



2010

STATISTICAL REPORT

RELEASED JANUARY 2011

PRESENTED BY
HOP GROWERS OF AMERICA



TABLE OF CONTENTS

	Page
U.S. HOP ACREAGE BY STATE AND VARIETY (5 YEARS)	4
U.S. HOP YIELDS BY STATE AND VARIETY (5 YEARS)	5
<u>U.S. HOP PRODUCTION BY STATE AND VARIETY (5 YEARS)</u>	<u>6</u>
U.S. HOP ACREAGE BY STATE (10 YEARS)	7
U.S. AVERAGE HOP YIELDS (10 YEARS)	7
<u>U.S. HOPS: SEASON AVERAGE PRICE & TOTAL CROP VALUE</u>	<u>7</u>
2010 U.S. HOP INSPECTION REPORT	8
U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE (10 YEARS)	8
<u>IHGC AROMA ACREAGE (5 YEARS)</u>	<u>9</u>
IHGC ALPHA ACREAGE (5 YEARS)	9-10
IHGC TOTAL ACREAGE (5 YEARS)	10
<u>2010 IHGC HOP ACREAGE AND PRODUCTION</u>	<u>11</u>
U.S. & GERMAN ALPHA ACID PRODUCTION (10 YEARS)	11
CHART – WORLD ALPHA PRODUCTION & DEMAND (10 YEARS)	12
<u>CHART - COMPOSITION OF WORLD HOP ACREAGE 1991 VERSUS 2010</u>	<u>12</u>
CHART – WORLD’S LARGEST ALPHA PRODUCERS	13
WORLD HOP ACREAGE & PERCENT SHARE (10 YEARS)	14
<u>WORLD HOP PRODUCTION & PERCENT SHARE (10 YEARS)</u>	<u>14</u>
MARCH 1 & SEPTEMBER 1 U.S. HOP STOCKS 1996– 2010	15
U.S. HOP IMPORTS BY COUNTRY (5 YEARS)	15
<u>U.S. HOP EXPORTS BY COUNTRY – TOP 40 (2006/07 – 2009/10)</u>	<u>16</u>
U.S. HOP EXPORTS BY PRODUCT 2010 – TOP 40	17
WORLD BEER PRODUCTION (FIVE YEARS)	18
<u>WORLD BEER PRODUCTION BY BREWERY (TOP 10) – 1988 VS. 2009</u>	<u>19</u>

Conversions used while compiling
the data presented in this document:

1 hectare = 2.4711 acres
1 acre = 0.405 hectares
1 kilogram = 2.2046 pounds
1 pound = 0.45 kilograms
1 metric tonne = 2204.6 pounds
1 hectoliter = 21.997 gallons
1 zentner = 110.23 pounds

Report prepared by: Ann George for Hop Growers of America, Inc.
P.O. Box 1207, Moxee, WA. 98936, USA
Telephone (509) 453-4749 Fax: (509) 457-8561
E-mail: info@usahops.org Website: www.usahops.org

U.S. HOP ACREAGE BY STATE AND VARIETY (FIVE YEARS)

STATE & VARIETY	ACRES HARVESTED					2009-10
	2006	2007	2008	2009	2010	% +/-
IDAHO						
Total Idaho	2,797	2,896	3,933	4,030	2,331	-42.16%
OREGON						
Cascade	*	*	76	152	122	-19.74%
Golding	117	115	135	*	*	
Millennium	258	294	343	344	*	
Mt. Hood	113	178	186	158	188	18.99%
Nugget	1,500	1,675	2,135	1,773	1,356	-23.52%
Sterling	109	95	95	101	87	-13.86%
Super Galena®		*	*	177	134	-24.29%
Willamette	2,301	2,396	2,593	2,469	1,452	-41.19%
Other	638	517	807	934	1283	37.37%
Total Oregon	5,036	5,270	6,370	6,108	4,622	-24.33%
WASHINGTON						
Ahtanum	40	42	*	*	*	
Apollo®	*	*	698	747	827	10.71%
Bravo®	*	*	222	335	414	23.58%
Cascade	1,116	1,303	2,073	2,019	1,728	-14.41%
Centennial	*	*	253	298	357	19.80%
Chelan	505	505	739	762	*	
Chinook	365	311	285	384	443	15.36%
Citra™	*	*	*	98	113	15.31%
Cluster	352	366	420	501	392	-21.76%
Columbus/Tomahawk®	2,772	3,342	4,891	4,858	3,401	-29.99%
Galena	3,809	3,030	2,584	2,412	1,920	-20.40%
Glacier	17	21	56	70	61	-12.86%
Golding	53	52	38	42	*	
Hallertauer	49	56	*	*	*	
Millennium	910	728	716	557	555	-0.36%
Mt. Hood	44	43	29	96	62	-35.42%
Northern Brewer	*	*	*	92	94	
Nugget	1,100	1,093	1,086	1,028	829	-19.36%
Simcoe	*	*	129	183	237	29.51%
Sterling	62	*	*	*	*	
Summit® ²	66	632	2,403	3,238	*	
Super Galena®	*	*	793	839	886	5.60%
Vanguard	*	64	*	*	*	
Willamette	4,554	4,462	4,664	2,719	1,734	-36.23%
YCR4 - Palisade®	54	91	307	351	373	6.27%
YCR5 - Warrior®	421	339	394	301	296	-1.66%
Zeus	3,982	4,737	6,779	6,544	4,440	-32.15%
Other* ²	1,261	1,528	1,036	1,212	5,174	326.90%
Total Washington	21,532	22,745	30,595	29,686	24,336	-18.02%
Total United States	29,365	30,911	40,898	39,824	31,289	-21.43%

SOURCE: USDA-NASS and ADHA. Prepared by HGA.

* Included in the category "Other" to avoid disclosure of individual operations.

² "Other", as published in the USDA-NASS December 2009 National Hop Report, reports 4,450 acres in WA, which includes the Summit variety. HGA has included an estimate for Summit which has been provided by the American Dwarf Hop Association, as a separately reported variety in this chart, deducting that acreage from the "Other" acreage reported by NASS for 2008 and 2009.

