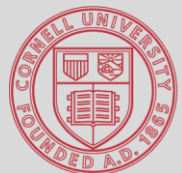


# Hops Supply Chain Survey Results



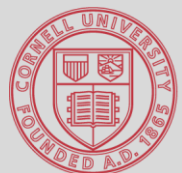
Photo Credit: wisegeek.com



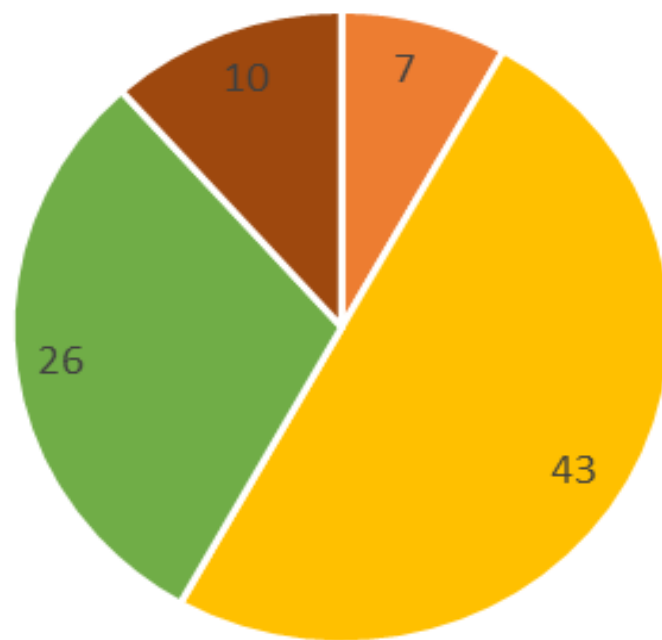
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# Survey Administration

- Issued in Spring 2015
- Emailed:
  - 32 malting barley farmers
  - 8 malt houses
  - 250 breweries
- Response rate:
  - 28 malting barley farmers (88%) – fully responded
  - 8 malt houses (100%) – fully responded
  - 80 breweries (31%) – some fully and some partially responded



# Respondents by Brewery License Type

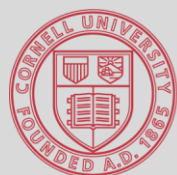


■ Brewery (>75K barrels/yr)

■ Micro-brewery

■ Farm-brewery

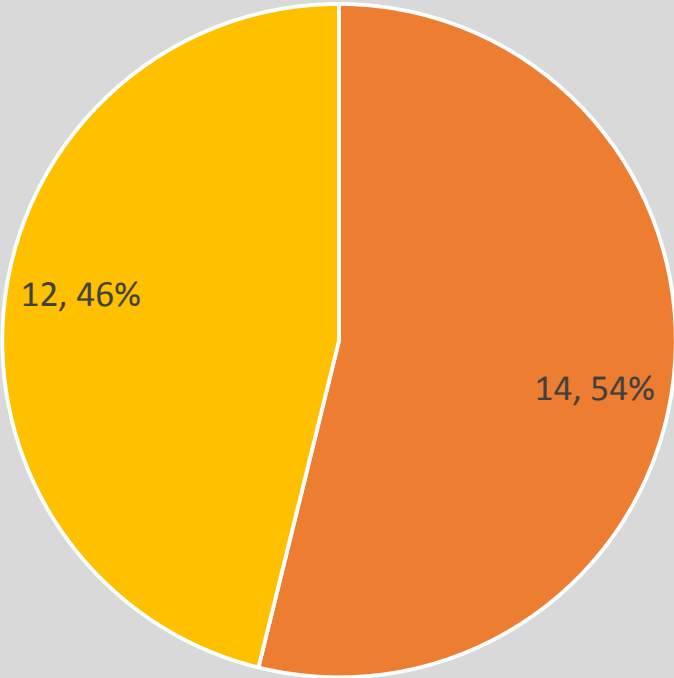
■ Restaurant Brewer (Brew Pub)



