



ONTARIO HOP GROWERS' ASSOCIATION

ASSOCIATION DE CULTIVATEURS D'HOUBLON DE L'ONTARIO



## 2016 Market & Research Update

Master Brewers Association Nov. 17, 2016

presented by Hugh Brown at the Annual General Meeting of the Master Brewers Association, District Ontario.  
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# Who are we?



- Formed in 2012 - non-profit, horticultural association - mandate is to support this re-emerging crop in Ontario.
- OHGA represents about 81 growers in Ontario & represent about 96% of the commercial growers in ON.
  - 57 full members
  - 21 affiliate members.
- Currently, members have approx. 77 acres (31.1 hectares) of hops under cultivation

**2017** -138 acres

**2018** close to 200 acres.

# 2016 Yield Projections



## **Growing season challenges:**

- Drought in a good portion of Ontario from mid June until just before harvest, so while cones were plentiful - without irrigation, some early varieties didn't properly fill out, resulting in:
  - Lower yields
  - Noticeably lower alpha/beta values – some times 2-3% lower than expected range

## **Positives:**

- Pest and disease pressure was actually lower as a result
- Less Downey
- ▣ At the start of the year, member yields of all cultivators in 2016 was projected to be approximately:

**31,056 lb. / 14,086. kg or (dry weight)**

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## Top 10 cultivars grown By OHGA members

1. Cascade	6. Super Alpha
2. Centennial	7. Newport
3. Chinook	8. Willamette
4. Nugget	9. Golding
5. Hallertau	10. Mount Hood

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# Hops making a come back



Hops are still a fairly uncommon sight in Eastern North America – still very rare to see a hop yard in ON

- ▣ 96% hops used by craft brewers in Ontario imported from the U.S and Europe
- ▣ However, it wasn't always that way...
- ▣ latter part of the 1800s – hops were fairly common in Ontario and a major commercial crop in Ontario, Quebec New York State and some of the eastern states.

# North America - Key trends



- Pacific NW dominates hop production (45,340 acres).
- 97% overall acreage, but also 94% of new acreage.
- Overall hop acreage increasing (15% between 2014 and 2015) aroma hop plantings.
- In 2015 U.S. production exceeded that of Germany.
- Conversely, 4,700 acres of high alpha varieties have been removed in the U.S. over the last five years,
- Craft beer hopping rates increased **over 50%** – from 3.5 to 5.5 grams/litre of beer .
- Water shortages in the Pacific NW may, become a limiting factor for that region in the future.

# Market potential



- Total import replacement to Ontario of ALL *imported* hops - ~**1500** + acres at commercial densities/yields (*unrealistic\**)
- **Ontario Craft Brewers (OCB)** 2015 production estimate 289,508 HL
- Hop production to replace ALL at current yields:  
**128-320 ac** † OMFRA \*

**Caveat** - seeing reports of oversupply in Michigan this year

- In 2010 – would have struggled to find a brewer using local, fresh hops.
- 2016 – 1-in-3 Ontario craft brewers working with local farms to create fresh hopped/seasonal beers.
- 18+ brewers released small batch, green hopped beers. Hops go from the field to the brew kettle in a matter of hours, but less than 24.
- Some of those brewers: Amsterdam Brewery, Bellwoods, Collected Arts, Block Three Brewing, Cassel Brewery, Wellington Brewery, Dominion City, Oast House, The Exchange, Sawdust City, Nickel Brook, Granite Brewery, and probably a few more.



# In summary



- Ontario has a long history of hop growing, which until recently has been supplanted by imports. The OHGA believes hop growers in this province have the ability to meet the needs of Ontario brewers beyond one-off and seasonal harvest beers. As a volunteer non-profit association, our objectives are as follows:
- Promote superior yields thru education and workshops (1,250 lb/acre – dry - 1000 plants) .
- Ensure Ontario hops exceed brewers' quality requirements (8-10% moisture, pelletized and vacuum sealed, alpha/beta testing).
- Expansion of acreage. Larger yards (over 4 acres)
- Member focused, educational workshops, Ontario specific hops research, lobby govt's & market the unique characteristics of Ontario hops.