



Hops in Virginia – 2014 Grower Survey

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Hops (*Humulus lupulus*) are an essential component of beer production. Though hops have been grown in Virginia since the 1700s, Virginia hop production has been relatively insignificant until the past decade. Most major hop production in the U.S. takes place in Washington, Oregon, and Idaho. However, in recent years, the number of craft breweries in Virginia has increased, and interest in local hop production has grown. The number of requests from current and potential growers seeking information and resources from Virginia Cooperative Extension has also increased steadily. Unfortunately, prior to 2014, no means were available to formally assess the scope of the industry, and national hop acreage reports did not provide data for Virginia.

Survey Process

We developed and distributed a survey to Virginia hop growers in September 2014 to evaluate the status of the industry and provide a benchmark for future growth assessments. The survey was developed with Qualtrics online survey software and administered on behalf of Virginia Cooperative Extension. The survey was marketed and distributed as widely as possible through email lists, grower groups, county agents, and social media. Industry stakeholders also assisted with distribution. Therefore, exact survey distribution and, thus, response rate are not known. Statewide yield and total plant numbers may be higher than shown in this survey because some growers may have chosen not to complete the survey and some growers may not have been reached by the survey administrators.

Though national reports include hop acreage, we chose instead to assess the total number of plants on Virginia operations. Unlike hop producers in states like Washington, many Virginia growers have hop yards of



Photo by Laura Siegle

less than 1 acre, and trellis spacing is not standardized. For these reasons, we believed that it would be difficult to get a highly accurate acreage estimate. Instead, we asked growers to report varieties grown, number of plants for each variety, and maturity in years of each set of plants. It should also be noted that yield was reported as “wet pounds harvested” because most growers use this benchmark in recordkeeping, and few Virginia growers dried and weighed their hops in 2014.

Survey Results

Our results indicate that most hop plants in Virginia are 3 years old or less. This correlates with our observations that the state experienced a rapid increase

in the number of growers in 2012 and 2013, while a handful of growers have been in existence for a longer period of time.

Although not all growers reported yields, the yields that were provided were consistent with expectations for new yards with young plants. Hop plants do not produce heavily until they reach three or more years in the field. As the maturity of each hop yard increases, yields are expected to increase. Interestingly, 24 out

of 46 respondents indicated plans to expand their operations for the 2015 growing season. Though several hop varieties were reported in production, Cascade was far and away the most widely grown. Detailed survey results are reported as follows.

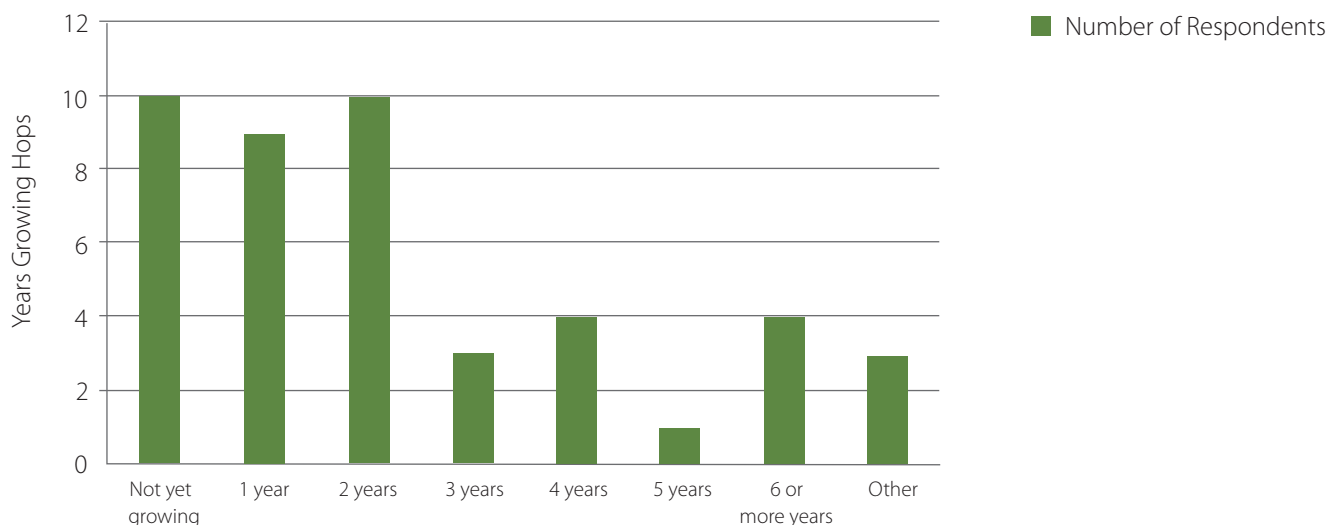
Hops in Virginia – Scope of the Industry Survey