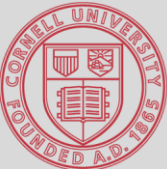
# Farm Brewery License Incentives Ranking by Farm Brewery Licensees

	Min Value	Max Value	Average Value	Standard Deviation
<b>Ability to sell beer by the glass</b>	7.00	10.00	9.72	0.74
<b>Exemption of excise tax reporting monthly</b>	2.00	10.00	8.12	2.11
<b>Ability to market as NY farm brewery produced</b>	1.00	10.00	7.76	2.60
<b>Ability to sell other NY farm brewery produced beer by the glass</b>	1.00	10.00	7.56	2.81
<b>Ability to do tastings of NY labeled beer, wine, cider, and spirits</b>	1.00	10.00	7.50	2.93
<b>Ability to make and sell cider by the glass</b>	0.00	10.00	7.00	3.12
<b>Ability to operate additional 5 branch locations</b>	0.00	10.00	6.96	2.76
<b>Exemption of 20C license fee</b>	0.00	10.00	6.96	3.11
<b>Ability to sell other NY labeled beer, wine, cider, and spirits by the bottle</b>	1.00	10.00	6.56	3.00

# Brewers' Support of Incentives as they are

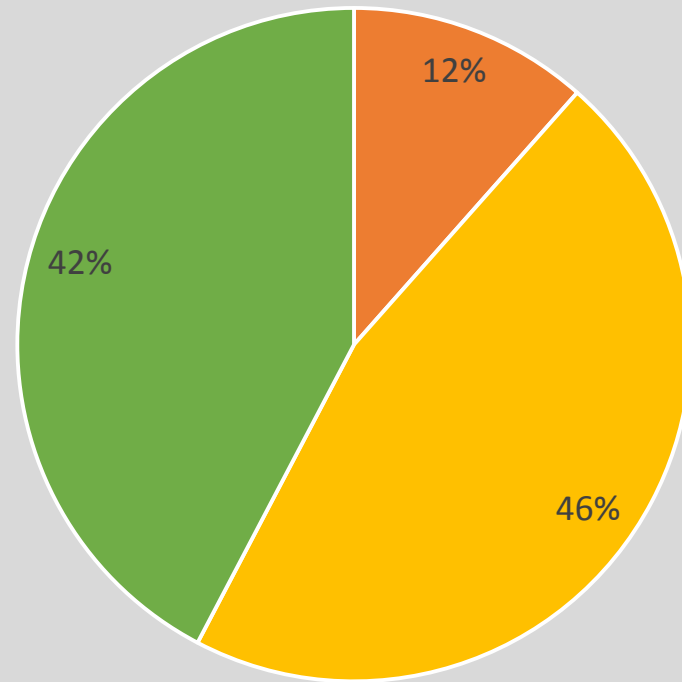


Yes No

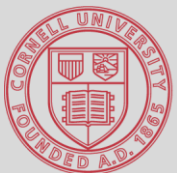


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# Brewers' Likelihood to Adjust License Types

