



2025

**Hop Industry
Annual Report**

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2025

HIGHLIGHTS

SERVING THE US HOP INDUSTRY FOR 67 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.

69TH ANNUAL AMERICAN HOP CONVENTION - CORONADO, CA

The U.S. hop industry ventured to Coronado, California and assembled the 69th Annual American Hop Convention, held January 22-24. The event centered around the theme *Charting the Course*. 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 15-19.

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.

INDUSTRY AWARDS HONOR ACHIEVEMENTS

In 2025 HGA recognized notable achievements within our membership. Learn more about the recipients on pages 10-11.

COLLABORATION OFFER OPPORTUNITY

HGA activities around the world build opportunity to spotlight our renowned commodity. Learn more on page 15.



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.

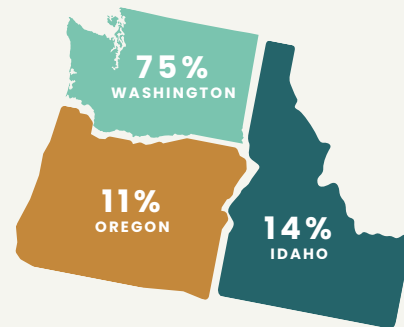
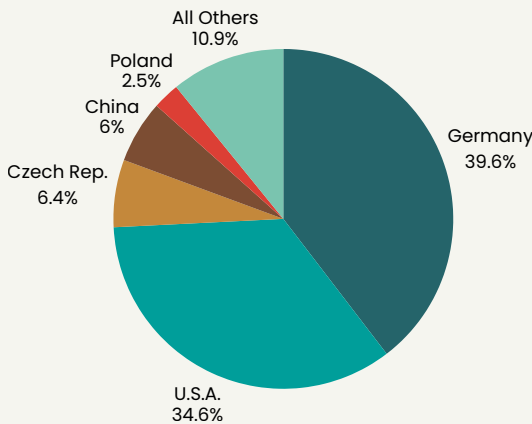
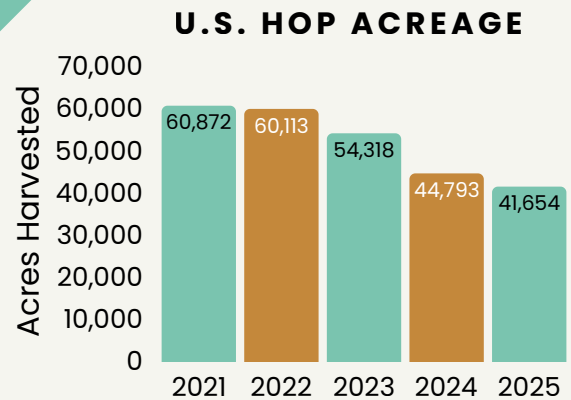
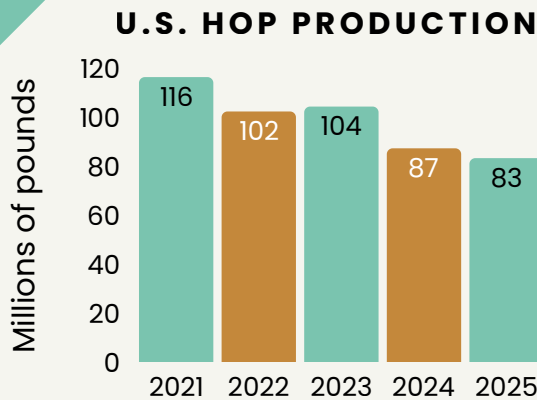
HGA SUPPORTS SEVERAL PROGRAMS STRENGTHENING THE U.S. HOP INDUSTRY:

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.



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 2025 the Pacific Northwest eliminated an additional 3,139 acres to relieve surplus pressure, revealing a total acreage decline of 32% since 2021. Despite severe market corrections and vast stretches of idled acreage, in 2025 the hops remained unfazed by the economics. Nourished by abundant sunshine inherent to long summer days in a growing season largely absent from extreme heat events or pest pressure, the Pacific Northwest boasted a crop with average yields of 1,996 pounds per acre bearing distinctly high oil content and exceptional aromatic quality reported by USDA-NASS at 83.1 million pounds, a 4.5% decrease from 2024.