Administered September 2014

1. Number of respondents to survey: 46
2. Respondents level of involvement in growing hops.

Grower Classification	Percentage of Respondents Matching Criteria
I am growing hops commercially/I intend to sell my hops	48%
I am currently growing hops for my personal use/for non-commercial purposes	24%
I am not yet growing hops, but planning on it	24%
Other	4%

3. Respondents number of years of experience growing hops.

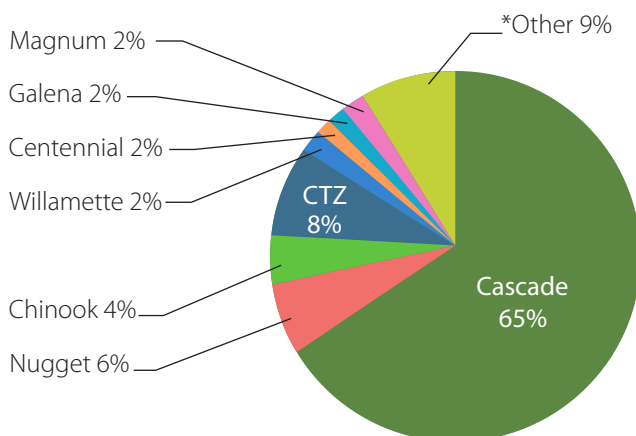


4. Growers were asked to complete a yield table for 2014, including variety grown, number of crowns of each variety, the plant's maturity (in years), and harvest/yield expressed as pounds of wet hops.

*Other: Seventeen other varieties were grown in small numbers, often by only one survey respondent. To protect privacy of yield data for these individuals, any variety with fewer than 50 plants in the state OR any variety that was grown by one respondent was lumped into one total in this "other" category. This category also includes data from growers who reported plants but did not specify varieties or data by variety.

Hop varieties grown as reported by respondents

Hop Varieties Grown in Virginia



Total number of plants reported: 13,317

2014 harvest yield date

*Other: Seventeen other varieties were grown in small numbers, often by only one survey respondent. To protect privacy of yield data for these individuals, any variety with fewer than 50 plants in the state OR any variety that was grown by one respondent was lumped into one total in this "other" category. This category also includes data from growers who reported plants but did not specify varieties or data by variety.

**Some growers were unable to report harvest data with their plant and variety totals. The figure represents the values that were provided.

Variety	Total Pounds Harvested by All Respondents (Wet)
Cascade	5,667
Chinook	210
CTZ	187
Nugget	129
Willamette	10
Centennial	4
Galena	0
Magnum	0
*Other	1,902
**Total yield	8,109 pounds (wet)

5. Form that harvested hops were sold in.

Of the 8,109 pounds harvested, 65 percent was sold wet, 11 percent was sold dried, and 10 percent was sold pelletized. For the remaining 14 percent, hops were not sold or the grower did not indicate the form in which they were sold.

6. Commercial growers were asked if they were able to sell all of their 2014 harvest, and if not, why.

Eleven respondents reported that they were able to sell their entire 2014 harvest. Ten respondents reported they did not sell their entire 2014 harvest. The following reasons were noted:

- Hops did not produce enough to sell.
- Too many wet hops were ready at one time.
- No buyer was available.
- Grower lacked time, resources, and/or knowledge to market crop.
- Demand.
- Holding hops for later sale.

7. Growers were asked if they plan to expand in 2015, and, if so, to estimate the additional number of crowns.

Twenty-four growers reported plans to expand in 2015 and provided estimates indicating a collective increase of 7,760 to more than 8,000 plants to existing totals in Virginia — a potential increase of 60 percent.

8. Growers were asked to describe their personal perception of current demand and future growth of the Virginia-grown hop market.