U.S. HOP YIELDS BY STATE AND VARIETY (FIVE YEARS)

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2009-10
	2006	2007	2008	2009	2010	% +/-
IDAHO						
Total Idaho	1,613	1,417	1,841	1,943	2,129	9.57%
OREGON						
Cascade	*	*	1,068	1,741	1,680	-3.50%
Golding	1,371	1,403	1,307	*	*	
Millennium	2,540	2,323	2,179	2,552	*	
Mt. Hood	1,544	1,640	1,552	1,671	1,640	-1.86%
Nugget	2,164	2,231	1,758	2,548	2,119	-16.84%
Sterling	1,766	1,665	1,667	1,684	1,644	-2.38%
Super Galena®		*	*	2,563	2,421	
Willamette	1,459	1,577	1,539	1,561	1,535	-1.67%
Other	1508	1,416	995	1,601	1,711	6.87%
Total Oregon	1,757	1,811	1,569	1,948	1,791	-8.06%
WASHINGTON						
Ahtanum	2,110	1,964	*	*	*	
Apollo®	*	*	2,229	2,941	2,778	-5.54%
Bravo®	*	*	2,340	2,397	2,566	7.05%
Cascade	1,954	2,031	1,781	2,120	1,905	-10.14%
Centennial	*	*	1,452	1,490	1,791	20.20%
Chelan	2,187	2,364	2,178	2,680	*	
Chinook	1,871	1,818	1,775	1,819	1,963	7.92%
Citra™	*	*	*	836	1,930	130.86%
Cluster	2,184	2,030	2,038	2,370	2,060	-13.08%
Columbus/Tomahawk®	2,660	2,533	2,585	2,790	2,350	-15.77%
Galena	1,820	1,776	1,826	1,852	1,810	-2.27%
Glacier	1,441	1,619	1,795	2,093	1,943	-7.17%
Golding	992	1,500	1,385	826	*	
Hallertauer	812	763	*	*	*	
Millennium	2,324	2,350	2,440	2,465	2,185	-11.36%
Mt. Hood	1,109	1,316	1,572	1,570	1,211	-22.87%
Northern Brewer	*	*	*	753	1,270	68.66%
Nugget	1,841	1,909	2,068	2,060	1,808	-12.23%
Simcoe	*	*	1,758	2,137	1,698	-20.54%
Sterling	1,419	*	*	*	*	
Summit®	1,864	1,822	1,724	2,687	*	
Super Galena®	*	*	2,104	3,186	2,622	-17.70%
Vanguard	*	1,470	*	*	*	
Willamette	1,222	1,318	1,351	1,455	1,350	-7.22%
YCR4 - Palisade®	2,998	2,519	2,091	2,756	2,431	-11.79%
YCR5 - Warrior®	2,159	1,903	1,846	2,110	1,778	-15.73%
Zeus	2,962	2,839	2,618	3,387	2,678	-20.93%
Other	1,775	1,355	1,233	1,567	1,968	25.59%
Total Washington	2,058	2,049	2,072	2,533	2,147	-15.24%
Total United States	1,964	1,949	1,971	2,383	2,093	-12.17%

SOURCE: USDA-NASS and ADHA. Prepared by HGA.

* included in the category "Other" to avoid disclosure of individual operations.

"Other", as published in the USDA-NASS December 2009 National Hop Report, includes the Summit variety for Washington. HGA has included a yield estimate for Summit which has been provided by the American Dwarf Hop Association, as a separately reported variety in this chart, deducting that amount from the "Other" acreage reported by NASS for 2008 and 2009.

U.S. HOP PRODUCTION BY STATE AND VARIETY (FIVE YEARS)

STATE & VARIETY	HOP PRODUCTION (POUNDS)					2009-10 % +/-
	2006	2007	2008	2009	2010	
IDAHO						
Total Idaho	4,510,400	4,104,900	7,239,800	7,829,100	4,962,600	-36.61%
OREGON						
Cascade	*	*	81,200	264,600	205,000	-22.52%
Golding	160,400	161,400	176,400	*	*	
Millennium	744,200	682,900	747,400	877,900	*	
Mt. Hood	248,600	292,000	288,600	264,000	308,300	16.78%
Nugget	3,440,800	3,737,500	3,753,200	4,517,100	2,873,200	-36.39%
Sterling	217,200	158,200	158,400	170,100	143,000	-15.93%
Super Galena®		*	*	453,700	324,400	
Willamette	3,357,200	3,778,800	3,989,600	3,853,900	2,228,300	-42.18%
Other	680,100	732,000	802,800	1,495,400	2,195,400	46.81%
Total Oregon	8,848,500	9,542,800	9,997,600	11,896,700	8,277,600	-30.42%
WASHINGTON						
Ahtanum	84,400	82,500	*	*	*	
Apollo®	*	*	1,555,800	2,196,900	2,297,400	4.57%
Bravo®	*	*	519,500	803,000	1,062,300	32.29%
Cascade	2,180,700	2,646,400	3,692,000	4,280,300	3,291,800	-23.09%
Centennial	*	*	367,400	444,000	639,400	44.01%
Chelan	1,104,400	1,193,800	1,609,500	2,042,200	*	
Chinook	682,900	565,400	505,900	698,500	869,600	24.50%
Citra™	*	*	*	81,900	218,100	166.30%
Cluster	768,800	743,000	856,000	1,187,400	807,500	-31.99%
Columbus/Tomahawk®	7,373,500	8,465,300	12,643,200	13,553,800	7,992,400	-41.03%
Galena	6,932,400	5,381,300	4,718,400	4,467,000	3,475,200	-22.20%
Glacier	24,500	34,000	100,500	146,500	118,500	-19.11%
Golding	52,600	78,000	52,600	34,700	*	
Hallertauer	39,800	42,700	*	*	*	
Millennium	2,114,800	1,710,800	1,747,000	1,373,000	1,212,700	-11.68%
Mt. Hood	48,800	56,600	45,600	150,700	75,100	-50.17%
Northern Brewer	*	*	*	69,300	119,400	
Nugget	2,025,100	2,086,500	2,245,800	2,117,700	1,498,800	-29.23%
Simcoe®	*	*	226,800	391,100	402,400	2.89%
Sterling	88,000	*	*	*	*	
Summit®	123,000	1,151,500	4,143,000	8,700,568	*	
Super Galena®	*	*	1,668,500	2,673,100	2,323,100	-13.09%
Vanguard	*	94,100	*	*	*	
Willamette	5,565,000	5,880,900	6,301,100	3,956,100	2,340,900	-40.83%
YCR4 - Palisade®	161,900	229,200	641,900	967,400	906,800	-6.26%
YCR5 - Warrior®	908,900	645,100	727,300	635,100	526,300	-17.13%
Zeus	11,794,700	13,448,300	17,747,400	22,164,500	11,890,300	-46.35%
Other	2,238,700	2,070,000	1,277,500	1,899,232	10,184,400	436.24%
Total Washington	44,312,900	46,605,400	63,392,700	75,034,000	52,252,400	-30.36%
Total United States	57,686,700	60,253,100	80,630,100	94,759,800	65,492,600	-30.89%

SOURCE: USDA-NASS and ADHA. Prepared by HGA.

