



2024

Hop Industry
Annual Report

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2024

HIGHLIGHTS

SERVING THE US HOP INDUSTRY FOR 66 YEARS:

Incorporated in 1957, Hop Growers of America seeks to increase global utilization of U.S. hops by facilitating communication between hop growers, merchants, and brewers on the quality, variety, and tradition of hops produced in the United States.

68TH ANNUAL AMERICAN HOP CONVENTION - FRISCO, TX

The U.S. hop industry ventured to Frisco, Texas and assembled the 68th Annual American Hop Convention, held January 17-19. The event centered around the theme *Fresh Out of the Chute... The Next Generation is Saddling up!* Learn more on page 9.

HOP INDUSTRY HILL CLIMB

HGA, Hop Research Council and state hop grower associations from Washington, Oregon and Idaho met with Members of Congress and USDA-ARS professionals to advocate for the legislative needs of the industry. Learn more on page 12.

TEC PROGRAM ACTIVITIES

The Trade Education and Communication program facilitated international seminars, brewing contests and attended trade shows to connect brewers with the merits of U.S. hops. Learn more on pages 17-21.

NEW BREWER - US HOP HARVEST REPORT

Each year Hop Growers of America is invited to contribute the U.S. Hop Harvest Report to the Brewer's Association New Brewer Magazine. The winter issue routinely examines the raw materials supply chain and delivers updates on barley and hop harvests on a national and global scale.

INAUGURAL AWARDS HONOR ACHIEVEMENTS

In 2024 HGA recognized notable achievements within our membership. Learn more about the first recipients on pages 10-11.

COLLABORATION OFFER OPPORTUNITY

HGA activities around the world build opportunity to spotlight our renowned commodity. Learn more on page 17.



ABOUT HOP GROWERS OF AMERICA

Hop Growers of America (HGA) is a trade organization striving to cultivate resiliency in the American hop industry by facilitating collaboration among growers, merchants, and brewers to empower producers with the research, policy, and marketing tools to remain as world-leading stewards of their land and communities.

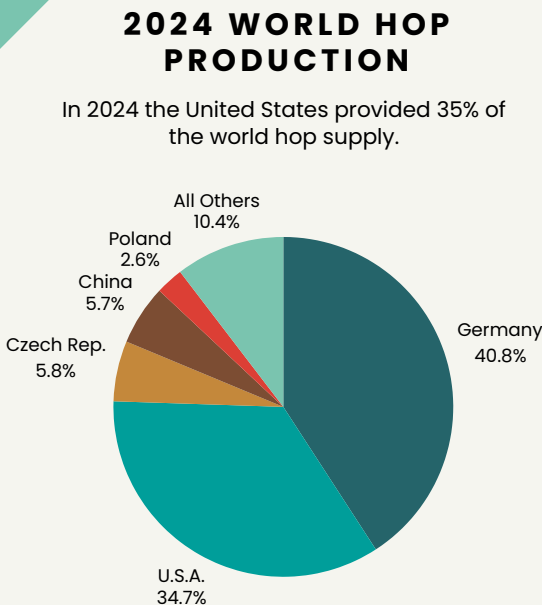
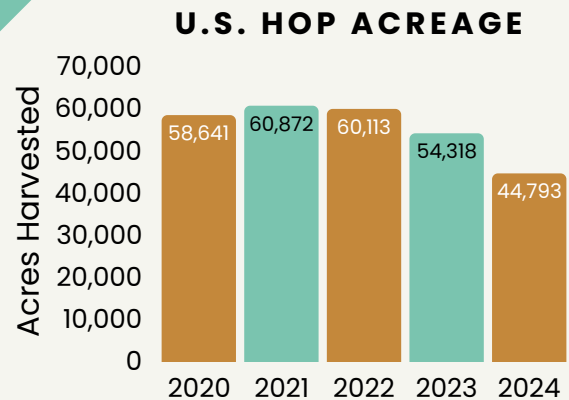
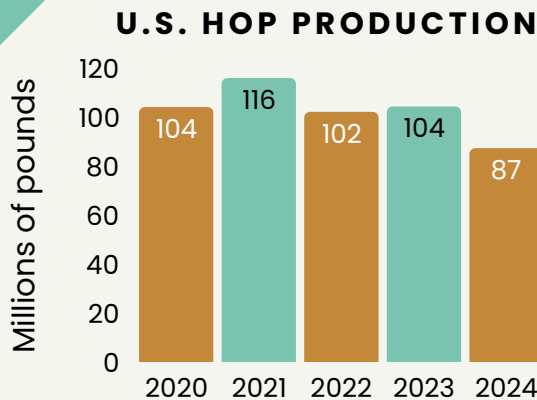
HGA SUPPORTS SEVERAL PROGRAMS STRENGTHENING THE U.S. HOP INDUSTRY:

The Best Practices Committee operates to connect industry members to reputable approaches to farm management. The committee provides educational platforms and funds research to develop novel advancements to inform the operational decisions of producers.

The Trade, Education, and Communications Program (TEC) builds long-term global demand for U.S. hops. Through the TEC program HGA shares the story of how U.S. producers responsibly grow high-quality hops with the international brewing community at trade shows, technical seminars, and IPA Contests.

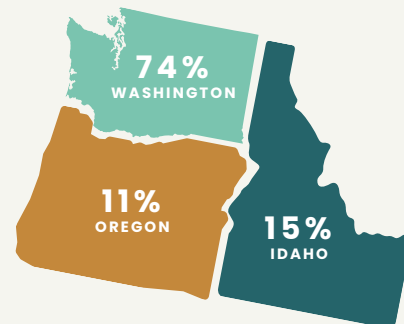
The U.S. Hop Industry Plant Protection Committee (USHIPPC) assists producers in navigating pest management issues by directing the delivery of plant protection tools. The committee also endeavors to harmonize international standards and secure trade access for U.S. hops abroad.

The Liaison Committee coordinates hop inspection activities between Washington, Idaho, and Oregon's respective state inspection labs, the USDA, and industry partners to ensure consistent and accurate inspection practices, bale labeling, and reporting measures.



2024 PNW PRODUCTION BY STATE

The Pacific Northwest states of Washington, Idaho, and Oregon account for 98% of U.S. hop production.



INDUSTRY AT A GLANCE

Hop Growers of America collaborates with federal, state, and industry partners to compile statistics that provide a clear view of the U.S. hop industry. In 2024 a striking long inventory of hops triggered widespread acreage reductions of 18% in the Pacific Northwest, eliminating over 9,500 acres from production. While the supply chain proved challenging, the natural affinities driving the U.S. to the helm of hop production enabled producers to deliver average yields of 1,944 pounds per acre in the Northwest and deliver a harvest of 87.1 million pounds.



WHAT WE DO: HGA VISION, MISSION, AND VALUES

VISION

U.S. hop growers are world-leading stewards of their land and communities and set the global standard for quality in hop production.

MISSION STATEMENT

HGA cultivates resiliency for American hop producers.

VALUES

Quality

American farming operations have honed the craft of cultivating high-quality hops over generations, and today the pride and responsibility of this profession remains woven into the identity of each producer. Growers harness a meticulous attention to detail, integrate systems of accountability, and provide transparency in each facet of production to deliver a world-renowned commodity that continues to revolutionize the brewing industry.

Innovation

In an industry characterized by profound volatility, at the heart of our growers' legacy is the relentless drive to innovate. Attuned to the inherent complexities of farming ecosystems, American hop producers tirelessly refine operational strategies and collaboratively fund research initiatives to embrace global shifts in market, climate, and regulatory conditions.

Stewardship

Instilled with the timeless principle 'you reap what you sow,' American hop growers invest in their natural, material, and human resources to nurture environmental security, economic stability, and social equity, strengthening the rural communities they call home.

SUSTAINABILITY AND CLIMATE STRATEGY

The Hop Growers of America Sustainability and Climate Strategy provides a framework to guide research and investment initiatives of the organization. In a world confronted by a shifting climate, growing populations, and shrinking natural resources, the concept of 'sustainability' is often heralded as a silver bullet. In reality, the path towards sustainability is often as complex as the challenges we face and requires balancing people, prosperity, and the planet to forge positive change.

