



THE TEC REPORT

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HGA Board settles on Brazil as new market to focus on

HGA officially kicked off in two new markets this year, participating in both Brazil Brau and Australia's BREWCON. As a quick reminder of how those two shows and markets were selected, the HGA Board went through a long strategic planning process that first identified new markets to focus on, and then identified appropriate activities. Trade shows were identified as the best initial activity for both markets: Brazil Brau for the Brazilian market, and BREWCON for Australia. Staff attended the selected activities for both markets prior to committing, and then in 2019 HGA participated in both shows in the same year to directly compare them.

While both markets show a lot of promise and excitement, it was clear that the Brazilian market was much larger, had a very robust trade show attendance, and an enthusiastic appreciation of American hops. These outweighed the high cost of purchasing and importing American hops and concerns about political/market stability. Australia is still a market of interest to HGA, but could not measure up with a much smaller population despite higher average GDP (Gross Domestic Product – an indicator of expendable income) and virtually no trade barriers when it comes to MRL's. Furthermore, the trade show in

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The TEC (Technical Education & Communication) Report is a newsletter written by HGA staff to keep the U.S. hop industry up to date on HGA's international promotional efforts. This is an internally managed and executed program with the help of contractors for grant applications and reports, and also financial/compliance reporting and tracking. HGA also has in-market representatives in Europe, for on-the ground support and local expertise. The program is managed by Jaki Brophy with the guidance of the HGA Board of Directors and Ann George. If you have questions on the program, please contact Jaki Brophy (509-453-4749; jbrophy@wahops.org).

Australia was significantly smaller in attendance and interest for HGA.

While HGA will focus its efforts in Brazil for 2020, they will also look for more cost-effective and market-appropriate ways to engage with Australian brewers as resources allow. More plans for 2020 are to come, but below are pictures and more information on the two shows from 2019.

Brazil Brau

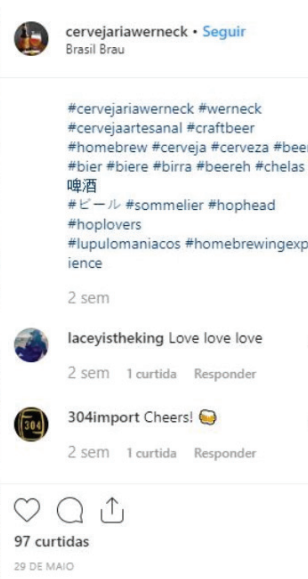
May 28-30th, 2019 | São Paulo Expo Exhibition Center, São Paulo, Brazil



Jaki Brophy talks hops with an attendee

In mid-spring, HGA participated in Brazil Brau in São Paulo from May 28-30. Staff members Ann George, Jaki Brophy, and Rachel Becker attended along with three staff members from River Global who work locally in São Paulo and speak Portuguese. Five hops were at the booth: Cascade, Chinook, Cluster, Comet, and CTZ, and nearly 300 pounds were handed out to trade show visitors. Over the three days, 4,760 one-ounce samples were given away along with translated Merchant Guides and Variety Manuals. Beer was also shipped down to the show featuring the hops at the booth: Sierra Nevada Brewing Company's Pale Ale, Georgetown Brewing Co.'s Bodhizafa, North Coast Brewing Co.'s Red Seal Ale, Sierra Nevada Brewing Company's Hazy Little Thing, and Russian River Brewing Company's Pliny the Elder. Waves of interest came for all of the beers at different points in the show; Instagram is very popular in this market and we often found out that many people rushing to the booth to try a particular beer. Some accounts had very high numbers, with one account having over 10,000 followers so the show allowed us to reach beyond the trade show walls.





Social media was king at Brasil Brau with multiple accounts posting content and information from our booth. Some of these accounts had up to 10K followers.