* included in the category "Other" to avoid disclosure of individual operations.

"Other", as published in the USDA-NASS December 2009 National Hop Report, includes the Summit variety in WA. HGA has included an estimate for Summit which has been provided by the American Dwarf Hop Association, as a separately reported variety in this chart, deducting that production from the "Other" pounds reported by NASS for 2008 and 2009.

U.S. HOP ACREAGE BY STATE (10 YEARS - IN ACRES)

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
2001	26,339	6,103	3,469	35,911
2002	20,333	5,577	3,399	29,309
2003	19,492	5,748	3,429	28,669
2004	19,382	5,107	3,253	27,742
2005	21,013	5,163	3,287	29,463
2006	21,532	5,036	2,797	29,365
2007	22,745	5,270	2,896	30,911
2008	30,595	6,370	3,933	40,898
2009	29,588	6,108	4,030	39,726
2010	24,336	4,622	2,331	31,289

SOURCE: USDA-NASS. Prepared by HGA.

U.S. AVERAGE HOP YIELD (TEN YEARS)

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL U.S.
2001	1,928	1,875	1,329	1,861
2002	2,133	1,692	1,624	1,990
2003	2,050	1,626	1,536	1,903
2004	2,137	1,686	1,588	1,990
2005	1,878	1,560	1,640	1,796
2006	2,058	1,757	1,613	1,964
2007	2,049	1,811	1,417	1,949
2008	2,072	1,569	1,841	1,971
2009	2,533	1,948	1,943	2,383
2010	2,147	1,791	2,129	2,093

SOURCE: USDA-NASS. Prepared by HGA.

U.S. HOPS: SEASON AVERAGE PRICE & TOTAL CROP VALUE

Marketing Year	SEASON AVERAGE PRICE				U.S.	Total Crop
	Washington	Oregon	Idaho	U.S.	Production	Value
	----- (\$ / pound) -----				(Lbs. x 1,000)	(x 1,000)
2001	\$1.81	\$2.15	\$1.59	\$1.91	66,832	\$123,843
2002	\$1.92	\$2.07	\$1.58	\$1.91	58,336	\$111,546
2003	\$1.79	\$2.32	\$1.62	\$1.86	54,565	\$101,637
2004	\$1.83	\$2.31	\$1.60	\$1.88	55,203	\$103,969
2005	\$1.86	\$2.56	\$1.63	\$1.94	52,914	\$102,818
2006	\$1.98	\$2.60	\$1.61	\$2.05	57,672	\$118,008
2007	\$2.94	\$3.31	\$2.77	\$2.99	60,253	\$179,978
2008	\$4.08	\$3.75	\$4.00	\$4.03	80,630	\$325,092
2009	\$3.54	\$3.63	\$3.75	\$3.57	94,678	\$336,375
2010	\$3.08	\$3.78	\$3.30	\$3.19	65,493	\$208,603

SOURCE: USDA-NASS. Prepared by HGA.

2010 HOP INSPECTION REPORT

TABLE 1. Total Number of Bales Inspected – Weighted Average of Leaf & Stem in Parenthesis

YEAR	WASHINGTON (%)	OREGON (%)	IDAHO (%)	TOTAL (%)
2006	218,805 (0.09)	43,929 (0.16)	22,244 (0.14)	284,978 (0.11)
2007	232,630 (0.18)	48,196 (0.20)	20,523 (0.19)	301,349 (0.19)
2008	302,122 (0.34)	45,321 (0.22)	21,397 (0.03)	368,840 (0.31)
2009	356,581 (0.12)	53,178 (0.25)	27,328 (0.15)	437,087 (0.14)
2010	259,380 (0.17)	41,384 (0.15)	24,000 (0.04)	326,764 (0.16)

TABLE 2. Number of Bales in Each Leaf & Stem Category – 2010

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	220,943	34,206	3,060	1,045	126	-	-	-	259,380
OR	35,695	4,988	701	-	-	-	-	-	41,384
ID	22,996	1,004	-	-	-	-	-	-	24,000
Total	279,634	40,198	3,761	1,045	126	-	-	-	324,764
% of Total	86%	12%	1%	0%	0%	0%	0%	0%	100%

TABLE 3. Number of Bales in Each Seed Category – 2010

	0%	1%	2%	3%	4%	5%	6%	7+%	TOTAL
WA	102,459	64,935	38,903	23,875	15,972	8,557	3,612	1,067	259,380
OR	17,145	9,198	4,238	3,422	1,897	1,581	964	2,939	41,384
ID	20,494	2,316	685	123	382	-	-	-	24,000
Total	140,098	76,449	43,826	27,420	18,251	10,138	4,576	4,006	324,764
% of Total	43%	24%	13%	8%	6%	3%	1%	1%	100%

SOURCE: USDA-GIPSA (Federal Grain Inspection Service).

U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE (10 YEARS)

Year	WASHINGTON Leaf & Stem	OREGON Leaf & Stem	IDAHO Leaf & Stem	U.S. AVERAGE % Leaf & Stem Seed Content	
2001	0.08	0.14	0.04	0.09	1.06
2002	0.07	0.32	0.04	0.11	0.63
2003	0.06	0.12	0.05	0.11	0.50
2004	0.11	0.28	0.01	0.07	0.56
2005	0.08	0.18	0.01	0.10	0.80
2006	0.09	0.16	0.14	0.15	0.56
2007	0.18	0.20	0.23	0.19	0.83
2008	0.34	0.22	0.03	0.31	1.85
2009	0.12	0.25	0.15	0.14	0.82
2010	0.17	0.15	0.04	0.16	1.31

SOURCE: USDA-GIPSA (Federal Grain Inspection Service). Prepared by HGA.

IHGC AROMA ACREAGE (FIVE YEARS)

COUNTRY	AROMA ACREAGE (IN ACRES)					2009-10 % +/-
	2006	2007	2008	2009	2010	
Australia*	15	22	82	67	67	0.00%
Austria		462	479	474	460	-3.13%
Belgium*	86	106	126	126	124	-1.96%
Bulgaria*	178	178	178	69	69	0.00%
China*	1,352	1,359	1,433	1,433	1,433	0.00%
Czech Rep.	12,899	12,664	12,486	12,316	12,215	-0.82%
France	1,772	1,814	1,814	1,068	983	-7.87%
Germany	24,622	24,998	25,386	23,673	23,844	0.72%
New Zealand	554	556	531	568	568	0.00%
Poland*	2,073	1,942	1,905	1,905	1,905	0.00%
Romania				183	183	0.00%
Russia*	482	395	376	376	376	0.00%
Serbia*	84	84	84	84	84	0.00%
Slovakia	865	741	531	581	566	-2.55%
Slovenia	3,459	3,415	3,615	3,581	3,210	-10.35%
South Africa*	0	0	0	0	0	0.00%
Spain*	0	0	0	0	0	0.00%
Ukraine	2,212	1,527	1,606	1,589	1,631	2.64%
UK - England*	1,937	1,977	1,977	2,002	2,002	0.00%
USA	10,853	10,977	15,182	13,425	10,811	-19.47%
IHGC Total	63,442	63,218	67,792	63,520	60,530	-4.71%

*Countries with partial provided report updates for the IHGC. Missing figures were used from previous reports or from IHGC estimates.

