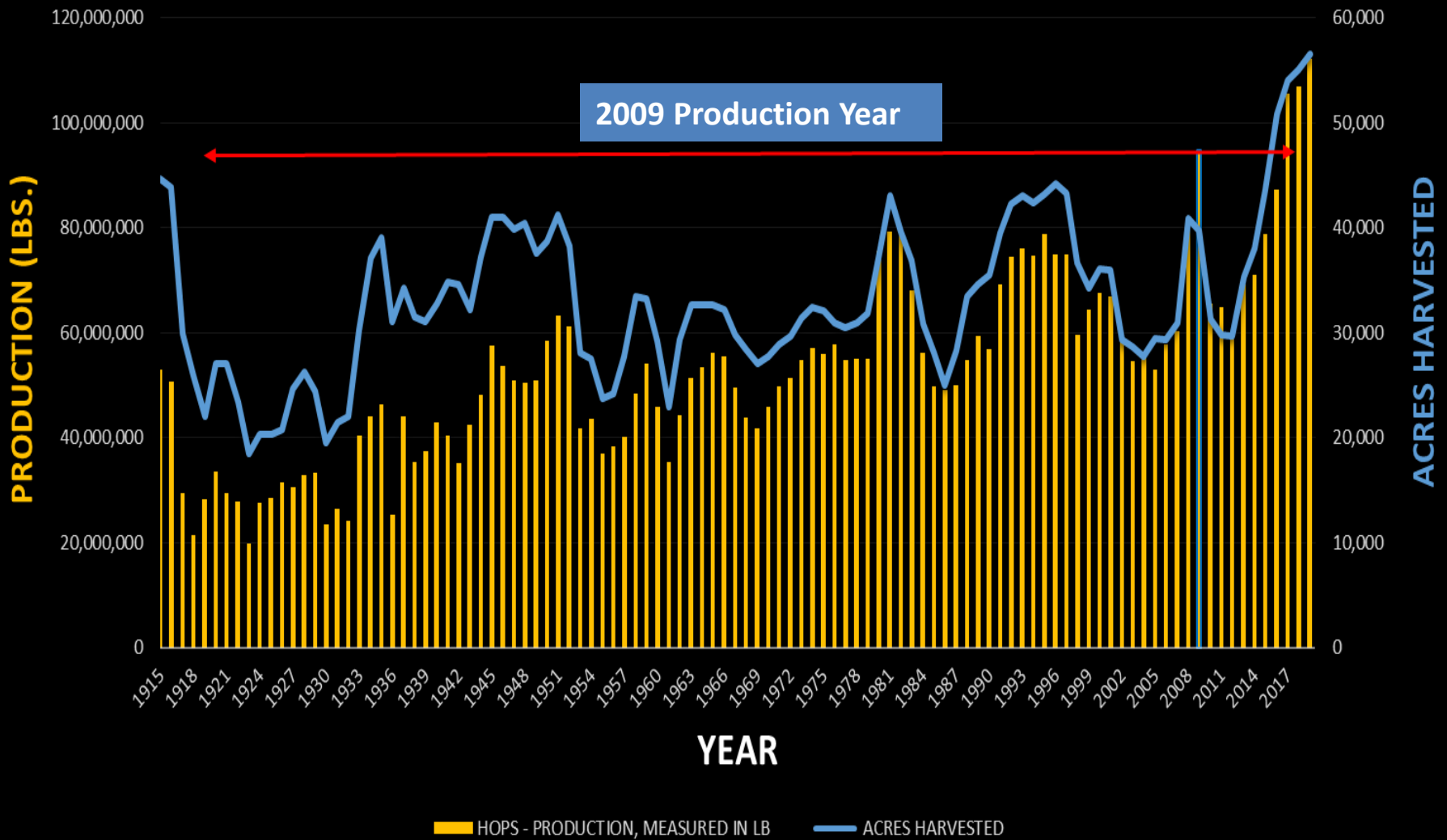
# U.S. HOP ACRES HARVESTED HISTORY



**Sitting at Record Level USA Hops Harvested Acreages**



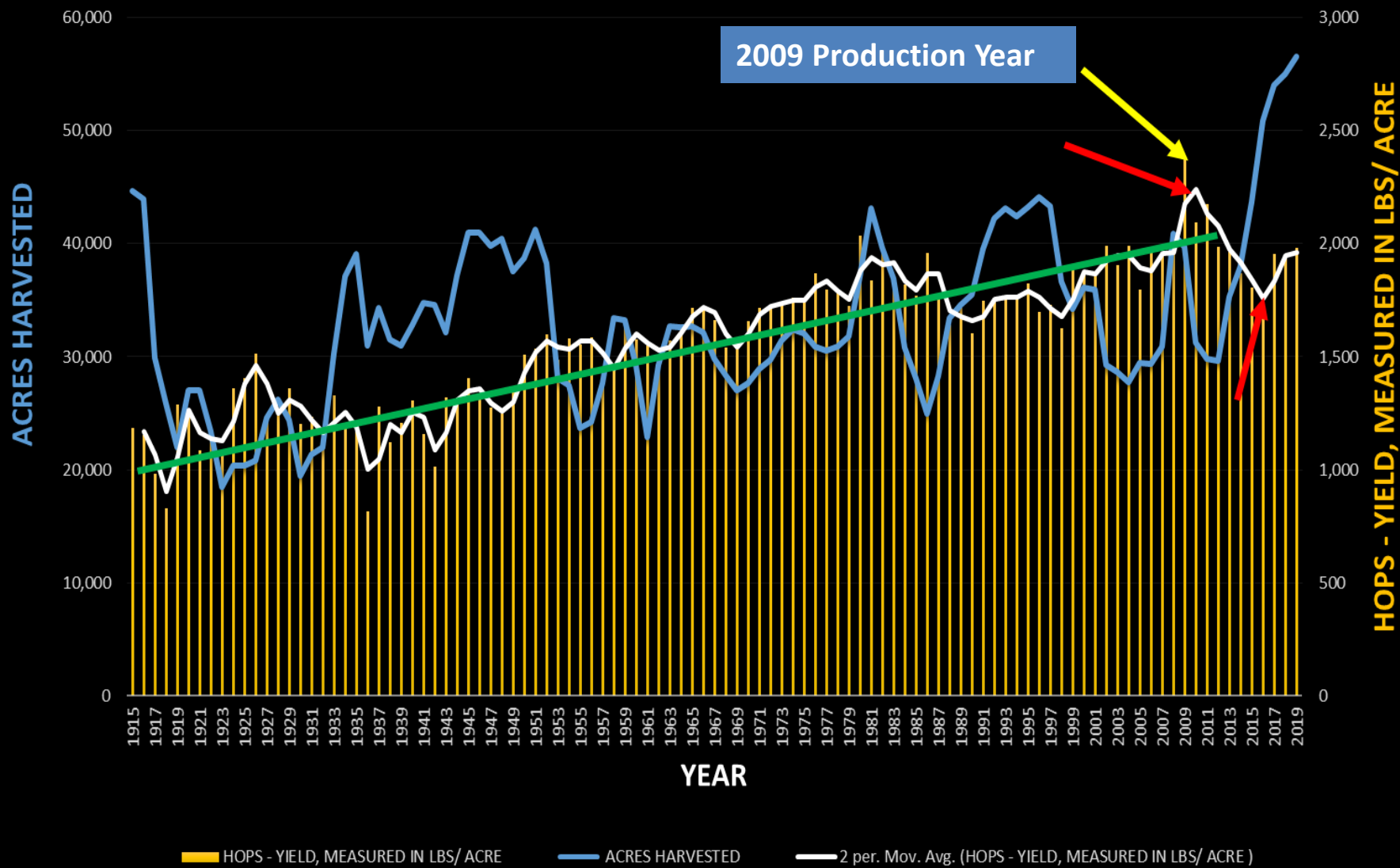
# Hops History - Acreage and Production



**Also Currently Sit at Record Production Levels**



# Hop History - Acreage and Yield



# Quick Look Back: 2018 and 2019 Hops Acreage and Production Summary

- 2018 Harvested acres: 55,035 → 56,544
  - Highest in survey history (third year in a row)
- Average Yield: 1,943 → 1981 pounds per acre (slight trend up from 2017)
- Total production: 106,906,700 → 112,041,200lbs.
  - Highest in survey history (third year in a row)
- 2019 Value of production: \$636,580,000
  - Average Cost Per Pound of Dry Hops in 2019 was 5.68\$ per pound