BREWCON

September 3-6, 2019 | Melbourne Convention Center, Melbourne, Victoria

A few months later, staff members Jaki Brophy and Rachel Becker went to Australia for BREWCON in Melbourne, Australia. They were also joined by two contractors from Sydney-based Daylight Agency to man the booth. Hosted by the Australian-based Independent Brewers Association (IBA), this event has grown substantially in size over the years and is targeted towards craft brewers in the country. Compared to Brazil Brau, attendance was small, however, it has been the key show to connect with brewers in this market. Additionally, while Brasil

Brau was strictly a trade show, BREWCON was similar to CBC in that there was a trade show and a conference, as well as evening events. While evaluating the event in 2018, HGA brought down Matthew Brynildson to be one of the featured speakers and give a USA HOPS presentation which was well-received. This year, HGA's proposal was not accepted to have a speaker. HGA shipped down Cascade, Chinook, Crystal, Comet, Centennial, and Citra® Brand HBC 394. Accompanying beers were Yak Ale's Fat Yak Original Pale Ale (Australian), Lit-

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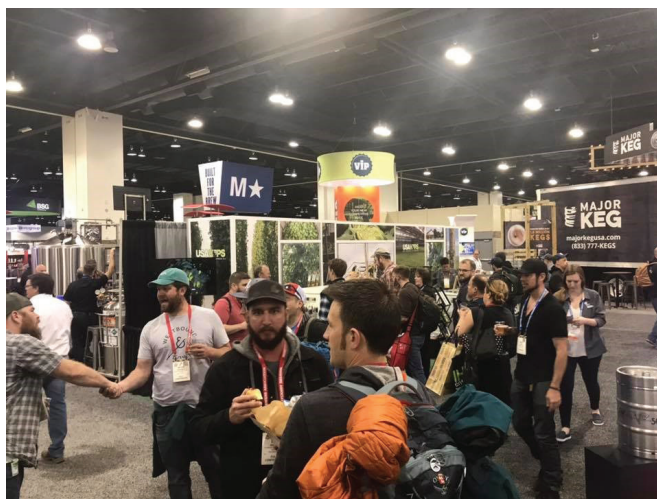
tle Creatures' Pale Ale (Australian), Odell's Colorado Lager, Sierra Nevada Brewing Company's Tropical Torpedo, Founder's Centennial IPA, and Three Floyd's Zombie Dust, respectively. While the show was lower in numbers, we found that those who visited the booth were very enthusiastic about American hops and enjoyed being able to take home larger samples than we are normally able to hand out, and many also appreciated being able

to bring beer not normally (or not ever) previously available in Australia. Most notably, Zombie Dust. In addition to connecting with trade show visitors, potential ideas for future HGA events were discovered, most notably speaker series in a few top Australian markets. These will be explored further for when funds and resources make another set of activities in Australia more prudent.



Craft Brewers Conference and BrewExpo

April 8-11th, 2019 | Colorado Convention Center, Denver, Colorado



For the 6th consecutive year, Hop Growers of America was an exhibitor at the Craft Brewers Conference (CBC) BrewExpo, hosted by the Brewers Association. CBC gives Hop Growers of America the opportunity to maintain and build new relationships with brewers from around the world. The event saw 14,000 attendees.

This year, HGA featured 6 hop varieties showcasing the wide diversity of the American hop industry. These varieties included 2 public: Cascade and Cashmere, 2 proprietaries: Azacca® and Sabro™ and 2 experimental: W11059-059 and Exp 2000009-033. 3,000 1oz. samples were distributed along with HGA's Merchant Guide, Variety Manual and a CBC-specific hop informational poster. The HGA booth is divided into two parts: hop sensory and beer tasting. These two sections give HGA's visitors the opportunity to rub, smell and take home 6 hop varieties. In addition, experiencing the hops by taste with specially brewed beers brewed fea-

turing these varieties.

HGA featured 5 beers specially brewed by 3 world-renowned brewing companies: Odell Brewing Co., Stone Brewing Co., and Karl Strauss Brewing Co. All 3 breweries are known for American hop-forward flavor profiles and pioneers in the craft brewing industry. HGA connected with 1,345 attendees during CBC's 3-day show. HGA was able to execute this high volume show thanks to 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), and Garrett Weaver (Coleman Ag, OR). HGA will continue to leverage USDA's funding resources including MAP to support the development of American hop usage among the attendance and influence the Craft Brewers Conference provides.

Summer Brewing School Seminars

In June 2019, HGA conducted technical seminars with the brewing school Doemens Academy in Munich and the brewing faculty of the Technical University in Berlin, reaching 53 future brewmasters and other future influential people in the beer industry. The seminars included a technical presentation led by Tim Kosteletzky, retired from Haas, followed by a sensory session with a hop rub and beer tasting.