SOURCE: IHGC Economic Commission annual reports.

Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC ALPHA ACREAGE (FIVE YEARS)

COUNTRY	ALPHA ACREAGE (IN ACRES)					2009-10 % +/-
	2006	2007	2008	2009	2010	
Australia*	904	1,068	1,114	1,203	1,203	0.00%
Austria		32	32	54	77	40.91%
Belgium*	361	329	334	334	329	-1.48%
Bulgaria*	368	368	368	326	326	0.00%
China*	3,558	12,553	12,889	12,889	12,889	0.00%
Czech Rep.	210	168	178	163	183	12.12%
France	96	91	94	99	111	12.50%
Germany	16,625	16,378	17,883	20,228	20,905	3.35%
New Zealand	319	309	371	420	371	-11.76%
Poland*	3,447	3,442	3,613	3,613	3,613	0.00%
Romania				428	428	0.00%

Russia*	556	168	168	168	168	0.00%
Serbia*	82	82	62	82	82	0.00%
Slovakia	0	0	0	0	0	0.00%
Slovenia	148	183	171	168	138	-17.65%
South Africa*	1,082	1,082	1,097	1,189	1,189	0.00%
Spain*	1,483	1,216	1,149	1,156	1,186	2.56%
Ukraine	1,406	1,021	724	808	682	-15.60%
UK - England*	603	642	642	667	667	0.00%
USA	18,582	19,934	25,717	26,300	20,436	-22.30%
IHGC Total	49,923	59,067	66,606	70,295	64,982	-7.56%

*Countries with partial provided report updates for the IHGC. Missing figures were used from previous reports or from IHGC estimates.

SOURCE: IHGC Economic Commission annual reports.
Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC TOTAL ACREAGE (FIVE YEARS)

COUNTRY	TOTAL ACREAGE (IN ACRES)					2009-10
	2006	2007	2008	2009	2010	% +/-
Australia*	899	1,090	1,090	1,270	1,270	0.00%
Austria		494	519	529	536	1.40%
Belgium*	447	435	460	460	452	-1.61%
Bulgaria*	546	546	546	395	395	0.00%
China*	4,910	13,912	14,322	14,322	14,322	0.00%
Czech Rep.	13,109	12,832	12,664	12,479	12,398	-0.65%
France	1,871	1,905	1,910	1,164	1,095	-5.94%
Germany	41,247	41,376	43,269	43,902	44,749	1.93%
New Zealand	872	865	902	988	939	-5.00%
Poland*	5,520	5,385	5,291	5,518	5,518	0.00%
Romania				610	610	0.00%
Russia*	1,038	563	544	544	544	0.00%
Serbia*	166	166	188	166	166	0.00%
Slovakia	865	741	531	581	566	-2.55%
Slovenia	3,608	3,598	4,003	3,749	3,348	-10.68%
South Africa*	1,082	1,082	1,097	1,189	1,189	0.00%
Spain*	1,483	1,216	1,216	1,156	1,186	2.56%
Ukraine	3,618	2,548	2,481	2,397	2,313	-3.51%
UK - England*	2,609	2,619	2,718	2,669	2,669	0.00%
USA	29,435	30,911	39,263	39,725	31,247	-21.34%
IHGC Total	113,417	122,285	133,014	133,813	125,512	-6.20%

*Countries with partial provided report updates for the IHGC. Missing figures were used from previous reports or from IHGC estimates.

SOURCE: IHGC Economic Commission annual reports. IHGC Total Acreage includes baby acreage (not included in separate aroma and alpha tables. Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC HOP ACREAGE AND PRODUCTION 2010

COUNTRY	HOP ACREAGE (acres)			HOP PRODUCTION (pounds)			
	AROMA	ALPHA	TOTAL	AROMA	ALPHA	TOTAL	Alpha MT.
Australia*	67	1,203	1,270	116,844	2,843,934	2,960,778	166
Austria	460	77	536	652,562	156,527	809,088	31
Belgium*	124	329	452	132,276	529,104	661,380	28
Bulgaria*	69	326	395	68,343	335,099	403,442	19
China*	1,433	12,889	14,322	3,527,360	31,966,700	35,494,060	860
Czech Rep.	12,215	183	12,398	15,851,074	352,736	16,203,810	206
France	983	111	1,095	1,523,379	218,255	1,741,634	34
Germany	23,844	20,905	44,749	35,934,980	39,241,880	75,176,860	3,600
New Zealand	568	371	939	970,024	771,610	1,741,634	95
Poland*	1,905	3,613	5,518	2,396,400	5,200,651	7,597,052	256
Romania	183	428	610	136,685	319,667	456,352	8
Russia*	376	168	544	242,506	110,230	352,736	7
Serbia*	84	82	166	127,867	167,550	295,416	11
Slovakia	566	0	566	451,943	0	451,943	7
Slovenia	3,210	138	3,348	4,903,030	176,368	5,079,398	177
South Africa*	0	1,189	1,189	0	2,012,800	2,012,800	128
Spain*	0	1,186	1,186	0	2,248,692	2,248,692	124
Ukraine	1,631	682	2,313	1,124,346	529,104	1,653,450	42
UK - England*	2,002	667	2,669	2,204,600	992,070	3,196,670	104
USA	10,811	20,436	31,247	12,043,730	52,910,400	64,954,130	3,517
IHGC Total	60,530	64,982	125,512	82,407,948	141,083,377	223,491,325	9,420

SOURCE: November 2010 IHGC Economic Commission Report. Numbers may not total exactly due to rounding and standard/metric conversions.