PEOPLE



American hop producers have been rooted in their communities for generations. How HGA can support our people:

- Support and strengthen food safety practices
- Support employees with fair wages and working conditions
- Provide community philanthropy/support/services
- Promote practices minimizing the health stress of the producer
- Promote workforce development by offering professional development opportunities
- Assist industry recruitment efforts
- Facilitate industry recognition and awards

PROSPERITY



Hop production serves as the backbone of rural economies, and supports the vitality of the U.S. brewing sector. How HGA can support prosperity:

- Assist with the cost-efficiency of production
- Support the continuity of family farms
- Provide a high-quality product
- Maintain strong systems of traceability
- Remedy trade barriers
- Build and support long-term global demand for U.S. hops
- Provide legislative advocacy for industry needs
- Develop and interpret crop reports (statistics)
- Support hop variety development with attention to harvest windows and aromatic profiles
- Maintain relationships with international industry partners and collaborate on issues of common concern

PLANET



Driven by the spirit of innovation, American hop producers attend to the distinct nuances of each ecosystem and relentlessly seek new information to nourish their natural resources. How HGA can support our planet:

- Promote practices enhancing biodiversity and native wildlife habitat
- Support initiatives to protect soil health
- Support projects to refine IPM approaches
- Promote the conservation and maintenance of high-quality water
- Support projects minimizing the generation of waste
- Support research initiatives aiming to lower carbon footprint of hop production
- Support the breeding of high-yielding, pest/heat/drought tolerant hop varieties requiring less inputs to grow

Communications

GOOD BINES



Good Bines is an educational program administered by Hop Growers of America, designed to connect hop industry members to reputable approaches to farm management. Online modules spanning key production topics are available, including Food Safety, Water & Irrigation, Business Management, Soil Fertility, Integrated Pest Management, and Sustainability. Growers can complete self-assessments to become Good Bines certified and showcase their commitment to best practices.

In an effort to recognize the time and resources invested in industry best practices, Hop Growers of America has sanctioned the use of Good Bines logos for use by hop growers. The logos will highlight completion of the Water & Irrigation, Food Safety and Risk Assessment modules. The logos are viable for one year and must be renewed on an annual basis, upon renewal of these three self-assessment modules (certificates of completion expire annually). Growers are welcome to utilize the logo on their institutional stationary, on-site facilities, websites, and promotional materials. To attain access to the logo each year, producers must submit all three Good Bines certificates of completion for the modules noted above OR active GLOBALG.A.P. compliance documents to Maggie Elliot at melliot@wahops.org.





AMERICAN HOP CONVENTION

The U.S. hop industry ventured to Frisco, Texas to assemble the 68th Annual American Hop Convention, held January 17-19. The event centered around the theme *Fresh Out of the Chute... The Next Generation is Saddling Up*. Pinthouse Brewing honored the gathering by crafting an Indian Pale Ale fitting for the occasion. Hosted by the Oregon Hop Growers Association, the event drew a crowd of attendees and delivered highlights including a keynote address by Jason Wetzler, industry updates from the merchant and brewing sectors, and a rodeo-themed dinner party.

Industry Award

BEYOND THE BINE



Beyond the Bine honors individuals or companies whose efforts have imparted a positive impact domestically on the U.S. hop industry through production improvements, policy/regulatory/legislative efforts, market impacts, or other contributions