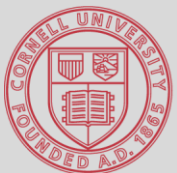
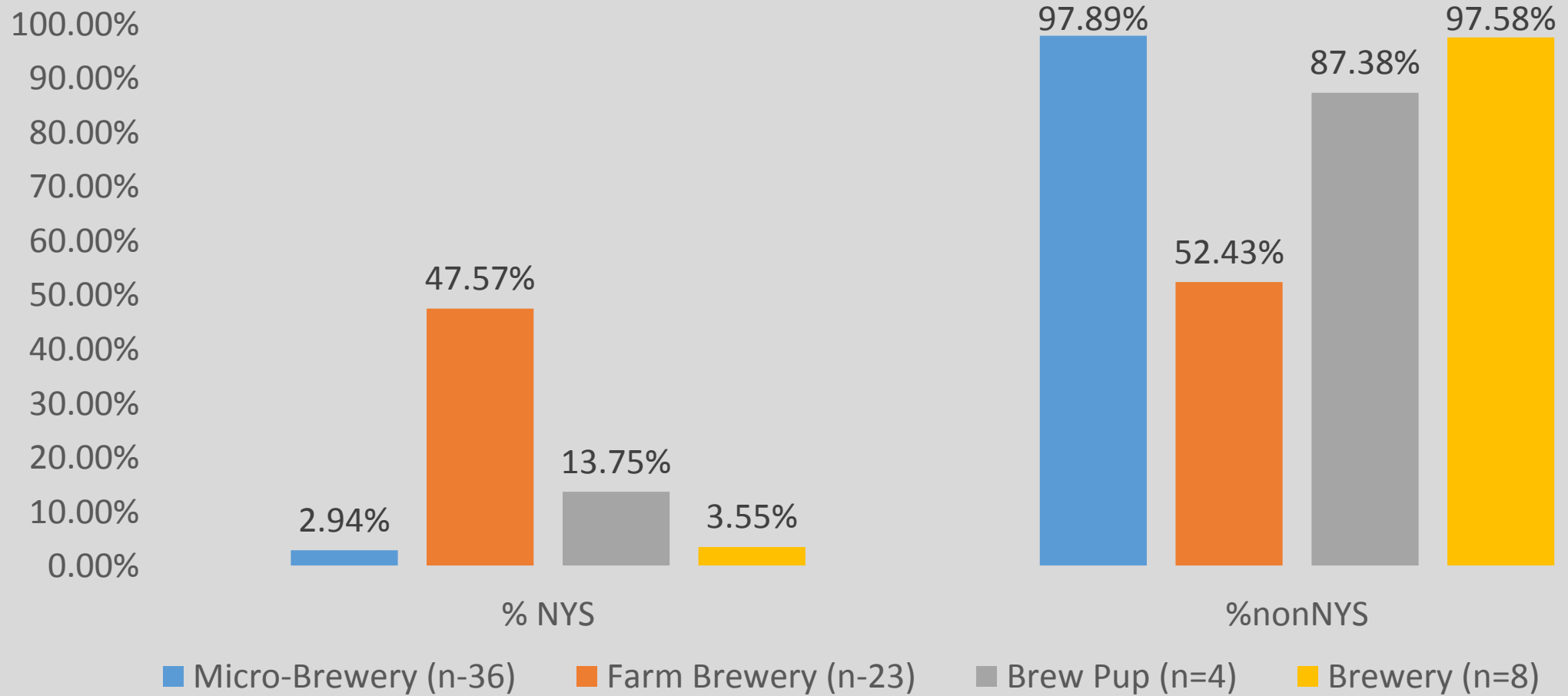


Switch (n=3)    Remain FBL (n=12)    Combine (n=11)