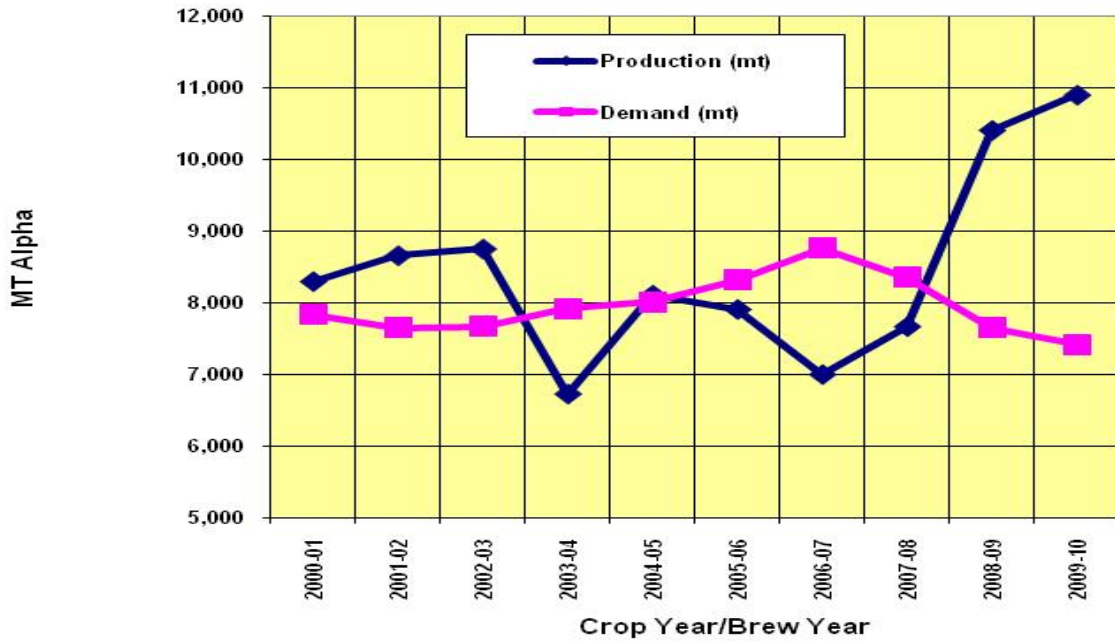
U.S. & GERMAN ALPHA ACID PRODUCTION (10 YEARS)

YEAR	UNITED STATES				GERMANY			
	Pounds of Hops (x 1,000)	MT Hops	MT Alpha	Avg. Alpha %*	Pounds of Hops (x 1,000)	MT Hops	MT Alpha	Avg. Alpha %*
2001	66,004	29,939	3,450	11.5%	68,343	31,000	2,580	8.3%
2002	56,912	25,815	3,140	12.2%	69,445	31,500	2,951	9.4%
2003	54,039	24,512	2,900	11.8%	55,115	25,000	1,825	7.3%
2004	55,538	25,192	2,900	11.5%	73,854	33,500	2,915	8.7%
2005	51,796	23,495	2,600	11.1%	75,397	34,200	3,272	9.6%
2006	53,815	24,410	2,929	12.0%	62,832	28,500	2,328	8.2%
2007	58,988	26,757	3,280	12.3%	70,854	32,139	2,880	9.0%
2008	80,630	36,574	4,150	11.3%	70,854	32,139	4,100	12.8%
2009	91,491	41,500	4,690	11.3%	87,104	39,510	3,520	8.9%
2010	64,954	29,463	3,517	11.9%	75,177	34,100	3,600	10.6%

SOURCE: IHGC November Economic Commission reports. Prepared by HGA.

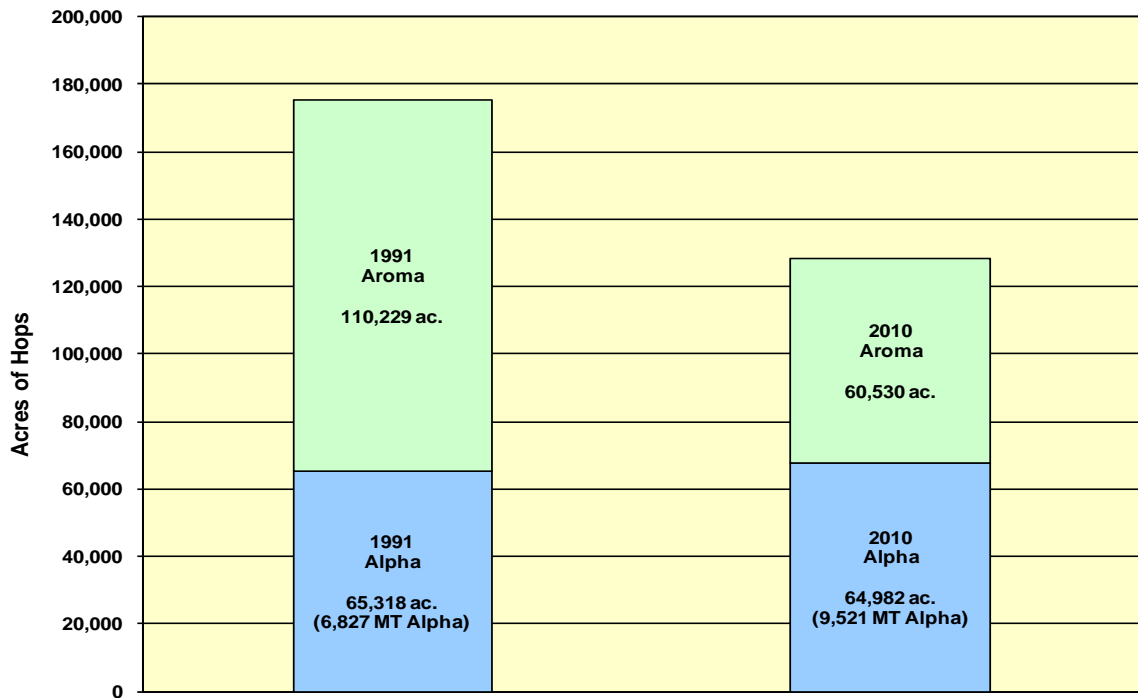
*Figures presented in the chart are the result of dividing the estimated MT Alpha by MT Hops for each year. This does not represent an estimate based on any type of analytical procedure.