THE 2024 HGA BEYOND THE BINE RECIPIENT IS PUTERBAUGH FARMS

Since 2020, USDA-ARS has established two new public hop research programs at the Washington State University Irrigated Agriculture Research and Extension Center. The expansion required the installation of new trellis and irrigation infrastructure to support field research activities. Hop Growers of America put a call out for a grower to provide the personnel, expertise, and specialized equipment to complete the work. Stacy Puterbaugh and his family answered the call on two occasions, first for Kayla Altendorf's breeding program in 2021, then for Paco Gonzalez's horticulture program in 2022. Across both projects, Stacy, his family, and their team installed nearly 20 acres of trellis, complex irrigation systems, a filtration system, and a pressure regulating valve that services the entire WSU Pear Acres field site. They went above and beyond in both cases to ensure the successful establishment of these research programs by providing extensive mentorship, guidance, and support from irrigation, training, burn-down, and weed control. The Puterbaugh Family has also responded to emergency irrigation and sprayer issues and has provided last-minute, critical field support as Kayla and Paco have worked to get the required equipment and personnel in place. Their family's contributions to ensuring the successful establishment of these public hop research programs will undoubtedly have lasting positive impacts on the U.S. Hop Industry.

Industry Award

TOP OF THE TRELLIS



Top of the Trellis seeks to recognize a commercial hop operation in the United States prioritizing sustainability.

THE 2024 TOP OF THE TRELLIS RECIPIENT IS PRAIRIE HOP FARMS

Sustainability is central to the mindset of Prairie Hop Farms based in St. Paul, Oregon. Although the operation was established in 2016, the founding families of Prairie Hop Farms stretch back seven generations in agriculture. Investing in soil health with novel fertilizer enhancements and cover crops remain a key aspect of the operation, as well as a strong integrated pest management program including the release of beneficial insects and new technologies optimizing spraying efficiencies. Prairie Hop Farms are also stewards of water – implementing precision irrigation and soil moisture sensors to conserve irrigation. HGA is proud to recognize Prairie Hop Farms as the 2024 recipient of the Top of the Trellis award.

GOVERNMENT AFFAIRS

HGA, Hop Research Council and state hop grower associations from Washington, Oregon and Idaho met with Members of Congress and USDA-ARS professionals to advocate for the legislative needs of the industry. The top six requests of the U.S. hop industry included:

1 | USDA-ARS HOP RESEARCH - "CLIMATE & SUSTAINABILITY INITIATIVE"

FY2025: We request \$3 million appropriation to prioritize hop research to strengthen the supply chain for global demand of high-quality U.S. hops and accelerate our Climate Smart production systems. In FY 2021, 2022, 2023, and 2024 USDA-ARS was appropriated \$2.6 million for hop research.

2 | LABOR AVAILABILITY

Agriculture needs a legal and reliable source of labor. Many hop growers are forced to use the H-2A program, the only option for temporary, reliable agricultural labor to supplement local labor availability. The system has been plagued by delays, design flaws and high costs, and is in need of reform. Our organizations support the Farm Workforce Modernization Act which makes some reforms to the H-2A Program. We are also interested in other legislation that would address reforms in the H-2A process, including the unfair and inaccurate wage survey that sets prevailing piece rates and wages, along with automatic cost escalators that will price H-2A out of feasibility.

3 | NATURAL DISASTER RELIEF: FEDERAL CROP INSURANCE AND NONINSURED CROP DISASTER ASSISTANCE PROGRAM (NAP)

- The U.S. hop industry supports the development of a federal crop insurance program to protect against the loss of crops due to natural disasters.
- The industry also supports the Noninsured Crop Disaster Assistance Program (NAP), providing financial assistance to producers of noninsurable crops when low yields, loss of inventory, or prevented planting occurs due to natural disasters. The US hop industry supports the Congressional effort to renew NAP for FY 2025.

4 | CRITICAL USDA PROGRAM SUPPORT

- The National Agricultural Statistics Service
- The FAS Foreign Market Development programs, including the Market Access Program and Quality Samples Program
- The FAS Technical Assistance for Specialty Crops Grant Program
- Specialty Crops Research Initiative and Specialty Crops Block Grant Program
- National Clean Plant Network

5 | IR-4 PROGRAM

- The IR-4 Project is a collaborative USDA-Land Grant University national research program to develop data required by US EPA to support the registration of crop protection products for specialty crops.
- IR-4's support of new registrations addresses gaps in specialty crop pest management.
 - New invasive pests
 - Loss of existing product registrations
 - Access to newer, reduced risk chemistries to improve impacts on climate, the environment, workers and consumers
- Increase funding from \$15 m to \$25m during FY2025 as authorized by Congress in the 2018 Farm Bill.