# Some quick things to discuss

- Continually looking for ways to improve our counts and what we publish
  - Evaluating Hop Variety Questionnaire for additions and deletions now for our 2020 cycle
- Estimate for Non-Response
  - Stocks
  - Acreage and production
- Data we collect versus data we publish
  - Stocks – publish at the USA level
  - Acreage and production



# Hop Varieties in 2019 Survey

YCR 1, Ahtanum™	Calypso™	Ekuanot™,HBC 366	Loral™ HBC 291	Saaz	YCR-5, Warrior R
<b>VGXP-01</b> <b>Amarillo</b> ®	Cashmere	Eureka™	Magnum	<b>Strata™ OR</b>	<b>Willamette</b>
ADHA-483 Azacca™	<b>Chinook</b>	Fuggle	Millennium	<b>Strata™ OR 91331</b>	<b>Sabro™ HBC 438</b>
ADHA-881 Jarrylo™	<b>HBC 394, Citra</b> ®	Galena	<b>HBC 369, Mosaic</b> ®	Sorachi Ace	<b>Zeus</b>
<b>Apollo™</b>	Cluster	Glacier	Mt. Hood	Sterling	Other – Please List Variety:3813
Bitter Gold	<b>Columbus/Tomahawk</b> ®	Golding	Mt. Rainier	<b>Summit™</b>	Other – Please List Variety:3823
Bravo™	Comet	Hallertauer	Northern Brewer	Super Galena™	Experimental
Brewers Gold	Crystal	Horizon	<b>Nugget</b>	Tahoma	
Bullion	Delta™	Idaho 7™	YCR-4, Palisade R	Tettnang	
<b>Cascade</b>	<b>Pahto HBC-682</b>	Lemon Drop™	ADHA-871,- Pekko™	Meridian	
<b>Centennial</b>	<b>El Dorado</b> ®	Liberty	Perle	Vanguard	

**Top 15 highlighted – Also 2 new varieties added in 2019 survey**



# Thank you

- Thank you for your participation in all NASS surveys!
- Appreciate comments on crop quality and grower challenges
- If you have any questions.
  - Mark Cerise; 360-890-3308; Mark.Cerise@usda.gov

Quick Statistics Link:

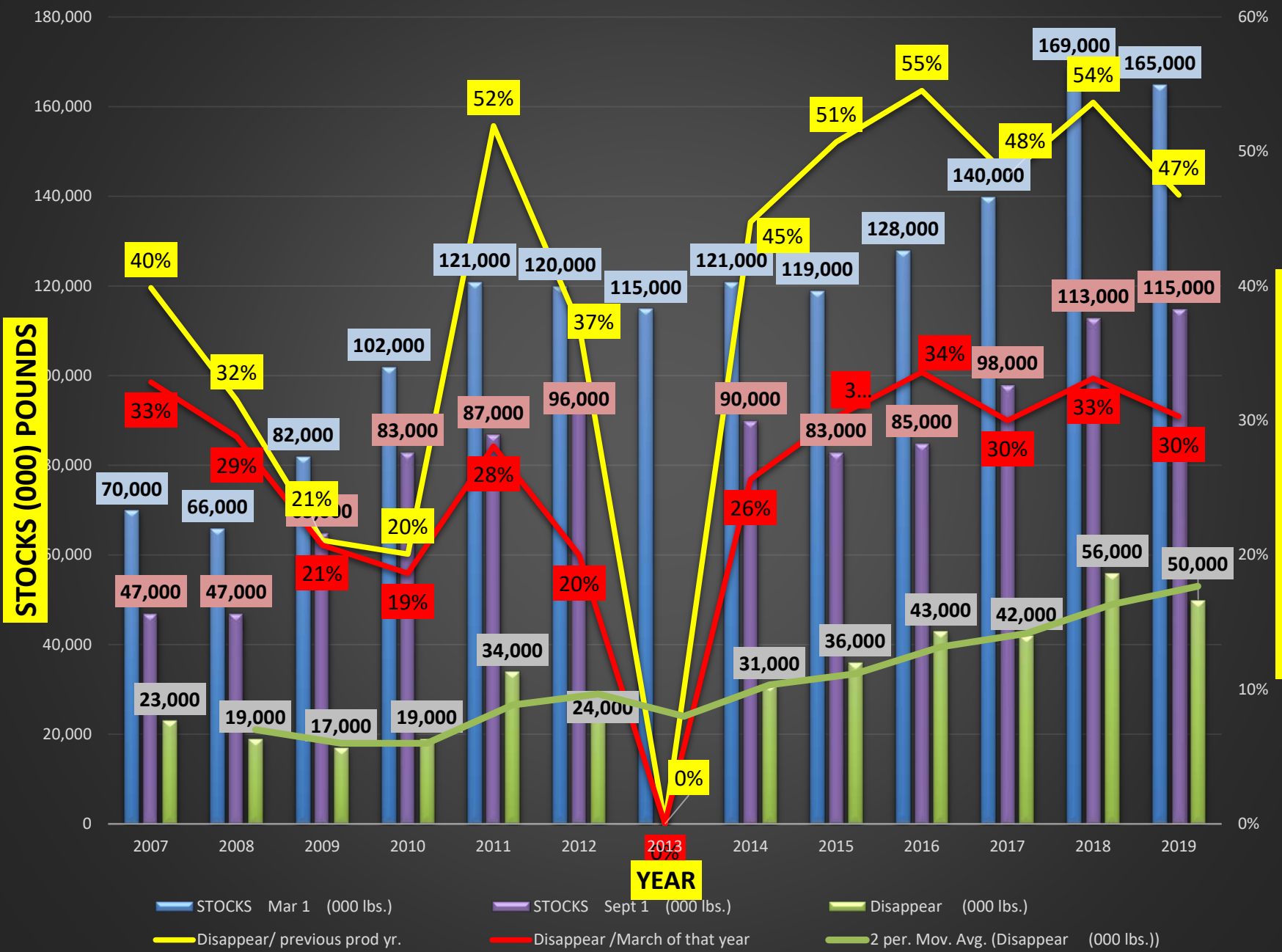
<https://quickstats.nass.usda.gov/>

Publication Link:

<https://www.nass.usda.gov/Publications/index.php>



# 13 Year View Hop Stocks - Disappearance Ratios



# Hops – 2019 Leading Varieties - Top 15

- Alpha
  - Zeus
  - Columbus/Tomahawk<sup>R</sup>
  - Pahto HBC-682
  - Summit<sup>TM</sup>
  - Nugget
  - Apollo
- Aroma/Dual Purpose
  - HBC 394, Citra<sup>R</sup>
  - Cascade
  - Centennial
  - YCR 14, Simcoe<sup>R</sup>
  - VGXP-01 Amarillo<sup>R</sup>
  - Chinook
  - HBC 369, Mosaic<sup>R</sup>
  - Willamette
  - El Dorado

**These 15 Varieties made of close to 80%  
of  
Planted Acreage in the June 2019 survey**