WORLD ALPHA PRODUCTION & DEMAND 2001 – 2010 (11 YEARS)



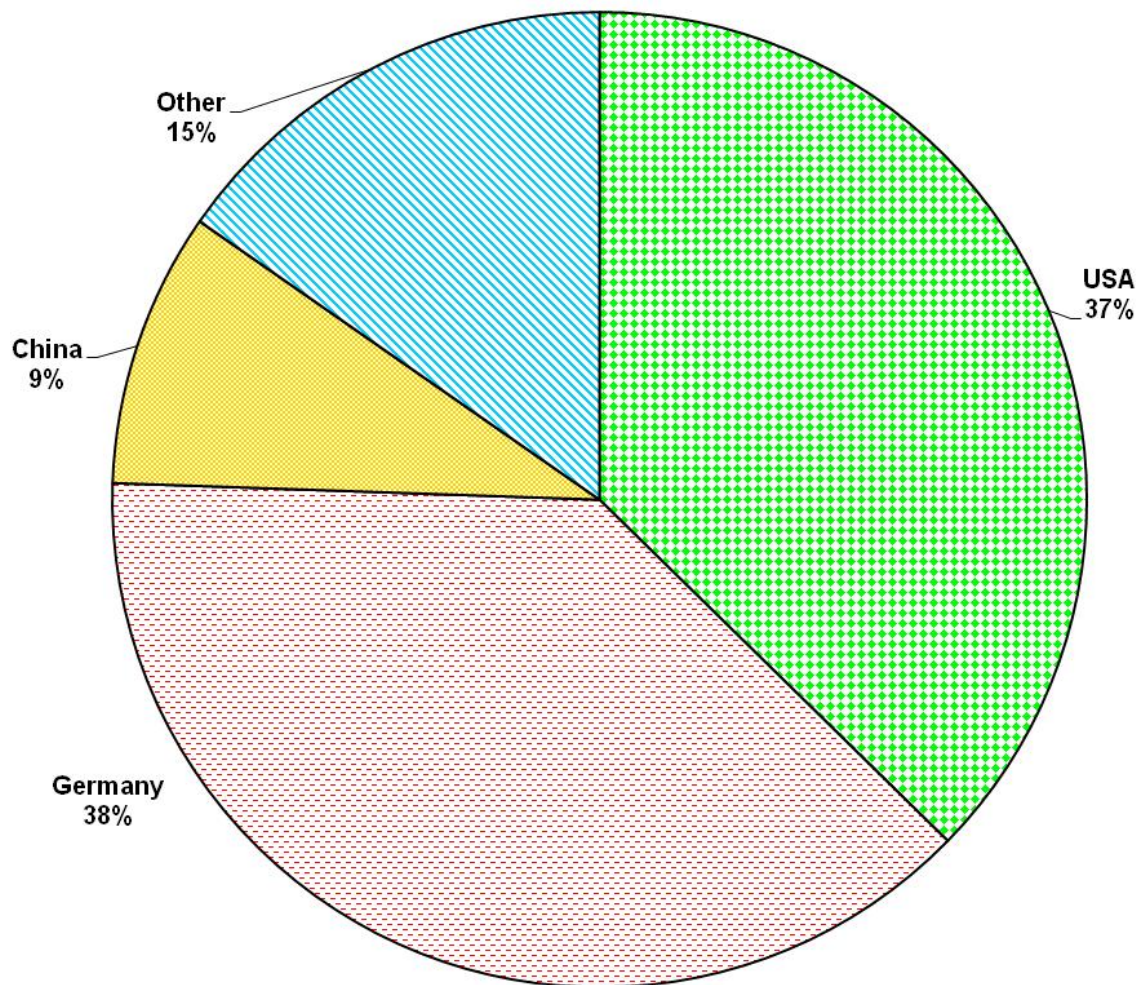
SOURCE: Barth Report. Prepared by HGA.

**COMPOSITION OF WORLD HOP ACREAGE
1991 VERSUS 2010**



SOURCE: IHGC November Reports, MT Alpha. Prepared by HGA.

WORLD'S LARGEST ALPHA PRODUCERS - 2010



WORLD HOP ACREAGE & PERCENT SHARE (acres)

COUNTRY	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Germany	46,965 33%	45,318 33%	40,879 32%	43,168 36%	42,404 34%	41,247 36%	41,376 34%	43,269 33%	43,902 33%	44,749 36%
UK-England	5,035 3%	4,681 3%	3,538 3%	3,354 2.7%	2,932 2%	2,609 2%	2,619 2%	2,718 2%	2,669 2%	2,669 2%
Czech Rep.	15,864 11%	14,735 11%	14,417 11%	14,420 12%	14,010 11%	13,109 12%	12,832 11%	12,664 10%	12,479 9%	12,398 10%
Europe (rest)	24,679 17%	23,616 17%	22,217 18%	20,666 17.20%	20,236 16%	19,253 17%	17,313 14%	17,236 13%	16,222 12%	16,186 13%
USA	35,891 25%	29,309 22%	28,669 23%	28,020 23.30%	29,188 24%	29,435 26%	30,911 25%	39,263 29%	40,126 30%	31,247 25%
China	11,884 8%	13,930 10%	13,931 11%	11,697 9.70%	11,846 10%	4,910 4%	13,912 11%	14,322 11%	14,322 11%	14,322 11%
World (rest)	4,139 3%	4,364 3%	3,211 3%	3,607 3%	3,354 3%	2,853 3%	3,047 2%	3,633 3%	3,991 3%	3,941 3%
World Totals	144,457	135,944	126,862	119,943	123,609	113,417	122,010	133,105	133,711	125,512

SOURCE: IHGC Economic Commission November 2010 report. Prepared by HGA.

WORLD HOP PRODUCTION & PERCENT SHARE (pounds x 1,000)

COUNTRY	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Germany	68,343 32%	69,444 34%	55,115 30%	73,854 36.30%	75,397 37%	62,831 35%	70,854 35%	87,104 36%	68,894 28%	75,177 34%
England	6,019 3%	5,849 3%	4,202 2%	3,525 1.70%	3,732 2%	3,109 2%	3,108 2%	2,976 1%	3,197 1%	3,197 1%
Czech	14,669 7%	13,668 7%	11,219 6%	13,889 6.80%	15,238 8%	11,530 6%	12,414 6%	14,771 6%	14,109 6%	16,204 7%
Europe (rest)	22,704 11%	18,178 9%	20,388 11%	23,745 11.60%	24,960 12%	21,312 12%	20,891 10%	23,115 9%	22,780 9%	21,398 10%
USA	66,832 31%	58,336 28%	54,565 30%	55,200 27%	51,796 26%	53,815 30%	58,989 29%	76,235 31%	91,491 38%	64,954 29%
China	29,786 14%	31,224 15%	30,662 17%	25,882 12.70%	23,315 12%	20,944 12%	29,762 15%	35,494 14%	35,494 15%	35,494 16%
World (rest)	8,114 4%	9,332 5%	8,013 4%	7,095 3.5%	6,682 3%	5,227 3%	5,489 3%	5,324 2%	6,927 3%	7,068 3%
World Totals	215,639	206,031	184,164	203,259	201,122	178,768	201,507	245,019	242,892	223,492