6 | INTERNATIONAL TRADE

The EU's "hazard-based" pesticide evaluation system does not employ a "risk-based" scientific assessment as required by the WTO. As a result of the EU policy, numerous pesticides are being withdrawn from use in the EU and associated Maximum Residue Levels are being eliminated. This loss is adversely impacting the export of agricultural goods to the EU, including hops. We urge Congressional support of US trade negotiators to address this issue.

USHIPPC ADVOCATES FOR ADOPTION OF CODEX MRLS IN INDIA

In 2022 the U.S. Hop Industry Plant Protection Committee (USHIPPC) secured a USDA-FAS Technical Assistance for Specialty Crops (TASC) grant for \$137,000 to expand industry efforts addressing trade barriers to India by exploring India's MRL regulation system and establishment of contacts. In the second year of the grant, USHIPPC sought engagement with U.S. Embassy Representatives and Indian officials to advocate for the government to adopt Codex MRLs when considering import tolerances.

IR-4 FOOD USE WORKSHOP SUCCESSES

The IR-4 Food Use workshop was a sweeping success this year as hop industry researchers secured studies submitted by the U.S. Hop Industry Plant Protection Committee. Next year residue study will commence on the herbicide flazasulfuron (Mission).

CHANNELS OF TRADE - BIFENAZATE AND ETOXAZOLE

In September of 2023, the EU proposed to restrict the MRL for bifenazate (acramite) on hops from 20 ppm to 0.05 ppm. While the 2023 and prior crop years of American hops were produced fully within compliance to the EU standards at the time they were grown, the policies introduced by the EU to retroactively ban all hops already in warehouses and breweries within 6 months of formal publication regarding new bifenazate restrictions introduced severe challenges to our supply chain. Under a similar timeline, etoxazole (Zeal) was proposed at a .05 ppm from 15 ppm. The U.S. exports half of the hop crop each year, with about a third of production headed towards the European Union.

The US hop industry faced grave repercussions because the language in the EU regulation did not allow for products produced in the EU or imported into the EU prior to the MRL change to remain compliant after the new MRL is established. The exclusion of "channels of trade" language remains major concern for the industry due to the current stock levels of hop pellets and extract that became noncompliant when the new MRL was in effect. Hop pellets can remain in the supply chain for 3-5 years and hop extract can remain viable for 10 years. Over the course of the fall of 2023, the US and EU hop industries collaborated to delay the publication of this rule, with steep expected losses from the American hop merchants and European Hop Merchant Association, Deutscher Hopfenwirtschaftsverband e. V., "DHWV".

After 6 months of delay, DG-SANTE (Directorate General for Health and Food Safety) extended a letter to the to EU Hop Merchants Association in February, informing the industry the new regulation is expected to be published in March of 2024, and the new MRL of 0.05 ppm for bifenazate to be in place late September 2024. The agency recommended member states extend 'proportionate' enforcement in beer.

Continued engagement in maintaining 'channels of trade' language in EU MRL regulations will prove pivotal in supporting agricultural products with a shelf life. At the 2024 International Hop Growers Convention in Lublin, Poland the IHGC voted to send a representative from the world hop industry in an observer status to the Codex Alimentarius meetings, which regulate international food standards, to advocate for the inclusion of channels of trade language in this global forum.

Research Initiatives

USHIPPC PROJECTS

HGA contributes funding and holds representation on the U.S. Hop Industry Plant Protection Committee (USHIPPC). This committee assists in the delivery of plant protection tools by developing the data needed to facilitate the registration of crop protection products and also endeavors to harmonize international standards, securing trade access for U.S. hops abroad. The committee directed several key accomplishments in 2024.



Drew Carlson Rothe, Drs. Altendorf, Gonzalez, Gent, and Martin Olsen celebrate the completion of the USDA-ARS Picker Barn Facility in Prosser, Wa.