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

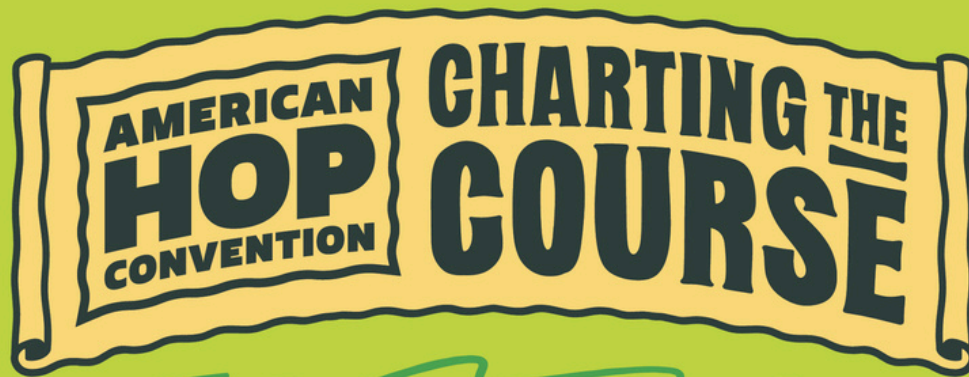


Good Bines is an educational program administered by Hop Growers of America, designed to connect hop industry members to reputable approaches to farm management. Online modules spanning key production topics are available, including Food Safety, Water & Irrigation, Business Management, Soil Fertility, 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.



69th ANNUAL AMERICAN HOP CONVENTION



The U.S. hop industry ventured to Coronado Island, CA to assemble the 69th Annual American Hop Convention, held January 22-24. The event centered around the theme *Charting the Course*. Societe Brewing Company honored the gathering by crafting a Single Hop India Pale Ale fitting for the occasion. Hosted by Hop Growers of America, the event drew a crowd of attendees and delivered highlights including a keynote address by the Beer Institute's President and CEO Brian Crawford, industry updates from the merchant and brewing sectors, and an evening event aboard the U.S.S. Midway aircraft carrier.

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 2025 HGA BEYOND THE BINE RECIPIENT IS MARTIN OLSEN

Martin Olsen has spent nearly 20 years in the hop industry, with 15 of those years spent serving on the Washington Hop Commission, 8 years as a Hop Growers of Washington Board member, a long-time research collaborator with WSU IAREC, and a champion for efficiency and quality as a grower with numerous annual hop grower awards. Martin can be found hosting ag-tech demonstrations in collaboration with industry partners in one of his many hop yards in Prosser, Washington. Martin is quick to support industry initiatives, traveling across the Pacific Northwest partnering with those in academia as well as those in Olympia. Martin has worked hard in support of family farming, advocating for worker's rights and giving back to his community

Industry Award

TOP OF THE TRELLIS



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

THE 2025 TOP OF THE TRELLIS RECIPIENT IS JOHN I. HAAS

Sustainability represents a core value of John I. Haas, based in Yakima, Washington. Cultivating hops for over 90 years, John I. Haas recognizes the importance for long-term success and orients their approach around planet, people, and prosperity. From breeding innovative varieties to leveraging cover crops, compost, minimal tillage, beneficial insects, and water conservation, the company embraces a commitment to renewed land productivity and soil health. HGA is proud to recognize John I. Haas as the recipient of the 2025 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

- FY2026: 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 production systems. From FY 2021 to FY 2025 USDA-ARS has appropriated \$2.6 million annually for hop research.
- We also request the restoration of probationary positions at research facilities in Prosser, WA and Corvallis, OR as well as an end to the agreement freezes at USDA-ARS.

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 2026.

4 | CRITICAL USDA PROGRAM SUPPORT

- The National Agricultural Statistics Service
- The FAS Foreign Market Development programs, including the Market Access Program, Quality Samples Program, and Regional Agriculture Promotion 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 \$15m to \$25m during FY2026 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.