SOURCE: IHGC Economic Commission November 2010 report. Prepared by HGA

MARCH 1 & SEPTEMBER 1 U.S. HOP STOCKS (15 YEARS)

Year	MARCH 1			SEPTEMBER 1		
	Brewer	Dealer / Grower	TOTAL	Brewer	Dealer / Grower	TOTAL
1996	55,900	25,500	81,400	47,000	11,700	58,700
1997	53,000	26,000	79,000	44,500	17,500	62,000
1998	50,500	25,000	75,500	41,000	14,000	55,000
1999	50,000	25,000	75,000	39,500	14,500	54,000
2000	43,500	21,000	64,500	37,500	10,500	48,000
2001	44,500	22,500	67,000	38,000	16,000	54,000
2002	45,000	44,000	89,000	30,000	35,000	65,000
2003	41,000	41,000	82,000	34,000	35,000	69,000
2004	37,000	48,000	85,000	30,000	31,000	61,000
2005	43,000	33,000	76,000	33,000	27,000	60,000
2006	39,000	30,000	69,000	35,000	14,000	49,000
2007	42,000	28,000	70,000	31,000	16,000	47,000
2008	36,000	30,000	66,000	29,000	18,000	47,000
2009	40,000	42,000	82,000	40,000	25,000	65,000
2010	47,000	55,000	102,000	45,000	38,000	83,000

SOURCE: USDA NASS. Prepared by HGA.

Includes equivalent pounds of dry hops held in form of extract or pellets. These numbers include all stocks held by growers, dealers or brewers that are physically stored on US soil at the time of the report, including both domestic and foreign hops.

U.S. IMPORTS OF HOPS (FIVE YEARS)

(In pounds; extract converted at 4:1 ratio)

Country	2005/06 (Sep- Aug)	2006/07 (Sep- Aug)	2007/08 (Sep-Aug)	2008/09 (Sep-Aug)	2009/10 (Sep- Aug)
Germany	8,408,210	7,973,238	7,484,694	8,133,073	4,753,166
United Kingdom	683,213	613,326	1,762,155	804,026	792,782
Australia	423,288	450,845	783,302	1,533,976	569,013
Slovenia	34,172	106,704	175,047	372,361	397,493
New Zealand	67,021	124,561	107,365	292,553	369,274
France	8,157	9,480	142,198	136,246	202,384
Czech Republic	132,718	69,005	119,491	130,514	162,481
China	0	119,931	13,228	2,205	13,669
Belgium-Luxembourg	15,873	7,055	0	48,502	9,700
Poland	11,684	25,353	7,055	7,275	9,700
Argentina	0	90,830	145,946	882	0
Hong Kong	0	0	2,205	0	0
Spain	0	0	1,764	0	0
Austria	1,984	661	0	0	0
ALL OTHER COUNTRIES	0	3,307	143,300	20,062	2,425
Grand Total	9,786,320	9,594,297	10,887,749	11,481,675	7,282,089

Source: USDA Foreign Agricultural Service - Global Agricultural Trade System (GATS)

<http://www.fas.usda.gov/gats/default.aspx>

Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS, TOP 40 COUNTRIES (2006/07 through 2009/10)
(In pounds; extract converted at 4:1 ratio)

Country	2006/07 (Sep-Aug)	2007/08 (Sep-Aug)	2008/09 (Sep-Aug)	2009/10 (Sep-Aug)
Belgium-Luxembourg	5,472,535	4,790,645	8,837,230	8,637,932
Mexico	2,985,941	4,295,046	9,408,227	8,079,721
United Kingdom	3,621,975	5,784,048	5,594,671	6,214,611
Germany	6,689,927	6,561,398	10,149,862	5,988,196
Brazil	4,159,461	3,563,552	4,905,285	5,345,769
Canada	2,538,402	5,083,639	5,077,907	4,071,497
China	3,629,691	4,471,857	2,303,169	4,039,089
Colombia	2,063,086	2,066,613	2,379,008	3,252,039
Japan	1,628,775	1,772,296	2,259,738	2,440,958
Korea, South	661,828	1,349,670	1,197,771	1,738,124
Australia	951,956	609,578	1,263,910	1,507,521
Philippines	649,923	657,859	841,725	1,399,715
Hong Kong	951,956	1,815,066	1,077,399	1,319,026
Russia	761,477	1,586,667	582,020	1,205,708
Peru	784,405	1,504,655	1,487,679	1,144,199
Ecuador	369,936	659,182	585,989	1,089,745
Vietnam	422,406	570,777	741,194	1,027,354
Argentina	1,466,956	1,387,810	921,532	947,326
India	399,478	546,526	646,616	879,644
Venezuela	2,432,140	1,255,533	687,181	718,927
Nigeria	1,060,864	561,738	302,033	642,868
Dominican Republic	726,644	662,489	714,518	591,280
Thailand	859,582	1,154,120	1,976,224	578,052
Chile	660,946	651,686	821,883	503,977
South Africa	2,646	684,315	259,925	426,815
Guatemala	198,416	205,912	115,522	386,691
Malaysia	173,063	265,437	203,707	268,964
Netherlands	1,006,190	510,591	112,436	231,044
Costa Rica	82,673	73,414	130,734	221,124
Spain	300,711	226,635	24,251	210,762
Bolivia	250,004	115,081	145,064	208,998
Honduras	274,255	312,175	295,419	197,975
Paraguay	67,241	143,741	77,382	194,448
Cameroon	211,644	155,205	45,856	155,867
Denmark	882	5,732	51,147	152,119
France	136,025	3,527	6,173	145,946
Singapore	246,036	289,246	210,982	138,450
Haiti	123,459	97,003	176,370	130,734
Italy	30,424	160,276	86,862	126,766
Kenya	263,232	290,128	263,452	115,302
ALL OTHER COUNTRIES	2,831,617	6,018,620	4,127,494	1,238,557
Grand Total	52,148,805	62,919,489	71,095,552	67,913,841

SOURCE: U.S. D.A. Foreign Agricultural Service. Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS BY PRODUCT (TOP 40) – 2009/10
(In pounds; extract is converted to fresh hop equivalent at a ratio of 4:1)