Research Initiatives

USDA-ARS HOP RESEARCHERS COMMEMORATE PICKER BARN FACILITY AT WSU-IAREC

In 2020 and 2021 the arrival of two new USDA-ARS hop researchers, Dr. Kayla Altendorf and Dr. Paco Gonzalez to the WSU Irrigated Agriculture Research and Extension Center (WSU-IAREC) in Prosser, Washington initiated a critical need for infrastructure. The research team celebrated the completion of a picker barn facility in October of 2024 with a twine cutting ceremony. The picker barn includes a Wolf 170 picker, room for a custom experimental kiln currently underway, as well as a processing area for data collection and pelletizing. The U.S. hop industry applauds this achievement and looks forward to many productive years of research endeavors!

INTERNATIONAL COLLABORATION



The International Hop Growers Convention (IHGC) serves as a forum for hop growers from across the globe to convene three times annually to share crop reports and deliberate issues of common concern. HGA is a member and represents U.S. hop growers at these meetings.

The Regulatory Harmonization Commission aims to collaboratively approach the harmonization of pesticide maximum residue levels (MRLs) and other trade concerns for the international hop industry. Maggie Elliot, Science and Communications Director of Hop Growers of America, and Erich Lehman, the Executive Director of the German Hop Growers Association co-chair and provide leadership for the IHGC Regulatory Harmonization Commission.

The Order of the Hop is the highest honor bestowed in the international hop industry. Instituted in the 14th century, the Order of the Hop served as a mark of distinction for individuals who contributed to the advancement of the “noble” plant essential to beer production. In the 21st century the award is conferred to hop growers, brewers, administrators, researchers, and those who lead notable advances in hop culture. The Order of the Hop is endowed every other year at the International Hop Growers Convention Congress. In 2024 the IHGC Congress assembled in Lublin, Poland, and 5 Americans received the Order of the Hop for their outstanding contributions to the global industry.



THE 2024 RECIPIENTS ARE

ALEX BARTH *JOHN I. HAAS, INC*



Alex represents the seventh-generation of the Barth family business and served as Chief Executive Officer of John I. Haas, Inc. from 2008-2023, when he transitioned to the Board of Directors. Prior to his appointment as CEO, Alex served as Executive Vice President where he was responsible for overseeing Haas' manufacturing, supply chain, purchasing, and farming activities. Throughout his 30+ year career at Haas, he fostered deep relationships with hop growers throughout the Pacific Northwest, while also establishing Haas itself as one of the world's largest hop growers.

SCOTT DORSCH *ODELL BREWING COMPANY*

Scott Dorsch began his journey in the brewing world with Busch Agricultural Resources, a subsidiary of Anheuser-Busch Companies, as an International Agronomist and collaborated closely with growers and researchers to develop classic aroma hops for the Pacific Northwest regions of the United States. In 2008 Scott joined Odell Brewing Company, a local craft brewery, expanding his skills to include brewing and procuring brewing raw materials, including hops. Scott represents Odell Brewing Company on the Hop Research Council, the Hop Quality Group, the American Malting Barley Association, the National Barley Improvement Committee as well as the Brewers Association Supply-Chain Subcommittee.



MICHELLE PALACIOS *OREGON HOP GROWERS OFFICE*



Michelle Palacios is the Oregon Hop Growers Association Executive Director and Administrator of the Oregon Hop Commission, a position that she has held for 19 years. Michelle directs the programs and activities of the Oregon hop industry that focus on research, education, and promotion of Oregon grown hops. She also serves as the Business Manager of the Hop Research Council, supporting the long-term research priorities of the U.S. hop industry. She is driven by her belief that farmers have an important message to share, and she is committed to helping Oregon hop farmers tell their stories to brewers and consumers alike.

TOM SAUVE *GROWERS SUPPLY*

Tom Sauve grew up on a homestead in Moxee, Washington raising hops on the family farm and later established his own hop operation. After producing hops for many years, he purchased Growers Supply and transitioned into the supply sector. Over the course of four decades Tom has molded the company into a vital backbone of the U.S. hop industry, working closely with growers and others in the hop industry to ensure domestic and imported supply chains provide high quality, essential products from reliable sources. Tom has manufactured American hop products used industry wide and invented solutions for many problems facing the hop industry.