2025 IR-4 FOOD USE WORKSHOP SUCCESSES

The IR-4 Food Use workshop was a sweeping success in 2025 as hop industry researchers secured studies submitted by the U.S. Hop Industry Plant Protection Committee. In 2026, a residue study will commence on the insecticide afidopyropen (Sefina).

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 third and final 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. Jessica Stevens, Maggie Elliot, and Alinne Oliveira traveled to Delhi and met with the CEO of the Food Safety and Standards Authority of India (FSSAI) to discuss the need of import tolerances. The CEO expressed India was willing to deliberate MRL needs bilaterally with the U.S. government as part of ongoing trade agreement negotiation. HGA notified the United States Trade Representatives (USTR) office to consider including MRLs as part of the bilateral discussions.

CHANNELS OF TRADE - EFFORT WITH CODEX

Codex Alimentarius (Codex) represents a collection of international standards developed with the Food and Agriculture Organization (FAO) and World Health Organization (WHO) to protect consumer safety and affirm fair trade practices. Codex serves as the empirical baseline justifying World Trade Organization (WTO) regulations. The bedrock of data collected and discussed at Codex serves as the foundation for many MRL regulations in countries around the world.

The revocation of channels of trade language in the European Union for hop products with bifenthrin, etoxazole, and potentially dimethomorph distinguished a marked and concerning divergence in trade policy. Affirming channels of trade language in all MRL regulations to allow the trade of goods compliant at the time of importation at Codex would foster inclusivity of this standard around the world. The International Hop Growers Convention (IHGC) sent Maggie Elliot as a representative of the hop industry to the 2025 Codex Committee on Pesticide Residues (CCPR) meeting in Santiago Chile, where other international commodity organizations agreed a formal stance on channels of trade language would be useful for trade standards. The IHGC and USHIPPC will continue to collaborate on this issue to strengthen all partners in the world hop industry.

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 2025.

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 Lehmail, the Executive Director of the German Hop Growers Association co-chair and provide leadership for the IHGC Regulatory Harmonization Commission.



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, brewing seminars, key trade shows, and technical educational seminars led by renowned Brewmasters for both student and professional brewers alike.

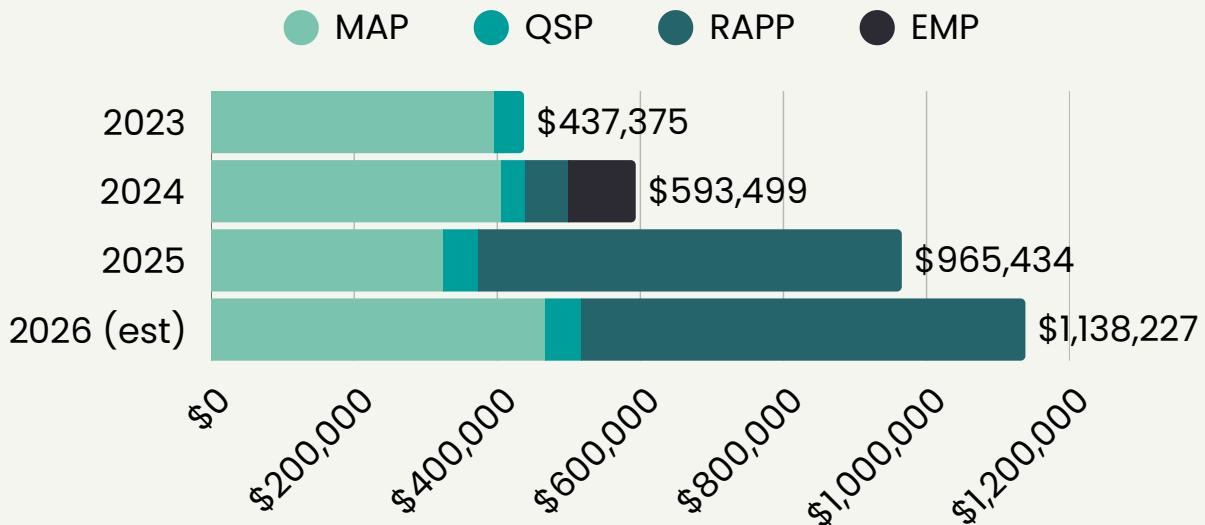
95%

of the 2025 TEC program costs were reimbursed by USDA-FAS grant programs.