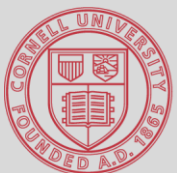
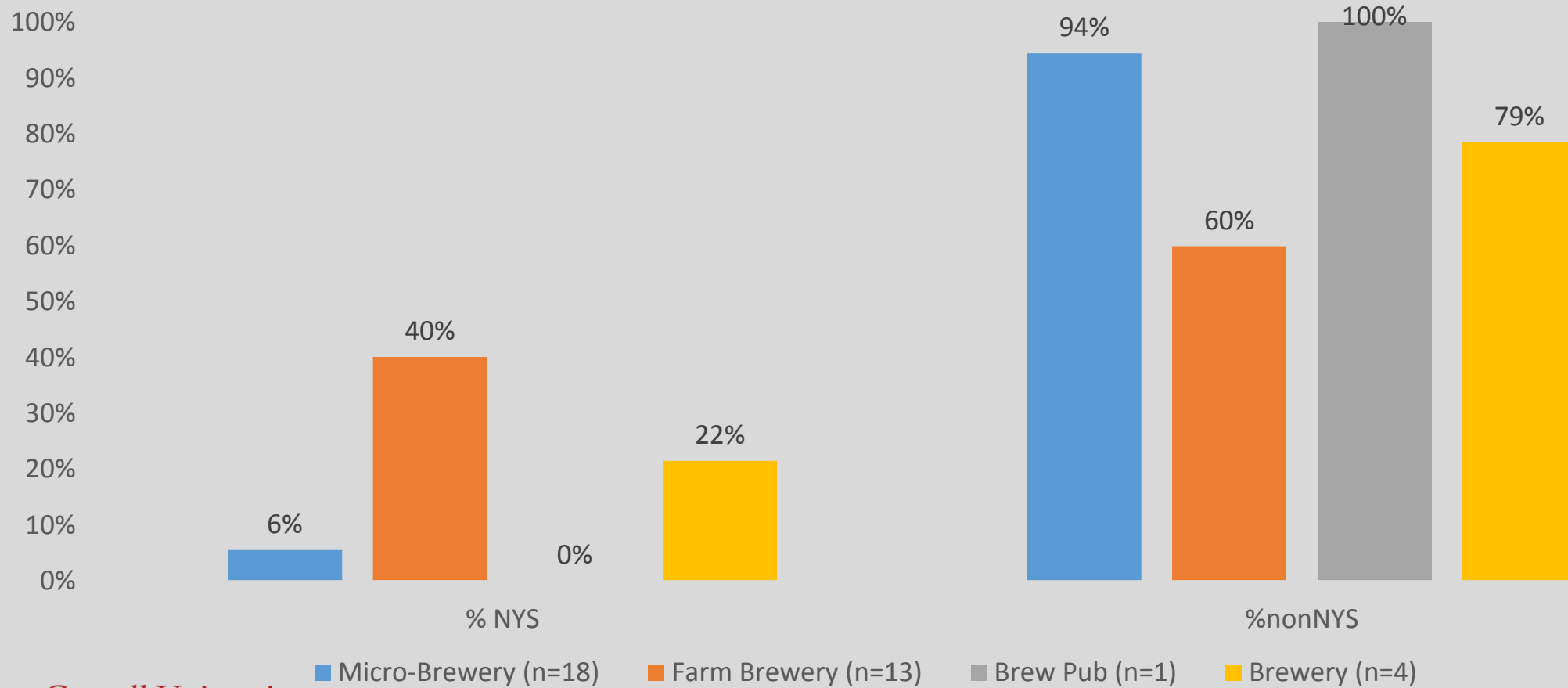


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# Demand for NY Grown Malt (2015)