DAVE WYCKOFF *WYCKOFF FARMS*



Born in 1945, Dave Wyckoff grew up on his family farm south of Grandview in Washington state and spent his youth farming row crops. In 1975 he began diversifying into permanent crops and hops soon became among the primary focuses of the operation. In his nearly 50-year tenure as a hop producer, Dave has relentlessly refined agronomic best practices to maximize yield and quality and also pioneered picking and drying technologies. Throughout his career Dave has advanced the broader interests of the hop industry by working alongside growers to address challenges and foster strong collaborative relationships with hop merchants and the brewing community.

Overview

GLOBAL MARKET DEVELOPMENT

The Trade Education and Communication (TEC) program’s primary objective is to increase trade awareness, global utilization, and demand of U.S. hops. To accomplish this, HGA implements a variety of targeted trade activities each program year. These include but are not limited to: brewing contests, key trade shows, and technical – educational seminars led by renowned Brewmasters for both student and professional brewer audiences alike.

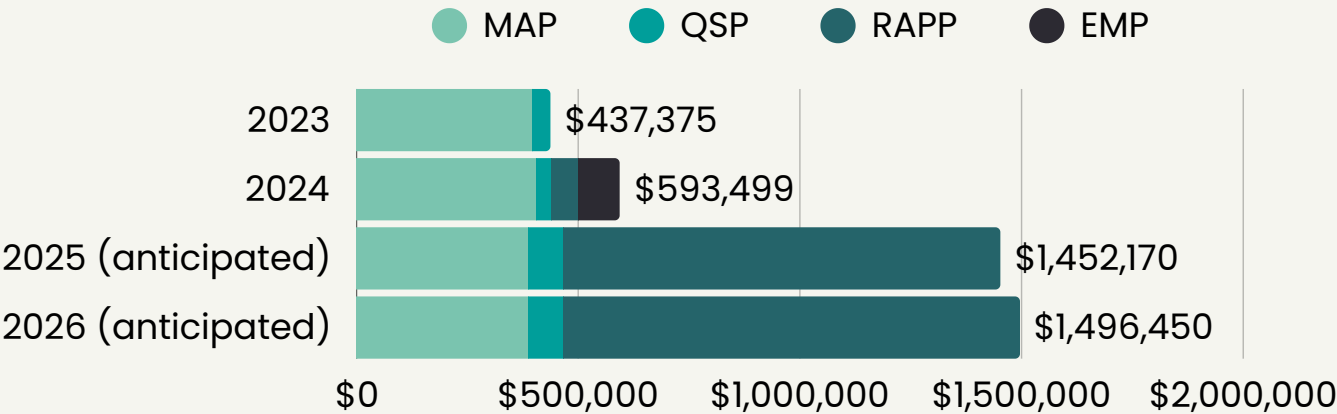
96%

of the 2024 TEC program funding was awarded through USDA-FAS grant programs.

2

new grant programs awarded in 2024.

TOTAL GRANT MONIES SPENT



Collaboration Spotlight

After cinching the third place winning honor at HGA’s 2023 EU Brewing Contest, Lemke Brewing launched the creation as a permanent installment.

In 2024 the cold IPA, featuring American hop varieties, was selected as the official beer of Berlin Beer Week in September and a special edition collaboration was released with Europe’s largest craft brewery Brew Dog.



MARKET ACCESS PROGRAM (MAP)

Through the Market Access Program (MAP), FAS partners with U.S. agricultural trade associations, cooperatives, state regional trade groups and small businesses to share the costs of overseas marketing and promotional activities that help build commercial export markets for U.S. agricultural products and commodities.

3 TRADESHOWS

HGA operated booths showcasing U.S. hop varieties at the Craft Brewers Conference & BrewExpo America (CBC) held in Las Vegas, Nevada, Brasil Brau in Sao Paulo, Brazil, and BrauBeviale in Nuremburg, Germany.