Overall, feedback received from seminar participants was positive and shows the importance of the HGA's education program. A survey conducted among seminar participants suggested that 73% would recommend using US hops among

their brewing colleagues. Among this same sample, 68% said that they were aware of specific US hop characteristics and 47% said they prefer to use US hop varieties because of their advantages. Importantly, 38% said that their use of US hop varieties in the next six months will likely increase.

As these students graduate and find positions within Europe's ever-expanding microbrewery segment, HGA's efforts are ensuring US hops are now top of mind along with more familiar domestic options with an extremely strong foothold in the market. Additionally, HGA's efforts will result in increased experimentation of US hops and their inclusion in future commercialized beers.

USA HOPS
HOP GROWERS OF AMERICA

U.S. HOPS: TASTE THE DIFFERENCE.

Blind Pig IPA	Red Seal Ale	Mirror Pond Pale Ale	IPA	Born & Raised IPA	No. 1 Brewhouse
Blind Pig IPA Rustical River Brewing Co. ABV: 6.25% • IBU: 64 Featured Hops: Crystal Other Hops: Cascade, Centennial, Chinook, CTZ, Amarillo® Simcoe® Brand YCR 14, Citra® Brand HBC 394	Red Seal Ale North Coast Brewing Co. ABV: 5.4% • IBU: 42 Featured Hops: Cluster Other Hops: Centennial	Mirror Pond Pale Ale Deschutes Brewing Co. ABV: 5.0% • IBU: 40 Featured Hops: Cascade	IPA pHren Family Brewers ABV: 6.8% • IBU: 65 Featured Hops: Comet Other Hops: Chinook, Mosaic® Brand HBC 309, Citra® Brand HBC 394	Born & Raised IPA No. 1 Brewhouse ABV: 7.0% • IBU: 85 Featured Hops: CTZ Other Hops: Cascade, Chinook, Northern Brewer	No. 1 Brewhouse ABV: 7.0% • IBU: 85 Featured Hops: CTZ Other Hops: Cascade, Chinook, Northern Brewer

Hop Growers of America • P.O. Box 2885 • Yakima, WA 98907 USA • Tel: +1 509 453 4749 • Fax: +1 509 457-8561 • E-mail: admin@usahops.org • www.usahops.org

Heriot - Watt November 6th

USA HOPS
HOP GROWERS OF AMERICA

U.S. HOPS: TASTE THE DIFFERENCE.

Blind Pig IPA	Fat Tire	Mirror Pond Pale Ale	IPA	Born & Raised IPA	No. 1 Brewhouse
Blind Pig IPA Rustical River Brewing Co. ABV: 6.25% • IBU: 64 Featured Hops: Crystal Other Hops: Cascade, Centennial, Chinook, CTZ, Amarillo® Simcoe® Brand YCR 14, Citra® Brand HBC 394	Fat Tire New Belgium Brewing Co. ABV: 5.2% • IBU: 22 Featured Hops: Comet Other Hops: Goldings, Nugget	Mirror Pond Pale Ale Deschutes Brewing Co. ABV: 5.0% • IBU: 40 Featured Hops: Cascade	IPA pHren Family Brewers ABV: 6.8% • IBU: 65 Featured Hops: Comet Other Hops: Chinook, Mosaic® Brand HBC 309, Citra® Brand HBC 394	Born & Raised IPA No. 1 Brewhouse ABV: 7.0% • IBU: 85 Featured Hops: CTZ Other Hops: Cascade, Chinook, Northern Brewer	No. 1 Brewhouse ABV: 7.0% • IBU: 85 Featured Hops: CTZ Other Hops: Cascade, Chinook, Northern Brewer

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Weihenstephan November 7th

Fall Brewing School Seminars

Once again, the week prior to BrauBeviale, HGA hosted two brewing school seminars in Europe at two highly distinguished brewing school programs: Heriot-Watt in Edinburgh, Scotland and at Weihenstephan in Munich, Germany. Matthew

Brynildson of Firestone Walker Brewing Company was our lecturing Brewmaster, and spoke to a total of 101 students for both schools – a handful of which opted to returned to this lecture a second time from previous years.