Country	PELLETS	FRESH/DRIED	GROUND	EXTRACT	TOTAL
Belgium-Luxembourg	831,143	2,425	0	7,804,364	8,637,932
Mexico	744,281	0	151,017	7,184,424	8,079,721
United Kingdom	2,206,166	92,153	1,764	3,914,528	6,214,611
Germany	3,049,214	661	0	2,938,321	5,988,196
Brazil	1,641,562	12,787	0	3,691,420	5,345,769
Canada	3,669,815	14,771	108,247	278,664	4,071,497
China	225,974	0	0	3,813,115	4,039,089
Colombia	1,167,348	0	0	2,084,691	3,252,039
Japan	1,227,313	301,813	193,125	718,707	2,440,958
Korea, South	67,902	0	0	1,670,222	1,738,124
Australia	293,215	87,744	3,968	1,122,594	1,507,521
Philippines	266,539	0	0	1,133,176	1,399,715
Hong Kong	392,202	0	0	926,823	1,319,026
Russia	71,650	0	0	1,134,058	1,205,708
Peru	392,864	0	0	751,335	1,144,199
Ecuador	511,252	0	0	578,493	1,089,745
Vietnam	59,084	0	0	968,270	1,027,354
Argentina	461,428	0	0	485,899	947,326
India	439,161	0	65,698	374,786	879,644
Venezuela	11,684	0	0	707,243	718,927
Nigeria	0	0	0	642,868	642,868
Dominican Republic	78,264	0	3,307	509,709	591,280
Thailand	51,588	0	0	526,464	578,052
Chile	17,637	1,323	0	485,017	503,977
South Africa	63,493	14,110	0	349,212	426,815
Guatemala	3,307	36,376	3,086	343,921	386,691
Malaysia	14,110	0	0	254,854	268,964
Netherlands	0	0	31,747	199,298	231,044
Costa Rica	5,071	0	0	216,053	221,124
Spain	0	0	0	210,762	210,762
Bolivia	152,560	0	0	56,438	208,998
Honduras	8,378	0	0	189,598	197,975
Paraguay	193,566	0	0	882	194,448
Cameroon	6,834	0	0	149,032	155,867
Denmark	441	0	0	151,678	152,119
France	0	10,141	0	135,805	145,946
Singapore	0	0	0	138,450	138,450
Haiti	0	1,984	0	128,750	130,734
Italy	11,684	0	37,479	77,603	126,766
Kenya	115,302	0	0	0	115,302
ALL OTHER COUNTRIES	318,127	4,189	14,110	902,132	1,238,557
Grand Total	18,770,157	580,477	613,546	47,949,660	67,913,841

SOURCE: U.S. D.A. Foreign Agricultural Service. Prepared by Bryant Christie Inc.

WORLD BEER PRODUCTION (FIVE YEARS - MILLION HL)

	2006	2007	2008	2009	2010*
Russia	99.8	116.0	115.3	108.5	101.0
Germany	106.8	103.9	102.8	102.9	100.8
Great Britain	54.1	50.5	49.5	45.2	44.5
Spain	33.6	33.2	33.4	33.8	32.5
Poland	33.0	32.5	35.6	32.3	32.0
Ukraine	27.2	31.5	32.0	30.0	30.0
Netherlands	26.5	28.0	26.8	25.4	24.5
Czech Republic	19.8	19.8	19.8	20.0	20.0
Belgium	18.3	18.6	17.8	18.0	17.8
Romania	17.0	19.5	20.8	17.2	15.5
France	17.0	15.1	14.4	14.2	13.9
Italy	12.8	13.5	12.8	12.4	12.0
Turkey	9.1	9.2	9.9	9.4	9.4
Austria	8.9	9.0	8.5	8.9	9.0
Ireland	9.2	9.3	8.9	8.5	8.5
Portugal	8.2	8.2	8.2	7.8	7.6
Other Europe	71.0	70.8	69.5	64.5	48.2
Total Europe	572.3	588.6	586.0	559.4	543.1
USA	231.6	233.4	234.1	228.5	225.5
Brazil	94.0	96.0	106.3	106.7	109.0
Mexico	78.1	81.0	82.3	82.0	82.0
Canada	23.6	23.9	23.7	23.2	23.0
Venezuela	23.0	26.3	24.0	23.2	23.0
Colombia	15.0	19.0	19.0	19.0	19.0
Argentina	13.9	14.5	15.5	16.5	16.5
Other Americas	38.8	38.9	41.8	35.1	34.4
Total Americas	518.0	533.0	546.7	541.1	540.4
China	352.0	393.0	410.3	422.6	435.0
Japan	63.0	62.7	61.0	59.7	57.3
Vietnam	17.0	18.4	18.5	21.0	23.0
South Korea	18.0	18.0	18.6	18.5	19.0
Thailand	23.0	22.0	20.7	18.5	18.5
India	8.5	9.0	13.4	15.0	17.2
Philippines	13.5	13.7	13.3	14.2	14.5
Other Asia	27.1	30.1	32.4	43.5	60.9
Total Asia	513.6	557.9	574.8	593.5	610.9
South Africa	26.5	26.5	25.9	26.2	26.0
Nigeria	11.0	12.3	15.2	16.0	16.2
Other Africa	41.1	39.6	45.0	50.6	53.7
Total Africa	78.6	78.4	86.1	92.1	95.2
Australia	17.2	16.9	17.0	17.0	17.2
New Zealand	3.1	3.4	3.2	3.4	3.4
Oceania	1.0	1.2	0.7	1.2	1.2
Total Australia	21.3	21.5	21.4	21.6	21.8
WORLD TOTALS	1,703.7	1,779.4	1,815.0	1,807.7	1,811.4

* estimates

Source: Hopsteiner – Guidelines for Hop Buying 2010. Prepared by HGA.

WORLD BEER PRODUCTION BY BREWERY (TOP 10) - 1988 (MILLION HL)

Brewery	1988 Production	1988 % Share
Anheuser-Busch	90	7%
Miller	47	4%
Heineken	43	3%
Kirin	30	2%
Bond	30	2%
Stroh	25	2%
Elders	21	2%
Kronenbourg	20	2%
Coors	20	2%
Brahma	18	1%
Top 10 total	344	26%

WORLD BEER PRODUCTION BY BREWERY (TOP 10) - 2009 (MILLION HL)

Brewery	2009 Production	2009 % Share
ABI	358.8	19.8%
Heineken + Femsa*	199.7	11.0%
SAB Miller	174.0	9.6%
Carlsberg	116.0	6.4%
China Resources	84.0	4.6%
Tsingtao	59.0	3.3%
MolsonCoors	52.5	2.9%
Modelo	51.8	2.9%
Yanjing	46.7	2.6%
Top 10 total	1,142.5	63.1%

SOURCE: Alexander Barth.

* Heineken acquired Femsa in January 2009. 2009 production and market share have been combined. The top 3 brewing groups controlled 40.4% of the market share in 2009, compared with 44% in 2008.