4 HOP AND BREWING EDUCATIONAL SEMINARS

HGA continued to build its relationship with influential brewing schools by conducting 2 technical seminars in Europe – including Technical University, Berlin and the Doemens Academy in Germany. Jeremy Moynier of Stone Brewing delivered the interactive lectures. Additionally HGA delivered two tasting seminars in Brazil in conjunction with the Brazil Brau tradeshow led by Tom Nielson. John Mallett rounded out the year by conducting a technical seminar in Nuremburg, Germany during BrauBeviale.

2 BREWING CONTESTS

HGA's EU Brewing Contest this year prompted breweries to experiment with Talus®, McKenzie™, and Vista and develop a recipe for a Session IPA. HGA's Brazil Brewing Contest challenged participating businesses to brew an Imperial or Double IPA using Talus®, Cascade, Centennial, and Vista.

KEY RESULTS OF THE 2024 SURVEY EFFORTS



81% ACTIVELY EXPERIMENTING/BREWING WITH U.S. HOPS

Technical seminar survey respondents reported a significant increase in active experimentation rates, rising from 65% in 2023 to 81% in 2024. This growth highlights greater engagement and a stronger commitment to incorporating U.S. hops among participants in the EU and Brazil among survey respondents.



100% COMMERCIALIZED NEW BEER WITH U.S. HOPS IN 2024

In 2024, all brewing contest participants commercialized at least one new beer with U.S. hops, a 10% increase from 2023 results, demonstrating a stronger adoption and commercialization of U.S. hop varieties during the program year.

Global Market Development

QUALITY SAMPLES PROGRAM (QSP)

The Quality Samples Program (QSP) enables potential customers around the world to discover the quality and benefits of U.S. agricultural products. QSP participants obtain commodity samples, export them, and provide the recipient with guidance on how to use the samples.



The Quality Samples Program (QSP) makes it possible for U.S. hop samples to maintain a central role in global development programs, accompanying HGA programs in trade shows, technical and tasting seminars, and brewing contests.

EMERGING MARKETS PROGRAM (EMP)

The Emerging Markets Program (EMP) helps U.S. organizations promote exports of U.S. agricultural products to countries that have or are developing market-oriented economies and that have the potential to be viable commercial markets. EMP funds empowered HGA to conduct market research exploring the viability of program capacity in India and Vietnam.



INDIA

Heralded as the fastest-growing major economy in the world, India's GDP is projected to grow a robust 7% in 2024-25. The U.S. is currently the second largest importer of hops to the country, importing \$2.29 million worth of the commodity, following Germany's \$410 million import value. Beer consumption is estimated to grow 8% each year over the course of the next decade. A burgeoning craft brewery market lends opportunity for HGA to explore promotional programs in India.



VIETNAM

Vietnam is experiencing strong economic growth and is emerging as a major beer market, with retail sales worth \$5 billion in 2023. The young, urban, and increasingly upwardly mobile population represent the drivers of craft beer consumption, and nearly half the population of the country is between 15-39 years old. Recent years have shown a preference shift for premium segments of beer, signaling potential areas of development for the craft market.

Global Market Development

REGIONAL AGRICULTURAL PROMOTION PROGRAM (RAPP)

Recognizing that it takes significant investment to open and develop new export markets, USDA launched the \$1.2 billion Regional Agricultural Promotion Program (RAPP) in 2023 in response to a bipartisan request from the U.S. Senate Committee on Agriculture, Nutrition, and Forestry.

RAPP aims to diversify and expand market opportunities for U.S. food and agricultural products beyond the traditional top customers. Instead, RAPP will focus on enhancing U.S. exports to new markets in parts of the world – including South and Southeast Asia, Latin America, the Middle East and Africa, and others – where the middle class is growing and the desire for high-quality food and farm products is increasing. Gaining market share in these diverse and dynamic markets will help U.S. exporters better weather global shocks and better compete in an increasingly volatile global marketplace.

HGA is able to reimburse 8% of their time & effort to the RAPP grant.



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American Hop
Convention Archive

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