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The lecture took approximately two hours and was then followed by a hop rub and beer tasting, the hops and corresponding beers were as follows:

Crystal – Blind Pig, Russian River Brewing Co.
Cluster – Red Seal Ale, North Coast Brewing Co. (Heriot-Watt only)
Cascade – Mirror Pond Pale Ale, Deschutes Brewing Co.
Comet – IPA, pFriem Family Brewers
CTZ – Born & Raised IPA, No-Li Brewhouse
Willamette – Fat Tire Amber Ale, New Belgium Brewing Co. (Weihenstephan only)

After a number of years of this program taking place, European students are already more knowledgeable of American hops in previous years, so we increased the level of technicality this year which was well-received and resulted in more technical questions from the students. Despite

the increased knowledge, students still reported positive feedback on the seminar and learned about the diverse nature of American hops, expressing a desire for continued cooperation and collaboration in 2020.

BrauBeviale

November 12-14th, 2019 | Nuremberg Exhibition Center, Nuremberg, Germany

Hop Growers of America returned to BrauBeviale once again this year, for what is the biggest activity of the year in delegates, budget, and resources. Thank you very much to our hard-working crew this year:

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: Jaki Brophy, Rachel Becker, Jens Hombeck and his colleague Bridget of mk2, our German-based European consultants.

The booth was consistently busy throughout the three days, with many visitors excited for hop samples and beer directly from the U.S. Approximately 660 pounds of hops total were handed out, all in

pelletized, 1 oz. packets. The samples were especially popular this year, all samples except for one final box per variety were gone by the afternoon of day two, and the remaining samples on day three were gone by late morning on the final third day. For reference, the same amount of hops are brought every year, so this is especially indicative of a busy year. In addition to the featured hops and corresponding beers, HGA also had some of the IPA submissions at the booth for visitors to try to get a taste of European beers featuring American hops.

Also keeping with tradition, HGA hosted their long-standing American craft beer tasting on Wednesday early afternoon at the show, hosted by Matthew Brynildson of Firestone Walker. The tasting was very popular with the room set for 120 guests, which was fully booked and even had a few extra guests towards the back of the room.

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Attendees tried 6 U.S. craft beers which were also available at the booth (as well as the featured hops), and were guided through different tasting notes, picking up the differences of the different beers and their hop aromas, as well as some comments on different techniques/approaches to dry hopping, different trends, and a reminder to visit the booth to learn and try more.

Between the seminar and the tasting, just over 1,611 visitors to HGA were captured, and will receive follow-up information from HGA. In addition, every guest who received hop samples also walked away with a Merchant Guide, as well as additional literature on the hops specifically at the show, and the USA Hops Variety Snapshot which contains some information about 50+ American hops as well as information about the U.S. hop industry and growing practices. Over 1,800 of each of the pieces of literature were distributed to booth visitors.

At the end of the seminar, the winners of the European IPA contest were announced:

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

Beers Featured at the HGA BrauBeviale Booth

Cascade – Mirror Pond Pale Ale, Deschutes Brewing Co. *

Crystal – Blind Pig IPA, Russian River Brewing Co. *

Centennial – Two Hearted Ale, Bell's Brewery *

Centennial – Back in Action, Alvarado St. Brewery *

Cashmere – Cashmere XPA, Firestone Walker Brewing Co. *

Chinook – IPA, pFriem Family Brewers *

Cluster – Red Seal Ale, North Coast Brewing Co.

Comet – River Trip, Allagash Brewing Co.

CTZ – Born & Raised IPA, No-Li Brewhouse

Nugget – Oatis Oatmeal Stout, Ninkasi Brewing Co.

Willamette – Fat Tire, New Belgium Brewing Co.

Idaho7™ - Mind Haze, Firestone Walker Brewing Co.

Azacca® - Grizacca, Oxbow Brewing Co.

Pekko® - Boat Shoes Hazy IPA, Karl Strauss Brewing Co.

Lotus™ - Lotus Room, Left Hand Brewing Co.

Sabro™ Brand HBC 438 – Mountain Standard IPA, Odell Brewing Co.

*indicates a beer that was also featured at the Wednesday Craft Beer Tasting