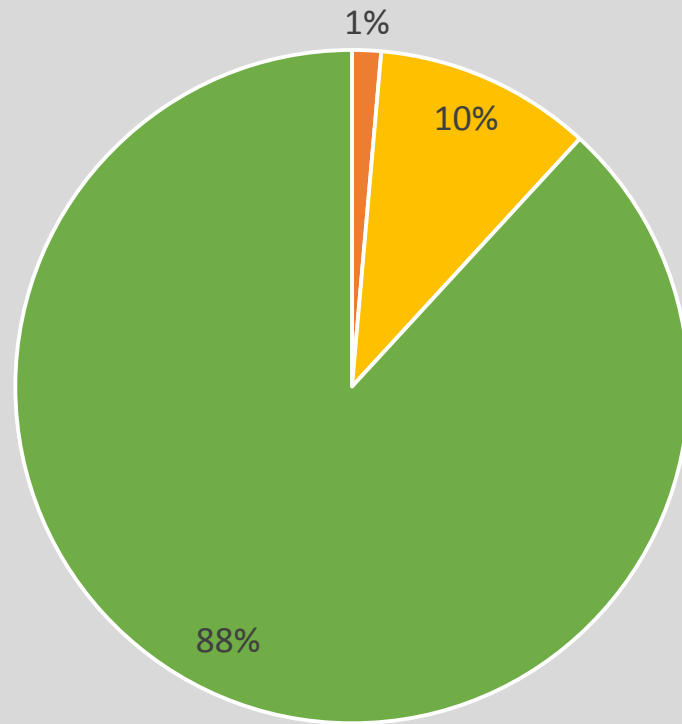


# Demand for NY Grown Hops (2015)

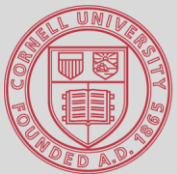




# Form of Hops Used by Brewers

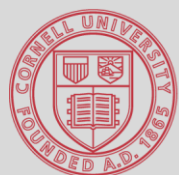
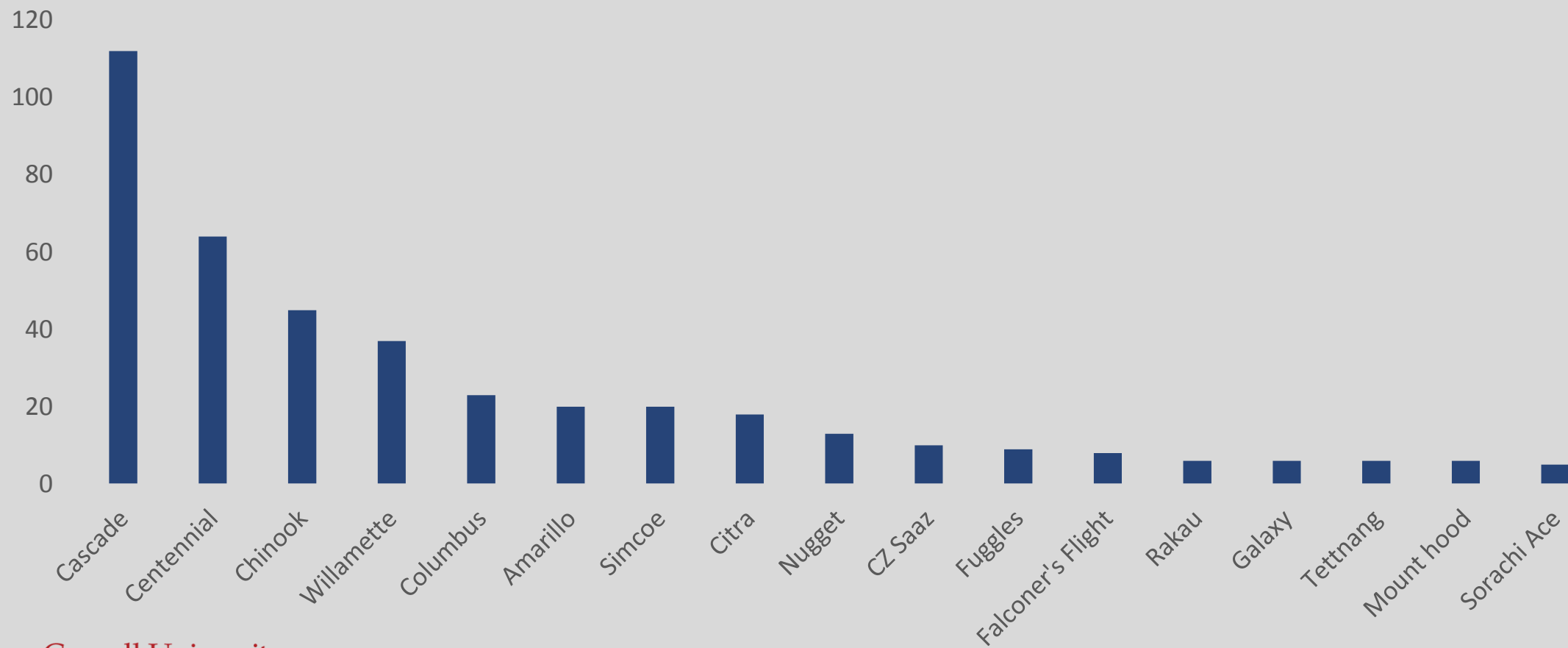