39%

increase in grant program spending in 2025 due to additional grant funding.

TOTAL GRANT MONIES SPENT



Collaboration Spotlight

Hop Growers of America has teamed up with Untappd for a first of its kind brewing competition in the Netherlands. HGA sent four U.S. hop varieties to eight participating breweries. Each brewery gets the same hops – but what they do with them is entirely up to their imagination.

HGA looks forward to crowning the first ever HGA x Untappd Netherlands champion in 2026.



Global Market Development

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.

2 TRADESHOWS

HGA operated booths showcasing U.S. hop varieties at the Craft Brewers Conference & BrewExpo America (CBC) held in Indianapolis, Indiana, and Drinktec in Munich, Germany.

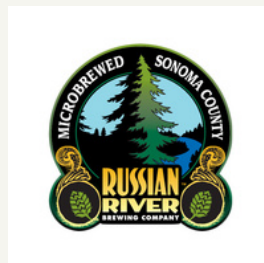
4 TECHNICAL EDUCATION SEMINARS

HGA continued to build its relationship with influential brewing schools by conducting 4 technical seminars in Europe - including Heriot-Watt University, United Kingdom, Doemens Academy of Munich, and Technical University and VLB of Berlin, Germany. Matthew Brynildson of Firestone Walker and Mitch Steele of New Realm delivered the interactive lectures.

3 BREWING CONTESTS

HGA's 10th annual EU Brewing Contest prompted breweries to experiment with Elani™, Cluster and CTZ, to develop a recipe for a West Coast IPA. HGA's Brazil Brewing Contest challenged participating businesses to brew a Session IPA using Amarillo®, El Dorado®, Idaho 7™, and CTZ. HGA also participated in its first ever collaboration brewing contest with Untappd. Providing hops for 8 Dutch breweries with the winner being the highest rated beer on the Untappd app.

Cheers to HGA's 2025 Brewing Sponsors, who donated beer consumed at our HGA trade show exhibits in 2025. As HGA wraps up a busy year of trade shows, we extend a sincere thank you to these top-tier U.S. craft breweries for supporting our hop grower community.



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.