Industry Outlook Ratings Based on Grower Perceptions

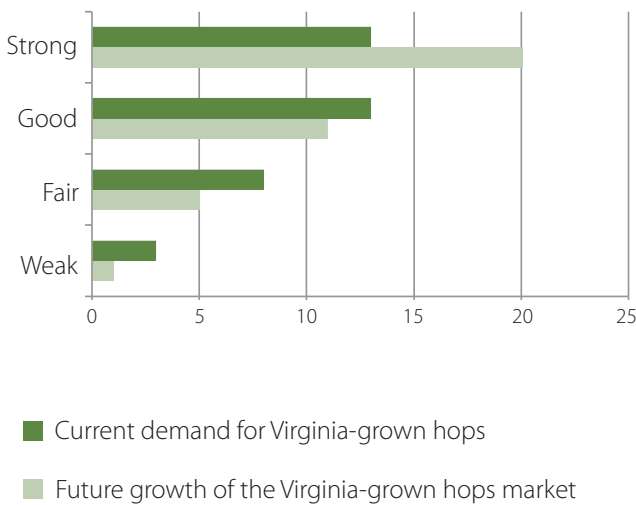


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9. Growers were asked to describe how they marketed their crop in 2014. Their responses are broadly categorized and summarized below.

*Several respondents noted they were farm breweries or home brewers who used their own hops and therefore did not need to market them.

Marketing Method*	Number of Growers Using Method
Meetings with brewers	7
Emails	4
Phone calls	4
Word of mouth	3
Social media	2
Brewer visits to hop yard	2
Outreach to brewing clubs	1

10. Growers were asked to explain their greatest challenges growing hops. Because many comments echoed one another, they were categorized and summarized.

Challenge	Number of Growers Noting This Challenge	Summaries of Comments from Growers
Time	9	Not as much available time as desired for chores.
Marketing	9	Product quality, coordinating delivery of wet hops with brewer, demand from buyers.
Labor	8	Particularly challenging during spring chores and harvest; also costly.
Harvest efficiency	8	Labor and time-intensive, even when mechanized.
Cost	5	Most challenging cost appears to be yard establishment.
Weeds	5	
Disease	4	Some worried about downy mildew.
Insects	3	Several specifically mentioned Japanese beetles.
Lack of industry & university resources	3	Local information not readily available; difficulty finding plant material.
Beginning grower "learning curve"	3	Some noted that getting started and learning to manage hops was a challenge of its own.
Pesticide selection	2	Uncertainty about products labeled for use on hops; no VA hops pest management guide available.
Rhizome establishment	2	Certain growers experienced rhizome failure.
Fertilizer	1	Grower still learning and adjusting to plant needs.
Irrigation	1	
Processing after harvest	1	Processing equipment/facility would be helpful for drying, pelletizing.

11. Growers were provided with an opportunity to share successes, experiences, and outlook gained from 2014. Many comments were similar, so grower responses were interpreted and summarized below.

Marketing

- Local potential for growing and selling hops seems good.
- Demand for Virginia hops seems strong.
- Consumers are interested and excited about locally grown hops.
- Hops may not be profitable if demand is low and/or buyers can get them cheaper elsewhere.
- Current cost per pound of wet hops is too high for most brewers. Brewers may be able to attain an acceptable margin if cost of wet hops decreased to \$10 or less per pound.
- Influx of breweries is increasing demand; brewers want fresh hops; brewers are interested in local hops.
- Competition between growers and lack of brewer willingness to use wet hops could negatively affect demand and outlook.
- Hops may not be profitable if demand is low and/or buyers can get them cheaper elsewhere.
- Some brewers have already locked up local suppliers and first-time grower had difficulty finding an outlet. Market development/assistance from grower group could mitigate this.

Cultural practices (including resources)

- Relationships with cooperatives, fellow growers, and farming neighbors are valuable.
- Several growers are pleased with Virginia Cooperative Extension, Virginia Tech, and Virginia State University involvement in the industry.
- Several growers are reevaluating variety selection in light of 2014 performance. Cascade remains popular.

Harvest and postharvest considerations

- Having the capability to dry and/or pelletize hops in the future would be helpful.
- Mechanized harvest is a necessity in the future, especially for larger yards.
- Several growers were very pleased with 2014 harvest and look forward to adding new plants and/or varieties.

Brewer interactions

- Connecting with brewers could be a challenge for some.
- Only a handful of brewers released a local hopped beer this season.
- Brewers are becoming acclimated to the considerations needed when working with Virginia growers and wet hops.



Photo by Laura Siegle

12. Growers were provided with an opportunity to describe any university and industry resources that they wish to see developed in the future.

Requested Resource	Number of Growers Requesting Resource
Shared harvesting equipment	4
Pest Management Guide	4
Hop breeding and research program	3
Hops production/management guide	2
Packing/drying facilities and services	2
Postharvest handling guidelines	1
Faculty specializing in hops	1
Local rhizome source	1
Product approval system	1
Method to inform/educate Virginia brewers about Virginia hops	1
Great accessibility and feasibility concerning patented varieties	1
Tissue testing service	1
Outlets for developing and marketing alternative uses for hops	1