■ Fresh Hops (Wet Hops)   ■ Whole Cone   ■ Pellets



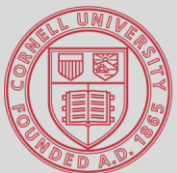
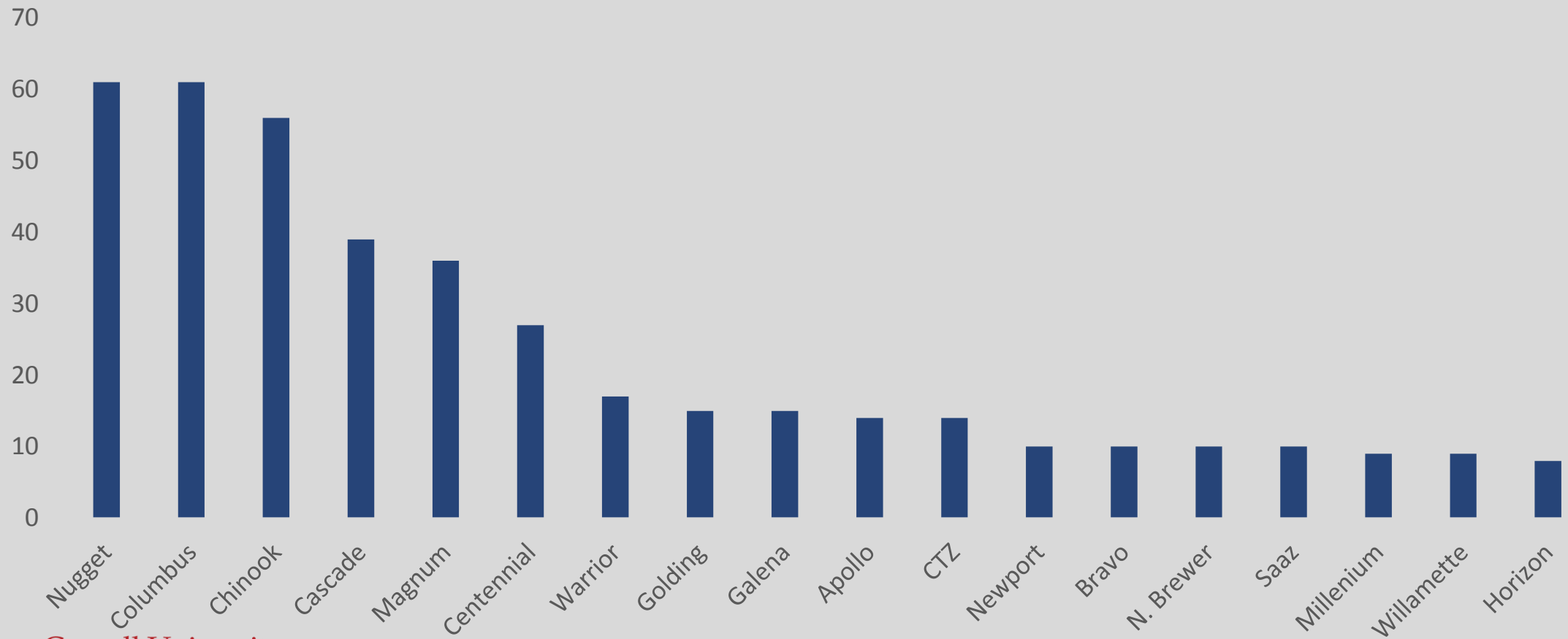
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# Ranking of Aroma Hops