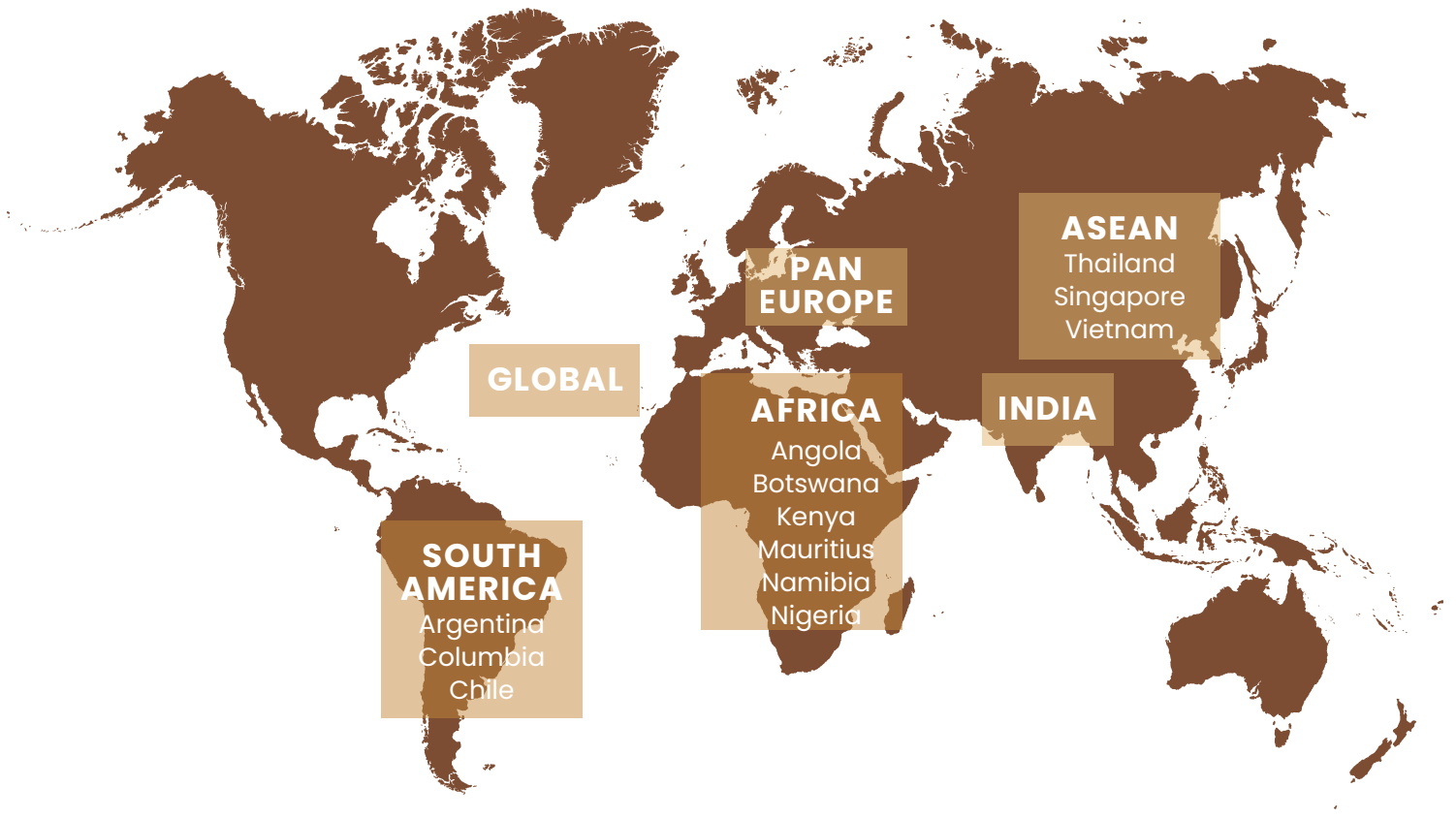
Global Market Development

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.



REGIONAL AGRICULTURE PROMOTIONAL PROGRAM (RAPP)

2 TRADESHOWS

HGA operated booths showcasing U.S. hop varieties at Brew Asia held in Bangkok, Thailand and the Brew and Spirit Expo in Bangaluru, India.

2 TECHNICAL EDUCATION SEMINARS

HGA initiated activities in Argentina with two technical seminars led by brewmaster Jeremy Moynier of Sapporo–Stone Brewing. Jeremy addressed key topics throughout the seminar, guided participants through a sensory evaluation of four U.S. hop varieties and concluded each seminar with a tasting of four local beers brewed with the featured hop varieties. A total of 60 brewers and brewing industry professionals attended the seminars.

3 BREWING SEMINARS

HGA conducted three brewing seminars in Ho Chi Minh City Vietnam, Medellin Columbia and Cape Town South Africa in 2025. Brewmaster John Mallet led the seminars which consisted of a three-day educational program beginning with a technical education seminar followed by two days of collaborative brewing with local breweries. Additionally, the batch produced during the Vietnam brewing seminar was later served at the HGA booth during the Brew Asia trade show in Thailand.

1 REVERSE TRADE MISSION

HGA organized a South American Reverse Trade Mission which brought together twelve leading brewing companies from Argentina, Chile and Colombia for a week-long visit to the Pacific Northwest. The program was designed to showcase the breadth of the U.S. hop industry while deepening commercial ties, advancing technical knowledge, and positioning U.S. hops as a trusted partner for the region’s fast-growing brewing sector.

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STAFF

Jessica Stevens | Executive Director
jstevens@wahops.org

Maggie Elliot | Science and Communications Director
melliot@wahops.org

Brooke Benner | Program Director
bbenner@wahops.org



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Convention Archive

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