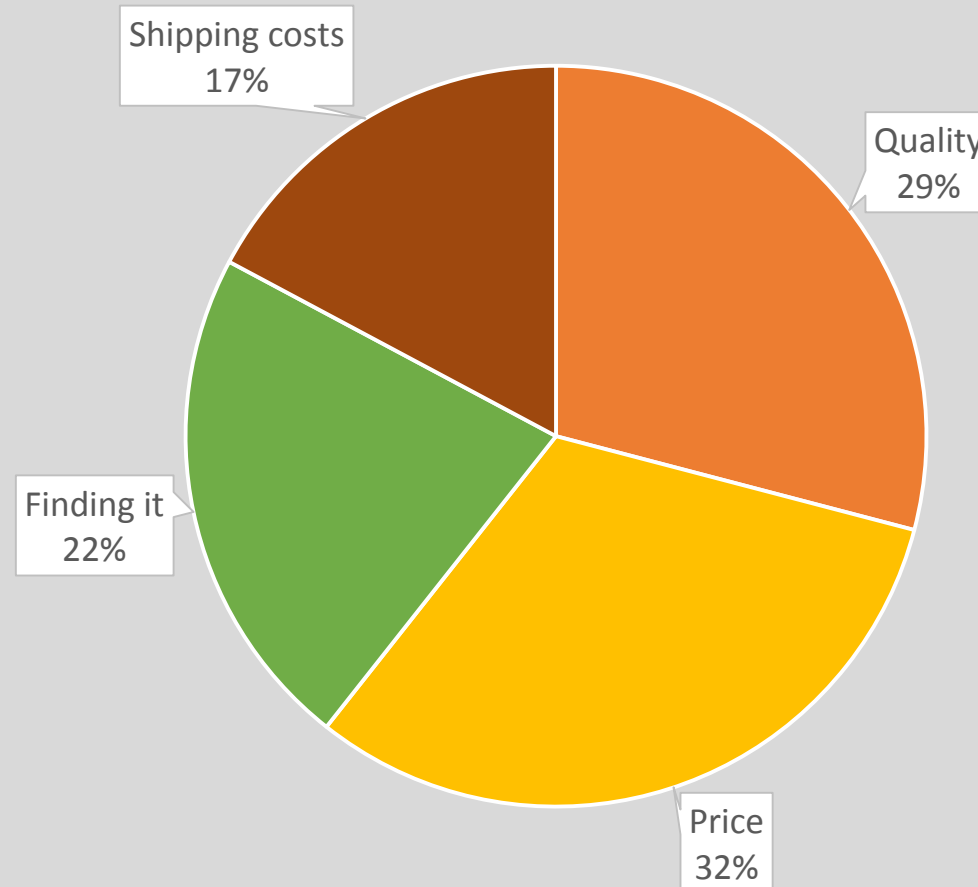
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# Ranking of Bittering Hops

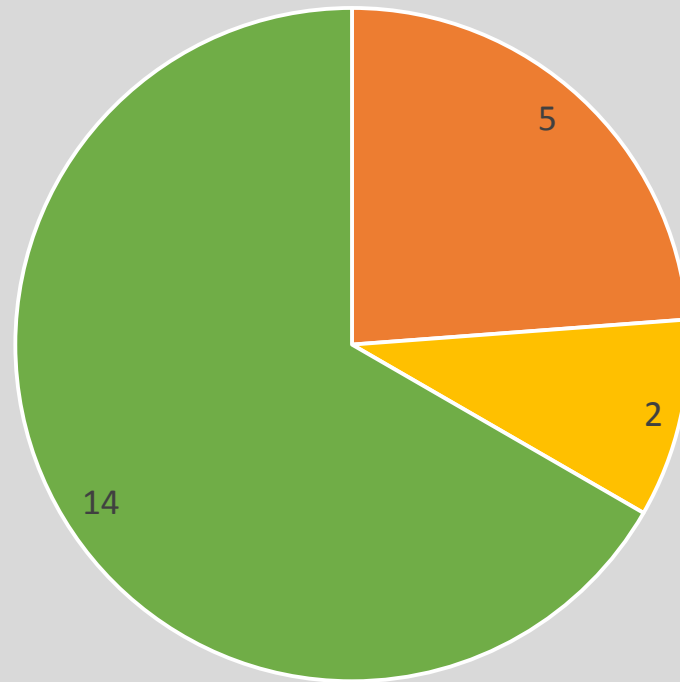


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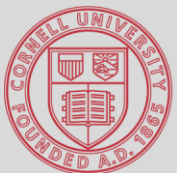
# Brewers' Concerns with Sourcing Local Hops



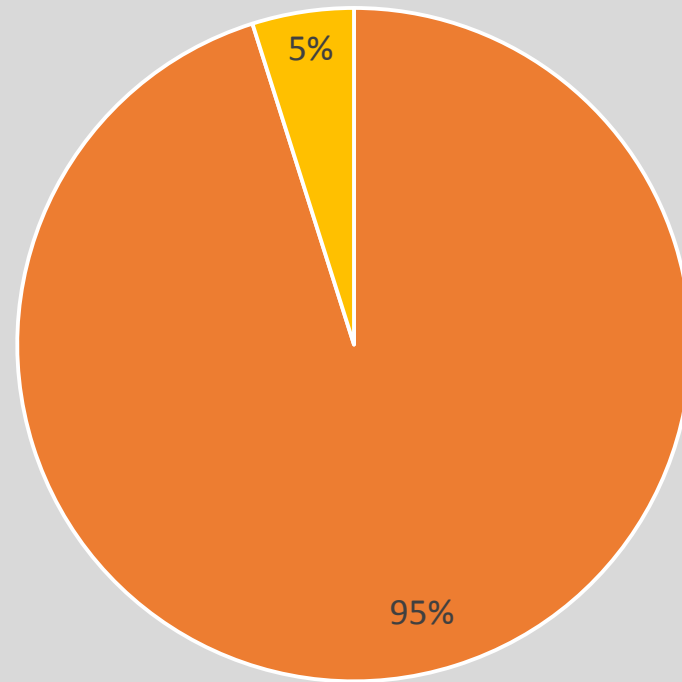
# Brewers Perspective: % More Consumers will Pay for Beer Made with NYS Grown Inputs



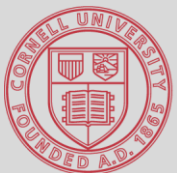
10% 20% 25%



# Consumers are Interested in Knowing which Beers are Produced with NY Grown Inputs

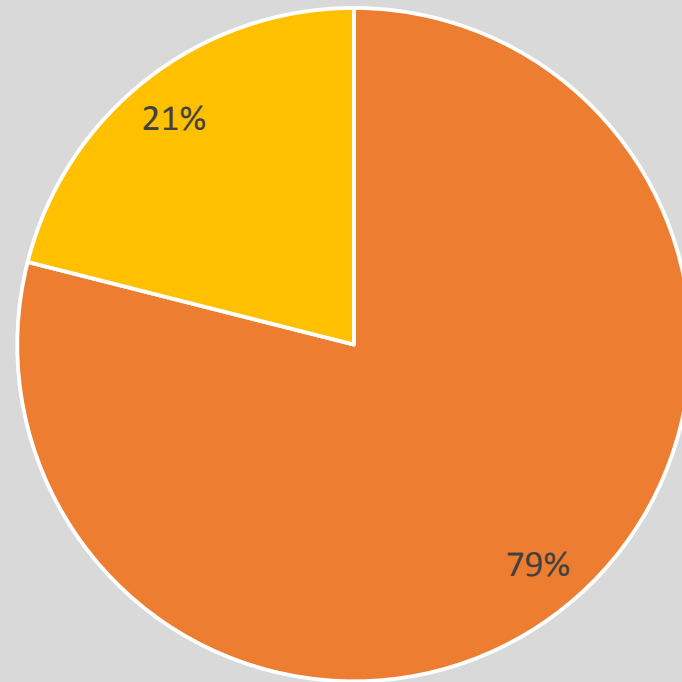


■ Yes ■ No

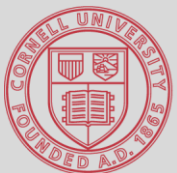


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# Brewers' Interest in a NY Designed Logo to Use with Beer Made with NY Grown Inputs



■ Yes ■ No



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# Any Questions?

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